



Glass's New Car Market Trends
July 2005

 **eurotaxGLASS's**
Automotive Business Intelligence



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EXECUTIVE SUMMARY

This is the seventh issue of Glass's New Car Market Trends report, a monthly analysis of the UK's new car market produced by Glass's Market Intelligence Service. This issue of the Report covers new car list price changes up to and including June 2005.

Key findings of Glass's New Car Market Trends Report for July 2005

NEW PRESTIGE CAR PRICES RISING AT BELOW-AVERAGE RATE

The list price of the average prestige-brand car is rising, but at a slower rate than for the new car market as a whole.

Figures for June show the list price of compact executive cars (Audi A4, BMW 3 Series, Mercedes-Benz C-Class, etc) rose on average by 0.3 per cent, year-on-year, to the end of June, while large executive models (Audi A6, BMW 5 Series, Mercedes E-Class, etc) rose by just 1 per cent. This compares to a rise across the UK new car market as a whole of 1.8 per cent.

Premium-brand car manufacturers are pushing hard to maintain or grow their market shares in the face of intense competition and a gradual easing back in demand. Therefore, despite climbing energy and steel costs, the prestige marques are reluctant to lift list prices and indeed many are continuing to work with their franchised dealer networks to offer incentives and negotiable discounts to encourage continued consumer interest.



KEY SEGMENT PRICE CHANGES

List prices changes for new **superminis** (ford Ka, Vauxhall Corsa, Peugeot 206, etc) once again lag behind all other sectors, falling by 0.4 per cent, or £27 over the past 12 months.

The **lower-medium** segment (Ford Focus, Vauxhall Astra, VW Golf, etc) has seen above-average levels of list price inflation – up 3.2 per cent, year-on-year or equivalent to an additional £397 on the average car. The sector continues to be influenced by a number of new arrivals, where additional specification over the outgoing models is in part responsible for average price increases.

List prices of **upper-medium** cars (Ford Mondeo, Vauxhall Vectra, Toyota Avensis, etc) have risen by 2.8 per cent, year-on-year, equivalent to an additional £399 on each vehicle.

Compact MPVs (Ford Focus C-MAX, Renault Mégane Scenic, Vauxhall Zafira, etc) rose by 2.9 per cent, compared with just 1.6 per cent for the slower-selling **large MPV** sector (Renault Espace, Peugeot 806, Volkswagen Sharan etc).

The biggest list price changes

The single biggest list price fall (in pound note terms), in June was for the Jaguar XJ8 4.2-litre Sovereign saloon, which fell by £2,125, or 3.67 per cent, to £55,777. The greatest list price increase was, curiously, for another car in the Jaguar XJ range. The XJ Super 4.2-litre long-wheelbase saloon rose in price by £3,025, or 4.25 per cent, to £74,277.



TOP 10 LIST PRICE CHANGES

Manufacturer	Range	Model	New Price	Old Price	% Change	£ Change
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Top-10 list price increases

Jaguar	XJ Series	4.2 XJ Super LWB Saloon auto	£74,277	£71,252	4.25%	£3,025
Jaguar	XJ Series	3.5 XJ8 Sport Premium Saloon auto	£49,277	£47,302	4.18%	£1,975
Jaguar	XJ Series	4.2 XJ8 Sovereign LWB Saloon auto	£61,277	£59,652	2.72%	£1,625
Jaguar	XJ Series	4.2 XJR Super V8 Saloon auto	£61,277	£60,252	1.70%	£1,025
Vauxhall	Meriva	1.8i 16v Enjoy (a/c) MPV Easytronic	£14,147	£13,672	3.47%	£475
Vauxhall	Meriva	1.8i 16v Breeze (a/c) MPV Easytronic	£13,447	£13,007	3.38%	£440
Vauxhall	Meriva	1.8i 16v Design (a/c) MPV Easytronic	£14,447	£14,007	3.14%	£440
Skoda	Octavia	1.9TDI PD Classic Estate DSG	£14,377	£13,952	3.05%	£425
Skoda	Octavia	1.9TDI PD Classic Hatchback auto	£13,677	£13,252	3.21%	£425
Vauxhall	Meriva	1.8i 16v Enjoy (a/c) MPV	£13,647	£13,222	3.21%	£425

Top-10 list price reductions

Jaguar	XJ Series	4.2 XJ8 Sovereign Saloon auto	£55,777	£57,902	-3.67%	-£2,125
Vauxhall	Vectra	1.8i 16v SRi (Nav) Estate	£17,542	£18,477	-5.06%	-£935
Vauxhall	Vectra	1.8i 16v SRi (Nav) Hatchback	£16,557	£17,492	-5.35%	-£935
Vauxhall	Vectra	1.8i 16v SRi Estate	£17,042	£17,977	-5.20%	-£935
Vauxhall	Vectra	1.8i 16v SRi Hatchback	£16,057	£16,992	-5.50%	-£935
Vauxhall	Vectra	1.8i 16v SRi LPG (Nav) Hatchback	£19,012	£19,947	-4.69%	-£935
Vauxhall	Vectra	1.8i 16v SRi LPG Hatchback	£18,512	£19,447	-4.81%	-£935
Vauxhall	Vectra	1.9CDTi (120ps) SRi (Nav) Estate	£19,322	£20,257	-4.62%	-£935
Vauxhall	Vectra	1.9CDTi (120ps) SRi (Nav) Hatchback	£18,022	£18,957	-4.93%	-£935
Vauxhall	Vectra	1.9CDTi (120ps) SRi Estate	£18,822	£19,757	-4.73%	-£935



METHODOLOGY

The list price of the 'average' new car referred to in the monthly Glass's New Car Market Trends report is based on analysis of over 1,000 models across key UK vehicle segments. The data is weighted by sales volumes to ensure the results are representative of the true market trend.

For more information about Glass's New Car Market Trends Report or to discuss how Glass's Market Intelligence Service can help your business, please contact:

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