



# REVEALED & ANALYSED

The **2025** financial performance of the UK's top 100 dealer groups

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# EDITOR'S WELCOME

I am delighted to present to you this year's AM100 report.

The portrait of the UK's franchised dealer community continues to change. We have seen rapid and widespread representation of the new Chinese brands emerge, particularly within the groups in the top 50 which can offer these ambitious carmakers immediate scale representation.

We have also seen a little more dealer group consolidation, which has led to two familiar names disappearing from its ranks.

And this is the first year when the impact of the agency model is evident in the outcome for Mercedes-Benz and Volvo dealers.

My thanks go to the motor trade specialists at

accountancy firm BDO for their collaboration on the AM100 research. Chris Bond, Steve Le Bas and James Evans have been analysing statutory accounts from 2024 and crunching the numbers to monitor the financial output of the AM100.

Where 2024 accounts were not available, or consolidation had since occurred, we have provided estimates.

The data reflects the generally tough trading conditions of 2024. One-in-five of the AM100 has fallen into the red, and the high performers for profitability are achieving returns that look modest in comparison with the prior year.

You'll see our findings overleaf, and there will be a webinar presentation of the AM100, on November 18, which you can register for via AM-online.

Sign up at AM-online to keep up to date with the latest news, interviews and insights in the UK motor retail industry.



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# Unlock a higher-value customer base with American Express



Holly Coventry, Vice President, UK Sales  
American Express

**A**merican Express is proud to sponsor this year's AM100 and we'd like to congratulate everyone listed.

The auto industry continues to face a range of challenges, which is why Amex is focused on best understanding how we can help sector businesses thrive and support their continued success.

Today's consumers want flexibility, and payment choice is crucial to attracting and retaining high-value customers, as well as ensuring maximum customer satisfaction. Here at American Express, we know this better than most – and we offer competitive industry rates, tailored specifically to the Auto sector.

Our Cardmembers regularly tell us they want to use their card at more auto dealerships and service centres and are willing to travel to do so.

We also know that our Cardmembers are nearly twice as likely to own multiple vehicles and are more inclined to invest in add-ons such as

extended warranties, service plans, and purchase electric vehicles.

For dealers, who are facing tighter margins, increasing customer expectations and fierce competition, the customer payment experience can be a critical point of difference. Accepting American Express can unlock a higher-value customer base, boost satisfaction and loyalty, and signals a commitment to premium service.

If your business is not accepting American Express Cards today, then please do contact us and we will gladly talk you through the benefits.

We very much look forward to working with you.



# Driving lasting protection and customer confidence



Anna Houldsworth, Head of Paint  
Protection, Autoglym LifeShine

**O**ur award-winning LifeShine system delivers unrivalled vehicle protection, ensuring every new car looks its best for longer. As a trusted partner to the UK's leading automotive manufacturers and dealerships, Autoglym provides complete, premium protection solutions that enhance and preserve the appearance of new vehicles — giving customers long-lasting pride and confidence in their purchase.

With more than 50 years of experience in automotive surface care, we've developed advanced formulations and technologies that provide enduring protection against environmental and everyday contaminants. LifeShine safeguards paintwork, upholstery, and glass, helping vehicles retain their showroom finish and value for years to come.

Our dedicated technical and training teams work closely with manufacturers and dealer groups to tailor LifeShine programmes to suit every brand and customer. From in-depth product knowledge to hands-on application support, we ensure your

teams deliver an exceptional experience that strengthens customer satisfaction and loyalty.

Our marketing experts collaborate with partners to create impactful retail solutions that drive awareness and sales of LifeShine. From bespoke point-of-sale materials and digital assets to in-dealership display concepts, we help you showcase the benefits of LifeShine with clarity and confidence. Our aim is to enhance every step of your customer journey, from the showroom floor to long-term aftersales engagement.

With continued investment in innovation, sustainability, and support, we're committed to ensuring that your customers — and their vehicles — continue to shine for years to come.

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# Driving Success in more Challenging Times



John Hogan, Co-Founder & CEO  
at RWA Automotive

**C**ongratulations to everyone for reaching a place on the AM 100. This achievement is the result of many years of hard work and dedication from your leaders and teams across your network.

In 2025, rising costs have significantly impacted annual profits. Although new car profits are down, used cars and aftersales remain strong performers, with notable improvements helping offset losses.

RWA Automotive is the leading business intelligence provider and an innovation partner in the industry, assisting our clients in confidently tackling the challenges above. We offer daily actionable insights to everyone at each level of the organisation, driving performance continuously.

Our commitment to continuous innovation in the last 12 months included benchmarking customers against aggregated data that has identified many millions in profit opportunities. This year, we are

using AI to automate more integrations to get to that utopia company-wide one version of the truth which AI can then leverage to help you manage your business with more pace and precision that leverages your know-how & experience.

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# Evolving with the Buyer



By Phill Jones,  
Chief Operating Officer, MOTORS

**A**t MOTORS, we regularly take the pulse of car buyers through our Consumer Insight Panel, and our latest findings highlight important messages for retailers.

Buyers still value the human touch, but their expectations around speed, trust and digital experience are higher than ever. Confidence in car search sites now sits second only to visiting a dealership, showing just how important these platforms are in influencing decision-making. For dealers, strong online visibility isn't just a nice-to-have; it's a fundamental basis of expectation to build credibility and trust before a buyer makes contact.

When the buyer is ready to make contact, dealers have to be quick to react. Two-thirds of buyers expect a same-day response, and 55% within three hours. More than a third will move on if they don't get a prompt reply. Not responding promptly destroys buyer confidence.

Meanwhile, almost a quarter of buyers now expect their next car to be electric, the highest

level we've ever recorded, with concerns shifting from accessibility and availability of charging to battery life and replacement costs. Education and reassurance will be vital to maintain EV momentum.

Ultimately, the winning formula is clear: connect your online and in-person experience, with swift response, great service and expertise to provide trust and reassurance.

At MOTORS, we're focused on helping dealers do exactly that, connecting them with millions of ready-to-buy consumers across our network of trusted automotive destinations.



# Providing Peace of Mind: Protecting What Matters to You



Mark Rose, Managing Director,  
Tracker Network UK Ltd

**F**or over 30 years, Tracker has partnered with UK OEMs and Dealers, protecting their customers while providing a strong profit opportunity. Vehicle theft is at a 15 year high, whilst national recovery rates have dropped by 60% in the same period. Customers understand this is a problem, and Tracker allows retailers to provide a credible solution.

Tracker is the UK's only stolen vehicle recovery provider with a formal, contracted partnership with UK policing. Our patented VHF technology is resilient to GPS/GSM jamming and works where other signals fail, crucially in shipping containers, a destination for many stolen vehicles. These USPs combine to deliver an industry-leading 95% recovery rate.

For retailers, the commercial case is clear. Tracker is an unregulated product and thus free from compliance burden. It is simple to sell; across our partners, typical penetration rates of

over 30% are being consistently achieved with margins three times those of regulated equivalents.

Tracker's partners sell vehicles from £5,000 to £250,000. The appeal is universal; we provide a profitable solution, allowing you to solve a problem that your customers know they have.

Tracker is a proud AM100 supporter. We would love to support you in protecting your customers and growing your profitability.



# Welcome from Payit by NatWest and Prommt



Geraint Evans, Executive Sales Manager  
Payit | NatWest Group

**W**e're delighted to sponsor this year's AM100 Digital Report – one of the most respected annual publications in the UK automotive industry, celebrating the country's top 100 dealer groups. Congratulations to every dealer group recognised in this year's list. They are a reflection of the strength, innovation and resilience that continue to define the UK motor retail industry.

At Payit by NatWest, together with Prommt, we're helping forward-thinking dealers modernise their payment journeys. By combining the speed and security of Payit's open banking technology with Prommt's intelligent paylink platform, we're enabling frictionless, branded payment experiences that build trust and streamline operations.

Our partnership is designed with automotive retailers in mind; simplifying high-value transactions, accelerating settlement times, and giving customers instant confidence that payments are

complete. Dealers benefit from fewer fees, faster cash flow and a "drive away today" experience that meets the expectations of the modern car buyer.

We're proud to be supporting innovation in the sector and to play a part in shaping the next generation of digital payments for the UK's leading dealer groups.



together with



# Year of deceleration and consolidation



Turnover for Porsche Retail Group grew by 22.9%

## TURNOVER CHANGE BY PERCENTAGE AND VALUE


Rank 2025	Group	Turnover growth (%)	Rank 2025	Group	Turnover growth (£,000)
10	AWR Holdings UK **	184.7%	2	Lithia **	1,292,657
91	St Leonards Motors	39.6%	10	AWR Holdings UK **	997,387
76	Grainger Motor Group	37.7%	9	Greenhouse Group	299,992
42	DM Keith	31.0%	8	TrustFord	278,042
20	RRG Group and Norton Way Motors	30.8%	11	PSA Retail UK **	259,269
83	FRF South Wales	28.7%	20	RRG Group and Norton Way Motors	242,416
2	Lithia **	24.5%	4	Vertu Motors *	213,282
92	Acorn Motor Goup	23.0%	3	Arnold Clark Automobiles	187,500
35	Porsche Retail Group **	22.9%	16	Hendy Group **	159,564
77	Heritage Automotive **	21.8%	12	Motus UK (incl. Pentagon Group)	123,689
11	PSA Retail UK **	21.3%	35	Porsche Retail Group **	96,726
9	Greenhouse Group	20.1%	42	DM Keith	93,247
75	Arbury	17.7%	22	Lloyd Motors	68,800
46	VT Holdings	17.2%	18	Park's Motor Group	65,008
50	Donnelly Bros Garages (Dungannon)	16.5%	37	Renault Retail Group **	62,983
37	Renault Retail Group **	16.1%	23	Eastern Western Motor Group	62,280
16	Hendy Group **	15.9%	6	Group 1 Automotive	61,441
96	WJ King	15.5%	76	Grainger Motor Group	60,727
8	TrustFord	14.8%	30	Yeomans	53,511
57	City West Country	14.2%	46	VT Holdings	53,345
93	WR Davies	14.1%	91	St Leonards Motors	52,900
90	Startin Group	14.1%	17	Steven Eagell	50,835
89	Central Garage Uppingham	11.8%	14	Listers	49,258
72	SG Petch	10.4%	50	Donnelly Bros Garages (Dungannon)	46,778
77	Partridge of Hampshire	10.3%	21	Swansway Garages	45,020

\* Estimated \*\* Prior year amounts used as current period not available

Figures reveal a modest increase in turnover, but profitability lags way behind, dragging net margins down, reports BDO's motor retail team of *James Evans, Chris Bond* and *Steve Le Bas*

**A**fter a period of post-pandemic recalibration, 2024 proved to be a year of mounting challenges for the UK motor retail sector. The AM100 cohort, while still demonstrating resilience, faced a tougher trading environment marked by economic uncertainty, margin compression and structural shifts in the industry. Yet, amid the headwinds, opportunities for growth and success remained for those agile enough to adapt.

### A YEAR OF SLOWER GROWTH

Revenue across the AM100 increased by 4.5% in 2024, a marked slowdown from the 19% growth seen in 2023. This deceleration reflects a broader cooling in the market, 

PROFIT BEFORE TAX (PBT) – TOP PERFORMERS

Rank 2025	Group	PBT (£,000)	Rank 2024	Group	PBT (£,000)	Rank 2023	Group	PBT (£,000)
3	Arnold Clark Automobiles	120,700	1	Sytner	135,990	1	Sytner	178,993
2	Lithia	65,222	3	Arnold Clark Automobiles	116,000	2	Arnold Clark Automobiles	173,500
1	Sytner	57,331	6	Group 1 Automotive	64,677	3	Lookers	84,400
5	Lookers	43,700	2	Lithia	55,199	6	Marshall Motor Group	70,000
18	Park's Motor Group	33,642	7	Marshall Motor Group	42,918	7	Group 1 Automotive	61,353
9	Greenhous Group	30,577	16	Park's Motor Group	41,891	5	Pendragon	57,200
4	Vertu Motors	24,856	12	Listers	40,501	20	Park's Motor Group	43,112
35	Porsche Retail Group	22,034	10	JCT600	36,029	10	JCT600	43,064
15	JCT600	20,167	4	Vertu Motors	34,567	12	Listers	39,375
22	Lloyd Motors	19,546	60	CEM Day	30,326	14	Stoneacre Motor Group	37,337
19	John Clark Motor Group	19,042	23	Steven Eagell	29,199	60	CEM Day	32,790
8	TrustFord	16,970	9	Greenhous Group	26,321	4	Vertu Motors	32,450
13	Stoneacre Motor Group	16,827	11	Stoneacre Motor Group	24,848	24	Dick Lovett Group	31,567
7	Marshall Motor Group	16,408	24	Dick Lovett Group	24,353	9	Jardine Motors Group	31,028
52	CEM Day	16,089	15	John Clark Motor Group	22,856	8	TrustFord	26,372
17	Steven Eagell	15,000	21	Lloyd Motors	22,453	25	Lloyd Motors	26,210
14	Listers	14,891	39	Porsche Retail Group	22,034	33	Cambria Automobiles	26,184
12	Motus UK (incl. Pentagon Group)	14,444	31	Cambria Automobiles	20,790	26	Steven Eagell	25,811
24	Dick Lovett Group	10,614	20	Hedin Automotive UK	17,000	19	John Clark Motor Group	25,313
31	Williams Motor Company	9,951	13	Motus UK (incl. Pentagon Group)	15,810	21	Swansway Garages	22,346

RETURN ON SALES (ROS) – TOP PERFORMERS

Rank 2025	Group	ROS (%)	Rank 2024	Group	ROS (%)	Rank 2023	Group	ROS (%)
52	CEM Day	5.3%	60	CEM Day	10.6%	60	CEM Day	12.7%
100	Riverside Motors Group	5.1%	39	Porsche Retail Group	4.3%	49	Porsche Retail Group	5.1%
35	Porsche Retail Group	4.3%	16	Park's Motor Group	4.1%	20	Park's Motor Group	5.0%
18	Park's Motor Group	3.1%	45	Hatfields	3.6%	33	Cambria Automobiles	4.6%
57	City West Country	3.0%	23	Steven Eagell	3.5%	95	Cars2	4.5%
83	FRF South Wales	2.7%	31	Cambria Automobiles	3.4%	84	Gates Group	4.5%
3	Arnold Clark Automobiles	2.3%	98	HSF Group	3.3%	86	John Grose Group	4.4%
88	John Grose Group	2.2%	85	John Grose Group	3.2%	55	Bowker Motor Group	4.3%
22	Lloyd Motors	2.1%	12	Listers	3.1%	24	Dick Lovett Group	4.1%
80	Howards Group	2.0%	48	TC Harrison Group	3.0%	48	Hatfields	4.1%
67	Partridge of Hampshire	2.0%	24	Dick Lovett Group	3.0%	40	Halliwel Jones Group	4.0%
82	Cars2	1.9%	99	FRF South Wales	2.9%	26	Steven Eagell	3.7%
49	Toomeys	1.9%	21	Lloyd Motors	2.6%	79	Cotswold Motor Group	3.7%
19	John Clark Motor Group	1.8%	70	JCB Group	2.6%	72	Toomeys	3.6%
96	W.J.King	1.8%	10	JCT600	2.5%	2	Arnold Clark Automobiles	3.5%
31	Williams Motor Company	1.7%	37	Williams Motor Company	2.5%	25	Lloyd Motors	3.5%
9	Greenhous Group	1.7%	58	Bowker Motor Group	2.4%	12	Listers	3.2%
55	Drive Motor Retail	1.7%	72	Riverside Motors Group	2.4%	14	Stoneacre Motor Group	3.2%
58	Peoples	1.6%	55	Peoples	2.4%	42	Marsh Wall	3.1%
65	Ryland Automotive	1.6%	3	Arnold Clark Automobiles	2.3%	87	Parkway Derby	3.1%



With Society for Motor Manufacturers and Traders (SMMT) data showing new vehicle registrations up just 2.6% and used vehicle sales rising by 5.5%. The contrast with the previous year, when fleet-led growth and improved supply drove an 18% surge in new registrations, is stark.

The impact of the agency model continued to ripple through the sector, as 2024 marked the first full year of Volvo's transition, joining Mercedes in reshaping the traditional franchise model. Agency's financial model becomes evident when looking at small AM100 groups heavily engaged with Volvo or Mercedes – Riverside and Waylands, for example, traded strongly despite their recorded revenues.

Mini has since followed suit with agency in early 2025, with BMW expected to adopt the model in 2027. However, many other OEMs such as JLR, Volkswagen Group and Lotus have paused or reconsidered their

agency roll-outs, reflecting the ongoing debate about the new model's long-term viability.

#### CONSOLIDATION DRIVES THE RANKINGS

Consolidation remained a defining feature of the AM100 landscape. The most significant movement came from AWR Holdings, which more than doubled in size (184.7% growth) following its acquisition of a larger AM100 group, Johnsons Cars, and leaping from 35th to 10th in the rankings. Lithia UK also posted substantial growth, driven by its continued acquisition strategy which included Hatfields in 2025, less than a year after it bought Pendragon's dealerships.

These deals reshaped the cohort. Johnsons Cars, Hatfields and Burrows Motor Group exited the AM100 rankings due to being acquired, while a few other franchised dealer groups dropped out due to size.

This opened the door for a handful of

new entrants, with Grainger Motor Group entering highest, at position 76, following its own acquisition activity which has consolidated a number of small dealer groups. Other new names included Startin Group, St Leonard's Motors, Acorn Motor Group, Ocean Automotive, WJ King, and Peter Cooper Motor Group.

Interestingly, turnover growth was concentrated among the larger groups. The top half of the AM100 saw average revenue growth of 6%, while the bottom half experienced a 2% decline. This divergence underscores the growing advantage of scale in navigating today's market dynamics.

#### PROFITABILITY UNDER PRESSURE

Despite the modest increase in turnover, profitability took a significant hit. Profit before tax for the whole of the AM100 fell by 38%, from £1,123m to £699m, dragging the average net margin down from 1.4% to just 0.9%.

For context, margins stood at 2.6% in 2021 and 2.3% in 2022. This erosion reflects a confluence of pressures: high interest rates, rising costs and a more competitive used car market. While new vehicle supply has stabilised, consumer demand remains subdued and dealers are having to work harder to maintain volumes and protect margins.

Only 11 groups achieved a return on sales above 2%, down from 27 in 2023. CEM Day led the profitability rankings with a 5.3% return, though this was down from 10.6% the previous year. Porsche Retail Group remained the most profitable on a per-outlet basis and reclaimed top spot for profit per employee.

The number of loss-making groups more than doubled, from eight in 2023 to 18 in 2024, highlighting the growing polarisation in performance across the sector.

The largest profits were made by Arnold Clark, who increased their profits from £116m to £121m. This is in contrast to Sytner, last year's most profitable group, who saw their profits more than halve from £136m to £57m.

The AM100 employed approximately 126,000 people in 2024, a slight increase from the previous year. While headcount has remained relatively stable, the focus on efficiency and productivity has intensified.

With cost pressures mounting, many groups are investing in digital tools, process automation, and data-driven decision-making to drive operational improvements. The ability to flex quickly in response to market shifts is proving to be a key differentiator.

PROFIT BEFORE INTEREST AND TAX (PBIT) PER STAFF MEMBER – TOP PERFORMERS

Rank 2025	Group	PBIT (£)
35	Porsche Retail Group	60,929
33	Cambria Automobiles	56,588
52	CEM Day	56,009
67	Partridge of Hampshire	36,933
49	Toomeys	34,068
100	Riverside Motors Group	32,173
65	Ryland Automotive	27,603
43	TC Harrison Group	21,798
82	Cars2	21,632
18	Park's Motor Group	19,223
9	Greenhous Group	18,812
22	Lloyd Motors	18,498
19	John Clark Motor Group	18,036
26	TG Holdcroft	16,097
83	FRF South Wales	16,064
39	Marsh Wall	15,957
31	Williams Motor Company	15,946
53	Brindley Garages Group	15,760
85	Waylands Automotive	15,723
80	Howards Group	15,654

Rank 2024	Group	PBIT (£)
60	CEM Day	74,054
39	Porsche Retail Group	60,929
31	Cambria Automobiles	40,834
45	Hatfields	36,472
77	Partridge of Hampshire	36,323
56	Toomeys	35,521
98	HSF Group	33,857
48	TC Harrison Group	30,399
72	Riverside Motors Group	27,183
70	JCB Group	26,626
24	Dick Lovett Group	26,421
23	Steven Eagell	25,536
34	HR Owen	23,530
89	Cars2	22,384
12	Listers	21,740
16	Park's Motor Group	21,387
21	Lloyd Motors	21,232
37	Williams Motor Company	21,032
15	John Clark Motor Group	20,448
85	John Grose Group	20,324

Rank 2023	Group	PBIT (£)
60	CEM Day	69,717
49	Porsche Retail Group	58,528
33	Cambria Automobiles	46,796
95	Cars2	39,495
37	HR Owen	38,430
48	Hatfields	36,230
24	Dick Lovett Group	35,562
72	Toomeys	34,403
40	Halliwell Jones Group	31,586
79	Cotswold Motor Group	27,861
42	Marsh Wall	27,326
86	John Grose Group	26,887
81	Riverside Motors Group	26,453
84	Gates Group	26,094
47	TC Harrison Group	25,726
25	Lloyd Motors	25,250
26	Steven Eagell	24,913
21	Swansway Garages	23,869
20	Park's Motor Group	23,409
57	Peoples	23,382

PROFIT PER FRANCHISED OUTLET – TOP PERFORMERS

Rank 2025	Group	(£s)
35	Porsche Retail Group	3,147,714
9	Greenhous Group	2,548,083
67	Partridge of Hampshire	2,533,500
52	CEM Day	2,011,125
31	Williams Motor Company	1,105,667
100	Riverside Motors Group	896,222
83	FRF South Wales	672,250
24	Dick Lovett Group	624,353
74	Cotswold Motor Group	612,200
39	Marsh Wall	560,083
22	Lloyd Motors	542,944
3	Arnold Clark Automobiles	524,783
15	JCT600	469,000
88	John Grose Group	466,778
56	City West Country	456,000
18	Park's Motor Group	431,308
19	John Clark Motor Group	396,708
1	Sytner	392,678
51	Bowker Motor Group	387,429
8	TrustFord	361,064

Rank 2024	Group	(£s)
39	Porsche Retail Group	4,406,800
60	CEM Day	4,332,286
9	Greenhous Group	2,632,100
77	Partridge of Hampshire	2,345,500
45	Hatfields	1,942,571
24	Dick Lovett Group	1,432,529
58	Bowker Motor Group	1,214,667
37	Williams Motor Company	1,040,923
20	Hedin Automotive UK	1,000,000
99	FRF South Wales	905,200
76	Cotswold Motor Group	894,400
98	HSF Group	873,000
32	Peter Vardy	872,571
1	Sytner	871,731
21	Lloyd Motors	863,577
44	Halliwell Jones Group	780,917
12	Listers	778,865
43	Marsh Wall	764,444
72	Riverside Motors Group	753,500
31	Cambria Automobiles	742,500

Rank 2023	Group	(£s)
60	CEM Day	3,279,000
49	Porsche Retail Group	3,269,600
55	Bowker Motor Group	2,020,167
24	Dick Lovett Group	1,856,882
48	Hatfields	1,658,250
40	Halliwell Jones Group	1,650,273
79	Cotswold Motor Group	1,571,672
80	Partridge of Hampshire	1,425,899
42	Marsh Wall	1,337,199
1	Sytner	1,278,521
36	Williams Motor Company	1,232,000
44	Greenhous Group	1,121,429
21	Swansway Garages	1,064,095
86	John Grose Group	1,041,750
18	Hedin Automotive UK	1,000,000
84	Gates Group	981,177
25	Lloyd Motors	970,741
87	Parkway Derby	962,947
10	JCT600	956,978
2	Arnold Clark Automobiles	937,838

Employee engagement and retention have also become critical, particularly in light of rising wage costs and a competitive labour market. Groups that foster strong cultures, invest in training, and offer clear career progression are more likely to retain top talent and maintain service quality.

### DEALERS FACE MORE UNCERTAINTY YET MORE OPPORTUNITY

The outlook for the sector remains uncertain. The macroeconomic environment continues to pose challenges, with the upcoming Budget likely including tax rises and a higher minimum wage, alongside elevated interest rates all contributing to a

higher cost base and dampening both business and consumer confidence across the UK. The increase in employer National Insurance contributions (NICs) in 2025 has already added further pressure on tight margins. The regulatory landscape is also evolving. While EV sales are growing – accounting for more than 21% of new car registrations in the first half of 2025 – they still fall short of the 28% Zero Emission Vehicle (ZEV) target set for the year. This shortfall creates pressure on retailers to stimulate demand in a market where consumer appetite remains cautious. Changes to Motability and employee car ownership schemes (subject to significant levels of lobbying) only add to the list

of unknowns for future trading plans.

Despite these headwinds, there are reasons for cautious optimism. The SMMT forecasts modest growth in new vehicle registrations – 1.7% in both 2025 and 2026 – and the used vehicle market remains a vital source of opportunity.

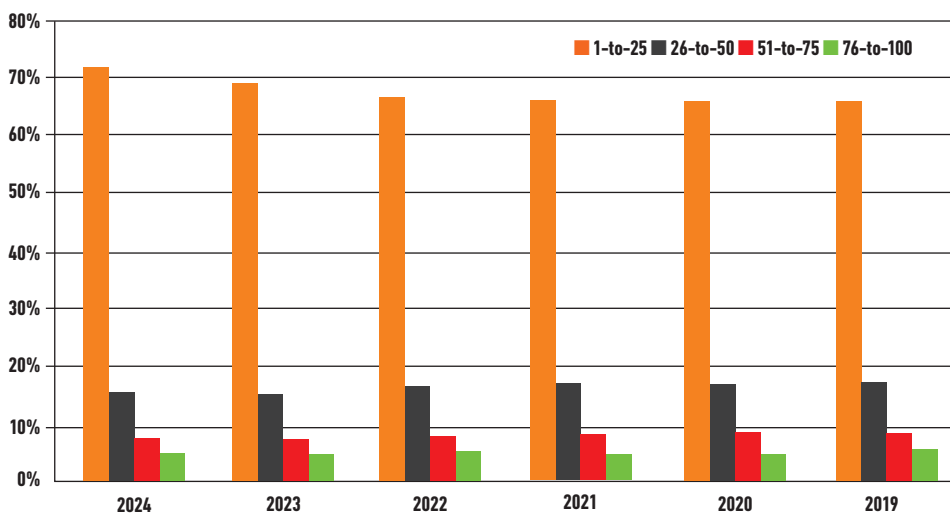
New entrants, particularly from China, are bringing fresh competition but also new partnerships and customer propositions. Retailers that can differentiate through customer experience, digital innovation and brand strength will be best placed to thrive.

The shift toward electrification, while still fraught with infrastructure and affordability challenges, also presents a long-term growth opportunity for

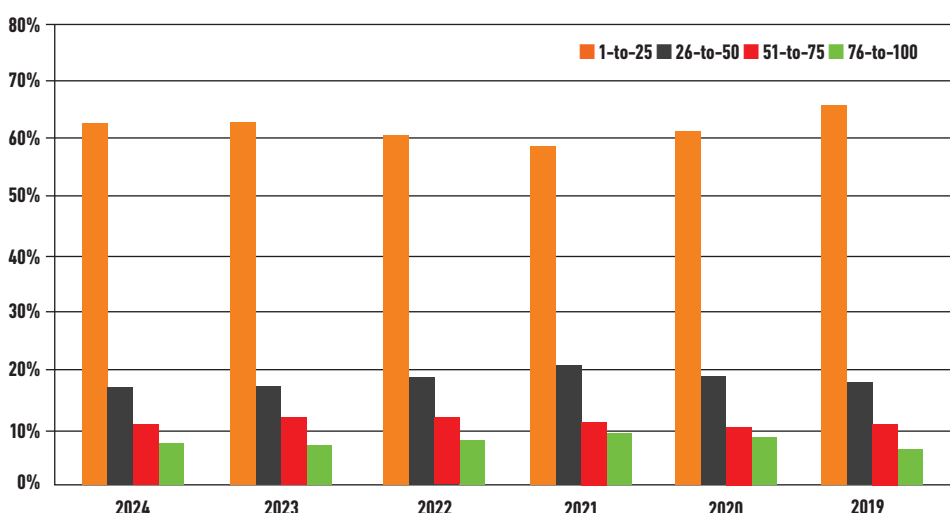
those who invest early and wisely. For those groups with strong controls, a clear strategy, and a focus on execution, there is still money to be made.

Consolidation is expected to continue, with the UK market remaining attractive to international investors as has been shown by the previous investment in Pendragon and Lookers. The acquisitions of Hatfields and Johnsons Cars in particular underscore this continuing appetite for M&A activity. The machinations of various OEM network development strategies are also giving rise to smaller 'bolt-on' acquisitions. However, in the months ahead this appetite could be impacted by the Budget with some decisions deferred or even brought forward to finalise ahead of any tax rate changes.

### AM100 SHARE OF TOTAL TURNOVER BY QUARTILE



### AM100 SHARE OF FRANCHISED OUTLETS BY QUARTILE



### A RESILIENT APPROACH WILL DEFINE THE STRONGEST OPERATORS

2024 was a year that tested the resilience of the AM100.

Slower growth, tighter margins, and structural change created a more demanding environment. Yet, as ever, the best operators found ways to succeed.

As we look to 2025 and beyond, the ability to adapt – to economic shifts, regulatory changes and evolving consumer expectations – will be the hallmark of success.

The AM100 remains a dynamic and innovative sector, and while the road ahead may be bumpy, the journey is far from over.

In a market where uncertainty is the only constant, resilience, agility and a relentless focus on the fundamentals will separate the leaders from the rest.

The AM100 has shown time and again that it can rise to the challenge, and 2025 will be no exception.

### NOTES ON THE AM100

Information in the AM100 is derived from statutory accounts. Where statutory accounts are not current, an estimate is made.

Profits are adjusted, where information is available, to eliminate exceptional items. Profit percentages are calculated on the unadjusted turnover numbers. Turnover is net of VAT.

For the table to be as comprehensive as possible, where estimates are made by AM these reflect past performance, national sales performance of franchises held, and other information in the public domain.

# Why payment choice is the next barometer for UK dealerships

Despite being associated with rapid transformation – from accelerated EV adoption to the impressive growth in online car sales – many UK dealerships are still missing a trick – namely, giving their customers the choice to pay in their preferred way. Today's customers want flexibility, and payment choice is crucial to attracting and retaining high-value customers, as well as ensuring maximum customer satisfaction.

Here at American Express, we know this better than most – and we offer competitive industry rates, tailored specifically to the Auto sector. We enable dealerships to cost-effectively enhance their payment choices and ensure they're able to attract high-spending and loyal customers.

## Attracting a premium customer base ...

Our recent research<sup>1</sup> shows that the average American Express Cardmember household earns more than double that of non-Cardmembers, and is also nearly twice as likely to own multiple vehicles. They are also more inclined to invest in extended warranties, service plans, and purchase electric vehicles. One in five (19%) would increase their spending – and over half (51%) say they would feel more positive about a business that accepted American Express. And, in the Auto sector, we found that 80% of Cardmembers say that it is their preferred way to pay for servicing.

Our Cardmembers want to spend on their cards whenever possible because they earn points on their spending – and they can choose how to redeem these.





“Today’s customers want flexibility, and payment choice is crucial to attracting and retaining high-value customers, as well as ensuring maximum customer satisfaction”

For example, they can be used across a range of shopping and lifestyle partners, or to help fund their next travel trip. They also enjoy a range of embedded Card benefits, such as purchase protection.

**... and a loyal one**

American Express Cardmembers are also not only more likely to invest heavily in their vehicles – they’re also actively choosing where to spend, based on payment options. Almost half (45%) of respondents would switch to a dealership that accepts American Express (versus one that does not) when the decision comes down to payment choice. For dealerships, the commercial incentive is clear.

**Seamless experience**

Forward-thinking dealerships are also starting to explore new payment options

powered by Open Banking technology. American Express’ Open Banking-enabled solution, Pay with Bank Transfer (PWBT), gives customers – whether or not they have an American Express Card - a secure, flexible alternative by enabling them to pay straight from their bank account – with no card required. For the Auto industry, where financial and insurance payment journeys involve both in-person and online touchpoints, this solution can support seamless checkout experiences whilst keeping costs competitive.

For dealers, who are facing tighter margins, increasing customer expectations and fierce competition, the customer payment experience can be a critical point of difference. Accepting American Express can unlock a higher-value customer base, boost satisfaction and loyalty, plus signal a commitment to premium service.

\*Independent research conducted by Jigsaw research on behalf of American Express. Online survey of 318 American Express Cardmembers (CM) and 451 non-Cardmembers, all of whom own a car. Fieldwork conducted March 2025.

**To learn more about how American Express can help drive customer loyalty and dealership growth, email [uksales@aexp.com](mailto:uksales@aexp.com), or visit our [website](#)**



# Is the era of AM100 'supergroups' nigh?

Consolidation of UK dealer groups continues at all levels, but at the top the number of AM100 supergroups is growing, typically backed by global investors with deep pockets, writes *Aimée Turner*

**F**or several years now more than two in every three franchised dealerships in the UK have been owned by AM100 dealer groups. But, even within the cohort, a significant number remain privately-owned groups with regional focus.

Yet there has been a noticeable rise in supergroups – motor retailers that are generating a billion pounds or more revenue from franchised dealerships across sizeable geographic UK territories.

At the heart of this rise is an increase in merger and acquisition (M&A) activity, fuelled by the desire to gain scale that helps to absorb the investments required in franchise standards and in new technologies that help the business adapt to changing consumer behaviours, changing vehicle technology and other operational pressures. OEMs that are reshaping their retail networks are also a key driver of the trend.

Interpreting this shift, Andy Feeke, head of MHA Corporate Finance, explains that the UK's dealership market has traditionally been highly fragmented, with a plethora of owner-managed businesses, many of which are legacy franchise operations.

"A fragmented market is the perfect hunting ground for M&A," Feeke told this year's MHA Automotive Sector Forum.

He adds: "Private equity identifies a platform – say, the number four player – then bolts on number five and six, creating scale, synergies and, ultimately, a business that can be flipped to one of the top players or a global investor."

This strategic stitching together of businesses is giving rise to supergroups that span multiple OEMs and regions, enabled in no small part by substantial inbound investment from the US, the Middle East and Asia.

Since the start of this decade an influx of overseas capital has been one of the accelerants of consolidation. UK dealerships, with their mature market structure and established customer bases, are attractive to foreign investors, particularly as fluctuations in foreign exchange rates can make UK assets appear undervalued.

Examples of significant investments by North American motor retailers include Lithia and Group 1 Automotive, who, Feeke says, view the UK as a springboard for European expansion.

"It's not just the asset base that's attractive," he says. "It's the opportunity to scale digitally and operationally and bring in best practices from more mature or better capitalised markets."

There are already a few established examples. Since America's Penske Automotive Group bought Sytner in 2002 it has expanded, through further acquisitions, into other European markets including Germany and Italy.

Last decade Hong Kong's Lei Shing Hong took over dealerships in Germany and the UK.

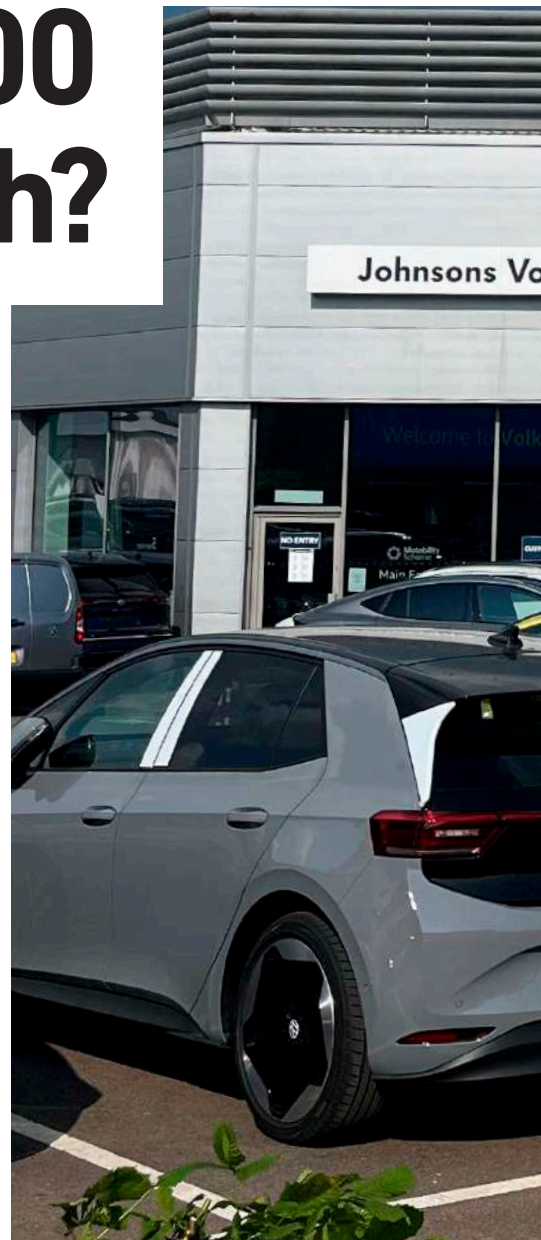
## INTERNATIONAL INVESTORS

David Kendrick, automotive corporate finance expert at Cooper Parry, believes that the emergence of supergroups will increasingly shape the market as achieving scale becomes the priority and acknowledges the role of international investors.

"One of these investors told me they wanted to invest £100 million in the UK," he notes.

"And to be fair, they're probably not far off hitting that threshold now."

Kendrick predicts the result will be an increasing number of regional privately-owned groups and larger international operators with the latter relying on existing management teams and local infrastructure to integrate effectively.



**“ IN 1990 WE HAD JUST MORE THAN 7,700 DEALERSHIPS, AND BY 2025 THAT NUMBER HAS DROPPED TO AROUND 4,200 – A DECREASE OF NEARLY 50% ”**

**BOBBY BARFOOT, SAVILLS AUTOMOTIVE**

The figures bear testimony to how the sector is changing. Analysis by property consultant Savills has predicted up to 1,200 car dealership closures by 2034, and it believes many sites are likely to be repurposed for EV charging or retail.

"There's a clear downward trend in the number of franchised car dealerships from 1990 to 2030," says Bobby Barfoot, associate at property expert Savills Automotive. "In 1990 we had just more than 7,700 dealerships, and by 2025 that number has dropped to around 4,200 – a decrease of nearly 50% over 35 years."

The rate of that decline has slowed considerably in recent years. Even so, the structural shift is set to continue, despite new entrants.

Barfoot estimates that around 1,200 dealerships in legacy volume brand networks may be lost, then multi-franchising will likely cut the number of locations by another 150 while 600 new dealerships will emerge from new entrants, mainly EV-focused brands.



The question of whether overseas capital is ultimately strengthening or destabilising the UK franchised dealer market continues to provoke debate, particularly when it comes to long-term sustainability and local decision-making.

Consultant and former Hyundai Motor UK chief executive Tony Whitehorn highlights the scale of capital investment required to operate a dealer group today and says it is that need which is driving the quest for economies of scale through acquisitions.

Whitehorn cautions against simple judgements about the rights and wrongs of where the investment comes from.

"In essence, business needs investment and such funds are not going to be found on the stock market as automotive retail is not attractive," he says.

"Foreign funding is, therefore, providing a solution which is proving, in the main, to offer a short-to-mid-term solution. Its long-term sustainability is yet to be determined."

Similarly, for Chris Bond, head of motor retail at BDO, the impact of overseas ownership is still unfolding especially since different owners will have different motivations in the short and medium term.

"I suspect that the foreign owners who will do the best from their investment in the UK will be those that retain the local expertise and really understand how the market works in the UK.

"Those that come in and immediately think they know best, strip out lots of costs, and assume that the customers will still come might be the ones who get stuck."


Notwithstanding the risk, Bond points to the potential for overseas investors to actually add value by bringing positive mindsets around omnichannel approaches, operations and alternative customer offerings.

It is also worth noting as David Manchester, former Peugeot dealer council chairman and now managing director of Automotive Assets, does that

the emergence of foreign owners can fundamentally strengthen the dealership model through the strength of the global brand relationships they already have.

He also points out that the domestic retail landscape remains a draw in its own right. "The UK is one of the most advanced retail markets, and the professionalism of its dealership model makes it more likely to be replicated elsewhere.

"Whether that's through agency or traditional models remains to be seen, but most brands would agree that the UK sits firmly in the top five global markets for retailing their products in a highly professional way."

One of this year's new entrants to the UK was DXB, an investment company headquartered in Dubai, which has acquired multiple Jaguar Land Rover dealerships and BMW, Mini and Volvo authorised repairer operations from AM100 group  Harwoods.

# THE BIG PICTURE

**JudgeService AI Sentiment Analysis** uses AI to analyse the sentiment across all online review platforms and come up with some profit boosting actions.

## What have we learned?

As you might expect, as aftersales is more of a distress purchase, the amount of positive sentiment is lower (**77%**) than it is for sales (**91%**). That said, the biggest contributor to negative scores in sales is mechanical preparation – so whilst a dealership develops a silo mentality, the customer sees it as one.

## Sales

We know from ongoing analysis that showroom staff are the absolute key to winning delighted customers with the “salesperson experience” generating the highest positive net promoter score (**96%**), along with the welcome/reception (**96%**) customers receive.

*“You never get a second chance to make a first impression!”*

Importantly the largest number of mentions in total was around the salesperson too – mentioned in **38%** of reviews.

During the purchase process the test drive attracts the most positives (**89%**) with part exchange a perhaps surprising second at **81%**. Less positives are negotiation (**64%**), followed by finance and paperwork both at **63%**.

The biggest gripe in vehicle quality/delivery is mechanical preparation with only **27%** positive as opposed to **88%** positives around choice and **86%** overall satisfaction.

## Aftersales

When it comes to aftersales the biggest objections are around communication, with **65%** positive and servicing booking with only **63%** positive.

That said when a service advisor gets it right it creates raving fans:

*“I would like to thank the service advisor, for putting some air into my tyres today. I had a warning notification, so I decided to call into a local tyre business in Retford (where I live) they told me I had a puncture and needed four new tyres, I decided to ring Perrys who I have dealt with for many years and was told to take the car to them for my tyres to be checked. Thank goodness I did, it was amazing as all my tyres needed was some air, so grateful. Thank you”*

- Customer Review

## Battle of the brands

When it comes to the sentiment towards brand, by franchise, Citroen comes out on top at **96%**, followed by Ford at **96%**, with Lexus and Mercedes both at **95%**.

By no means disastrous at the bottom of the table were Jaguar (**79%**), BMW (**85%**) and Land Rover (**87%**).

## How does it work

Our new AI Sentiment Analysis service takes all the reviews from dealers on all the platforms, including what franchises they represent. It then uses AI to work out what department they are referring to and, using data from hundreds of thousands of reviews, breaks it down to the type of issue (eg sales process or delivery) and the actual positive or negative. This allows us to see what are most mentioned and where the opportunities exist.



## Who should use it?

Whilst AI Sentiment Analysis fits with our Reputation Manager service – which is often managed by a marketing person or team, dependent on the size of the group – it is specifically geared towards operational excellence.

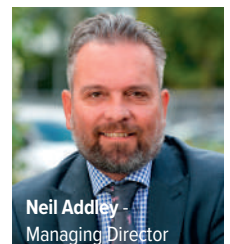
Hence it is designed to work for CEOs and MDs as well as franchise or regional directors, operations directors and general managers. The whole point is to provide guidance to where each individual business and its team can improve, and what can be celebrated.

## Where does it fit

AI Sentiment Analysis sits alongside our existing Reputation Manager, Business Listings and AI Reply services.

## For more information

contact us on **01423 225166**  
or email: **neil@judgeservice.com**



Neil Addley  
Managing Director





**“THOSE THAT COME IN AND IMMEDIATELY THINK THEY KNOW BEST, STRIP OUT LOTS OF COSTS, AND ASSUME THAT THE CUSTOMERS WILL STILL COME MIGHT BE THE ONES WHO GET STUCK**

**CHRIS BOND, BDO**

Ex-ASE chairman Mike Jones of Fresh Track Holdings, is working with DXB on its strategy going forward.

Far from the influx of capital destabilising the UK dealership market, Jones insists such investors, in common with UK dealership owners, are seeking a long-term return on their investment.

“The threat would come from franchises deciding to sell direct to consumer, however with the tide turning against the agency model and new entrants choosing the dealership model for their distribution plans, the UK dealership model is here to stay.”

**QUEST FOR EFFICIENCY**

Another factor that is giving rise to the supergroup is the rapid technological transformation across the sector. The biggest businesses such as Arnold Clark Automobiles and Vertu Motors have the resources to develop their own solutions as well as extract the maximum value from third-party providers.

“The future will be about data consolidation,” Feeke says. “A single source of truth is essential – buyers are increasingly interested in businesses

with robust tech stacks that can support data-driven decision-making.”

That should fire a shot across the bows of any dealership acquisition candidate which still operates with siloed systems, resulting in operational inefficiencies and a lack of integration.

Simultaneously, the shift to electric vehicles (EVs) has added pressure. It requires substantial investment in infrastructure and training at a time when other operating costs have risen substantially. While some groups are well-positioned to adapt, those that are struggling, or that have an owner nearing retirement, are hoping for a timely exit.

“There’s a dying breed of privately-owned entrepreneurs who can’t afford to get into this space,” Kendrick says.

“Many family businesses don’t have a next generation to pass them to, so a sale becomes the only option. That’s why we’re seeing deals like the acquisition of Johnsons by Athenaeum International Holdings – the owner of AM100 dealership group Brayleys Cars – and others coming to the fore.”

“Undoubtedly, there’s going to be more consolida-

tion. It’s becoming ever harder to be an individual site or a small group. The deeper your pockets and the more sites you can spread costs across, the better positioned you are.”

Recent transactions are evidence that privately-owned regional AM100 groups are acquiring additional businesses to boost market share at the same time internationally-owned groups are growing rapidly.

For example, John Clark Motor Group acquired Hawco Group just a few weeks ago, expanding its Volkswagen Group portfolio, and Vospers took over County Garages Group in the spring.

**MANUFACTURER INFLUENCE**

As some dealer groups expand beyond the market share thresholds that many OEMs once sought to enforce, manufacturers are finding that they, too, are being challenged to rethink their network strategies.

“OEMs like to have influence over how many dealerships a group can have within their network,” Kendrick says.

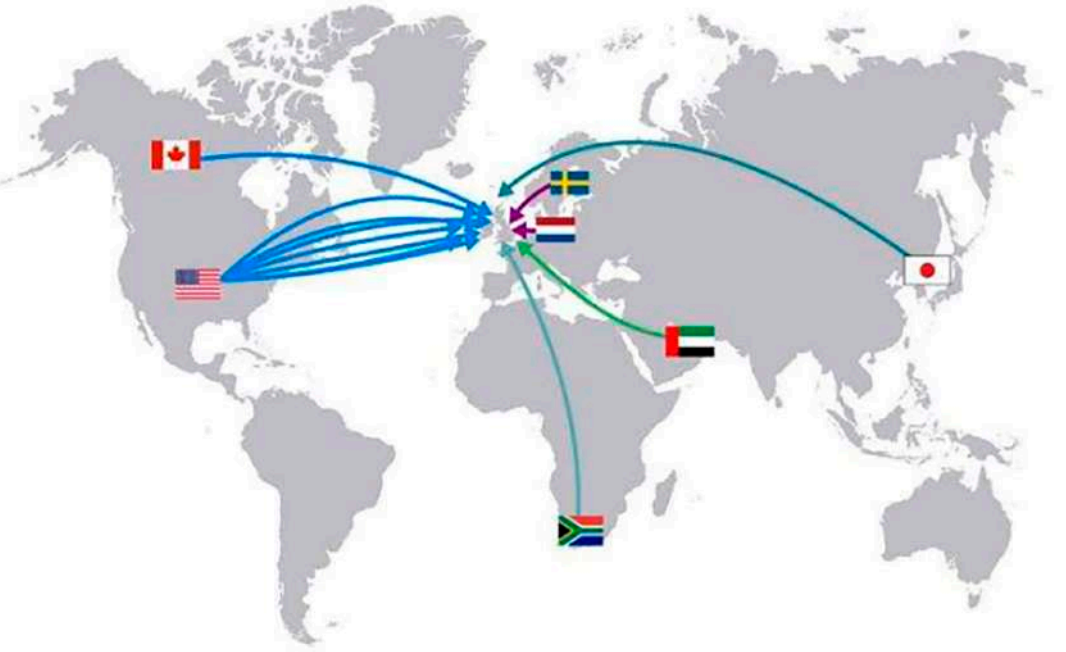
“They openly state they don’t want any dealer group to have more than 10% market share. But eventually, they won’t be able to control that, because to survive, major locations need investors with seriously deep pockets.”

Many OEMs have strategies to reach the 2030s with fewer dealer partners, each operating multiple locations.

JLR’s network reorganisation last decade led to significant consolidation, pushing out some smaller franchisees whose territories were sold to the OEM’s approved retailer.

Stellantis, Volkswagen Group and Ford have restructured their networks since the start of

**Overseas acquisitions of UK dealer groups since 2022**



\*revenue of acquired UK dealer group due to undisclosed purchase price.

Source: Savills Research



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## “ THE ONLY CRITERIA ON WHETHER A DEALERSHIP GROUP SHOULD REPRESENT THE FRANCHISE IN A PARTICULAR MARKET AREA SHOULD BE DOWN TO OVERALL MERIT AND FINANCIAL VIABILITY

TONY WHITEHORN, CONSULTANT

this decade, and Renault and Hyundai are in the process of completing theirs.

Some OEMs are choosing to focus less on retail representation thresholds and more on fostering trusted, mutually beneficial partnerships with dealer groups that can demonstrate both resilience and performance.

Automotive Assets' Manchester believes the old representation caps have effectively disappeared. "I think it's long gone. If you look at traditionally conservative brands like Toyota, and then at how many sites Steven Eagell operates, it's clear that policy has gone out the window.

"With trusted partners they've built long relationships, there's really almost no limit. If they're performing well, share the same values and the relationship is strong, why wouldn't you want to expand?"

Whitehorn agrees that the industry has matured well beyond the fears that originally shaped those restrictions in the 1980s when OEMs were frightened dealers would control what they wanted to do.

Like Manchester, he argues that network planning should now be guided by performance, not by outdated quotas.

Whitehorn says: "To establish nebulous criteria to determine business partners is somewhat naïve. The only criteria on whether a dealership group should represent the franchise in a particular market area should be down to overall merit and financial viability."

Jones believes national sales companies are still trying to prevail over what continues to be a delicate balancing act.

"We have seen through some of the recent asset disposals, following some of the large consolidation plays in recent years, that the national sales companies are still maintaining their control."

"Many have actively encouraged – or forced – the consolidation of their retailer ownership structure, giving them financially strong partners and fewer retailers to speak to, enabling them to reduce their own costs.

"They do, however, need to make sure that the tail can't wag the dog, with any retailer getting too dominant within a brand that they can dictate, rather than gently influence, brand decisions."

### BENEFITS IN THE BALANCE

The supergroup model offers several key benefits, with economies of scale being the primary advantage. Larger groups can negotiate better finance rates, oil deals, and auction charges by spreading costs across multiple sites.

They may also develop better brand awareness within regions.

Yet some may question whether big is beautiful when some smaller privately-owned groups generate better profits per site than their much larger counterparts.

Despite all the talk over the years about gaining benefits of scale the largest dealer groups' return on sales suggest the efficiency gains are limited – with Arnold Clark Automobiles' long established one-stop-shop strategy a rare exception.

Larger operations allow for some back-office consolidation and process synergies, but then require more layers of management to support this,

and it introduces complexity in managing relationships with multiple OEM partners, especially when different manufacturers have conflicting strategies.

"When you get 50-plus dealerships," Kendrick argues, "it's very hard to influence culture. With thousands of people, how do you really benefit from scale? Market dominance and regional share help, but controlling costs and processes becomes increasingly difficult as businesses grow. Scale has benefits, but it also has pitfalls."

The key to success appears to be finding the right balance – becoming large enough to achieve meaningful economies, but not so large that operational control and cultural identity is lost.

### WINNING THE CULTURE WAR

The preservation of agility and culture in scaled-up dealer groups will depend not just on financial backing, but on well-designed corporate structures, integration and strong leadership at all levels.

Whitehorn argues that success hinges on the clarity of roles and responsibilities when outside investors are involved.

"First, the role of the foreign investment company needs to be clearly defined. Specifically, their function is to 'monitor and measure'. They do need to have representation on the board as a conduit between the dealer group and investment company which, while it adds bureaucracy, does provide involvement at 'arm's length'.

"Second, the operational management needs to be driven by local personnel. This will maintain the culture and the flexibility necessary in this dynamic environment. Such a configuration has been found to be advantageous by OEMs over the years."

Bond at BDO agrees that governance and leadership design is crucial.

"The management structure needs the balance between avoiding having too many layers in the structure, i.e. quite corporate, as this can slow down actual decision-making, and ensuring all decisions are made by a board despite being removed from the day-to-day operations and, in some cases, in another country."

Automotive Assets' Manchester also sees integration as the critical factor believing that this can often be more important than the acquisition itself.

"If you can't bring the group into your culture and systems quickly and effectively, the chances of long-term success are slim.

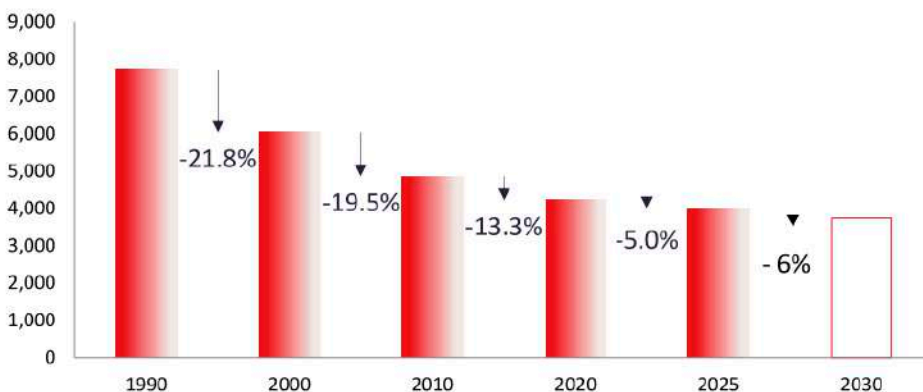
"There are strong examples of businesses that have integrated rapidly and successfully – and others that have struggled.

"That integration piece is vital, and it's becoming increasingly important: aligning culture, managing teams, supporting people and ensuring everyone feels comfortable is the only way to get the best out of the investment."

However Jones points out, this is not an issue unique to automotive and that each supergroup must choose its own balance between central and local decision-making.

"Maintaining central control and monitoring while leaving scope for local flair and entrepreneurship is a challenge. However, it is one which some of the national supermarket chains manage to successfully navigate."

## Dealership numbers 1990-2030



Source: Savills National Franchised Dealer Association

# TRANSACTIONS INCREASE, BUT HALF OF TOP 10 REPORT LOSSES

Sudden market shifts impact several leading independent used car dealers. *Tim Rose* reports

**T**rading conditions remain difficult for all UK motor retailers however the evidence is in plain view among this year's ID10 ranking of the country's largest independent used car dealers. Half of them have posted pre-tax losses. For some of the companies, the swing into the red has been very significant.

The used car market has been growing, and DVLA data gathered by the Society of Motor Manufacturers and Traders (SMMT) shows it reached 7.6 million transactions last year, up from 7.2m in 2023. The challenge for businesses is that the costs of energy, stock, property and payroll have all increased too. And the complexity and sourcing challenges of the recent years remain, particularly for independent used car dealer groups. The full impact of the three million new cars not sold during the pandemic continues to flow through the parc, shifting from one-three-year-old cars to the three-five-year-old segment of the market, and beginning to impact five-10-year stock availability.

Sudden market shifts hit profitability for many, plus some dealers lamented the rapid drops in their GAP insurance income as the Financial Conduct Authority took action out of concern for lack of value.

The combined turnover of the ID10 has fallen year-on-year to £4.08 billion, from the £4.14bn we reported last year. Some of the biggest dealer groups have headed backwards and two which were in last year's ID10 have dropped out, replaced by ambitiously growing groups. Last year's 9th placed Tom Hartley Junior has reported a 37%



plunge in revenues, caused by market conditions and management focus on the building of its new 60,000sq ft base, The Firs, in the Cotswolds, while the 10th placed Redline Specialist Cars has been acquired by leasing firm AMT Auto and is yet to file its 2024 accounts.

Replacing them are Carbase, which sat just outside the ID10 for several years, and Hippo Motor Group.

At the top of the ID10 is Motorpoint, which remains

the only independent used car dealer to generate above £1bn annual revenues. After two years of battling losses, which led to around 200 job cuts and a pause on its dealership expansion plan, Motorpoint has returned into the black and is beginning to grow again. At the end of 2024 it opened its 21st showroom, at Norwich, and it has invested in automation to speed up the customer journey. It claims that its digital contactless process

## THE ID10

2025 Rank (2024 ID10)	Company/trading name	Turnover 2024 £,000	Turnover 2023 £,000	Profit before tax 2024 £	Profit before tax 2023 £	No. of staff 2024	No. of staff 2023	Key executive	No. of sites 2024	No. of sites 2023
1 (1)	Motorpoint	1,173,100	1,086,600	4,100,000	-10,400,000	780	764	Mark Carpenter, chief executive	21	20
2 (2)	Big Motoring World	859,051	697,438	-38,694,000	-22,446,093	1293	881	Laurence Vaughan, chief executive	11	8
3 (5)	CarSupermarket.com*	387,653	339,957	1,087,408	2,387,726	544	489	Matthew Barrick, chief executive	9	10
4 (3)	Car Giant	352,539	491,231	121,200,000	-22,385,297	483	511	Michael Holahan, managing director, car operations	1	1
5 (4)	Available Car	302,641	425,977	938,000	-12,664,000	381	610	Michael Bell, chief executive	2	2
6 (6)	Trade Centre Group	275,502	311,565	-4,750,000	7,638,000	6	665	Tim Carr, chief executive	6	6
7 (8)	V12 Sports & Classics	235,193	195,510	256,959	563,997	217	215	Farhad Tailor, managing director	4	4
8 (7)	Saxton 4x4	202,198	250,438	-3,761,899	5,181,355	174	164	Danny Austin, managing director	1	1
9 (NEW)	Carbase	151,799	117,797	-2,213,792	220,488	204	205	Alex Jones, chief operations officer	4	5
10 (NEW)	Hippo Motor Group	142,555	143,762	-5,373,901	-123,567	342	318	Tom Preston, managing director	2	1

\* Rebrand from Motor Depot

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Available Car has emerged from downsizing with a much more profitable business

allows a customer the option to complete their purchase in store or online, visit a store to collect the vehicle, and drive away in 30 minutes. Home delivery is also offered.

Motorpoint chief executive Mark Carpenter says: "Data is becoming ever more fundamental to how we operate; from what prices we set daily, to what streams of marketing work best in a rapidly changing marketplace. As such, we continue to bolster our data and digital teams and, where necessary, attain input from third party experts. We are now able to provide our buying teams with real time data to allow them to have further confidence when acquiring vehicles, and also to inform selling price decisions."

Further expansion would be into large, under-represented locations, similar to the Norwich opening, with large forecourts and the capacity to prepare cars on site. Carpenter says that investing in organic growth is the priority, and Motorpoint will look for opportunities in cities where it can win 10% local market share.

Since Cazoo's demise, the challenger for Motorpoint's crown has become Big Motoring World. It added three dealerships and closed one existing site in 2024, leaving its dealership network at 11 sites, and it has closed the gap to Motorpoint considerably since its investment by private equity firm Freshstream and its replacement of founding chief executive Peter Waddell with veteran motor retailer

Laurence Vaughan. Vaughan expects Big Motoring World's revenues to exceed £1bn soon, which will be double what the group achieved in 2022, when it had five dealerships.

Nevertheless, the Companies House accounts show Big Motoring World's losses mounted in 2024, falling another £16m into the red as it scales up. Exceptional items related to legal fees and the closure of one dealership were a factor in the losses, as were rapidly rising interest costs on stocking loans and shareholder loans.

This year there is a new company in third spot on the podium. CarSupermarket.com, the trading brand of Motor Depot, has achieved double-digit percentage growth to record revenues of £388m,

TURNOVER CHANGE YEAR-ON-YEAR

2025 rank (2024)	Company/trading name	Growth/decline
9 (NEW)	Carbase	28.9%
2 (2)	Big Motoring World	23.2%
7 (8)	V12 Sports & Classics	20.3%
3 (5)	CarSupermarket.com (rebrand from Motor Depot)	14.0%
1 (1)	Motorpoint	8.0%
10 (NEW)	Hippo Motor Group	-0.8%
6 (6)	Trade Centre Group	-11.6%
8 (7)	Saxton 4x4	-19.3%
4 (3)	Car Giant	-28.2%
5 (4)	Available Car	-29.0%



After several years spent on the outside looking in Carbase has broken into the top 10 reporting the leading growth percentage



“Our transformation strategy remains a key focus, supported by ongoing investment in digital tools. The retail stock profile is robust with ageing stock managed down to record levels through improved stock-turn, acute inventory acquisition and price management. These initiatives position the business well for sustainable growth and improved profitability,” says Bailey.

Inching closer to Trade Centre Group in the ID10 is V12 Sports & Classics, owned by chief executive Farhad Tailor. It grew revenue by almost 20% but it too felt the pain of the economic rising costs and low consumer confidence in 2024. It implemented its own transformation strategy, closing four showrooms, some of which had not traded long, to focus on its core operations at Hinkley, Stoke-on-Trent, Worksop and Wolverhampton and “setting the stage for stronger results in 2025”.

It did manage to keep in the black in 2024, with a £256,959 pre-tax profit – half that achieved the previous year – and Tailor says investment in increased senior management expertise, plus in digital tools, artificial intelligence (AI) and IT systems will benefit the business in the future.

Prestige car specialist Saxton 4x4 is another to slip down the ID10, dropping to eighth as its turnover slumped by almost 20%. Its profit disappeared too, swinging to a £3.76m pre-tax loss in 2024 from the previous year’s £5.2m profit.

Chairman Alwyn Austin, who founded Saxton 4x4 in 2009, notes sadly that the market correction, particularly as EV values slumped, and increasing operating costs such as interest rates led to the company posting its first financial loss.

Nevertheless, the business has invested in freehold brownfield properties in line with its operational plans to scale up the business and continue to sell prestige cars on supermarket-level volume.

Austin says: “We remain confident that our

strategic investments will yield positive results and support long term sustainable growth.”

He adds: “Demand for the SUV and prestige market remains high, with manufacturers capitalising on this by introducing new models and upgrading technology on those entering the market. This will add to increased sales and growth for Saxton 4x4.”

ID10 new entrant Carbase also recorded a pre-tax loss, of £2.2m, from a small profit the previous year. However, its revenues rocketed up 28% to almost £152m. As margins came under pressure the business deliberately focused on vehicles with stronger margin potential and continued refinement of its dynamic pricing model, to ensure stock was competitive and attractive to potential buyers, with a resultant reduction in average days in stock from 69 to 60. Advanced in-house pricing systems, using the power of AI, are able to re-evaluate the market on a daily basis and adjust vehicle prices to optimise both stock turn and margin.

Tight controls on fixed overheads limited cost growth to 1%, reports owner Steve Winter. He’s also proud that the company retained its Great Place To Work accreditation, having gained it on first attempt in 2023. “This recognition reflects our ongoing efforts to be an employer of choice in the automotive sector,” says Winter.

The final group in the ID10 is the second new entrant, Hippo Motor Group. Just as CarSupermarket.com has benefited from some others’ declining sales, Hippo has nudged into the ID10 despite an almost flat year-on-year revenue performance which, in previously years, would not have been significant enough.

And despite its £5.4m pre-tax loss, the company will hope to recover and grow in the coming years as it has recently opened its second showroom at Peterborough, in a site which was closed by Big Motoring World.

In its accounts managing director Tom Preston says the 2024 performance was impacted by higher interest rates and living costs which led to lower customer demand and affordability, plus the business had added capacity to increase its sales volume but was unable to deliver the expected growth. Since then, Hippo has strengthened the leadership team and driven improvements both to the online customer journey and to the stock acquisition process.

It has also taken action to reduce costs, and Preston says in the accounts that the board is confident the business will return to profitability in its next financial year.

“The business gained more than 92% of its leads via various internet channels. We are therefore vulnerable to changes in technology or consumer buying habits,” says Preston in the accounts.

He notes that work is under way on a full end-to-end e-commerce buying experience, and Hippo will ensure that e-commerce systems remain at the forefront of any technological developments in this area.

Looking at this ID10 as a whole, when only half of the cohort have achieved pre-tax profit, it is notable that the average number of staff employed in the year has increased for seven of the companies. This year 275 more people worked at the ID10 companies than in the prior year. Whether this remains the case will be seen in the next iterations of the ID10.

The impact of further cost rises, such as increases in National Insurance and the National Minimum Wage, are yet to be reflected in filed accounts and the ID10 must battle to outperform a used car market which is still building slowly, and which has an increasing volume of electric vehicles to sell. Yet while many groups in the ID10 talk of improving systems and even introducing automation and AI, it seems the complexities of retailing used cars successfully still requires the human touch.

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and it has done so while staying in the black. Having already closed a dealership at Worksop in 2023 it closed another site in 2024, at Hull, consolidating the operation into another site in the region.

Nevertheless, the reason CarSupermarket.com has climbed the ID10 ranking is the rapid shrinkage of two competitors – Car Giant and Available Car.


London-focused Car Giant has slipped down the rankings from last year's fourth place, with a turnover decline of almost £140m, following a corporate restructuring which hived off its property rental and development business into a new company. And, while Car Giant's pre-tax profit swing of more than £140m looks extraordinary, it is following a revaluation of assets to fair value, which led to a

surplus of £98.8m. Its operating profit of £22.9m was down from the prior year's £31.3m.

Meanwhile the sale in 2023 of two of its car supermarkets to Big Motoring World, and the exit from a business in Cheshire, has left Available Car with a much smaller business, but one which has dramatically improved profitability and is back in the black from posting a £12.3m loss in 2023. Now in fifth position in the ID10, the used car retailer owned by Graham Bell will continue to invest in its remaining two sites at Castle Donington and Sutton In Ashfield, in its staff and in technology. "The key is long term stability for the shareholders and stakeholders of the business," Bell says in its accounts. Bell reports that revenue generated at the continuing operation

was £55m ahead of the prior year, and sales volume increased by 3,588 retail units.

With six car supermarkets in England and Wales, the Trade Centre Group is another of the ID10 which has been downsizing. An £11m swing into losses, as the business battled "significant economic headwinds... particularly in the first half (of 2024)", led to a transformation plan being put in place, including improved stock management and the closure of its Birmingham South branch.

Total vehicle sales dropped by 13% to 33,538 units. Owner Mark Bailey says that since the year-end the business has seen significant benefits from the transformation plan, with profits growing ahead of forecasted levels. 

#### THE ID10 PROFIT BEFORE TAX (PBT) PER EMPLOYEE

2025 rank (2024)	Company/trading name	PBT per employee (£)
4 (3)	Car Giant	250,931.68
1 (1)	Motorpoint	5,256.41
5 (4)	Available Car	2,461.94
3 (5)	CarSupermarket.com (rebrand from Motor Depot)	1,998.91
7 (8)	V12 Sports & Classics	1,184.14
6 (6)	Trade Centre Group	-6,995.58
9 (NEW)	Carbase	-10,851.92
10 (NEW)	Hippo Motor Group	-15,713.16
8 (7)	Saxton 4x4	-21,620.11
2 (2)	Big Motoring World	-29,925.75

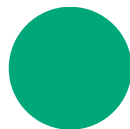
#### THE ID10 RETURN ON SALES (ROS)

2025 rank (2024)	Company/trading name	ROS
4 (3)	Car Giant	34.38%
1 (1)	Motorpoint	0.35%
5 (4)	Available Car	0.31%
3 (5)	CarSupermarket.com (rebrand from Motor Depot)	0.28%
7 (8)	V12 Sports & Classics	0.11%
9 (NEW)	Carbase	-1.46%
6 (6)	Trade Centre Group	-1.72%
8 (7)	Saxton 4x4	-1.86%
10 (NEW)	Hippo Motor Group	-3.77%
2 (2)	Big Motoring World	-4.50%

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RUSSELL BORRIE



# RUSSELL BORRIE, CHIEF EXECUTIVE OFFICER, ARNOLD CLARK AUTOMOBILES

## ON A CHARGE

Russell Borrie is leading the AM100's largest privately-owned group into its next phase of data utilisation, customer experience and growth. *Tim Rose* reports

# A

s I walk into the headquarters of Arnold Clark Automobiles in Glasgow I'm struck by two thoughts.

First, this AM100 group does not want anyone, ever, to forget that its purpose is keeping people mobile, whether that means a car sale, vehicle parts for the trade or a van rental.

Unusually for a top five AM100 group, the corporate headquarters is not in an anonymous office block, but is connected to a Renault, Dacia and Alpine dealership. And just across the road is one of its latest brand extensions, a prestige luxury car dealership branded Arnold Clark Luxe with an array of used Porsches, Ferraris and Aston Martins beside new and used Maseratis and Corvettes from the franchises held there.

My second thought is how proud the group is of the multiple AM Awards it has secured over the years, displayed in cabinets around the reception area.

I casually check with a member of staff that these haven't been put out front due to my visit. No, I am assured, they are a permanent feature. From past discussions with other AM100 leaders I know many regard Arnold Clark as the ultimate motor retailer, and the AM Awards echo that. Yet, from visiting the business a few times in my 20-plus years with AM, and from talking often to its leadership team, I find this company prefers quiet confidence over brazen boldness.

That impression continues when I sit down with Arnold Clark's new chief executive Russell Borrie.

Borrie took over the role from Eddie Hawthorne earlier this year. But he's a familiar face, having worked in the group for three decades and latterly been mentored by Hawthorne (who remains in the business), just as Hawthorne himself had been earlier in his career by Sir Arnold Clark.

"There are many groups and we can learn

a lot from these other dealer groups as well. We don't single ourselves out to be any better," says Borrie, who admits he is proud, "very much so", to be leading the £5 billion turnover group into its next phase.

His start as CEO coincided with cost rises due to National Insurance and Minimum Wage increases, so there were immediate challenges. But, for him personally, it was delegating everything he'd been doing in his previous role of chief operating officer to take over Hawthorne's reins.

"I look forward to the continuation of our relationships with all our OEM partners, our finance partners," he says. "The company is on a very stable footing. While we recognise the challenges, we're looking forward very much to the opportunities that we think will come in the next five-to-10 years."

Asked about Arnold Clark's strengths, and what helps it stand out, he says: "We've built the business up over many years and have solid financial and strategic foundations. Everything we do is in a very measured basis, expanding steadily over decades through reinvestment and strong operational disciplines.

"We always focus on the long term rather than short term gains, that's always been our ethos. We also do have a huge commitment to developing our own people."

### INVESTMENT STRATEGY

"In terms of what stands out, it is our investment in digital, with digitising our own internal systems, and what we've done with our website, the Arnold Clark app and AC Charge really."

An in-house software development department and the financial resources of the group give it the opportunity to continue meeting consumers' evolving needs for as long as its leadership team has the foresight to see where motoring is headed.

An example of that next phase for the group is the ongoing roll-out of Arnold Clark

Charge, a venture which has already put ultra-rapid EV charging hubs into more than 50 of its properties for the public to use. Drivers can book a charger through the Arnold Clark app, get a highly competitive kWh rate, and can pay via the app or contactless.

It is supporting the EV transition, and in the long term, it encourages more people to download the app, gets the Arnold Clark brand known more widely, and it makes EV drivers more familiar with the group's dealerships and car collection sites.

The group is still working out what the customer offering should be on site. It could extend to a concierge-type service, with assisted charging and refreshment facilities. All the showroom hosts at dealerships which have Arnold Clark Charge facilities are trained to help users and ensure they have a nice experience. "It's an opportunity to see customers you might not otherwise see," Borrie says.

Borrie also flags up that, as fellow dealers reach the point in 2030 when 60%-70% of their used car stock will be electric, they will have difficulties unless they have charging solutions on site. Ultimately, a customer will expect to drive off with a level of charge, and if staff are having to go off site to charge cars that is inefficient.

Its ownership of Bumblebee, a home charger installation business, has also been of huge benefit to new and used EV sales.

Borrie says the key to any good business is its operating system. "It makes the flow of the transaction much easier," Borrie says. The group built its own sales and aftersales system, which is fully integrated so that a customer can be online building their purchase and that will flow through into the group's internal systems. A consumer anywhere in the UK can buy any of the group's stock. Should a buyer choose a 'click and collect' option it even feeds this through to the group's fleet of 150



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transporters, to ensure the car is taken to the collection centre the buyer selected.

"Through COVID we were forced to do it, and, as a consequence, you see the benefits of being able to get into areas where you didn't necessarily have a retail site but you penetrate that market through click and collect."

Greater London is a good example. The group won customers there remotely to the extent that it opened a Motorstore at Chertsey just inside the M25 last year.

#### SPREADING SOUTHWARDS

"We are now looking at retail sites further south than we've been previously, as we see the opportunity."

It is more than 30 years since Arnold Clark opened its first dealership outside Scotland, at Liverpool, and gradually opened more sites in the Midlands, reaching recently as far down the UK as Exeter and Southampton with click and collect depots.

New entrant brands from China are keen to partner with Arnold Clark – Borrie proudly comments that they are coming to him, rather than the group seeking them out. Its

#### FACTFILE

**Turnover** £5.15 billion

**Latest profit before tax** £120.7 million

**Sales volume:** 191,000 used vehicles, 64,000 new

**Outlets** – 230 franchised, plus 30+ Motorstores and Click & Collect Centres, and 37 vehicle rental locations

**Employees** 11,586

## WE'RE PUTTING A STATEMENT OUT THERE TO SAY WE ARE LOOKING TO EXPAND THE PREMIUM DIVISION

BYD representation now comprises six showrooms in Scotland and five in England. It has just opened three Chery showrooms, adding to its partnership with Chery Group's Omoda and Jaecoo brands, and its long partnership with Stellantis has extended to introducing Leapmotor showrooms.

"As far as we're concerned it's low entry costs. We've had availability of sites and we've put a few of them in. I think there's a huge consolidation of manufacturers in China under way, so they may not all work, but the challenge is going to be real estate. Take another two or three big Chinese brands into the UK, and look another two or three years down the line, then there's not going to be much retail space for them, unless somebody else exits."

Borrie says the group is also looking at another two new entrants, but hasn't made a decision yet. However, he adds that Arnold Clark is keen to expand with any of the brands it represents.

In a recent example, it took on the Renault and Dacia franchises at the Wirral this year, increasing its already extensive representation of the French carmaker.

#### A PENCHANT FOR PREMIUM

This year Arnold Clark signed up to represent Maserati and Corvette, which, along with its Luxe businesses, form its first venture into the luxury end of the car market. Its dealerships are at Manchester and Glasgow. Asked if the group is just dipping its toe, Borrie responds: "No, no, we're going to go for it."

He explains that the group's traditional focus on mainstream brands evolved after 2008 when it took on BMW, and then Mercedes-Benz in 2012, and now that it has well established traditional franchise, used car, and premium divisions its opportunity is to grow luxury car sales.

"What that might look like in the next five, 10 years – who knows? But we're putting a statement out there to say we are looking to expand the premium division. We'd never really sold high-end used cars, but we thought there's a bit of a market for it."

The sites are doing well and Borrie hopes to attract other premium franchises in time.

"I think we can add scale, with our marketing, our contract hire division and the renewed focus on salary sacrifice. I think there's a big opportunity for brands with us."

Used car competence has long been a strength for the group. Its 2024 accounts show it sold 191,000 used versus 64,000 new. With the benefit of its own leasing division, the rental business and – since 2022 – ownership of Central Car Auctions, together with part-exchanges coming into its dealerships, Arnold Clark has secured its own supply chain which ensures the group is able to offer consumers a vast choice of cars. And through its 30+ Motorstore used car dealerships it is even able to help customers on low budgets – some cars are available for less than £5,000 in its value range.

Borrie says the group wants all consumers to feel they can come to Arnold Clark. "We always try to sell at a very competitive finance rate, which enables us to sell more used cars, and we've scale in our acquisition of stock so we can offer customers good value for money," he adds.

Since taking over Central Car Auctions the group has expanded it from its original Glasgow site into auction centres in Newcastle, Stafford, Lingfield and now Accrington. It provides used car stock for independents and franchised dealers. It's yet another revenue stream for the group and builds on its connection to the motor trade, which it already serves through its trade parts operation, Arnold Clark Autoparts.

#### DATA IS A PRIORITY

Along with the EV transition, motor retail has other big challenges ahead.

"If you're asking me what a business needs to do in the next 10 years, it is leverage your data properly." Dealerships need to



Arnold Clark's charging service brings it into contact with potential new customers

The group took on a Renault franchise in the Wirral this year



monetise the lifetime value of customers, he says, and that means one single customer record and lean, omnichannel operations.

That Arnold Clark app is a crucial part of the group's strategy. More than 1.5 million people have downloaded it, of which about 400,000 are active users. As Arnold Clark Charge expands further even more motorists will download it.

Customers who have it can also sign up for Arnold Clark Rewards, which allows them to access benefits such as discounted airport parking and days out, a free Greggs coffee and a monthly competition to win back the cost of their car.

Borrie says keeping customers engaged with the app means they are engaged with the business. The group can present its own offers to them and, ultimately, he hopes to begin doing retentions through the app, so a customer can receive their next new car offer before they're tempted to look elsewhere.

Arnold Clark is well known and well respected in the industry, and across Scotland of course, but as it opens more dealerships further south in England it needs to become a household name in new territories. Borrie says its sponsorships are vital tools in this. Arnold Clark partners Scottish Rugby and, as



shirt sponsor, gets its brand seen by millions of Six Nations fans. It also sponsors Fulham FC, which offers a superb opportunity to connect with football fans across London and beyond.

Asked if Arnold Clark is known enough in England and Wales, Borrie concedes: "We've

still a bit to go." There's work to be done, but his team will certainly do it. More and more of the yellow and black Arnold Clark rear window stickers will be spotted on Britain's roads in the years ahead, that's for sure. That's another thing the company can be quietly proud of.



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# AM AWARDS: 2026

## STAKE YOUR CLAIM AT THE 2026 AM AWARDS

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**E**ntering Automotive Management's AM Awards presents a strategic opportunity for UK car dealerships to gain recognition, enhance brand credibility and engage with industry leaders.

Winning or even being shortlisted in categories such as Dealership of the Year, Community Hero or Online Consumer Experience offers dealerships a unique promotional boost, helping them to stand out in a competitive market.

Past winners report that the award showcases their commitment to excellence in customer service, digital innovation and team achievements, drawing both customers and skilled employees who are motivated to work for recognised leaders in the automotive field.

The AM Awards Dinner, on May 14, 2026 in London, also opens valuable networking channels, providing dealerships with access to other high-

performing industry players, from suppliers to OEMs, and enhances professional visibility.

Participating in the AM Awards supports continuous improvement, as the preparation of entry submissions encourages dealerships to evaluate their practices and refine strategies, particularly in emerging areas such as electric vehicle sales and sustainability initiatives. For dealerships aiming to position themselves as market leaders, entering the AM Awards is more than a celebration; it's a mark of trust that can attract customers, retain talent and build long-term industry relationships.

In addition to boosting recognition and credibility, entering the AM Awards enables dealerships to benchmark their performance against some of the best in the industry. The companies that make it through the judging to the shortlist of finalists showcase their dedication to quality, innovation and customer satisfaction, which appeals to a consumer base that values trusted, reputable

service providers in the automotive space.

A critical advantage of the AM Awards lies in its role in talent attraction and retention.

Dealerships that achieve an award or shortlisted status are more appealing to potential employees, as the recognition serves as a testament to an organisation's commitment to excellence and professional growth. Dealer groups such as Marshall, TrustFord and Waylands have leveraged their AM Award wins to attract top-tier talent, boosting team morale and ensuring that motivated staff serve their customers to their best abilities.

The event itself is also a networking hub, bringing together dealer group executives, suppliers and manufacturers, to create opportunities for sharing insights and discussing mutual opportunities.

By entering the AM Awards, dealerships not only earn industry accolades, but also foster an internal culture of continuous improvement and resilience, helping them adapt to shifting market demands.



### AWARDS 2026 TIMELINE

NOVEMBER 12, 2025  
Open for entries – visit [www.am-awards.co.uk](http://www.am-awards.co.uk)

JANUARY 30, 2026  
Deadline for entries

EARLY MARCH, 2026  
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END OF MARCH, 2026  
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## CATEGORIES AVAILABLE TO ENTER

### The Community Hero Award

*Sponsored by AutogyIm*

We want to recognise dealerships that are deeply rooted in their communities, support local causes and organisations, and have a culture of giving something back. Open to car and LCV dealers, including franchised and independents.

### Marketing Strategy of the Year

*Sponsored by Tekcor4*

Marketing should help you to build your brand as well as to find new customers and help you to grow sales in the short term. Open to dealers of cars or LCVs, whether independent or franchised, and vehicle manufacturers.

### Online Consumer Experience of the Year

Dealers entering this award category should provide an excellent, comprehensive, customer-focused digital experience for consumers who are searching online for their next car, whether new or used.

### Leader in Diversity and Inclusion

Bringing diversity and inclusion together provides a holistic opportunity to recognise and honour the companies that are looking after their staff in the best possible way by being an inclusive employer creating an open, respectful and equitable workplace. Open to franchised and independent car and van retailers.

### Workshop of the Year – Independent & Franchised

*Sponsored by SecretService powered by Book My Garage*

The workshop is a critical source of profitability and customer contact. This award seeks to recognise a superb, outstanding service site. Open to both independent and franchised workshops.

### Best in Customer Service

*Sponsored by LTK Consultants*

Entrants should have a customer-centric culture and take pride in strong satisfaction scores, but never allow complacency and react robustly to fix the situation whenever things go wrong. Entries accepted from franchised and independent car and LCV dealers.

### Customer Service Champion

This award is for an individual who works within a franchised or independent car or LCV retailer, in any customer-facing role or department. Entrants may self-nominate or may be put forward by colleagues or managers. The judges expect to see individuals who clearly and consistently show that they go the extra mile to deliver the highest level of customer service and who stand out for their ability to listen, empathise and adapt.

### EV Advocate of the Year

Open to both dealers and OEMs, this award requires businesses to demonstrate how they have gone the extra mile to support the use of electric vehicles (EVs). Entrants will have a passionate and knowledgeable workforce that advocates the adoption of EVs.

### EV Performance of the Year

Outlets that are high performing in EV sales should enter this category, demonstrating their ability to develop a strong local market. Open to franchised and independent car or LCV dealers.

### The Sustainability Award

This category is looking for the best motor retailers and carmakers which can demonstrate strategic planning and robust steps being taken to help build a more sustainable and better future.

### Franchised Dealership of the Year

*Sponsored by Auto Trader*

This category is open to single-site owner/operators and to best performing dealerships within a larger group network – both single franchised and multi-franchised showrooms.

### Independent Dealer of the Year

*Sponsored by Visitor Chat*

This award is open to any independent (non-franchised) dealer that sells used cars and is intended to recognise the broad success across the group from its focus on used cars.

### Used Car Performance of the Year

This award is open to any company or group that sells used cars and is intended to recognise those who have turned the practice into an art form and a hugely successful and profitable business.

### Dealer Principal/General Manager of the Year

The winner will be a dealer principal or general manager who has done incredible things with difficult brands or marketplaces by demonstrating excellent leadership skills, drive and innovative thinking that has helped the dealership achieve business objectives.

### Dealer Group of the Year (up to 20 sites)\*

*Sponsored by Payment Assist*

The motor retail industry is made up primarily of smaller, regional groups. This award category is designed to recognise and honour those companies. Entrants will be able to show how they meet the AM Awards' original criteria of quality, innovation and service and how they have tracked their performance improvement over the past five years.

TO ENTER  
THE AWARDS,  
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### Dealer Group of the Year (more than 20 sites)\*

This award recognises the unique complications and complexities that come from co-ordinating a large retail group, one with more than 10 dealerships. Entrants will be able to show how they meet the AM Awards' original criteria of quality, innovation and service, and how they have tracked their performance improvement over the past five years.

### Best New Product or Service – sales/after-sales (supplier category)

Open to industry suppliers that are helping to change dealers' fortunes. We expect to see innovation and measurable results, including examples of beneficial use by your customers. Products or services must have been launched since January 2025.

### Supplier of the Year

Open to submissions from industry suppliers.

### Supplier Customer Service Champion

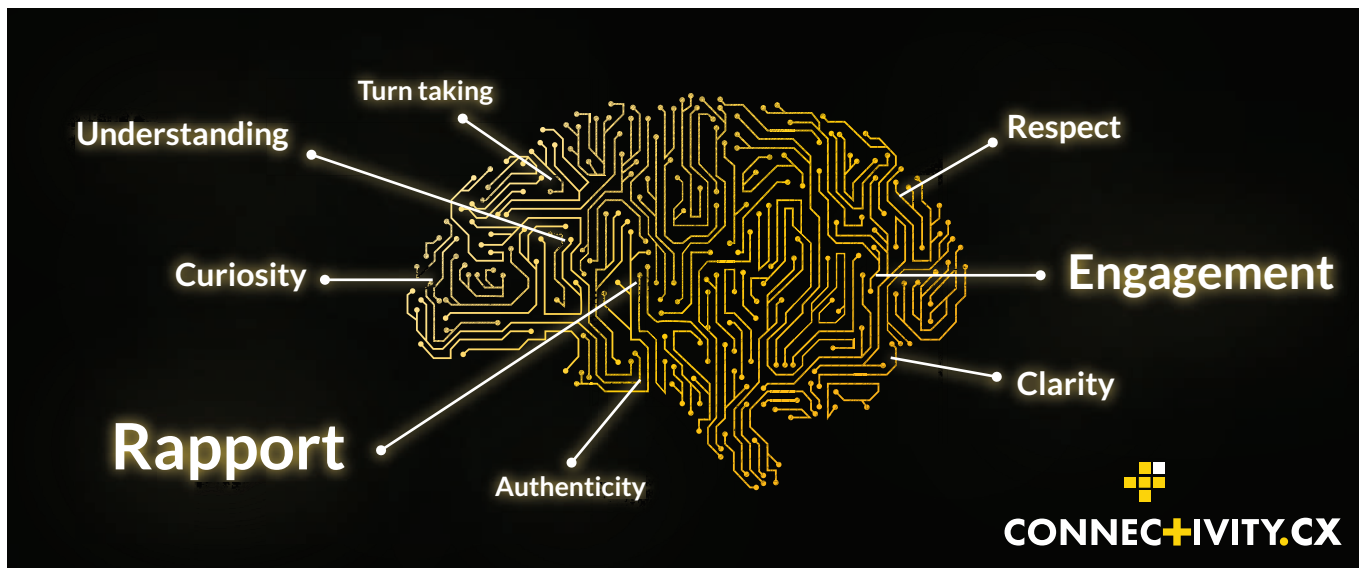
This award is for an individual who works within a motor retail supplier business, and who goes above and beyond to foster strong partnerships with its dealer and/or OEM customers, to support clients in optimising their business opportunities, and to resolve issues when they arise.

## AM AWARDS AUDITORS

Continuing in their role as AM Awards auditors will be the specialist automotive team at Cooper Parry (formerly UHY Hacker Young Manchester) led by David Kendrick, Ian McMahon and Paul Daly. AM is delighted to engage such expertise, which is vital in verifying entries and helping the judging panel to decide the strongest contenders in our headline dealer group categories as marked by \*.

COOPER PARRY





# Using the Human - AI Hybrid approach to deliver Actual Intelligence™

*"I want AI to do my laundry and dishes so that I can do art and writing, not for AI to do my art and writing so that I can do my laundry and dishes."*

You've probably heard that quotation from sci-fi author Joanna Maciejewska. In business, few would argue that selling isn't an art. The question is: can AI do this type of art?

Even the best sales trainers will admit that there are those who are natural born sales people. These individuals love meeting new people. They love to listen. They love to build relationships. How on Earth can a computer - however powerful - replicate this? The short answer is that it can't. Yet that doesn't mean AI and virtual assistants shouldn't be a central part of your sales strategy.

At Connectivity.CX we have spent the past three years working with cutting edge AI developers to create our human-AI hybrid way of working. We call this Actual Intelligence™ - using cutting edge technology to enhance the human skills that turn prospects into happy customers.

Not only do we have thousands of hours of recordings of customer calls (both good and bad) to draw upon, we've also got decades of experience in coaching sales people to success. The results are products that deliver outstanding customer engagement rates, along with new sales appointments 24/7.

## **Kate and MiLO - virtual assistants that customers ask for by name**

If your business hours are 8.00am to 6.00pm then you're closed for nearly 60% of each day. In the connected world, around one third of sales enquiries now come out-of-hours. If that enquiry is limited to an email or form submission, then there's every chance that the same enquiry went to your competitors.

Our Virtual Assistant (Kate) engages prospective customers across live chat, SMS, or WhatsApp 24/7. Kate achieves 65% customer engagement rate, whatever time of the day or night. Even better, Kate can automatically follow up a conversation across multiple days. When a sales appointment is confirmed, it's dropped into your sales executive's inbox. Conversations with Kate are so naturalistic that we've even had customers ask for her by name when they arrive for their sales appointment.

## **Using AI to deliver real-time scoring, transcription and coaching**

Our AI Call Scoring and Coaching provides near real-time transcription of calls, along with identifying what the sales agent did well and what they missed on individual calls.

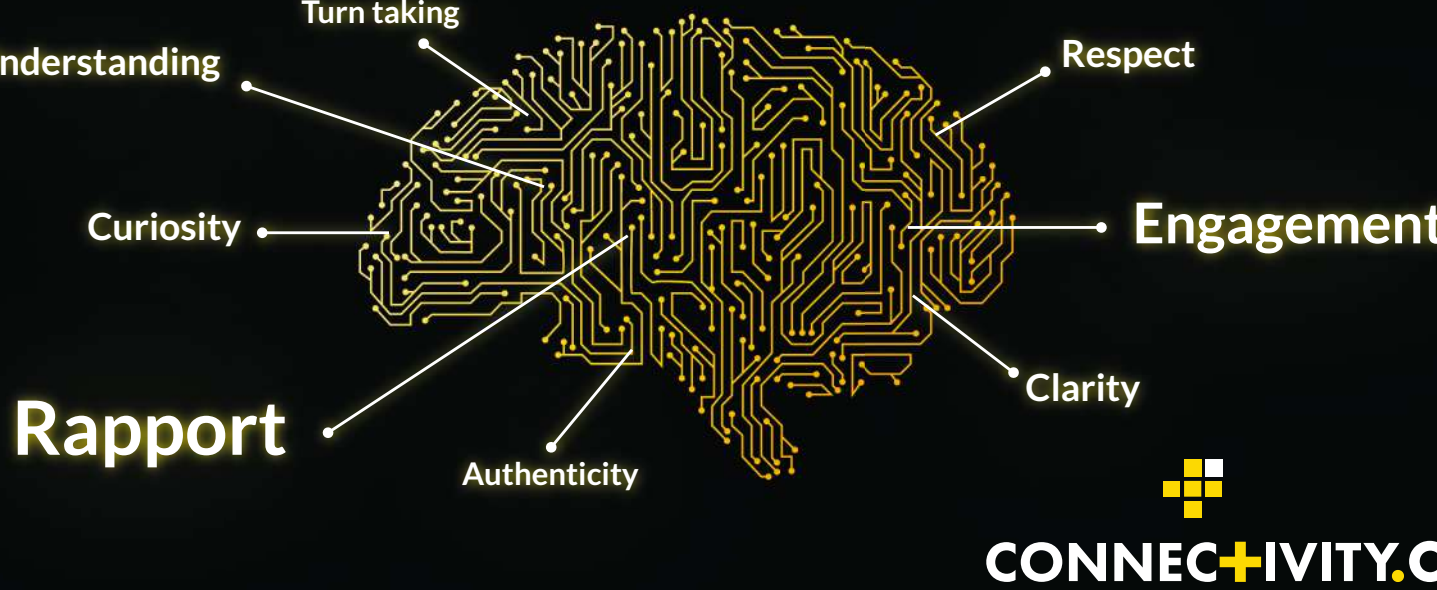
Calls are assessed against the key performance indicators that you choose. It provides your sales team with valuable feedback, offering timely reminders of what they missed for the next call and positive reinforcement of what they are doing well.

## **Trusted Voice - letting customers know its a human calling them**

For all the benefits that AI can bring, it is also being harnessed by spammers and scammers. Nowhere is this more evident than with spam phone calls. The typical first-time connection rate is now only 8 - 15%. Our Trusted Voice technology displays your name number and logo on mobile phones, so people know it's you who is calling them, not some automated dialler. If a call does go to voicemail, your name and logo appear in the list of missed calls. The result is a first-time connection rate of 60-75%. That's a 500% increase.

To discover more about Actual Intelligence™, call 0161 850 3261 or scan the QR code.





# Use the power of the Human -AI Hybrid to convert more sales and aftersales enquiries into sales

## Speed of Response

Turn online enquiries into a real conversation, taking prospects out of the market in minutes.

## Kate and MiLO Virtual Assistants

Achieve 65% customer engagement 24/7, delivering new sales appointments directly to your inbox.

## Real-time scoring, transcription and coaching

Our AI Call Scoring and Coaching provides near real-time transcription of calls, identifying what the sales agent did well and what they missed on individual calls.

## Trusted Voice

The complete anti-spam call solution that increases first-time connection rates by up to 500%.



*Discover the power of Actual Intelligence™. Scan the QR code to request a demonstration or call us on 0161 850 3261.*

# UPS (AND DOWNS) AMONG THE LEADING CAR BRANDS



Matt de Prez gives an overview of the carmakers to keep an eye on in 2026

AT RISK		SAFE BET				BRANDS TO WATCH	
Alfa Romeo	Polestar	Audi	Kia	Nissan	Toyota	Alpine	Vauxhall
DS	Skywell	BMW	Jeep	Peugeot	Volkswagen	Changan	Seat
Fiat	Subaru	BYD	Lexus	Omoda	Volvo	Chery	Xpeng
Ford	Suzuki	Cupra	BYD	Porsche		Genesis	
GMW Ora	Tesla	Dacia	Mercedes-Benz	Renault		Honda	
KGM		Hyundai	MG Motor UK	Škoda		Land Rover	
Mazda		Jaecoo	Mini	Smart		Leapmotor	

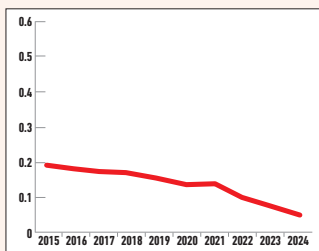
## AT RISK

### ALFA ROMEO

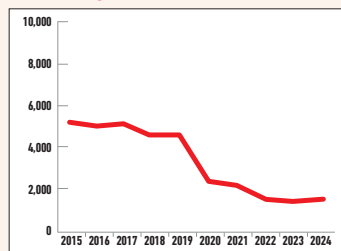
Market share 2015: 0.19 Market share 2025: 0.14

With a tiny market share and little growth in registrations year-on-year, Alfa Romeo continues to be challenged. The introduction of Junior, the brand's first electric car, has brought a much-needed sales boost, but it still sells in small volumes compared with rivals. Core models – the Giulia and Stelvio – are now almost 10 years old and not compatible with hybrid or electric powertrains. The Tonale mid-size SUV is being facelifted for 2026, but early sales are poor.

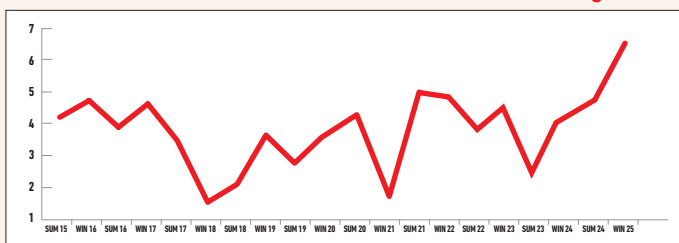
Market share



Annual registrations



National Franchised Dealers Association (NFDA) manufacturer rating

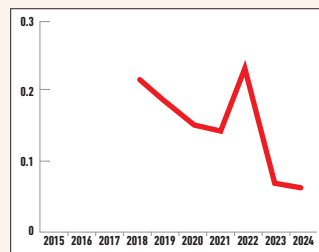


### DS

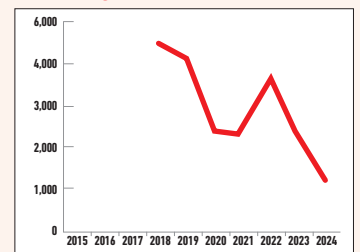
Market share 2015: 0.22 Market share 2025: 0.06

DS is losing market share year-on-year and its registrations are shrinking. Despite this, dealer sentiment continues to climb. The French luxury brand is on the cusp of becoming electric-only and a refreshed line-up would be welcome. In 2026, dealers will have the No8 luxury saloon to sell, replacing the unpopular DS9. The volume seller DS4 is also being updated and is to get a new name as the No4.

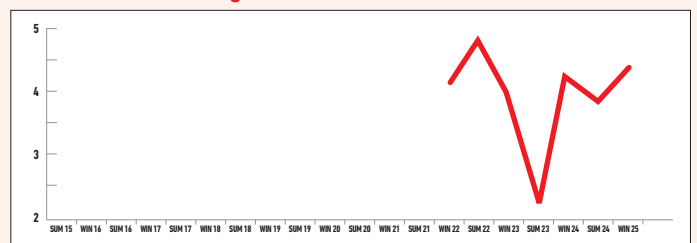
Market share



Annual registrations



NFDA manufacturer rating

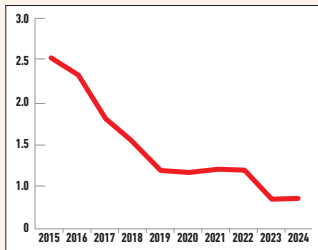


**FIAT**

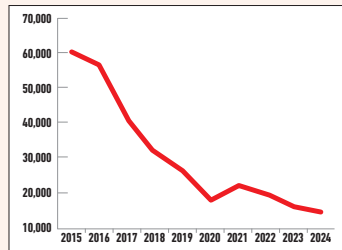
**Market share 2015: 2.47      Market share 2025: 0.51**

Another struggling Stellantis brand with a line-up that needs an overhaul. Fiat's all-electric 500 failed to resonate with buyers, forcing the introduction of a hybrid variant, and the more recently launched 600e is yet to establish itself in the market. All hopes are now on the Grande Panda, a compact SUV with the option of hybrid or electric powertrains. Dealer sentiment continues to improve significantly, despite a decline in registrations this year.

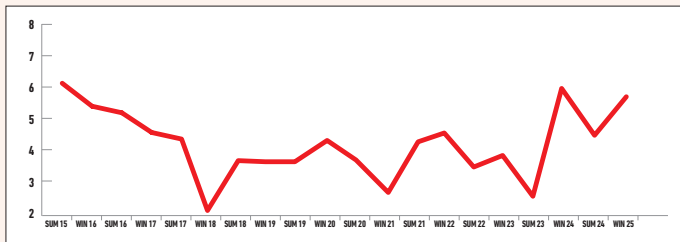
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

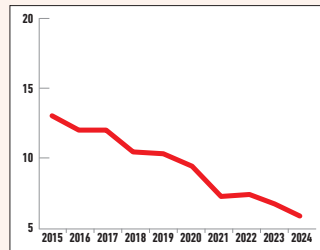


**FORD**

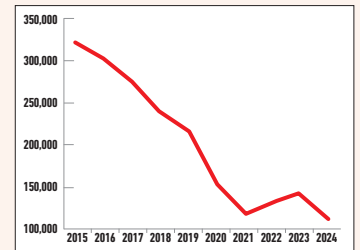
**Market share 2015: 12.8      Market share 2025: 5.8**

Ford's registrations remain in decline, more than halving the market share it held 10 years ago as the UK's most popular car brand. Today, it sells fewer cars than Audi and BMW, as well as rival marque Kia. New electric models – the Explorer and Capri – on borrowed platforms from VW are not plugging the gap left after the Fiesta was killed off. New car supply is being restricted as Ford struggles to meet the ZEV Mandate targets. The brand's dealer network is shrinking and dealer sentiment is the lowest in the NFDA's survey.

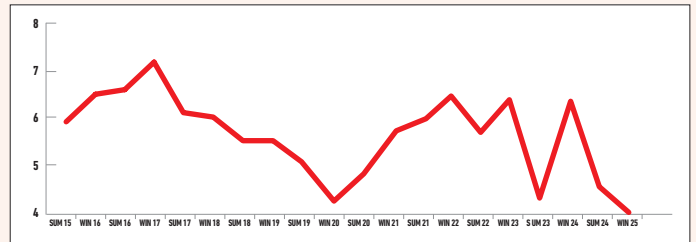
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

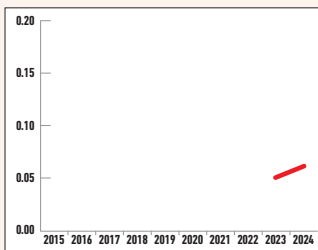


**GWM ORA**

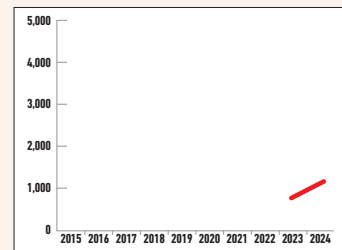
**Market share 2015: N/A      Market share 2025: 0.03**

The IM Group's Chinese electric car brand hasn't made much of an impact since it launched three years ago. Sales are up slightly this year, but its debut model – the O3 – is still the only car on offer. We were expecting the O7 saloon to arrive in the summer, but its introduction has been delayed.

**Market share**



**Annual registrations**

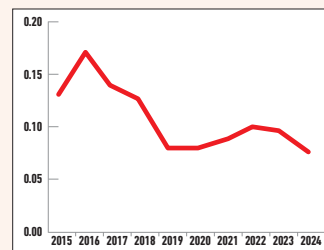


**KGM**

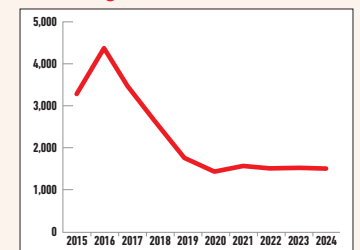
**Market share 2015: 0.13      Market share 2025: 0.08**

The brand formerly known as SsangYong remains 'at risk' following its relaunch at the start of last year. A line-up of new models is in the pipeline, including an electric pick-up truck, but only the Torres has been introduced to date. The brand's remaining models have simply been rebadged.

**Market share**



**Annual registrations**



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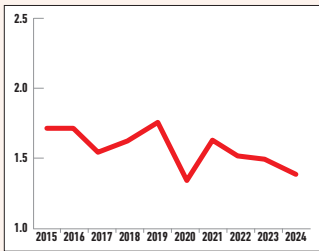


**MAZDA**

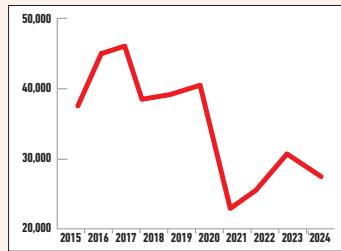
**Market share 2015: 1.81      Market share 2025: 1.7**

Dealer sentiment is levelling out as Mazda gets to grip with the shift to electrified powertrains, but it's still 'at risk', with declining sales. It's first and only electric car, to date, the MX-30, has an uncompetitive range and has not resonated well with buyers. Mazda has since introduced a plug-in hybrid version. Next year will see the launch of the 6e, a fully-electric saloon car. But it might be too little, too late. Its range and charging speeds are not as competitive as those from rivals.

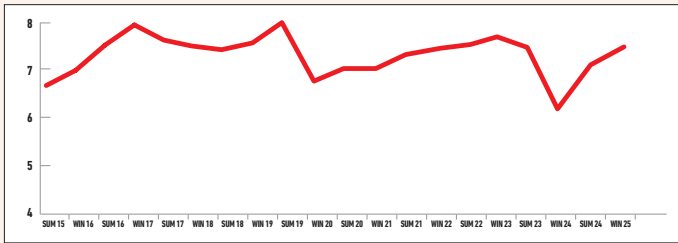
**Market share**



**Annual registrations**



**NFDA manufacturer rating**



**SKYWELL**

**Market share 2015: N/A      Market share 2025: 0**

Following what was probably the most underwhelming brand debut in the history of the British motor industry, Skywell has emerged as 2025's biggest disappointment. To date, it has registered just 26 cars – only seven of which were sold to private retail customers. Its debut model, the BE11, was poorly received by the motoring press and wildly overpriced. Unregistered models are now being offered at significant discounts, but still failing to sell.

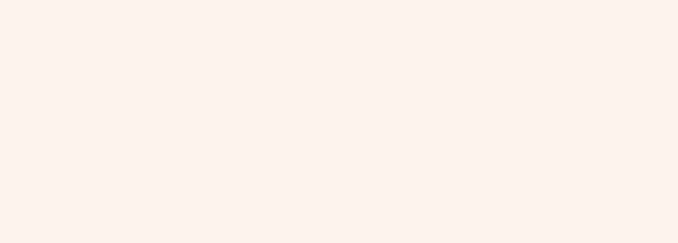
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

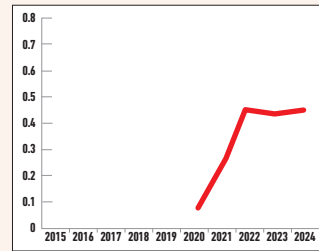


**POLESTAR**

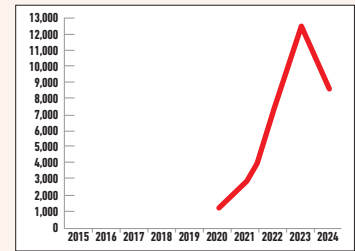
**Market share 2015: N/A      Market share 2025: 0.8**

Polestar had a tough 2024, with sales significantly down due to the delayed launch of two new models, along with troubling finances. With the Polestar 3 and 4 now on sale, and a refreshed leadership team, the brand could be on the brink of a turnaround, but it's too early to shift it into the 'safe bet' category.

**Market share**



**Annual registrations**

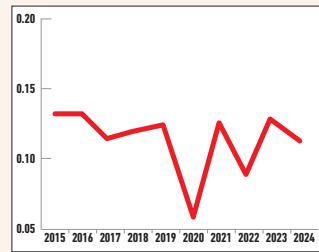


**SUBARU**

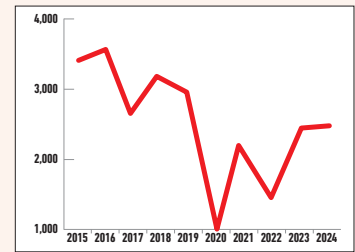
**Market share 2015: 0.13      Market share 2025: 0.11**

Subaru's low sales volumes remain a threat for its retailer network when compared with rapidly growing new entrants in the UK market. With only a handful of models on offer, Subaru lacks a strong contender in any of the segments in which it competes. The brand does have an EV, albeit a re-badged Toyota bZ4x with a higher price tag.

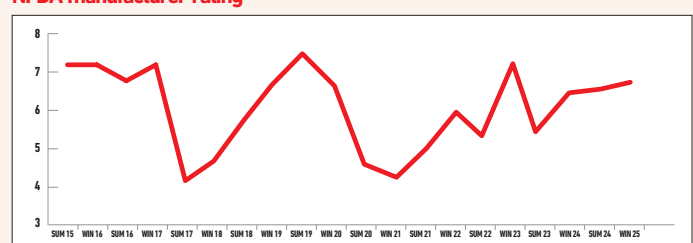
**Market share**



**Annual registrations**



**NFDA manufacturer rating**



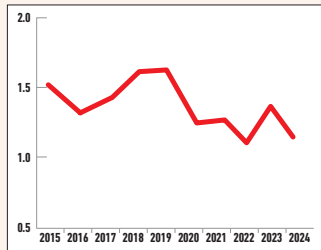
### SUZUKI

Market share 2015: 1.37

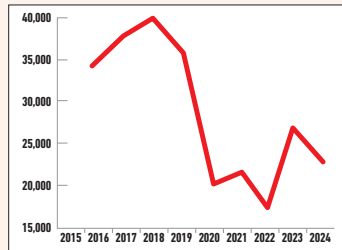
Market share 2025: 0.91

Suzuki's dealer sentiment is slipping and its sales are falling. Registrations were 13% down last year and are on track to be even lower this. The brand has a tired model range and its only electric model, the eVitara, won't arrive in showrooms until the end of the year. When it does arrive it will face a fierce pool of rivals, most of which offer more range for similar money.

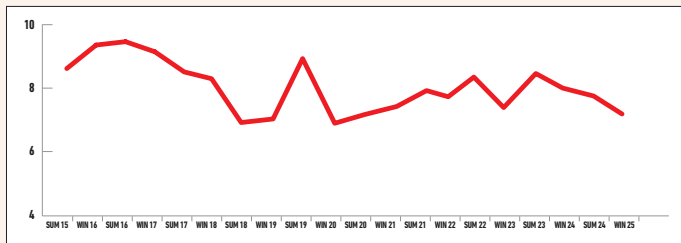
Market share



Annual registrations



NFDA manufacturer rating



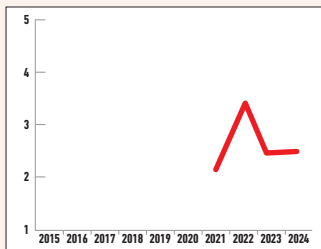
### TESLA

Market share 2015: N/A

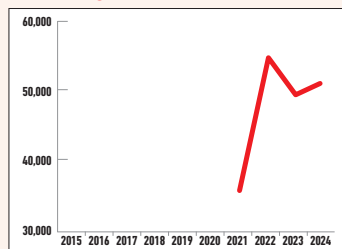
Market share 2025: 2.21

It may only have two models, but both are best sellers in their respective markets. So why is Tesla 'at risk'? The brand has been a major disruptor in the UK automotive space, with its slick, digitally-led direct sales model and extremely quick delivery times. The Model 3 was refreshed in 2024 and similar updates were applied to the Model Y in 2025. Yet, total registrations are declining as buyers move back to established brands.

Market share



Annual registrations



## SAFE BETS

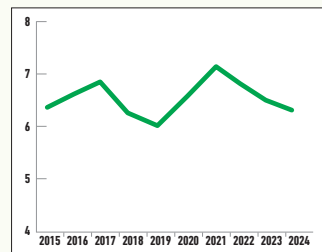
### AUDI

Market share 2015: 6.36

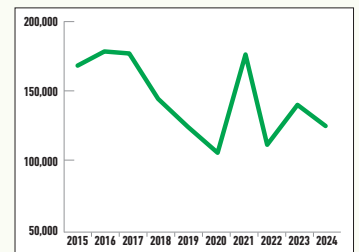
Market share 2025: 5.36

Audi was the UK's third best-selling car brand in 2024 and the most popular premium marque. It continues to shift strong volumes of core models, such as the A3, while also strengthening its position in the electric car market with the Q4 e-tron. The brand's line-up is being updated at serious pace, with new Q3, Q5 and A6 models launching this year, alongside the introduction of Q6 e-tron.

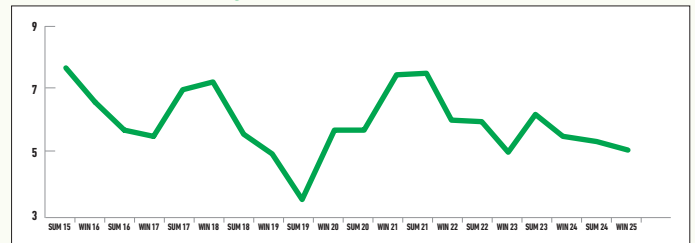
Market share



Annual registrations



NFDA manufacturer rating



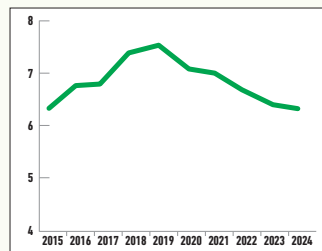
### BMW

Market share 2015: 5.93

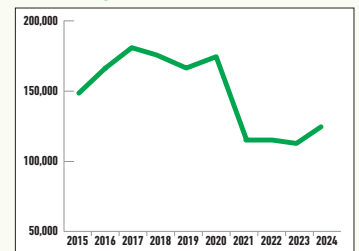
Market share 2025: 6.12

Significant volume growth has been achieved by BMW in the last year and with its Neue Klasse models coming in 2026, the brand is set to remain on an upwards trajectory. Dealer sentiment is growing, ranking fourth overall. BMW is also a top fleet performer, where models like the iX1 and i4 are top sellers.

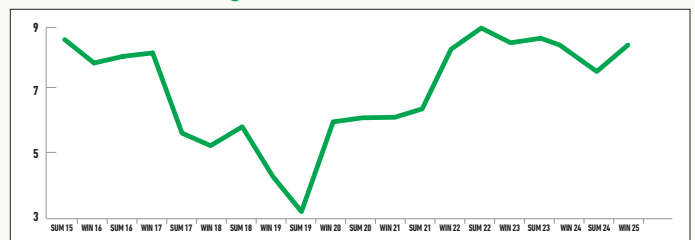
Market share



Annual registrations



NFDA manufacturer rating



# Green DNA

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# Outcome



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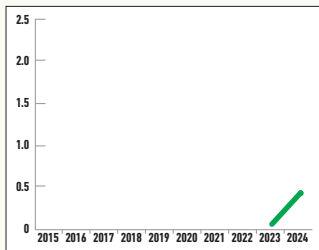
[www.greenip.co.uk](http://www.greenip.co.uk)

**BYD**

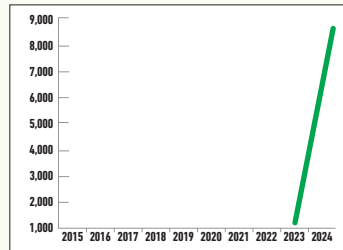
**Market share 2015: N/A      Market share 2025: 2.26**

A strong second year has enabled BYD to establish itself as a real threat to rival manufacturers. Its retail network is expanding at pace, taking over sites previously held by big players such as Ford. The brand has work to do, however, to grow its registrations to a sustainable level. Having launched with an all-electric line-up, BYD is now expanding its model range with plug-in hybrid models.

**Market share**



**Annual registrations**

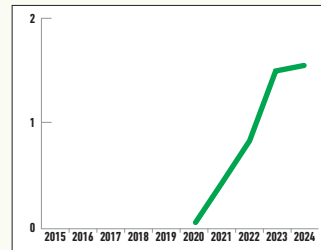


**CUPRA**

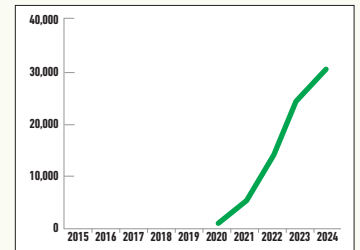
**Market share 2015: N/A      Market share 2025: 1.95**

Cupra continues to grow at pace with a fully refreshed model line-up now in showrooms. The Formentor remains its best-seller, followed by the electric Born. An all-new model, called Terramar, arrived earlier this year and is already proving popular. The Tavascan, which launched in 2024, has started to establish itself in the market and will be joined by the hotly anticipated small car, the Raval, in 2026.

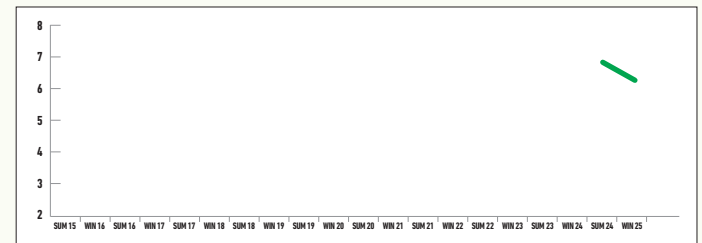
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

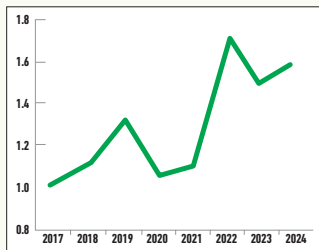


**DACIA**

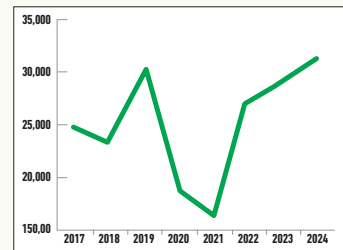
**Market share 2015: 0.97      Market share 2025: 1.45**

As the budget arm of the Renault Group, Dacia has been focused on providing low price petrol and hybrid models. A major brand overhaul took place last year, bringing a fresh look to Dacia's dealerships and a revised car line-up. Dacia entered the C-SUV segment for the first time with its Nissan Qashqai-rivalling Bigster, and launched its first electric car, a compact model called Spring.

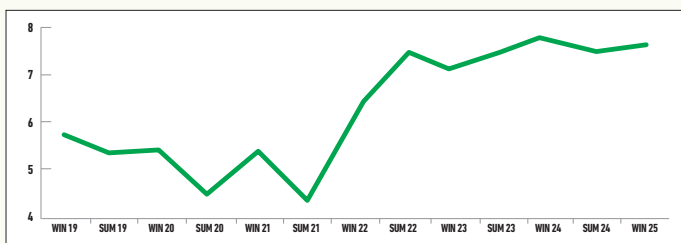
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

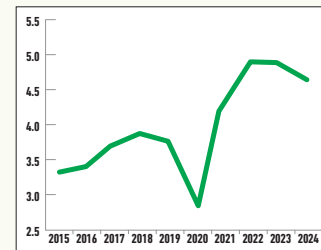


**HYUNDAI**

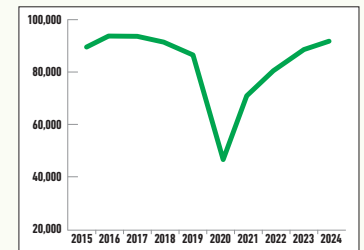
**Market share 2015: 3.75      Market share 2025: 4.75**

Hyundai's model range is moving closer to the premium segments and buyers are responding well. Sales were up in 2024 and the brand is achieving a strong mix of electric and plug-in hybrid models. Its Ioniq range of electric models has expanded with the seven-seat Ioniq 9, although a large proportion of sales still comes from its older, petrol-powered models such as the i10 and i20.

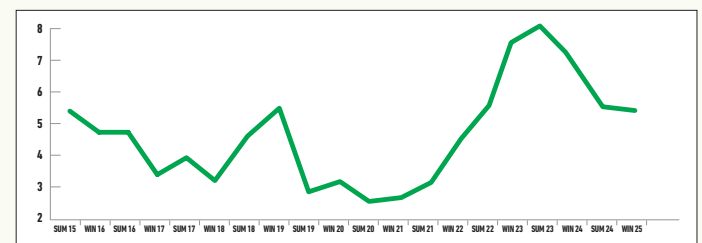
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

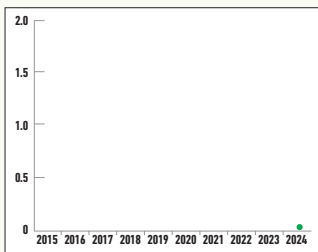


### JAECOO

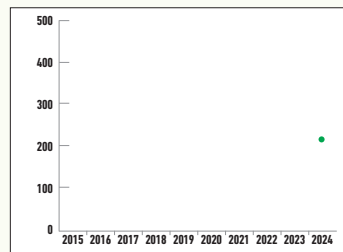
Market share 2015: N/A Market share 2025: 1.15

Jaecoo has had an astonishing start, achieving more than 1% market share in less than one year and from just one model. Registrations have soared during 2025 and the recent introduction of the Jaecoo 5 and 9 gives dealers a broader model range to offer. New models will keep coming in 2026.

Market share



Annual registrations

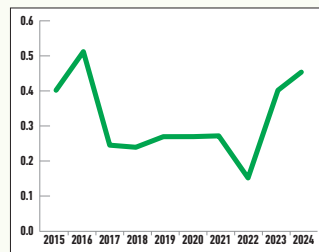


### JEEP

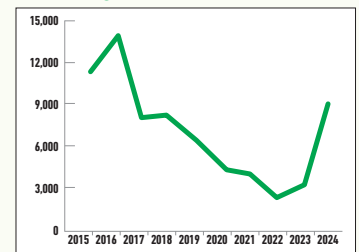
Market share 2015: 0.4 Market share 2025: 0.59

Jeep is turning its fortunes around, but it's all thanks to introduction of the Avenger. The compact SUV has enabled the brand to more than double its sales. A replacement Compass, using the same underpinnings as the Peugeot 3008 and Vauxhall Grandland will bring more plug-in hybrid and electric options to the line-up in 2026.

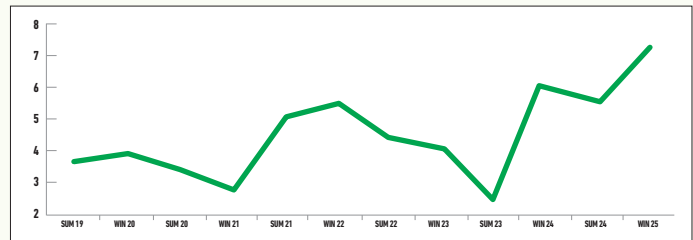
Market share



Annual registrations



NFDA manufacturer rating

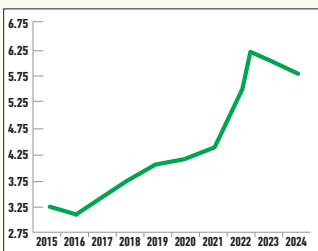


### KIA

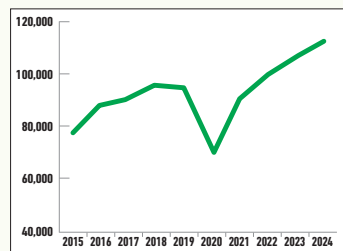
Market share 2015: 3.06 Market share 2025: 5.91

Kia reached 112,000 registrations in 2024, allowing it to pass Ford and become the UK's fourth best-selling car brand. Market share continues to climb and the brand retains its top spot in the NFDA's dealer sentiment survey. Sales have, in no small part, been aided by Kia's SUV dominance with Sportage, Niro and the newly-launched EV3 all selling in high volumes. Before the end of the year, Kia will expand its remit beyond cars into commercial vehicles.

Market share



Annual registrations

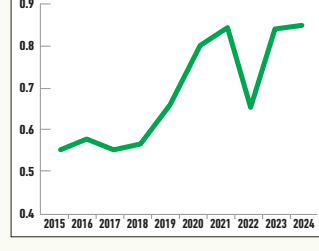


### LEXUS

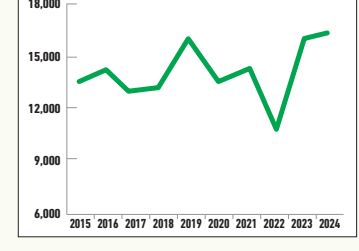
Market share 2015: 0.51 Market share 2025: 0.84

Lexus has jumped into second place in the NFDA's dealer satisfaction survey. While its model range is still heavily geared towards hybrids, the company's sales and market share remain on an upward trajectory. The brand's best-selling car, currently, is the LBX – a compact SUV that was launched in 2024.

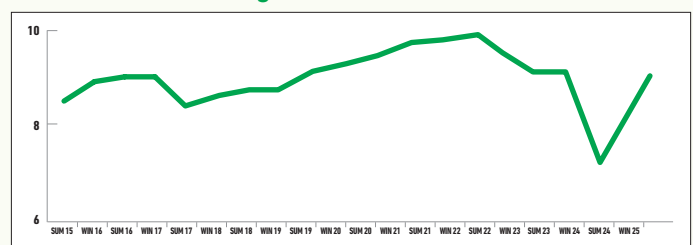
Market share



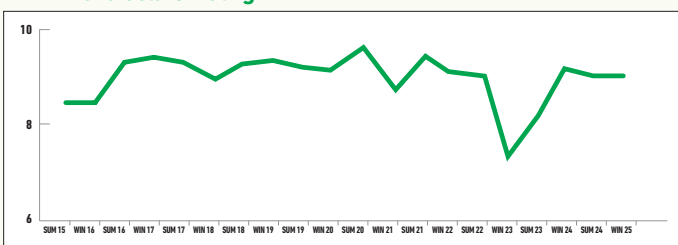
Annual registrations



NFDA manufacturer rating



NFDA manufacturer rating





**You didn't start a  
business to deal with  
warranty repairs...**



**...but we did.**

**You sell it.  
We'll handle  
everything else.**

**Time is money  
scan now to save  
on both**



4.5 ★ 13.4K+ reviews ★★★★★ ★ Trustpilot

[warrantywise.co.uk/dealer](https://warrantywise.co.uk/dealer)

# Take warranty repairs off your to do list. Put them at the top of ours instead.

## There's a lot to think about when running a car dealership...

...stocking loans, auctions, pricing, advertising, finance, warranties, the list goes on... and on. So when something unexpected does go wrong with a vehicle you've sold, the last thing you need is having to deal with repairs and all the admin that comes with them.

When you partner with Warrantywise, you'll gain access to over 150 warranty experts who will answer every repair call, advise every customer and deal directly with every repairing garage. We'll handle everything, leaving you to get back to what you do best: selling vehicles.

## The Dealer Framework:

Handling your warranty repairs is what we're best at, but that's just the start. Our Dealer Framework is designed to support and grow your dealership, whether you're just starting out in the motor industry or a nationwide franchise. It features tiered benefits that'll help your business grow:

- Bespoke warranty pricing for your stock profile.
- Dedicated account management
- Exclusive Warrantywise VAPs
- Marketing support
- Scaled rewards with wiseup+

and much more...

## Want to hear more about wiseup rewards+?

Gain access to the exclusive Warrantywise dealer savings and rewards platform.

Join dealers just like you who are already earning monthly rewards from their warranty sales and spending them at over 250 household-name brands - from fashion and travel to sports and supermarkets! All you have to do is become a Warrantywise partner dealer to get access to the platform and start earning.

## So, what would you spend your rewards on?

\*estimated value over a 12 month period, Sep 24-Aug 25.



**Over  
£160,000\***  
credited to our dealers  
in the last 12 months!

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**With over  
100+**  
dealers a month  
cashing in.

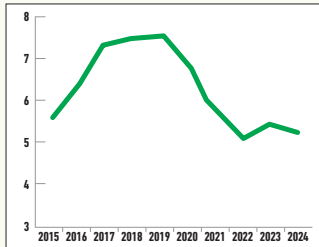


**MERCEDES-BENZ**

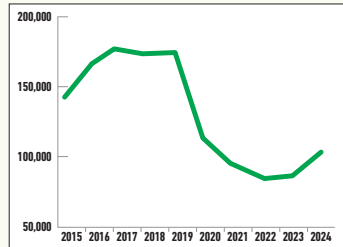
**Market share 2015: 5.56      Market share 2025: 4.64**

Mercedes delivered strong volumes in 2024, but 2025 seems to be more of a challenge. Dealer sentiment has slipped, knocking the brand from second to seventh. Mercedes has a large line-up, but lots of aging models. Its strategy will see it exit high-volume segments in favour of luxury ones. For 2026, the new electric CLA is going to be the champion seller.

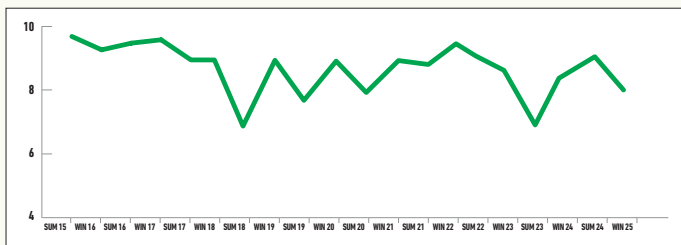
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

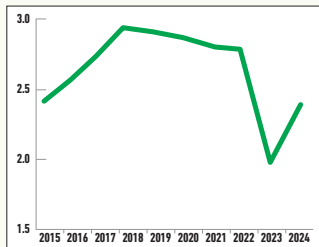


**MINI**

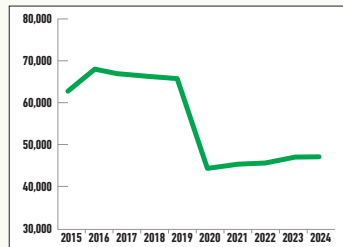
**Market share 2015: 2.25      Market share 2025: 2.17**

Mini retailers were lumbered with an aging model range but that has all changed. The brand has a fresh three-model line-up. Mini Hatch is all-new and includes a second-generation electric model that is significantly more capable than its predecessor. It's the same story with Countryman and sitting between the two is the new Aceman, which enters the compact electric SUV segment.

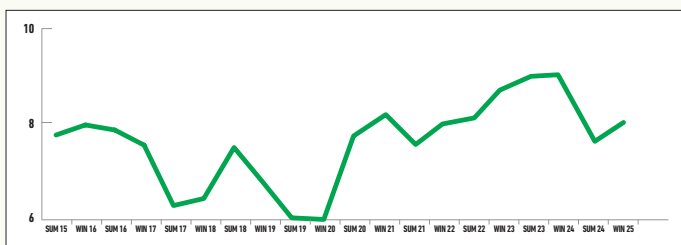
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

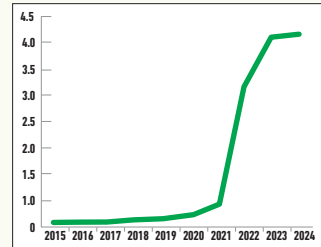


**MG MOTOR UK**

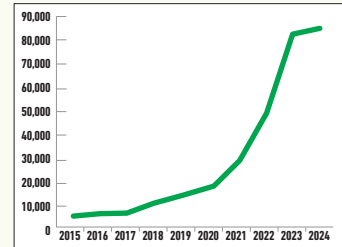
**Market share 2015: 0.12      Market share 2025: 4.14**

MG has delivered an astounding performance in recent years and is now a major player in the UK market. Sales are beginning to level out, as the brand overtakes the likes of Peugeot and Vauxhall. MG's strong model line-up is expanding with the S5 and S6 SUVs, as well as its higher-end IM5 and IM6 cars, while the HS and ZS continue to perform strongly.

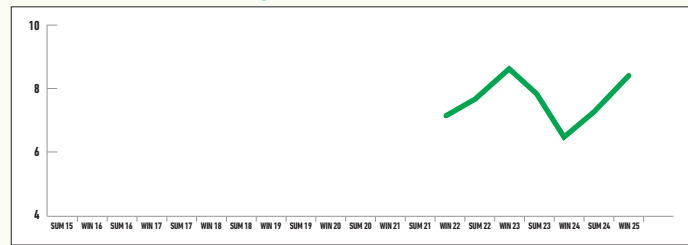
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

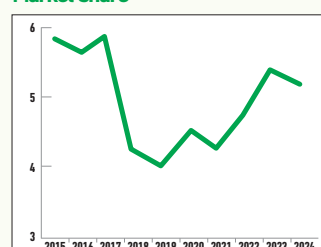


**NISSAN**

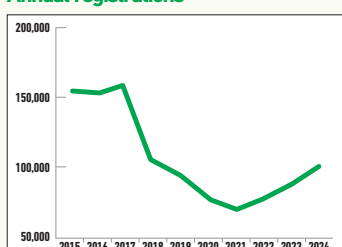
**Market share 2015: 5.96      Market share 2025: 4.54**

Strong sales keep Nissan in the 'safe bet' category this year although success hangs largely on the strength of the Juke and Qashqai – both powered by internal combustion engines. Change is afoot, however. There's a new Micra and a new Leaf, both with electric powertrains, coming in early 2026. Electric Juke and Qashqai will follow, hopefully boosting the declining dealer sentiment score.

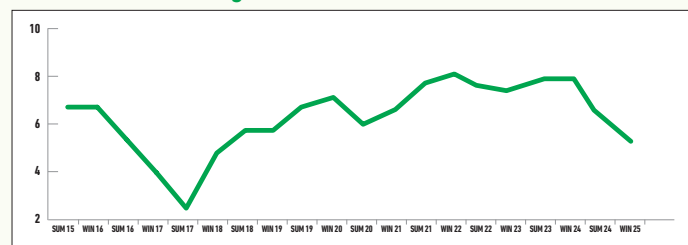
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

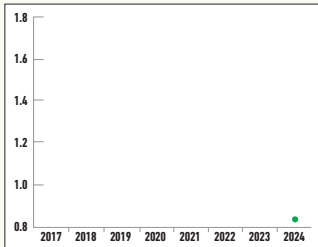


### OMODA

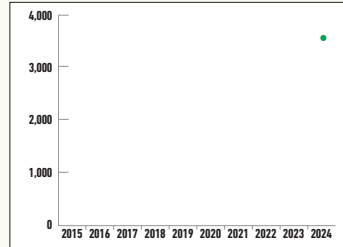
Market share 2015: N/A Market share 2025: 0.9

As a sister brand to Jaecoo, Omoda has also had a flying start. The Chinese newcomer has almost reached 1% market share in its first year, despite only having one model on sale until very recently. An expanded line-up is coming in 2026, with a mix of petrol, plug-in hybrid and electric powertrain options.

Market share



Annual registrations

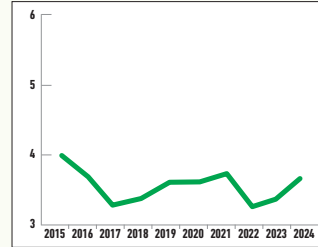


### PEUGEOT

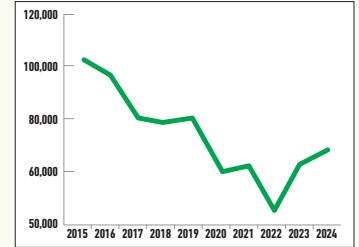
Market share 2015: 4.03 Market share 2025: 4.48

Peugeot is performing strongly with a year-on-year increase in sales and a fresh model line-up. The new 3008 and 5008 share an all-new Stellantis platform, offering hybrid, plug-in hybrid and electric powertrain options. Along with the E-408, there's now an electric version available of every Peugeot model. Dealer sentiment has risen significantly, as a result.

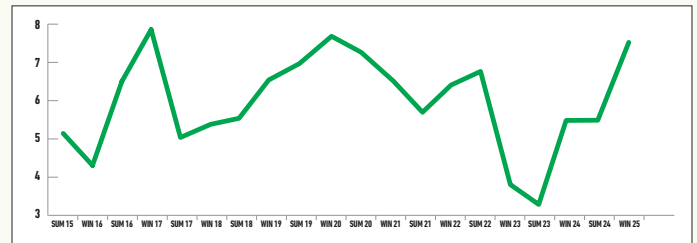
Market share



Annual registrations



NFDA manufacturer rating

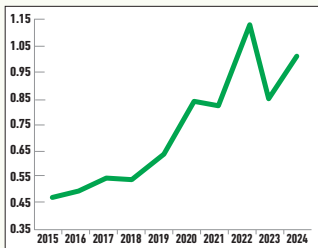


### PORSCHE

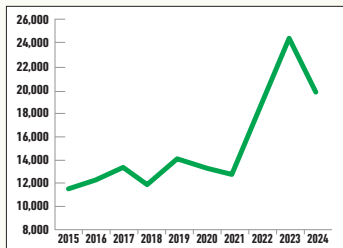
Market share 2015: 0.46 Market share 2025: 0.86

Porsche registrations have been declining, but it remains a highly-desirable brand. The Macan is all-new, while the Panamera and Taycan have been updated. A new Cayenne is on the way. Demand remains incredibly strong for Porsche's limited edition models but a saturated market for used ex-fleet Taycans continues to pose a challenge for dealers.

Market share



Annual registrations

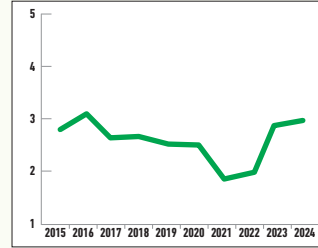


### RENAULT

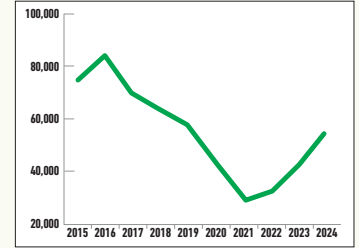
Market share 2015: 2.82 Market share 2025: 3.09

The 'Renaulution' is in full swing and Renault continues to bring fresh, desirable models to market. The new 5 has been a major success, followed by the quirky 4. Advanced in-car tech and high spec levels helps it compete well with cars from premium brands, while low pricing puts it ahead of mainstream rivals. Registrations have surged, this year, as a result.

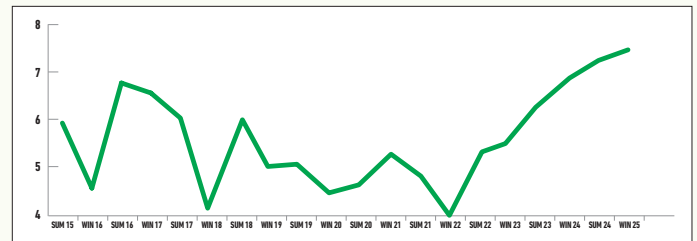
Market share



Annual registrations



NFDA manufacturer rating





PLUG-IN HYBRID



ELECTRIC VEHICLE

**HANKOOK**  
driving emotion



3PMSF

# ***ION** FlexClimate*

*Evolutionized to perform more in all weather*



LEARN MORE

# Technology for Allseason Conditions

SUMMER

WINTER

## Perfect Grip

### Improved Wet Grip

#### Grip Claw

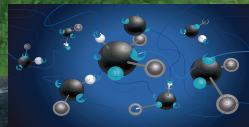
The 3D Grip claw sipes are placed on the main treads to keep the tire in an optimize shape. This helps to provide outstanding grip performance on dry, wet roads and light snow.



**Dry & Wet Grip up**

### ProGrip Compound

Achieve high grip on wet surfaces through the combination of high-density silica and eco-friendly new materials.



**Wet Grip max 5% up**

### Outstanding Snow Performance

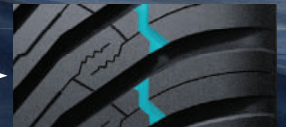
#### Two in One Sipe

Increased sipe density through 2-In-1 Sipe in the block to improve overall Snow performance!



#### Semi-Bent Groove

Improved traction on winter condition by eliminating circumferential void that does not function in snow traction.



## Available Sizes

**ION FlexClimate**

**ION FlexClimate SUV**

Inch	Series	Size	Rolling Resistance	Wet Grip	Noise Class	PBN	Available vehicle
20	45	215/45R20V XL	B	B	B	70	ID.3, Born
	35	235/35ZP20Y XL	B	B	B	70	Model 3
	45	245/45ZP20Y XL	C	B	B	70	BMW iX3, Taycan, e-tron GT
	35	285/35ZP20Y XL	C	B	B	73	EQE, Model S
19	50	215/50R19V XL	C	B	B	70	ID.3, Born
	40	235/40ZR19W XL	C	B	B	70	Model 3
	50	235/50R19V XL	B	B	B	70	EQA, EQB
	40	245/40ZR19Y XL	C	B	B	70	BMW i4
	45	245/45ZR19Y XL	B	B	B	70	BMW iX1, Model S
18	40	255/40ZR19Y XL	C	B	B	71	BMW i4
	40	205/40R18W XL	C	B	B	70	Mini Electric-e
	55	215/55R18V XL	C	B	B	70	ID.3, e2008, Copra Born
	55	225/55R18W XL	C	B	B	70	BMW iX1, IONIQ6
	45	235/45ZR18W XL	C	B	B	70	Model 3

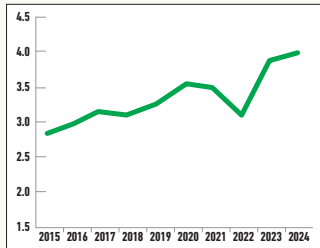
Inch	Series	Size	Rolling Resistance	Wet Grip	Noise Class	PBN	Available vehicle
21	50	255/50ZR21W XL	B	B	B	71	BMW iX
	45	235/45R20V XL	C	B	B	70	EQA, EQB
20	50	235/50ZR20W XL	C	B	B	70	Q4 e-tron, ID.4, EQC
	40	255/40ZR20Y XL	C	B	B	71	EQE, Model Y, Model S
	45	255/45ZR20W XL	B	B	B	71	Q4 e-tron, ID.4, IONIQ 5, EV6, EQC, BMW i7
	45	265/45ZR20W XL	B	B	B	71	Model X, iD Buzz, Q5 e-tron
	40	275/40ZR20Y XL	B	B	B	71	BMW iX3
19	55	235/55ZR19W XL	B	B	B	70	e-tron, ID.4, IONIQ 5, EV6, GV60, EQC
	45	255/45ZR19Y XL	B	B	B	71	EQE, Model Y, Model S
	50	255/50ZR19W XL	B	B	B	71	Q4 e-tron, EQC, ID.4
18	50	215/50R18V XL	C	B	B	70	e-Kona, e-Niro
	55	235/55R18V XL	C	B	B	70	EQA, EQB
	60	235/60R18V XL	B	B	B	70	Enyaq IV, ID.4, ID.Buzz
17	55	215/55R17V XL	C	B	B	70	e-Kona, e-Niro

**ŠKODA**

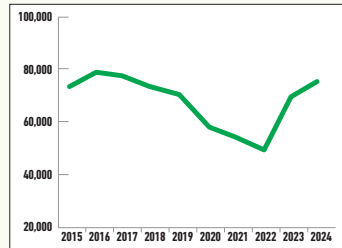
**Market share 2015: 2.87      Market share 2025: 4.2**

Škoda enjoyed a strong 2024 although it only sits mid-table for dealer sentiment. While it can't quite match the market share of Hyundai or Kia, Škoda does have a decent hold on the mainstream market. Most of its models have been updated or replaced in the past two years – the Superb and best-selling Kodiaq are all new. The Elroq, a new electric compact SUV, launched earlier this year.

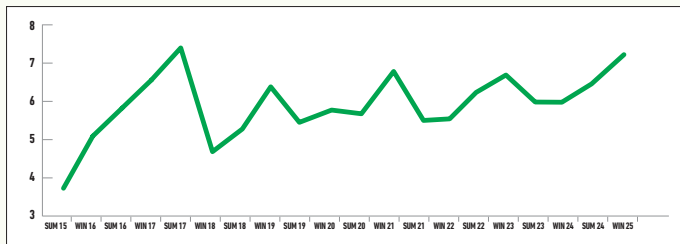
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

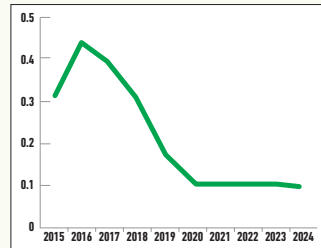


**SMART**

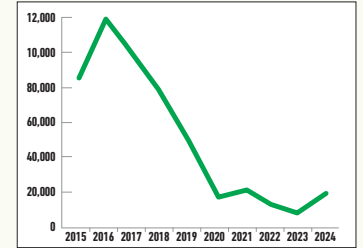
**Market share 2015: 0.8      Market share 2025: 0.03**

Following its re-invention as a joint venture between Geely and Mercedes, Smart has been a slow burner. Only 1,981 cars were registered in 2024 and sales this year haven't really picked up. The #5 spacious family SUV may make a difference when it arrives in late 2025. It has an impressive spec, good performance and attractive pricing. If registrations don't pick-up expect to see it 'at risk' next year.

**Market share**



**Annual registrations**

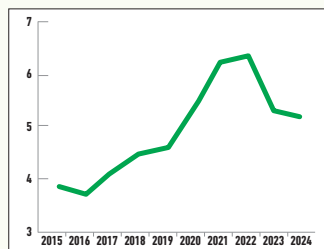


**TOYOTA**

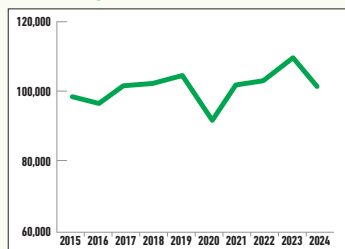
**Market share 2015: 3.89      Market share 2025: 4.53**

Toyota is part way through a major model overhaul, with numerous electric and plug-in hybrid options on the horizon. A boost in electric sales is needed to avoid ZEV Mandate fines, although Toyota's current powertrain strategy of offering hybrids is delivering strong sales. Dealer sentiment has improved in the past year, but a boost in sales is needed if the brand is to hold on to its market share.

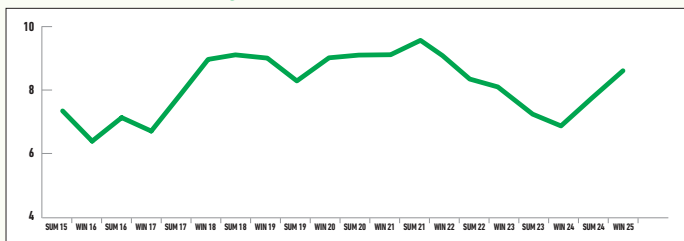
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

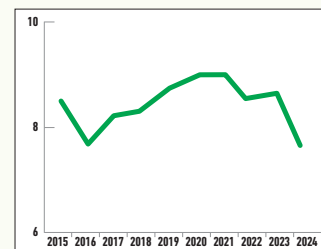


**VOLKSWAGEN**

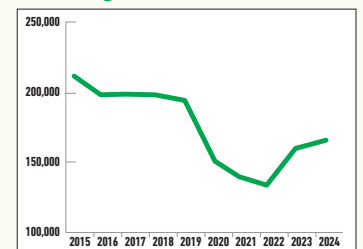
**Market share 2015: 8.87      Market share 2025: 8.92**

Volkswagen sells more cars than any other brand, despite facing struggles with component shortages and software issues. Registrations hit 166,000 in 2024, and market share is slightly higher than it was 10 years ago. New Passat and Tiguan, along with updated Golf, have renewed interest in the brand, while its electric ID models continue to sell well.

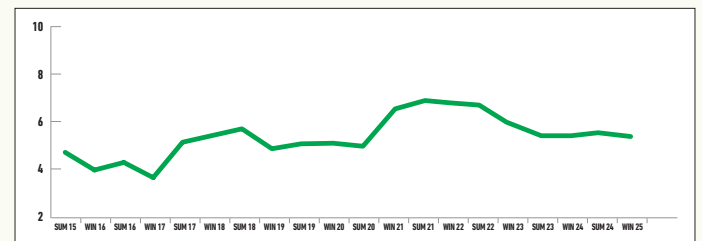
**Market share**



**Annual registrations**



**NFDA manufacturer rating**

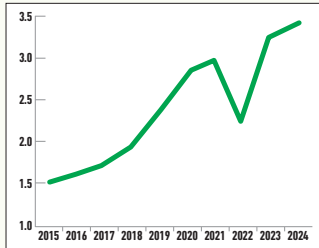


## VOLVO

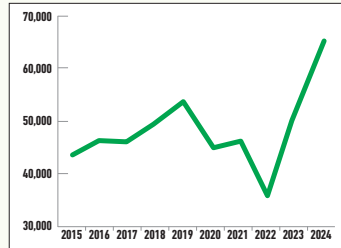
**Market share 2015: 1.54      Market share 2025: 3.28**

Volvo has been forced to adapt its electrification strategy and the promise of all new Volvos being electric by 2030 has been adjusted to 90%. It has updated the XC60 and XC90, rather than killing them off in favour of electric models. The ES90 saloon will expand Volvo's EV line-up, alongside the existing EX30, EX40 and EX90. There's also an EX60 in the works. Dealer sentiment is strong.

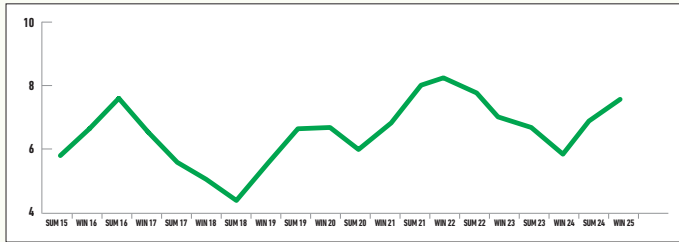
### Market share



### Annual registrations



### NFDA manufacturer rating



## ONES TO WATCH

### ALPINE

**Market share 2015: N/A      Market share 2025: 0.06**

Alpine will become the Renault Group's first all-electric brand. It has already begun the transition from having just one petrol model to a full range of electric cars with the introduction of the A290 – a tuned-up version of the Renault 5. A390, a mid-size plug-in hybrid crossover, will come in 2026.

### CHANGAN

**Market share 2015: N/A      Market share 2025: N/A**

Chinese newcomer Changan is aiming to go from zero to 60 dealerships this year as it establishes a network for a new line-up of models. The manufacturer launched its first car, the Deepal S07, in Q3 but has a relentless roadmap that will see a full range of electric, plug-in hybrid and hybrid SUVs available within two years.

### CHERY

**Market share 2015: N/A      Market share 2025: 0.08**

Chery Automobile has launched its core brand in the UK with an ambitious roll-out of four models and a nationwide dealer network over the next year. Following the UK debut of its Omoda and Jaecoo sub-brands, Chery introduced the Tiggo 7 and Tiggo 8 SUVs in summer 2025. The compact Tiggo 4 and flagship Tiggo 9 will follow in quick succession.

### GENESIS

**Market share 2015: N/A      Market share 2025: 0.06**

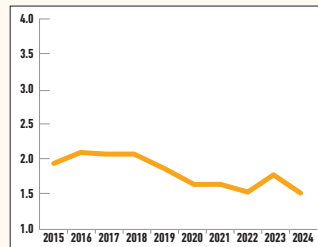
Korea's luxury brand Genesis launched with a VIP-style 'we come to you' service promise but was forced to change tack due to slow sales. It now sits within Hyundai Motor UK, bringing a range of back office efficiencies. Part of its strategy includes opening a network of retail sites and using Hyundai dealers for after-sales. The brand's entire line-up has been refreshed this year, bringing hope for a sales boom in 2026.

### HONDA

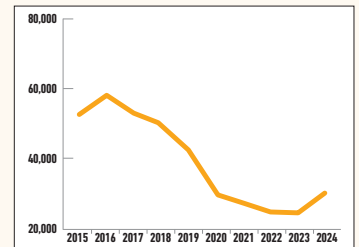
**Market share 2015: 2.08      Market share 2025: 1.30**

Honda grew its sales by 21% in 2024 and achieved an EV sales split of 18%, showing promise for the brand. Dealer sentiment has grown, too. But, sales this year-to-date are down and its electric e:NY1 model is only shifting in small volumes. The only new model to launch this year was the Prelude coupé, which is likely to be a low volume model in the UK. Honda will need to make a serious adjustment to its strategy to keep ahead of stricter ZEV Mandate targets.

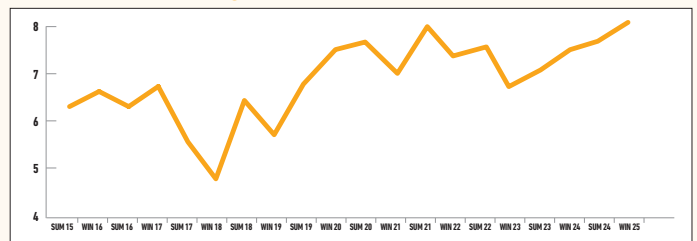
### Market share



### Annual registrations



### NFDA manufacturer rating

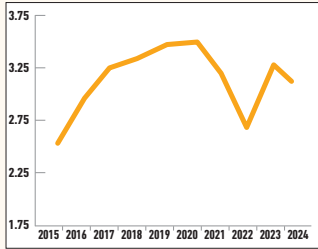


**LAND ROVER**

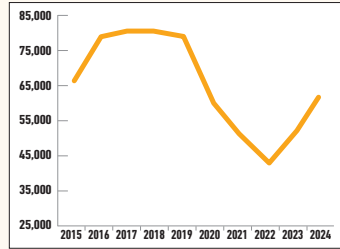
Market share 2015: 2.38 Market share 2025: 3.06

All eyes are on Land Rover after Jaguar paused new car sales as part of its brand reinvention. Dealer sentiment remains low, but that hasn't stopped Land Rover from enjoying a sales boom. It hasn't come without challenges, however. Following action to rectify thefts of cars with keyless entry, the brand suffered a major cyber attack that led to a temporary factory closure. Demand for new Land Rovers remains high, especially for higher-value Range Rover models.

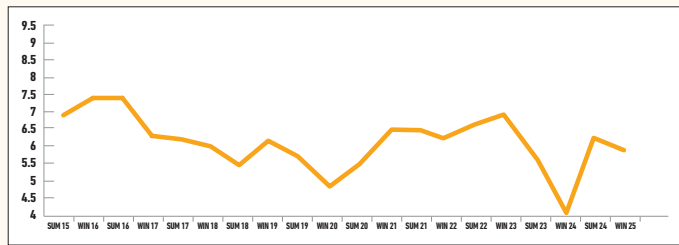
Market share



Annual registrations



NFDA manufacturer rating

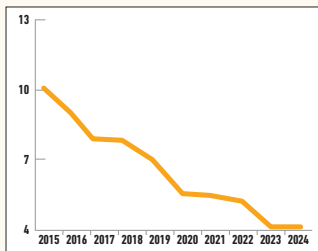


**VAUXHALL**

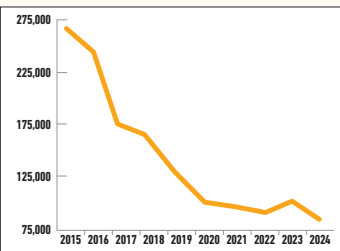
Market share 2015: 10.11 Market share 2025: 4.21

Vauxhall is a far smaller brand than it once was due to a rise in popularity of mainstream alternatives such as Kia and Hyundai, alongside the influx of Chinese brands. The focus at Vauxhall is now on electric models and it offers many at the same price, or even less, than equivalent petrol models. The new Frontera is its hero model for 2026, while the GSE performance sub-brand will also be better utilised in a bid to draw in more buyers.

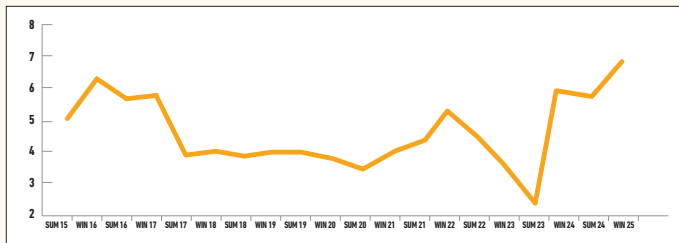
Market share



Annual registrations



NFDA manufacturer rating



**LEAPMOTOR**

Market share 2015: N/A Market share 2025: 0.10

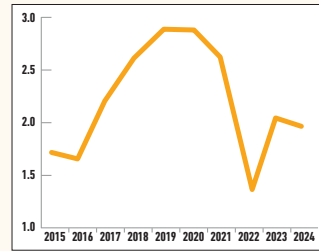
Another Chinese newcomer, but this is one with a difference. Leapmotor is partnered with Stellantis and benefits from the European giant's experience and know-how. Its model line-up starts with the compact T03 city car, which is one of the UK's cheapest new cars, and includes a variety of family-friendly EVs. There are plenty of models in the pipeline, including models with a petrol range-extender.

**SEAT**

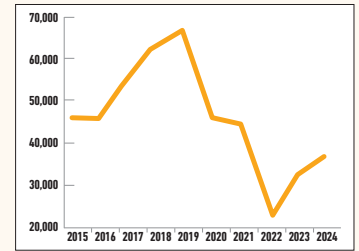
Market share 2015: 1.93 Market share 2025: 1.18

Seat sales have bounced back after the Volkswagen Group confirmed the brand will continue alongside the better-performing Cupra. Its current range is being facelifted and will run until the end of the decade. Electric models will start to launch in the lead-up to 2030.

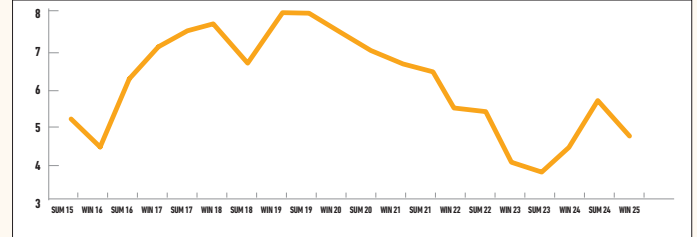
Market share



Annual registrations



NFDA manufacturer rating



**XPENG**

Market share 2015: N/A Market share 2025: 0.03

As one of China's most advanced carmakers, Xpeng has a portfolio of high-tech products set to launch in the UK over the next few years. So far, only the G6 – a rival to the Tesla Model Y – has been available in dealerships and that model is on the brink of a facelift. The IM Group-backed brand plans to expand its dealer network in 2026 and introduce additional models.

# Powering the next phase of EV adoption: why the used market holds the key



**By Christian Gorton,  
Head of Marketing,  
CA Auto Finance**

The UK's automotive landscape is evolving at pace. Electric vehicles (EVs) are transforming the market, offering consumers cleaner,

smarter and more affordable mobility options. However, the real opportunity for mass EV adoption lies not just in the new car market – but in the used one.

This growth potential is being undermined by a market imbalance. Heavy discounting on new EVs, driven by factors including Government-backed incentives and manufacturer price repositioning, has significantly undercut pre-owned EV values.

Between 2021 and 2024, used EV residuals have fallen by an average of 46%, compared with just 19% for used ICE (internal combustion engine) cars (BVRLA figures). This volatility makes pricing difficult, squeezes lenders' margins, and, ultimately, discourages both dealers and consumers from participating in the used EV market.

At CA Auto Finance, we recognise this challenge and are actively working collaboratively with Government stakeholders, partners and industry bodies to help stabilise residual values. Without intervention, the used EV market risks stagnation, stifling manufacturer progress toward ZEV Mandate targets and jeopardising the UK's broader net-zero ambitions.

The Government's focus on subsidising new EVs has left the used market underdeveloped and undervalued. A used EV grant, or the extension of the existing ECG Scheme to pre-owned models, would immediately help improve affordability for middle- and lower-income households.

Similarly, a scrappage scheme encouraging drivers to trade in older ICE vehicles for money toward a used EV would accelerate adoption and reduce carbon emissions.

From a dealer perspective, the



opportunity is significant. Used EVs offer access to a growing pool of environmentally-conscious buyers who are priced out of the new market. Many used EVs, often ex-company cars, enter the market in excellent condition and require minimal servicing – meaning lower reconditioning costs and faster turnaround.

At CA Auto Finance, we're supporting this transition through partnerships and product innovation. We're developing new partnerships that will soon allow customers to include home charging solutions within their monthly finance payments – removing upfront costs and making

EV ownership simpler and more accessible.

Encouragingly, our own figures reflect the momentum in this space. Between 2015 and 2020, we financed just less than 1,000 new and used electric cars. Between 2021 and Q3 2025, that number surged to almost 40,000 – an increase of around 4,000%. This rapid growth underscores both the progress made and the potential still to be unlocked if the right support mechanisms are in place.

Looking ahead, new entrants from overseas, including several major Chinese manufacturers are launching affordable, tech-led EVs in the UK. As these vehicles filter into the second-hand market, they'll expand consumer choice, increase competition, and further strengthen the case for used EV ownership.

Falling new EV prices may have created opportunities in the short term, but long-term market health depends on stability. If industry, Government and finance providers act together, the used EV market can become the real engine of sustainable mobility – ensuring everyone has the chance to drive electric and helping the UK meet its net-zero ambitions.

For more information visit:  
[www.ca-autofinance.co.uk](http://www.ca-autofinance.co.uk)



# Actionable Insights: The Real Competitive Advantage

*By Anthony Gaskell, Managing Director, Reputation*

The global auto industry is facing a profound transformation. A combination of economic uncertainty, rapidly evolving technologies and intense new competitive pressure is rewriting the rules of the game for manufacturers across Europe.

The market is shifting, primarily due to new AI-powered search and discovery tools that are redefining the start of the customer journey. Among senior leaders I speak to, one theme keeps surfacing: the urgent need for actionable, real-time customer insights.

For decades, manufacturers have relied on legacy survey tools like CSAT and CSI. But these are lagging indicators. They show how customers felt weeks later, not what's happening now. Modern feedback intelligence reveals emerging patterns in real time, allowing teams to predict and fix issues before they spread.

In today's environment – where new and existing entrants are redefining the cost/quality equation and consumers have more choice than ever, delayed feedback is a lost opportunity.

## **From Data to Action: Supporting the Retail Network**

European OEMs are all asking the same question: How do we make insights useful to the dealer network? The answer lies in giving frontline staff actionable, real-time intelligence – not dashboards that overwhelm or survey scores that arrive too late.

If customers express frustration with the EV charging experience or confusion about finance options, dealerships need to recognise those signals quickly and take corrective action. Otherwise, the same issues will quietly drive future customers toward competitors whose journeys feel smoother and more attentive.

That makes reputation management a competitive differentiator. Reviews, ratings, and social content alongside traditional surveys now drive buyer perception, directly influencing where they spend money.

In this new landscape, reputation management has become a critical competitive differentiator. Customer reviews, ratings, and social content, considered alongside traditional surveys, now directly drive buyer perception and significantly influence where consumers choose to spend their money.

Empowering staff to respond quickly, resolve issues publicly, and improve experiences based on feedback isn't just good service; it's proactive brand management.

## Local Search and the AI Disruption

There is another major shift happening in parallel: the evolution of local search and SEO in the age of AI.

For years, auto brands optimised for Google's local 3-Pack – the map listings that determined which dealers customers saw first. But AI-generated results are now reshaping how shoppers research, compare, and choose their next vehicle.

Whether it's ChatGPT or any other AI-powered assistants, customers are increasingly being given one distilled answer instead of a page of options. That answer will depend heavily on reputation signals – customer reviews, local visibility, and digital trustworthiness.

### This means:

- Local reputation management is no longer optional; it's decisive.
- AI is filtering the journey, surfacing the brands with the strongest, most credible feedback footprint.
- OEMs must prepare now to ensure their retail networks appear positively and prominently in this AI-shaped landscape.

The search battleground is moving away from keywords and towards credibility, trust, and relevance. Those who fail to adapt risk being invisible at the exact moment when customers are deciding what to buy and where.

## Closing Consumer Journey Blind Spots

One area where many OEMs still face a critical blind spot is the pre-purchase experience. Too often, the customer journey is measured only after a sale is complete or a service visit is finished. That overlooks the many digital and emotional touchpoints that shape perception.

OEMs can't improve what they can't see. To win in today's market, brands need a full view of the consumer journey, from how they're discovered online to how they're treated at the dealership and supported after the sale.

Just as important, they must understand how that journey stacks up against competitors at every step. Without this holistic perspective, it's impossible to identify where prospects are lost, where trust is broken, and where market share is left on the table.

## The Path Forward

The industry is facing many challenges such as EV adoption hurdles, economic headwinds and intensifying global competition which are not going away. But what can set OEMs apart is how they connect with customers in real time, equip their dealer networks with actionable insights, and prepare for the AI-led evolution of search.

The winners in this next chapter won't be those with the slickest product brochures or the most polished campaigns. They'll be the ones who listen better, act faster, and make every local interaction count.

**Because in this market, reputation isn't a marketing asset.**

***It's the engine of growth.***

# Preparing the dealer group for maximum sale value

The M&A market suggests there are time-served motor retailers who want to pick the right time to sell. *Aimée Turner* gathers what they need to know from the industry's experts

**F**or many owner-operators who've spent decades running franchised dealer groups the decision to sell is likely to be the most significant – and emotional – financial deal of their career. But, with valuations softening and buyer sentiment shifting, solid preparation has never been more critical.

The market context has rarely been more complex. After the high profits of 2021-2022, fuelled by vehicle demand exceeding supply post-COVID, dealership valuations are now softening.

OEMs are regularly reviewing their network requirements while acquirers are becoming more selective in their criteria.

Opportunities remain for well-prepared sellers – those who can anticipate what buyers want, align with the right manufacturers and present a clean, resilient financial story.

"If I were looking to exit, I would start by thinking how an acquirer will see the business," says David Kendrick, automotive corporate finance expert at Cooper Parry. "Are you representing the right brands in the right locations? Are your sites CI (corporate identity)-compliant and well-invested? You want to shape the business into what you believe will be the most attractive asset in the market."

That lens forces owners to think long before they

launch a sale. Even five years out, preparation may mean refreshing tired showrooms, updating manufacturer standards, and maintaining an engaged, well-performing workforce and leadership successors that would carry the business forward even after the owner's exit.

It could even mean terminating a franchise or closing a location that is struggling if the portfolio is otherwise prime.

"Upper-quartile and premium marques are especially sought after, and financial performance should be balanced across multiple sites, avoiding reliance on a single location or brand," says Chris Bond, head of motor retail at BDO.

He adds: "For a retailer to be considered a strong candidate, it must first demonstrate consistent profitability with robust margins since the COVID period, supported by strong operational cash flows. Crucially, this track record should show year-on-year growth, even when facing tougher new and used car markets, proving resilience and adaptability."

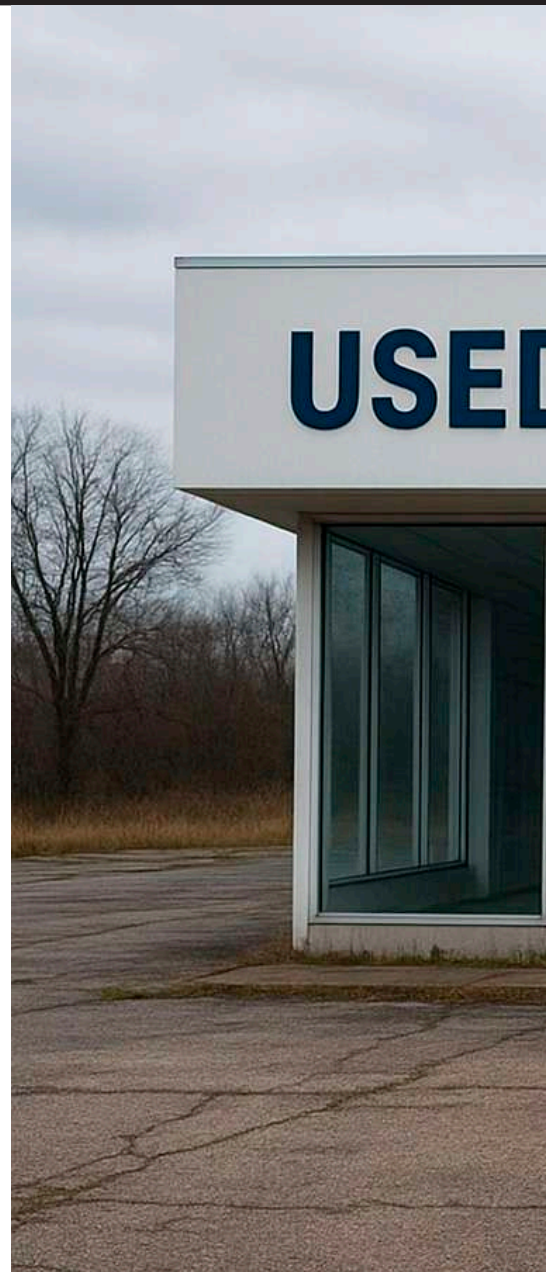
## CULTURE AND PEOPLE

Investment in the business's culture and people also pays off. Bond adds: "Operational excellence underpins everything. This means strong management teams across sites, not just reliance on a single leader, with succession planning in place."



**“ FLEXIBILITY TO CHANGE BRANDS IN THE FUTURE IS IMPORTANT AS, HISTORICALLY, PREMISES HAVE BEEN VERY BRAND SPECIFIC – LEXUS BEING A PRIME EXAMPLE WITH THEIR ELLIPSE-SHAPED SHOWROOM**

**DANIEL COOK, RAPLEYS**



While the ability to demonstrate resilience in tough conditions is important, so too is reading the market and choosing the right moment to sell up.

"Selling into a buoyant market, when sentiment is positive and buyers are feeling confident, can make a big difference," adds Kendrick. "Don't try to sell on the slide when everyone's watching the pennies."

Industry surveys, positive NFDA dealer satisfaction scores, and the volume of deals being completed all provide useful signals for potential acquirers.

If competitor groups are actively bidding, if consolidation activity is high, and if valuations are being sustained in similar transactions, confidence levels are likely solid. Conversely, if deals are stalling and OEMs are hesitant, it may not be the right time.

Valuation methodologies – typically pegged to net assets and adjusted for market dynamics – are remaining relatively consistent at the moment. However, the COVID-19 pandemic acted as both disruptor and catalyst.

The post-pandemic boom in used vehicle demand bolstered dealership earnings. But, since then, our

# D DIESEL SUPERCENTRE



SALE

AM100 research shows profitability is coming under increased pressure, as the industry manages economic headwinds, brand investment demands and increased competition for new car buyers from ambitious Chinese brands.

As Andy Feeke at MHA corporate finance points out, prospective acquirers are examining the future as well as past performance. He says: "Today, it's about the sustainability of earnings, not just the past 12 months."

It is the businesses that can point to growth strategies, operational efficiency, and scalable systems and processes that are likely to command premium valuations going forward.

#### DEFINING THE 'PREMIUM' SALE

The experts agree that prime dealerships in strong locations can still attract competitive interest.

"If you've got the right asset in the right location, you can still get good value for your business. But perhaps the super profits of 2021-2022 are behind us, and that is having an impact," says Kendrick.

"Over recent years we have seen a rush of foreign investors allied to record – and probably not repeatable – profitability levels, resulting in huge goodwill payments. This has now paused as they digest acquisitions, meaning that sellers have to work harder to identify the right buyers," adds Kendrick.

As valuations soften and external pressures rise, factors that set apart 'premium' dealership assets from those likely to be absorbed at lower multiples are becoming clearer: an ability to preserve brand distinctiveness in line with the OEM's strategy and to meet, or exceed, customers' changing expectations.


Consultant and former Hyundai UK boss Tony Whitehorn points to the shifting dynamics of brand identity in a crowded marketplace. He says: "With the steady increase in the number of brands coming to the UK and the development of multi-franchised premises, brand identities are starting to become eroded. Brand agnosticism and reduction in loyalty by customers is adding to that pressure. Prestige brands are able to hold their distinctiveness, but premium and volume brands less so."

For Whitehorn, the key lies in how OEMs themselves will adapt. He says: "Pragmatism by OEMs without diluting the brand experience for the customer – no more vanity projects from the OEM, please – will become the order of the day. That is already happening and those OEMs who realise this will be ahead of the game."

David Manchester, managing director of Automotive Assets and a former Peugeot dealer, stresses that the fundamentals of franchise viability and product pipeline matter greatly. He says: "It's one thing to have a strong market share and good returns, but if the future product line-up isn't there to sustain that, why would anyone invest?"

"The most important factor is whether the brand is consistently renewing its range with vehicles people actually want to buy. That's what really underpins long-term confidence."

#### THE MANUFACTURER FACTOR

"Any buyer is buying into future profitability," notes ex-ASE chairman Mike Jones of Fresh 

Track Holdings. “Having strong brands is key to this as it is a main driver of the goodwill multiple – albeit having too many brand partners can create challenges for a purchaser. Anything sellers can do to give the buyer confidence over the long-term profitability of their retail proposition will help,” he says.

For Jones, a dealership is only worth what a buyer is willing to pay for it: “Getting competitive tension between rival bidders is the best way to maximise the price, however, this is not always possible given the required approval from the franchise.”

Communication with the manufacturer can be one of the most sensitive aspects of selling the business. While OEMs can be supportive, they can also be highly prescriptive about who they want as the franchise partners.

“There’s a fine balance between involving them early and ending up being told what you must do,” says Kendrick. “Their input matters – but as a privately-owned business, you still have to prioritise finding the right buyer for your people and securing the best value for your investment.”

Kendrick stresses the importance of seeking advice from advisors who understand the OEM marketplace independently before engaging in any process.

“Some people think they can just do what they want and then get it wrong, while others involve the OEM but end up being steered in a way that doesn’t maximise value. It’s a delicate balancing act,” he adds.

The risk? Being shut out entirely or being steered into a closed-shop deal with a single buyer, which rarely maximises value. Done well, the dealer secures the right value and the OEM gets the right partner.

Jones says: “Ultimately, it is the franchisor’s train set and their approval is required, particularly for new entrants into the brand. Where the brand has a set target for market area consolidation it is very

difficult for a seller to sell to anyone who isn’t the approved buyer.”

Yet Kendrick suggests OEMs may have to be pragmatic to preserve valued representation points as dealers’ appetite for acquisitions varies. “Soon, there may only be a dozen or so major groups genuinely competitive in acquisition processes,” he adds. “If an owner wants to sell and retire, and none of the OEM’s preferred buyers are interested, what then?”

**REFINING BRAND PORTFOLIOS**

A common question is whether sellers should rationalise or change their franchise mix ahead of a sale. Having many franchises can create challenges for some potential purchasers and, in some instances, closing loss-making dealerships may make sense. Yet Manchester advises sellers not to rebrand as part of an exit strategy. “You could change your brand portfolio, and they may not start to perform for two or three years,” he adds.

It’s better to focus on profit from existing brands, used cars and aftersales. “Dealerships have almost got to be in a situation where, if the brand isn’t doing as well, they’re still very profitable. Do the basics well and there’s no reason why you shouldn’t, as what we base our goodwill numbers on is three or four years of previous profits.”

Sellers mustn’t feel tempted to disguise the truth. Even when OEM sentiment is positive, the detail within financial disclosure can make or break a deal. Clean financials, accurate KPIs and transparent disclosure can help build trust and accelerate negotiations, although, according to Manchester, the two common problem areas are property and data. Property due to the size of the asset, and data because if the quality isn’t there any acquirer “might as well throw it away and start again”, he says.

He adds: “It’s really about having the business in

the right condition to sell, and that comes down to the property, the people and the processes. If those three elements are strong, the business will always be attractive to a buyer.”

**THE EMOTIONAL DIMENSION**

Selling the business is time-consuming – and emotional. Manchester sees this regularly. He says: “It is very emotional, and I would always advise a seller to appoint an advisor because the seller can’t manage the sale and continue to run the business. The ones that try to end up probably messing up the sale and messing up their business.

“You can never appoint an advisor too early. The earlier you appoint them, the better. If you’re thinking of selling five years’ down the line, now would be a good time.”

Jones, who has advised on many transactions and sold his own business, agrees: “Having an advisor to sit between you and the purchaser is vital to smooth the sale to completion. Difficult as it is, particularly when a business has been built up over decades of hard work, the seller needs to emotionally disassociate themselves from the process as much as they can.”

A wave of mergers and acquisitions within the AM100, and outside it, is driving potential motor retail buyers to scrutinise every aspect of their target business more closely. The property element has become one of the most complex and strategically sensitive parts of any transaction.

Bobby Barfoot, associate at property consultancy Savills Automotive, says while the UK’s dealership footprint is contracting, the value of dealership property is improving.

He says: “The reduction in the number of dealerships is being driven by rising operational costs, planning restrictions, market uncertainty and pressure on long-term profitability.

“But this is not just a story of decline. What we’re seeing is a repurposing and restructuring of the sector. Dealerships are becoming leaner, more digital and more focused on experience and service rather than traditional sales.”

**CHINESE INFLUENCE**

Demand is good for dealerships in high traffic locations, fuelled by the new Chinese brands’ ambitions to rapidly build retail networks from scratch. But change of use is always a consideration for dealer groups with properties to sell.

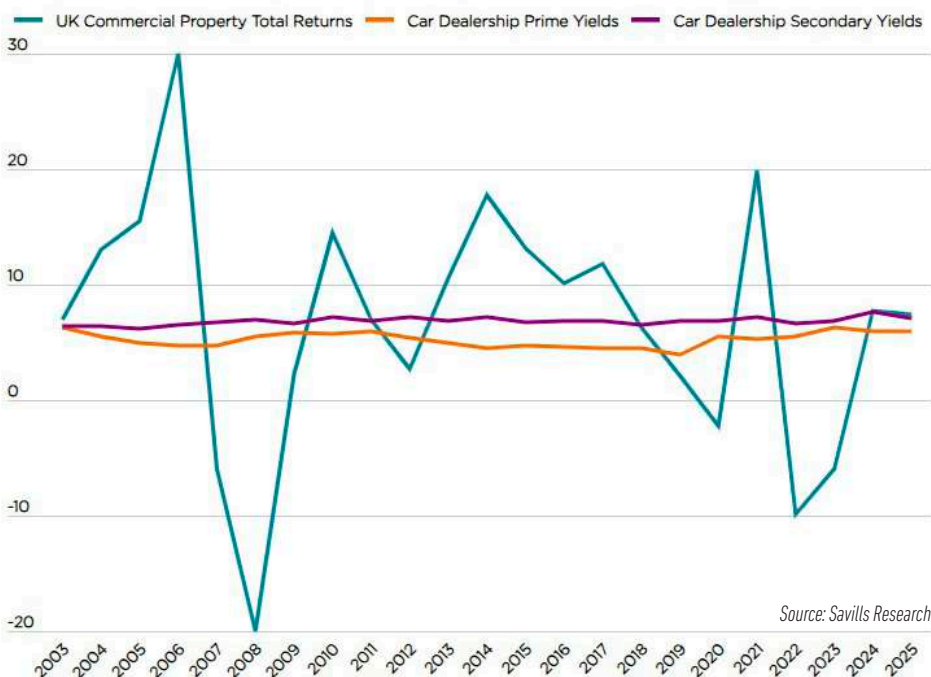
Thanks to their substantial footprint and parking areas some former showrooms are suited for alternative uses such as gyms, restaurants and other retail stores, or for replacement with residential properties.

Yet Manchester warns of the risk to the workforce if a site is quietly still working out the termination notice. “Selling for alternative use is far more complex as you have to keep it quiet until the last moment – and yet a planning application makes that difficult,” he says.

“I’ve seen dealers turn down offers twice as high as those for continuing use because they couldn’t face closing the business, making staff redundant and letting customers down. To take that path you need a very clear strategy.

“It’s painful and it’s risky, because you don’t know

**Property total returns v dealership yields**





**“ ANYTHING SELLERS CAN DO TO GIVE THE BUYER CONFIDENCE OVER THE LONG-TERM PROFITABILITY OF THEIR RETAIL PROPOSITION WILL HELP**

**MIKE JONES, FRESH TRACK HOLDINGS**

if planning will be approved until it's done. By that stage, everyone knows.”

Property experts stress the importance of ensuring assets remain saleable. Manchester doubts whether every dealer understands either how to maximise their property's value or how to gauge market appetite accurately.

“My advice to dealers is to be realistic about property,” he says. “The market has changed. Someone might have been offered £5 million a year or two ago, but property values are no longer rising in the way people assume. With Government moves on stamp duty and taxation, values are flattening. Waiting another five or 10 years in the hope of doubling your money just isn't going to happen.”

#### COMPLIANCE CONSIDERATIONS

Barfoot says the due diligence for a dealership sale now covers an array of legal, compliance, environmental, condition and financial considerations – each with the potential to derail a deal if overlooked.

Reviewing leases, deeds of variation and rent review memorandums remains fundamental to understanding future liabilities, but there are also more hidden risks, from wayleaves and easements to title ownership disputes, access rights and third-party consents. Revaluations of business rates are

further expected to push up liabilities next year.

Compliance demands are also mounting. Fire risk assessments, asbestos surveys, safety audits, planning permissions and confirmation of use class status all come under increasing scrutiny. Condition surveys, maintenance logs, utility and drainage plans can help build a picture of operational risk.

Environmental issues now feature as a core part of any valuation. Flood risk and contamination surveys have become standard. Minimum energy performance certificate (EPC) ratings (currently E, rising to C in 2027) must be achieved to sell or let property while new biodiversity rules also mean that any development must deliver a 10% biodiversity net gain, on-site or off-site, all backed up with robust documentation.

Daniel Cook, Rapleys partner and head of automotive and roadside, says biodiversity gain and energy performance standards have become a hugely significant issue for purchasers. He adds: “Such matters are now an absolute pre-requisite of the planning process but these additional requirements add to cost and complexity of planning applications.”

At the same time, dealers face growing expectations to invest in insulation, solar panels and EV charging, making an assessment of power capacity critical. Cladding and insulation materials are under

tighter control post-Grenfell, with implications for both valuations and insurance.

It all means property due diligence has become much more strategically significant in dealership transactions. He recommends surveys are provided up front, plus as much information is shared as possible, to help the sale proceed more quickly.

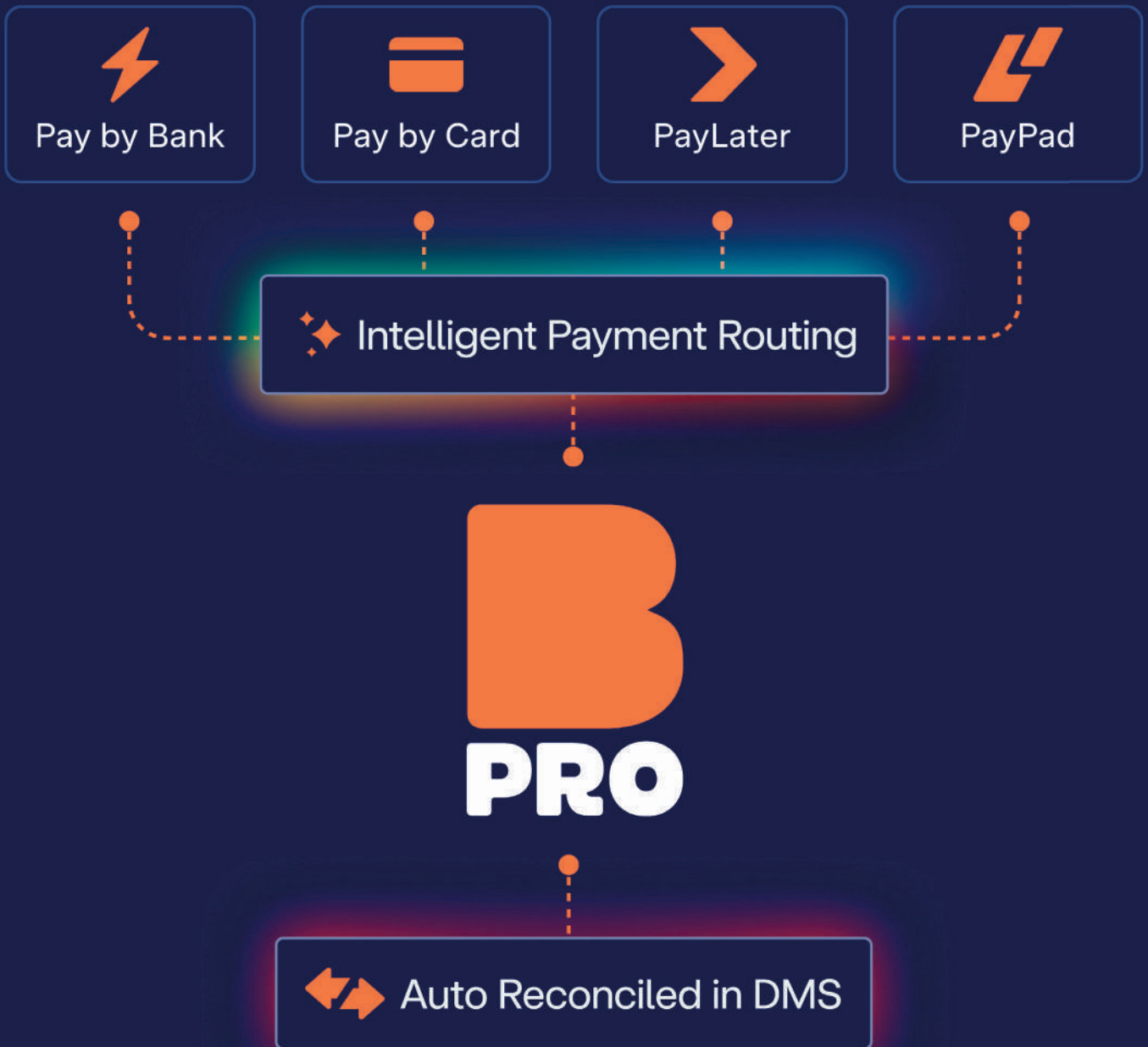
Cook says the biggest property-related risks in dealership M&A are mainly to do with issues arising from due diligence such as no provision for dilapidations and the lack of available information. When the purchaser has already committed finance to the deal this delays the transaction and, in some cases, collapse it completely.

Cook says showroom transactional activity is quite subdued at the moment, mainly as a result of groups consolidating or rebranding surplus sites for new brands such as Omoda, Jaecoo, BYD and Changan. Nevertheless, OEMs and dealer groups need an increased requirement for future-proofing properties.

“Flexibility to change brands in the future is important as, historically, premises have been very brand specific – Lexus being a prime example with their ellipse-shaped showroom. Much of this is cost-driven. Build costs and property procurement costs are enormous and in a consolidating world, this needs more consideration,” he says.

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Rank (2024)		Name	T/O 2025 (£,000)	T/O 2024 (£,000)	Outlets 2025	Outlets 2024	Staff 2025	Staff 2024
1	1	Sytner	7,295,409	7,935,958	146	156	10,902	10,633
2	2	Lithia UK	6,573,557	5,280,900	186	187	8,710	8,343
3	3	Arnold Clark Automobiles	5,152,300	4,964,800	230	195	11,586	11,400
4	4	Vertu Motors	4,932,869	4,719,587	202	204	8,081	7,441
5	5	Global Auto Holdings (Lookers)	4,295,300	4,598,400	149	160	6,003	6,724
6	6	Group 1 Automotive	4,229,248	4,167,807	167	150	7,630	6,618
7	7	Marshall Motor Group	3,673,473	3,732,369	139	152	5,004	5,288
8	8	TrustFord	2,158,450	1,880,408	47	40	2,818	2,706
9	9	Greenhouse Group	1,794,124	1,494,132	12	10	1,716	1,473
10	36	AWR Holdings UK	1,537,387	540,000	80	29	1,976	656
11	14	PSA Retail UK	1,478,011	1,218,742	86	68	1,285	1,215
12	13	Motus UK (incl. Pentagon Group)	1,402,564	1,278,875	52	46	2,934	2,806
13	11	Stoneacre Motor Group	1,390,522	1,356,554	138	123	2,866	2,796
14	12	Listers	1,339,477	1,290,219	53	52	2,283	2,041
15	10	JCT600	1,334,889	1,414,434	43	49	2,177	2,133
16	17	Hendy Group	1,163,566	1,004,002	66	69	1,777	1,690
17	23	Steven Eagell	1,095,245	1,044,410	43	44	1,621	1,181
18	16	Park's Motor Group	1,076,718	1,011,710	78	68	2,009	2,114
19	15	John Clark Motor Group	1,065,435	1,029,873	48	39	1,385	1,355
20	26	RRG Group and Norton Way Motors	1,029,608	787,192	32	32	1,365	1,194
21	18	Swansway Garages	986,089	941,069	24	22	1,174	1,154
22	21	Lloyd Motors	939,785	870,985	36	26	1,230	1,168
23	22	Eastern Western Motor Group	921,666	859,386	46	43	1,522	1,461
24	24	Dick Lovett Group	810,496	822,064	17	17	1,000	964
25	25	Perrys Group	768,439	794,154	49	48	1,362	1,387

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**TOP 100  
TABLE**

Rank (2024)		Name	T/O 2025 (£,000)	T/O 2024 (£,000)	Outlets 2025	Outlets 2024	Staff 2025	Staff 2024
26	27	TG Holdcroft	745,644	750,289	31	30	688	651
27	33	Snows Motor Group	735,174	691,253	54	53	1,160	1,045
28	28	Allen Ford (Supergroup UK)	704,100	725,290	41	39	1,222	1,293
29	29	Sinclair Group	674,140	637,851	32	25	835	764
30	38	Yeomans	581,768	528,257	41	38	876	784
31	37	Williams Motor Company	577,213	543,886	9	13	829	773
32	30	Harwoods Group	577,033	627,655	8	20	999	1,029
33	31	Cambria Automobiles	562,174	615,634	35	28	616	628
34	34	HR Owen	556,551	567,128	23	21	497	489
35	39	Porsche Retail Group	518,424	421,698	7	5	338	338
36	35	Glyn Hopkin	492,882	560,560	45	36	768	835
37	40	Renault Retail Group	453,255	390,272	32	33	508	508
38	44	Halliwell Jones Group	444,020	409,823	13	12	572	575
39	43	Marsh Wall	441,949	412,999	12	9	532	512
40	42	Citygate Group	414,848	424,018	21	21	630	623
41	19	Hedin Automotive UK	414,453	428,468	17	17	407	1,691
42	50	DM Keith	394,082	300,835	34	20	598	448
43	48	TC Harrison Group	387,990	365,555	15	16	610	546
44	41	Vindis Group	387,086	436,055	16	16	721	775
45	46	Richmond Cars	371,133	377,299	15	15	475	467
46	55	VT Holdings	364,393	311,048	19	19	308	308
47	52	Jemca Car Group	345,170	314,884	11	11	434	449
48	51	Mon Motors	341,995	315,418	23	24	674	674
49	57	Toomeys	330,688	306,176	23	21	442	412
50	61	Donnelly Bros Garages (Dungannon)	330,411	283,633	26	26	536	512

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Rank (2024)		Name	T/O 2025 (£,000)	T/O 2024 (£,000)	Outlets 2025	Outlets 2024	Staff 2025	Staff 2024
51	59	Bowker Motor Group	322,453	303,449	7	6	900	853
52	60	CEM Day	303,172	284,855	8	7	570	570
53	58	Brindley Garages Group	299,043	304,796	16	13	246	302
54	64	Eden Motor Group	296,956	327,428	21	21	597	664
55	54	Drive Motor Retail	292,911	311,214	29	25	653	650
56	53	Sandcliffe Motor Group	291,456	312,673	22	14	463	437
57	47	City West Country	286,792	251,072	19	15	699	693
58	56	Peoples	283,450	306,766	16	12	356	356
59	68	Thurlow Nunn	281,778	267,764	14	14	636	630
60	63	Barretts of Canterbury	276,457	261,383	7	7	472	472
61	65	Vantage Motor Group	273,292	272,217	13	13	427	425
62	71	LSH Auto UK	271,938	255,944	15	15	608	604
63	66	Vospers	268,869	270,286	39	33	595	601
64	69	Caffyns	262,084	251,426	19	18	414	414
65	49	Ryland Automotive	261,427	315,541	12	14	267	n/a
66	62	Chorley Group	259,722	281,436	22	21	351	362
67	77	Partridge of Hampshire	252,392	228,738	2	2	165	157
68	73	Hartwell	247,536	250,437	21	21	338	341
69	74	Fish Brothers	243,102	248,492	13	11	310	311
70	75	Ancaster Group	241,631	242,589	16	14	389	377
71	67	Endeavour Automotive Group	238,144	269,260	15	18	412	404
72	82	SG Petch	233,170	211,135	21	21	363	318
73	79	William Morgan Group	226,192	225,275	6	6	357	331
74	76	Cotswold Motor Group	223,647	235,862	5	5	338	343
75	90	Arbury	222,256	188,833	16	14	294	288



Rank (2024)		Name	T/O 2025 (£,000)	T/O 2024 (£,000)	Outlets 2025	Outlets 2024	Staff 2025	Staff 2024
76	NEW	Grainger Motor Group	221,804	161,077	13	13	358	n/a
77	80	Heritage Automotive	218,311	179,286	15	15	357	357
78	78	Parkway Derby	218,189	227,976	6	6	377	330
79	70	JCB Group	217,747	256,782	27	28	376	304
80	86	Howards Group	215,902	198,769	24	20	298	263
81	83	Vines Group	210,840	201,848	7	7	310	304
82	89	Cars2	207,600	191,562	19	17	266	239
83	99	FRF South Wales	201,657	156,659	8	5	358	282
84	32	Peter Vardy	200,000	590,518	2	7	150	1,008
85	84	Waylands Automotive	198,037	200,870	15	11	310	248
86	87	Marriott Motor Group	195,195	197,492	10	10	358	356
87	81	Gates Group	195,187	211,440	13	9	301	302
88	85	John Grose Group	191,102	199,815	9	9	310	306
89	96	Central Garage Uppingham	187,036	167,302	11	11	333	301
90	NEW	Startin Group	187,026	163,967	12	12	271	n/a
91	NEW	St Leonards Motors	186,352	133,452	16	16	403	n/a
92	NEW	Acorn Motor Goup	181,586	147,646	7	7	206	n/a
93	100	WR Davies	169,265	148,320	15	14	293	260
94	NEW	Ocean Automotive	168,237	171,106	3	3	273	260
95	93	Sandown Motors	168,178	175,511	10	15	544	548
96	NEW	WJ King	163,264	141,390	16	16	339	n/a
97	97	Worcester Carsales	162,796	163,870	15	6	336	349
98	94	Foray Motor Group	159,457	174,252	7	7	399	404
99	NEW	Peter Cooper Motor Group	158,289	147,666	9	9	293	n/a
100	72	Riverside Motors Group	157,267	252,159	9	8	272	253

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**A****Acorn Motor Group (VM Automotive)****Franchises:** Kia 5 MG 1 Suz 1**Key executives:** James Platt, managing director; Samantha Platt, aftersales director; David Vickers, director; Steve Mills, director**Allen Motor Group (Supergroup UK)****Franchises:** Che 3 Ford 15 Ford LCV 9 Hy 1 Kia 5 Om 4 Other 4**Key executives:** Niall Hooper, chief executive; Paula Wood, chief financial officer; Richard Arnold, chief operations officer**Ancaster Group****Franchises:** Chan 1 Dac 1 Gen 1 Hy 2 MG 3 Nis 6 Ren 1 Ško 1**Key executives:** Stephen Wood, managing director; Simon Hill, operations director; Robert Smith, aftersales director**Arbury****Franchises:** Abar 1 Cup 1 Fiat 1 Leap 2 Nis 2 Peu 6 Seat 2 Ško 1**Key executives:** Ben Archer, managing director; Stephen Drew, finance director; Scott Stenning, director**Arnold Clark Automobiles****Franchises:** Abar 13 AR 4 BMW 5 BYD 11 Che 3 Cit 8 Cup 3 Dac 15 DS 3 Fiat 16 Gen 1 GWM 4 Hon 1 Hy 9 Om 7 Jeep 8 Kia 10 Leap 4 Mas 2 Maz 5 MB 5 MG 14 Mini 5 Nis 0 Peu 13 Ren 15 Seat 5 Ško 2 Sm 1 Vaux 24 VW 7 Vo 2 Other 5**Key executives:** Russell Borrie, chief executive & group managing director; Eddie Hawthorne, director; John Clark, chief commercial officer; Lady Philomena Clark, chairwoman**AWR Holdings UK****Franchises:** Abar 1 AR 1 Cup 2 Dac 1 Fiat 1 Fiat LCV 1 Ford 2 Hon 14 Hy 7 Jeep 1 Kia 4 Lex 1 Maz 6 Nis 9 Ren 1 Seat 3 Ško 8 Suz 2 Toy 3 VW 11 Vo 1**Key executives:** Jose Blanco, chief executive, Brayleys & Johnsons; Sara Harris, business transformation director; Dave Carter, operations director; Khalid Al Rostamani, chairman**B****Barretts of Canterbury****Franchises:** BMW 2 Hon 1 Jag 1 LR 1 Mini 2**Key executive:** Paul Barrett, managing director**Bowker Motor Group****Franchises:** BMW 2 Mini 2 Por 2 Other 1**Key executives:** Paul Bowker, chief executive; Ben Gornall, finance director; Kenneth Bowker, director; Chris Eccles, managing director**Brindley Garages Group****Franchises:** Chan 1 Gen 1 Hon 3 Hy 3 Om 1 Kia 2 Maz 1 MG 1 Vo 1 Xpen 1 Other 1**Key executives:** Che Watson, chairman; Chris Adams, group operations director; Paul Ashcroft, finance director**C****Caffyns****Franchises:** Au 3 Cup 2 Lo 1 MG 1 Seat 2 Ško 3 Vaux 1 VW 4 Vo 2**Key executives:** Simon Caffyn, chief executive; Michael Warren, finance director; Sarah Caffyn, company secretary; Richard Wright, chairman**Cambria Automobiles****Franchises:** AM 4 Ben 2 Che 5 Jag 1 Lamb 2 LR 2 Mcl 1 Maz 4 MG 3 Om 4 RR 1 Sub 1 Other 5**Key executives:** Mark Lavery, chief executive; Tim Duckers, managing director; Richard Hubbard, director; Natalie Boon, HR director**Cars2****Franchises:** Dac 3 Gee 1 Hy 3 MG 3 Nis 2 Om 2 Ren 3 Seat 2**Key executives:** Allan Otley, managing director; Lindsay Collier, finance director; Jeremy Bates, business development director**CEM Day****Franchises:** Che 2 Ford 2 Ford LCV 1 Peu 2 Other 1**Key executives:** Graham Day, chairman; Russell Day, managing director; Jill Day, director; Grant Matthews, finance director**Central Garage Uppingham****Franchises:** BMW 1 Kia 2 Maz 3 MG 1 Mini 1 Vo 1 Other 2**Key executives:** Samantha Hamblin, chair; Graham Wemyss, managing director; James Morris, group operations manager**Chorley Group****Franchises:** Cit 4 GWM 1 Hy 2 Isz 1 Kia 1 MG 3 Nis 6 Peu 3 Vaux 1**Key executives:** Adam Turner, managing director; Andrew Turner, chairman; Stacey Turner, legal director**City West Country****Franchises:** BYD 4 GWM 3 MB 4 MB LCV 4 Sm 4**Key executives:** Anthony Wickens, chairman; Mike Wickens, managing director**Citygate Group****Franchises:** Cup 3 GWM 1 Kia 3 Seat 3 Ško 3 VW 5 VW LCV 3**Key executives:** Jonathan Smith, chief executive; Simon McLaughlin, managing director**Cotswold Motor Group****Franchises:** BMW 2 Mini 2 Other 1**Key executives:** Andrew Hulcoop, managing director; Paul Neale, managing director**D****Dick Lovett Group****Franchises:** AM 1 BMW 4 Fer 1 Jag 1 LR 1 Mini 4 Por 4 Other 1**Key executives:** Peter Lovett, chairman; Lynn Campbell, managing director; Julian Winterburn, finance director**DM Keith****Franchises:** BYD 8 Chan 2 Cup 2 Ford 2 Ford LCV 2 Hon 1 Kia 2 Seat 2 Ško 7 Sub 2 Suz 4**Key executives:** Dougal Keith, managing director; Angus Keith, director; Martin Nield, chief operating officer**Donnelly Bros Garages (Dungannon)****Franchises:** Abar 1 AR 1 Cit 2 Dac 2 Fiat 1 Fiat LCV 1 Hon 2 Jag 1 LR 1 Peu 2 Ren 2 Seat 1 Suz 1 Toy 1 Vaux 1 Vaux LCV 1 VW 2 VW LCV 3**Key executives:** Terence Donnelly, executive chair; Raymond Donnelly, director; Dave Sheeran, managing director**Drive Motor Retail****Franchises:** Cit 1 Hy 3 Leap 5 MG 6 Peu 1 Vx 13**Key executives:** Richard Manning, chairman; Stephen Bessex, chairman; Stuart Harrison, managing director; Rob Keenan, managing director**E****Eastern Western Motor Group****Franchises:** BMW 2 Che 3 Hon 5 Lex 3 Maz 2 MB 4 MB LCV 3 Mini 2 Nis 6 Sm 1 Toy 6 VW 4 VW LCV 1 Other 4**Key executives:** Douglas Brown, chairman & chief executive; Nasser Mohammed, group financial director; Keith Duncan, group managing director**Eden Motor Group****Franchises:** Hy 5 Maz 3 MG 2 Peu 1 Vx 10**Key executives:** Graeme Potts, chief executive; Stephen Belcher, finance director; Nicola Hadley, chief financial officer**Endeavour Automotive Group****Franchises:** Hy 4 Lo 2 Om 1 Pol 2 Vo 6**Key executives:** John Caney, chairman; Andrew Shackleton, chief executive; Andrew Gore, managing director**F****Fish Brothers****Franchises:** Che 1 Cup 1 Dac 1 Hon 1 Kia 1 Lex 1 Nis 1 Om 1 Ren 1 Seat 1 Ško 1 Toy 1 VW LCV 1**Key executives:** Mike Fish and Tim Fish, joint managing directors; Gregory Hughes, finance director; Jon Fish, director**Foray Motor Group****Franchises:** Ford 4 Ford LCV 3**Key executives:** Simon Moulton, managing director; Chris Yoxon, director; Claire Gardiner, finance director**FRF South Wales****Franchises:** Lex 1 Toy 6 Vo 1**Key executives:** Mark Radcliffe, managing director; John Radcliffe, director; Tom Radcliffe, operations director; Stuart Rees, finance director**Gates Group****Franchises:** BYD 2 Ford 5 Ford LCV 4 Om 2**Key executives:** Heath Greenall, managing director; Phil Benson, finance director; Suzanne Greenall, director**Global Auto Holdings (aka Lookers)****Franchises:** AM 2 Au 11 Ben 1 BMW 3 BYD 3 Chan 3 Cit 1 Cup 2 Dac 7 DS 1 Fer 1 Ford 9 Ford LCV 6 GWM 2 Hy 1 Jag 3 Jeep 1 Kia 5 LR 7 Lex 1 Lo 1 Mas 1 MB 13 MG 1 Mini 3 Nis 9 Peu 1 Pol 2 Ren 7 Seat 2 Ško 3 Sm 2 Toy 3 Vx 7 VW 12 VW LCV 5 Vo 5 Other 2**Key executives:** James Brearley, managing director; Martin Reay, finance director; Kuldeep Billan, executive chairman; Derek Chiu, chief financial officer**Glyn Hopkin****Franchises:** BYD 4 Che 2 Dac 3 Gee 2 Kia 3 MG 10 Nis 13 Ren 3 Suz 3 Other 2**Key executives:** Glyn Hopkin, chairman; Fraser Cohen, managing director; Hady Laba, finance director; Shabir Chowdhury, sales director**Grainger Motor Group****Franchises:** BYD 4 Kia 6 Maz 2 MG 1**Key executives:** Harry Grainger, managing director; Neil Grainger, managing director; Jordan Hammond, head of accounts**Greenhouse Group****Franchises:** BYD 1 Cit 1 Daf 5 Leap 1 Nis 1 Om 1 Peu 1 Vx 1**Key executives:** Derek Passant, chief executive; Mike Pawson, finance director; Ashley Passant, managing director**Group 1 Automotive UK****Franchises:** Au 15 BMW 16 Cit 1 Cup 2 Ford 5 Ford LCV 5 Jag 10 Kia 2 LR 10 Leap 1 Lex 5 MB 19 Mini 16 Por 2 Seat 2 Ško 4 Sm 12 Toy 13 VW 21 VW LCV 6**Key executives:** Mark Raban, chief executive; Daniel McHenry, chief financial officer**H****Halliwell Jones Group****Franchises:** BMW 5 Kia 1 Mini 5 Other 2**Key executives:** Phillip Jones, managing director; Glyn Howes, finance director; James Houghton, sales director;**Hartwell****Franchises:** BYD 4 Che 1 Ford 8 Ford LCV 4 GWM 1 Om 3**Key executives:** Kevin Godfrey, managing director; Atiq Rehman, director

**Harwoods Group**

**Franchises:** AM 1 Au 4 Bn 1 Mcl 1 Vo 1  
**Key executives:** Guy Harwood, chairman; Archie Harwood, chief executive; Guy Rowson, finance director

**Hedin Automotive UK**

**Franchises:** BMW 4 MB 4 MB LCV 3 Mini 3 Sm 3  
**Key executives:** Richard Ennis, chief executive; Peter Williams, chief financial officer

**Hendy Group**

**Franchises:** Abar 1 BYD 2 Cit 1 Gee 2 Dac 7 Fiat 1 Ford 6 Ford LCV 4 Hon 1 Hy 2 Jag 2 Kia 5 LR 2 Lo 1 Maz 3 MG 3 Nis 4 Om 1 Peu 2 Ren 7 Ško 2 Vx 3 Other 4  
**Key executives:** Paul Hendy, chief executive; Mark Busby, commercial director; Daksh Gupta, chairman; Duncan McPhee, chief operating officer

**Heritage Automotive**

**Franchises:** Au 1 Hon 1 Ško 1 VW 3 Other 9  
**Key executives:** Paul Hrachovec, managing director; Richard Neulander, director; Nick Hinallas, director

**Howards Group**

**Franchises:** Cit 3 DS 1 Hon 2 Hy 4 Kia 2 Leap 2 Nis 1 Peu 4 Suz 2 Toy 1 Vx 2  
**Key executives:** Peter Coleman, chairman; Chris Lee, managing director; Mark Eggar, chief financial officer; Jonathan Coleman, executive director; Louise Devine, marketing director; Chris Lynch, head of group operating functions & communications

**HR Owen**

**Franchises:** AM 2 Bn 3 Bug 1 Fer 2 Lamb 5 Lo 4 Mas 1 RR 1 Others 4  
**Key executives:** Ken Choo, chief executive; Manish Patel, finance director

**J**

**JCB Group**

**Franchises:** Cup 3 Dac 3 Kia 3 Maz 1 Ren 3 Seat 3 Ško 2 VW 3 VW LCV 4 Other 2  
**Key executive:** Jonathan Bischoff, managing director

**JCT600**

**Franchises:** AM 1 Au 7 Bn 1 Cup 3 Fer 1 Kia 1 Lo 1 Mas 1 MB 5 Por 5 RR 1 Seat 3 Sm 1 VW 7 VW LCV 5  
**Key executives:** John Tordoff, executive chairman; Ian Tordoff, director; Nigel Shaw, finance director; Richard Hargraves, managing director

**Jemca Car Group**

**Franchises:** Lex 4 Toy 7  
**Key executives:** Hiroyuki Niwa, chairman & chief executive; David Collis, president; Gary Brown, chief finance officer; Simon Boxall, chief operating officer

**John Clark Motor Group**

**Franchises:** Au 3 BMW 2 BYD 2 Cup 2 Dac 1 Gee 3 Jag 3 Kia 2 LR 6 MG 2 Mini 2 Nis 1 Ren 1 Seat 2 Ško 4 VW 4 VW LCV 2 Vo 3 Other 3  
**Key executives:** John Clark, chairman; Christopher Clark, managing director; Alan McIntosh, finance director

**John Grose Group**

**Franchises:** Che 1 Cit 1 Ford 3 Ford LCV 1 Kia 1 Om 1 Peu 1  
**Key executives:** Ian Twinley, chairman & managing director; Steve Syrett, aftersales director; David Billison, sales director

**L**

**Listers**

**Franchises:** Au 4 BMW 2 Cup 2 Hon 3 LR 3 Lex 4 MB 4 MB LCV 1 MG 2 Mini 2 Om 1 Por 1 Seat 2 Ško 1 Sm 2 Toy 9 VW 6 VW LCV 2 Vo 2  
**Key executives:** Keith Bradshaw, chairman; Terence Lister, managing director; Geoffrey Lister, chief executive; Timothy Bradshaw, chief operating officer; Antony Dadd, director of finance

**Lithia UK**

**Franchises:** AM 3 Au 12 Abar 2 BMW 10 BYD 5 Cit 10 Dac 5 DS 2 Fer 3 Fiat 2 Ford 25 Ford LCV 4 Gen 3 Hy 5 Jag 8 Jeep 1 Kia 2 Leap 2 Lo 1 LR 11 Mas 1 McL 2 MB 12 MG 2 Mini 10 Nis 3 Om 1 Por 7 Peu 6 Ren 5 Sm 3 Vx 15 Other 3  
**Key executives:** Neil Williamson, regional president; Richard Thomas, chief financial officer; Justin Byrne, chief technology & innovation officer

**Lloyd Motors**

**Franchises:** BMW 7 BYD 2 Jag 3 Kia 3 LR 7 Mini 7 Ško 1 VW 1 Vo 2 Other 3  
**Key executive:** Sam Lloyd, managing director

**LSH Auto UK**

**Franchises:** BYD 5 MB 6 MB LCV 2 Sm 2  
**Key executives:** Vaughan Blackman, managing director; Masim Syed, CFO

**M**

**Marriott Motor Group**

**Franchises:** Au 3 GWM 1 Ško 2 VW 3 VW LCV 1  
**Key executives:** Paul Barnard, managing director; Ian Woodward, operations director; Steven Bridges, finance director

**Marsh Wall**

**Franchises:** BMW 5 BYD 2 Hy 1 Mini 4  
**Key executives:** Wayne Berry, managing director; Deborah Lowles, finance director; John Naylor, non-exec director

**Marshall Motor Group**

**Franchises:** AM 1 Au 12 BMW 5 BYD 6 Cup 3 Ford 2 Ford LCV 2 Hon 8 Hy 7 Jag 8 LR 8 MB 8 Mini 4 Nis 10 Om 3 Seat 5 Ško 15 Sm 1 VW 14 VW LCV 5 Vo 6 Other 6  
**Key executives:** Gary Savage, chief executive; Mark Hemus, finance director; Trevor Fussey and Mark Robinson, joint managing directors

**Mon Motors**

**Franchises:** Au 4 Cup 2 Ford 3 Ford LCV 1 Seat 2 Ško 4 VW 5 VW LCV 1 Vo 1  
**Key executives:** Jeffrey Cleverly, chairman; Gavin Cleverly, managing director; Roger Moore, finance director

**Motus UK (incl. Pentagon Group)**

**Franchises:** BYD 5 Che 2 Cit 1 Cup 2 Ford 6 Ford LCV Dac 2 Fiat 5 Isz 1 Kia 2 Maz 1 Nis 1 Om 1 Peu 4 Ren 2 Seat 2 Vx 10 VW LCV 2 Other 3  
**Key executives:** Tom Carney, managing director, Pentagon; Shak Hussain, marketing director, Pentagon; Rob Truscott, chief executive Motus Group UK; Andrew Welch, chief financial officer

**O**

**Ocean Automotive Holdings**

**Franchises:** Au 2 Vo 1  
**Key executives:** Gail Polkinghorne, managing director; David Kelly, chairman; Annalie Briers, head of people & culture; Sue Batterson, group commercial manager

**P**

**Park's Motor Group**

**Franchises:** Bn 1 BMW 4 Chan 1 Che 1 Dac 6 Ford 5 Ford LCV 4 Hon 4 Jag 4 Kia 3 Lamb 1 LR 5 Lex 2 Lo 1 Maz 2 Mcl 2 MG 1 Mini 4 Nis 3 Om 5 Ren 6 Ško 2 Suz 3 Toy 5 Vo 1 Xp 1 Other 1  
**Key executives:** Douglas Park, chairman & managing director; Alasdair Noble, finance director; William Cumming, aftersales director; Graeme Park, director; Ross Park, director

**Parkway Derby**

**Franchises:** VW 4 VW LCV 2  
**Key executive:** Sean Booth, managing director

**Partridge of Hampshire**

**Franchises:** BMW 1 Mini 1  
**Key executives:** Toby Partridge, managing director

**Peoples**

**Franchises:** BYD 2 Ford 6 Ford LCV 5 Om 3  
**Key executives:** Brian Gilda, chairman & managing director; Stewart Ramsay, finance director; Nicola Gilda, managing director

**Perrys Group**

**Franchises:** Cit 3 Cup 1 Ford 6 Ford LCV 4 Kia 5 Maz 5 MG 3 Om 2 Peu 6 Seat 2 Vaux 12  
**Key executives:** Darren Ardron, managing director; Richard Ingram, chairman; Ken Savage, commercial director; Denise Millard, director; Neil Taylor, finance director

**Peter Cooper Motor Co**

**Franchises:** Jeep 1 Kia 2 Om 1 VW 4 Xp 1  
**Key executives:** Darren Cooper, managing director; Peter Cooper, chairman; Gareth Lovett, group financial director

**Peter Vardy**

**Franchises:** Por 2  
**Key executives:** Peter Vardy, chief executive; Sir Peter Vardy, chairman; Alastair Grier, chief operations officer

**Porsche Retail Group**

**Franchises:** Por 7  
**Key executives:** Adam Flint, managing director; Andrew Coates, head of finance

**PSA Retail UK**

**Franchises:** Abar 7 AR 5 Cit 17 DS 6 Fiat 8 Jeep 2 Leap 9 Peu 24 Vaux 8  
**Key executives:** Richard Garbutt, chief executive; Simon Lawrence, chief financial officer; Bryn Thomas, finance director

**R**

**Renault Retail Group**

**Franchises:** Dac 11 Nis 2 Ren 15 Other 4  
**Key executives:** Frederic Maillard, managing director; Scott Kilbourne, finance director; Rachel Manley, HR director; Elina Karppinen, marketing director

**Richmond Cars**

**Franchises:** Hy 5 Gen 1 MG 4 Ško 3 Suz 2  
**Key executives:** Michael Nobes, chief executive; Sam Nobes, operations director

**Riverside Motors Group**

**Franchises:** BYD 1 Cup 1 Hon 1 Pol 1 Seat 1 Vo 4  
**Key executives:** Mark Denton, managing director; Russell Wright, director

**RRG Group and Norton Way Motors**

**Franchises:** Cit 1 Hon 2 Kia 2 Lex 2 Maz 2 MG 1 Nis 2 Om 2 Peu 3 Ško 2 Toy 11 Others 2  
**Key executives:** Toru Masuyama, chairman Marubeni Auto Investment UK; Arran Bangham, vice chairman RRG Group

**Ryland Automotive**

**Franchises:** Bn 2 Lamb 1 LR 1 Lo 3 Mas 1 Mcl 1 Por 2 RR1 Other 1  
**Key executives:** Henry Whale, chief executive; Peter Whale, chairman

**S****Sandicliffe Motor Group**

**Franchises:** BYD 2 Chan 3 Ford 3 Ford LCV 2 GWM 1 Maz 2 MG 4 Xp 1 Other 4

**Key executives:** Andrew Woodhouse, chairman; Paul Woodhouse, managing director; Nicholas Woodhouse, company secretary; Tom Barton, director

**Sandown Motors**

**Franchises:** MB 7 MB LCV 1 Sm 2

**Key executives:** Gavin McAllister, managing director; Gareth Copling, group financial director

**SG Petch**

**Franchises:** Abar 1 BYD 1 Fiat 1 Hy 3 Isz 1 Jeep 1 Kia 4 Maz 4 Nis 1 Om 1 Peu 1 Seat 2

**Key executives:** Steve Petch, managing director; Samantha Petch, sales & marketing director; Shaun Burke, sales director; Andrew Hodgson, aftersales director; Simon Rees, finance director

**Sinclair Group**

**Franchises:** Au 2 BYD 3 Cup 1 GWM 1 Hy 1 Jag 3 LR 6 MB 4 Seat 1 Ško 1 Sm 1 VW 6 VW LCV 2

**Key executives:** Gerald Sinclair, chairman; Andrew Sinclair, managing director; Jonathan Sinclair, director

**Snows Motor Group**

**Franchises:** AR 1 BMW 1 BYD 6 Cit 2 Cup 3 Fiat 2 Jeep 1 Kia 3

Leap 2 Lex 3 Maz 2 Mini 1 Peu 6 Ren 1 Seat 3 Toy 11 Vx 4 Vo 2

**Key executives:** Stephen Snow, chairman & chief executive; Neil McCue, chief operational officer; Alex Domone, chief operational officer; Shawn Gates, chief financial officer

**St Leonard Motors**

**Franchises:** Cup 1 Dac 2 GWM 1 Lex 1 Ren 2 Seat 2 Toy 5 Vx 1 Other 1

**Key executives:** Mark Phillips, managing director; Gus Wakeford, director; Jason Barlow, director; Will Woods, director

**Startin Group**

**Franchises:** Dac 1 Hon 1 Kia 2 Nis 1 Peu 2 Ren 1 Ško 1 Suz 2 Vaux 1

**Key executives:** Timothy Freeman, managing director; Gerald Freeman, chairman

**Steven Egell**

**Franchises:** Toy 32 Lex 11

**Key executives:** Steven Egell, chief executive; Gary Smith, managing director; David Sherriff, finance director

**Stoneacre Motor Group**

**Franchises:** AM 1 Abar 10 BYD 4 Chan 1 Cit 4 Cup 3 Dac 6 Fiat 13

Fiat LCV 1 Ford 8 Ford LCV 2 Gee 3 Hon 2 Hy 2 Isz 1 Jeep 6 KGM 1 Kia 5 Lex 2 Maz 8 MG 5 Nis 4 Peu 5 Pol 1 Ren 7 Seat 4 Suz 10 Toy 7 Vaux 4 Vo 8

**Key executives:** Richard Teatum, chairman; Shaun Foweather, managing director; Nigel Wood, finance director; Gerry George, aftersales director; Philip Wade, franchise & development director

**Swansway Garages**

**Franchises:** Au 6 BYD 3 Cup 1 Hon 2 LR 1 Peu 1 Seat 2 VW 3 VW LCV 5

**Key executives:** Michael Smyth, chairman; Peter Smyth, director; David Smyth, director; John Smyth, director; Richard Marsland, finance director

**Sytner**

**Franchises:** AM 1 Au 12 Bn 4 BMW 23 Bug 1 Che 3 Fer 5 Gee 5

Jag 2 Lamb 3 LR 10 Mas 2 McL 1 MB 19 Mini 23 Por 8 RR 2 Seat 1 Ško 1 Sm 6 VW 3 VW LCV 2 Vo 5 Other 4

**Key executives:** John Cragg, chief executive; Simon Moorhouse, chief financial officer; Melvin Rogers, HR director; Jeremy Mallett, director

**T****TC Harrison Group**

**Franchises:** Ford 6 Ford LCV 3 Other 6

**Key executives:** Christopher Cornell, chief executive; James Harrison, chairman; William Harrison and Jonathan Harrison, joint deputy chairmen; Tim Simcox, finance director & company secretary

**TG Holdcroft**

**Franchises:** Che 1 Dac 4 GWM 1 Hon 3 Hy 7 Maz 2 MG 3 Nis 3 Om 1

Ren 4 Vo 1 Other 1

**Key executives:** Chris Greenhall, managing director; Martin McCormick, finance director

**Thurlow Nunn**

**Franchises:** Hy 1 Leap 2 MG 1 Peu 2 Vx 8

**Key executives:** Will Tew, managing director; Ashleigh Lewis, chief financial officer; Simon Grylls, sales director

**Toomeys**

**Franchises:** Abar 1 Che 1 Cit 1 Dac 2 DS 1 Fiat 1 Hy 2 Leap 1 MG 2

Nis 2 Om 1 Peu 2 Ren 2 Vx 2 Vx LCV 2

**Key executives:** Michael Toomey, director; Jonathan Brook, director; Paul Plant, director

**TrustFord**

**Franchises:** Ford 24 Ford LCV 23

**Key executives:** Stuart Mustoe, chief executive; John Leeman, operations director; Sharon Ashcroft, HR director; Stuart Cresswell, aftersales director; Paul Rogers, finance director; Julia Greenhough, marketing director

**V****Vantage Motor Group**

**Franchises:** Kia 1 Lex 2 Ško 1 Toy 9

**Key executives:** Phil White, chairman; Andrew Mallory, chief operating officer; Tim Swindin, chief financial officer

**Vertu Motors**

**Franchises:** Au 1 BMW 7 BYD 3 Cit 6 Dac 9 Fer 1 Ford 18 Ford LCV

10 Hon 17 Hy 11 Kia 4 LR 10 Maz 4 MB 5 MG 4 Mini 7 Nis 12 Peu 11 Ren 9 Seat 3 Ško 3 Sm 2 Toy 11 Vaux 16 VW 8 Vo 6 Other 4

**Key executives:** Andy Goss, non-exec chairman; Robert Forrester, chief executive; David Crane, chief operations officer; Karen Anderson, chief financial officer; Liz Cope, chief marketing officer

**Vindis Group**

**Franchises:** Au 5 Cup 1 Seat 1 Ško 2 VW 4 VW LCV 2 Other 1

**Key executives:** Jamie Vindis, managing director; Gary Vindis, chairman; Stephen Fossey, finance director; Peter Toop, commercial director; Simon Bottomley, chief operating officer;

**Vines Group**

**Franchises:** BMW 3 Mini 3 Other 1

**Key executive:** Sean Kelly, managing director

**Vospers**

**Franchises:** Abar 3 AR 1 Cup 1 Dac 2 Fiat 3 Fiat LCV 3 Ford 4 Ford LCV 4

Jeep 1 Maz 4 MG 1 Om 3 Peu 2 Peu LCV 1 Ren 2 Seat 1 Vaux 2 Vaux LCV 1

**Key executives:** Peter Vosper, chairman; Nick Vosper, managing director; Jonathan Tremain, sales director; Neil Tickner, aftersales director; Mark Haslam, contact & communications director

**VT Holdings**

**Franchises:** Abar 1 Dac 1 Fiat 1 GWM 1 Hy 2 Kia 5 Leap 1 Maz 1 Nis 5

Peu 1 Ren 1

**Key executives:** Tim Bagnall, chief executive; Andrew Dunne, head of finance; Mark Pardoe, managing director

**W****Waylands Automotive**

**Franchises:** Hon 2 Kia 2 MG 2 Om 1 Pol 2 Vo 6

**Key executives:** John O'Hanlon, chief executive; Richard Spencer, aftersales director; James Smullen, finance director; Vicky Hart, head of marketing & digital

**William Morgan Group**

**Franchises:** BMW 2 Mini 2 Other 2

**Key executive:** William Le Fevre, managing director

**Williams Motor Company**

**Franchises:** BMW 5 Jag 1 LR 1 Mini 1 Other 1

**Key executives:** Margaret Orton Williams, chair; William Adams, managing director; Michael Sherwin, non-exec director

**WJ King**

**Franchises:** Cup 1 Kia 1 Peu 2 Seat 2 Suz 2 Vaux 8

**Key executive:** William King, managing director

**Worcester Carsales**

**Franchises:** Cit 1 Hy 2 Kia 1 Maz 1 MG 1 Om 1 Peu 1 Suz 3 Vaux 4

**Key executives:** Stuart Grieveson, managing director; Ali Grieveson, director

**WR Davies**

**Franchises:** Cit 2 Dac 1 DS 1 Ford 3 Nis 3 Peu 1 Ren 1 Toy 3

**Key executives:** Jonathan Davies, managing director; Craig Taylor, finance director

**Y****Yeomans**

**Franchises:** Au 1 Cit 4 Cup 2 DS 1 Hon 5 Hy 1 Om 1 Maz 2 Nis 8

Peu 2 Seat 2 Ško 4 Toy 3 Vaux 1 VW 2 VW LCV 2

**Key executives:** James Smith, chairman & managing director; Kevin Newitt, operations director; David Hamilton Brown, director

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