

Cars.co.za



INDUSTRY REPORT 2025

Powered by TransUnion^{tu}

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Foreword



Amasi Mwela

Managing Director, Cars.co.za



Periods of disruption can feel daunting, but history tells us they are also when the strongest businesses emerge. With better understanding, sharper strategies, and stronger partnerships, South Africa's automotive retail sector can seize the opportunities ahead.



It is with great pride that I present the **first-ever Cars.co.za Industry Report**, released in conjunction with DealerCon 2025. Since its founding in 2009, Cars.co.za has committed itself to being the dealer's partner, providing not only the country's leading digital marketplace but also insights that help our industry grow stronger and more resilient. This report represents a milestone in that journey.

Built on Cars.co.za's proprietary market data, tracked back to 2015 for the purpose of DealerCon, and complemented by finance and consumer insights from our partner TransUnion, this report shines a light on the **profound shifts** that have been reshaping South Africa's automotive industry - both in the new and used markets. What becomes clear is that change is not only here; **it is accelerating.**

We see, for example, how **buyer behaviour has evolved**, from the vehicles consumers are choosing, to the ways they finance them. We see how economic pressures, political uncertainty, global industry transformations, and local challenges such as energy instability have shaped the market in real time. And we see how new players, new technologies, and new consumer expectations are redrawing the competitive landscape.

For dealers, these findings are not abstract - they are the reality of daily operations. And yet, they also represent opportunity. **Understanding these trends** is the first step toward being prepared for them. That is the purpose of this report, and indeed, the purpose of DealerCon: to provide clarity in times of change, and to **empower the dealer community to anticipate, adapt, and thrive.**

DealerCon is for the dealers. It is a platform built to decode complexity, provide actionable insight, and facilitate collaboration across the automotive value chain. My hope is that this report will serve as both a mirror, reflecting where we have come from, and a compass, pointing toward where we are going.

Periods of disruption can feel daunting, but history tells us they are also when the strongest businesses emerge. With better understanding, sharper strategies, and stronger partnerships, South Africa's automotive retail sector can **seize the opportunities ahead.**

I invite you to engage deeply with the insights in this report, to bring them into your strategies, and to **join us in shaping the next chapter of automotive retail in South Africa.**

About Cars.co.za

Cars.co.za is South Africa's most loved automotive platform, the trusted destination where buyers and sellers turn for independent information on vehicles, dealers, and every aspect of car buying and selling. Since 2009, we've been committed to quality leads, connecting buyers with over **83,000 carefully curated new and used cars from more than 1,700 trusted dealers nationwide (August 2025).**

On our platform, we don't encourage endless searching, we guide buyers toward confident decisions. With innovative smart tools, consumers can safely and seamlessly navigate their way to the right car.


Our significant reach, with **57.1 million monthly page views, 12.2 million sessions, and 5.4 million unique visitors to our site (August 2025)**, is the result of our commitment to trust and quality. We empower consumers to make informed choices at every step of their car-buying journey, fostering an engaged, educated, and loyal audience.

As South Africa's smartest automotive tech platform, we deliver tailored content and **cutting-edge solutions**, from **direct WhatsApp**

dealer communication and seamless vehicle selling services to comprehensive resources for insurance, finance, and warranties.

Our reputation as a household name is strengthened by our **award-winning motoring journalism and vibrant digital ecosystem**. This includes a **YouTube channel with more than 500,000 subscribers and 171 million views since 2014, plus a highly engaged social community of 794,000 followers on Facebook, 333,000 on TikTok, 277,000 on X, and 110,000 on Instagram.**

This integrated ecosystem ensures that we don't just generate quality leads, we cultivate **South Africa's most informed, confident, and empowered automotive consumers.**

 **YouTube**

Subscribers

500 000

with a

171 Million views

since 2014


**Largest
Motoring
channel
in SA**

 **TikTok**

333 000

Followers



 **X (formerly Twitter)**

277 000

Followers

 **Instagram**

110 000

Followers

 **Facebook**

794 000

Followers

Foreword



Lee Naik

*Regional President & CEO,
TransUnion Africa*



The future of mobility in South Africa will not be shaped by legacy thinking - but by those willing to see differently.



At TransUnion, we often say that data tells the story of our economy long before headlines do. It shows us not only where we've been, but **where we are going - and in the case of South Africa's automotive industry, the story is one of resilience, reinvention, and opportunity.**

What makes this DealerCon Industry Insights Report powerful is not just the numbers on the page. It's the picture they paint of an industry **navigating seismic shifts - shifts in affordability, in consumer behavior, in technology, and in trust.** From the **rise of Chinese brands to the realities of constrained household budgets**, these aren't abstract forces. They are the choices happening every day on showroom floors, on dealer lots, and around family kitchen tables.

Our role at TransUnion is to help decode that complexity. By combining our data, insights and analytics with Cars.co.za's unmatched market intelligence, we are able

to **shine a light on the patterns beneath the noise.** And what we see is clear: while pressure points remain, there are also profound opportunities for those ready to adapt boldly.

The future of mobility in South Africa will not be shaped by legacy thinking, but by those willing to see differently - to use data as a lens, not just a rear-view mirror. **Dealers who lean into insight, who embrace innovation, and who build trust with consumers will be the ones to thrive in this next chapter.**

This report is more than a reflection of the past decade. It is a compass for the journey ahead. My hope is that it empowers you - our partners, our dealers, our industry leaders - to chart a course not only through disruption, but toward a more inclusive, more sustainable, and more prosperous automotive sector for South Africa. Periods of change demand courage. **This is our moment to be bold.**

A Decade of Dramatic Change

- The **most affordable new car today (Suzuki S-Presso)** now costs **almost twice as much as the cheapest new car in 2015 (Chery QQ3)** - and the price increase is above mere inflation.
- Compared with share of stock on Cars.co.za in 2015, **SUVs and Crossovers have grown their presence by more than 100% while sedans have shrunk by more than 60%.**
- In 2015, **25.03% of Double-Cab stock** on Cars.co.za were Automatic, today it is **70.91%, growth of 183.3%.**
- Suzuki has **grown by 31% in the past 2 ½ years alone!**
- In 2015, Chinese vehicles accounted for **0,76% of stock on Cars.co.za, but now the figure is 6.45%, growth of 748.7%!**
- Two things have not changed - **Toyota's Hilux** at the top of the New-Vehicle sales chart, and **VW Polo** at the top of the Used-Car popularity chart.
- **Double-Cab** demand continues to **grow - up 71.3% since 2015.**
- **Double-Cab bakkies** are being considered in combination with almost every other body type on the market, as well as at almost all price points - indicative of desirability.

Seismic Shift

A Decade of Change

Over the past decade, South Africa's automotive market - both new and used - has undergone radical transformation, shaped by a convergence of global industry shifts and local macro-economic pressures.

The COVID-19 pandemic accelerated structural changes, disrupting supply chains, dampening consumer confidence, and reshaping buying behaviour. These challenges were compounded by persistent political uncertainty, sluggish economic growth, and the ongoing Eskom energy crisis, which together eroded household spending power and business confidence.

At the same time, the international automotive industry has been navigating its own upheavals: **the rapid rise of new-energy vehicles, the dramatic entry and expansion of Chinese brands, the growing dominance of crossovers, and the**

mounting struggles of legacy manufacturers to maintain relevance.

Within this context, the South African market reflects a complex interplay between global innovation and local constraints, resulting in **shifting consumer preferences, altered demand dynamics, and a fundamentally redefined competitive landscape.**

In this first section of the Cars.co.za Report we will take a closer look at **trends that have emerged during this tumultuous period, and also identify the aspects that have remained resilient to these shifts, and consistent.**



New Vehicle Market

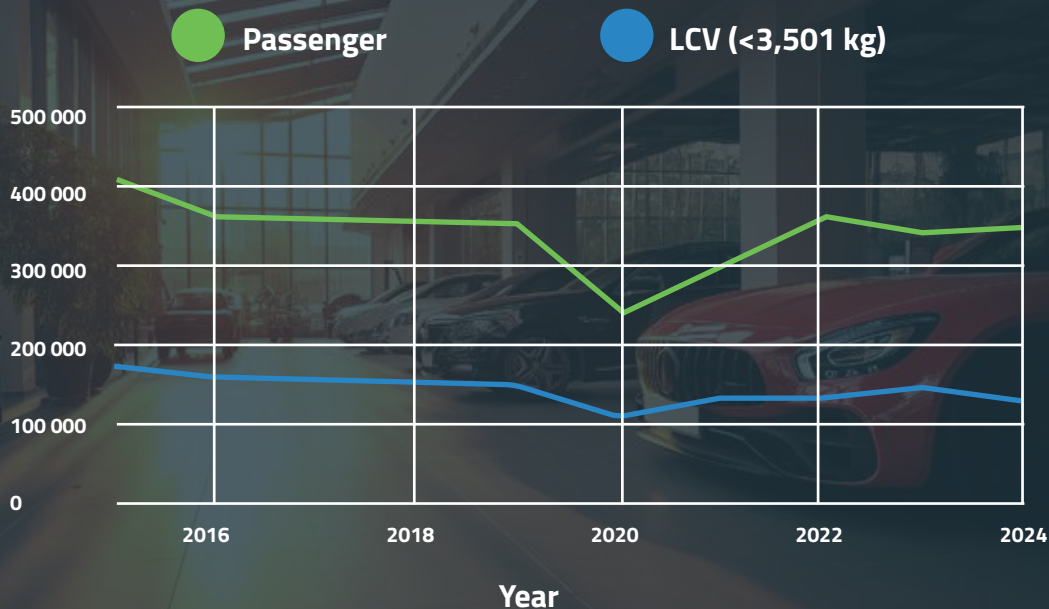
South Africa's new vehicle market has experienced notable fluctuations since 2015, with annual sales of passenger cars and light commercial vehicles (LCVs) generally trending downward from pre-COVID highs, before showing signs of stabilisation in recent years.

Passenger sales declined from over 412,000 units in 2015 to a low of just 246,500 in 2020, reflecting both the

domestic economic slowdown and the disruptive impact of the pandemic. While volumes have partially recovered, stabilising at around **350,000 units since 2022**, the market has not regained its mid-2010s strength.

LCV sales followed a similar trajectory, **dipping sharply in 2020 and then recovering unevenly**.

Passenger and LCV (<3,501kg)



These shifts align closely with South Africa's macro-economic environment: inflation climbed above target in 2016 and again in 2022-23, eroding consumer purchasing power, while the South African Reserve Bank's repo rate rose from 7% in 2015 to 8.25% by 2023, **pushing up borrowing costs and vehicle finance repayments**.

GDP growth has been weak and volatile over the decade, compounding affordability challenges. Against this backdrop of fluctuating inflation, elevated interest rates, and muted growth, the **automotive market has remained under**

pressure, with consumers delaying purchases or trading down to more affordable options.

One could describe the local market as quite resilient, given all the challenges faced in the past decade, but the **reality is that the numbers have not shown signs of much growth**, and without deeper analysis, look relatively "calm".

However, within the broad parameters of these headline **numbers hides a story of revolution**. Let's compare the Top 15 best-selling new cars of 2015 with those of today.

SA's 15 Best-Selling New Vehicles

2015 (Full Year) vs 2025 (H1) - NAAMSA

2015 (Full Year)

01	Toyota Hilux 35 684 units		06	Chevrolet Utility 16 341 units		11	Toyota Quantum 11 894 units	
02	Ford Ranger 33 916 units		07	Isuzu KB 16 318 units		12	Hyundai i20 11 700 units	
03	VW Polo Vivo 24 544 units		08	Toyota Etios 16 270 units		13	Ford EcoSport 11 626 units	
04	VW Polo Hatch 22 758 units		09	Mercedes C-Class 12 562 units		14	Toyota Corolla 11 567 units	
05	Nissan NP200 18 124 units		10	Toyota Corolla Quest 11 975 units		15	Ford Fiesta 10 462 units	

2025 (First Half)

01	Toyota Hilux 16 526 units		06	Toyota Corolla Cross 9 576 units		11	GWM Haval Jolion 6 385 units	
02	Ford Ranger 12 398 units		07	Hyundai Grand i10* 7 836 units		12	Toyota Starlet Cross 5 195 units	
03	Suzuki Swift 11 948 units		08	Toyota Starlet 7 330 units		13	Mahindra Pik Up 5 079 units	
04	VW Polo Vivo 11 310 units		09	Chery Tiggo 4 Pro** 7 297 units		14	Kia Sonet* 4 930 units	
05	Isuzu D-Max 9 846 units		10	Suzuki Fronx 6 463 units		15	VW Polo Hatch 4 809 units	

*excluding LCV sales (of converted panel vans)

**including Tiggo Cross sales from June 2025

The consistent players in the New vehicle market have been **Toyota's Hilux, the Ford Ranger, VW Polo Vivo and Isuzu D-Max** (previously KB). This immediately speaks to two major trends; a shift to double-cab bakkies and a focus on affordability at the lower end.

The pricier, "traditional" cars (hatchback/sedan) - (VW Polo, Mercedes-Benz C-Class) have nearly disappeared from the top of the new vehicle sales charts, and perhaps the most glaring gap left is by the discontinuation of the half-ton pickups (two entrants in 2015 vs none currently).

Toyota has very successfully pivoted its previous top sellers into new models (Corolla vs Corolla Cross, Etios vs Starlet), but it is no longer active in the Corolla Quest segment, but that volume has effectively been replaced by the Starlet Cross. Ten years ago there were no Suzukis in

the Top 15 (nevermind in the Top 3!), but now there are two. "New" brands **Mahindra, Chery and GWM/Haval** now feature strongly.

As the table on the next page shows, the **most affordable new car today (Suzuki S-Presso) costs almost twice as much as the cheapest new car in 2015 (Chery QQ3)**. When CPI is applied to the Chery's 2015 price, a **2025 equivalent would be roughly R150 000**. This illustrates that the most affordable new car on the market has indeed become more expensive in real terms. It is also worth noting that a minimum **net salary of R21 900 per month** would be needed to finance this car (10% deposit, 72 months, 13.75% interest rate) if 15% of that net salary is put aside for a car purchase. The **average net salary** in South Africa currently is around **R18 000**.

Most Affordable New Cars Since 2015

Cheapest Car on Sale

R93,900.00	Chery QQ3 0.8TE 2015	
R92,990.00	Geely GC2 2016	
R99,995.00	Chery QQ3 0.8TE 2017	
R127,900.00	Renault Kwid Expression 2018	
R134,900.00	Renault Kwid Expression 2019	
R139,900.00	Suzuki S-Presso 1.0 2020	

R145,900.00	Suzuki S-Presso 1.0 2021	
R152,900.00	Suzuki S-Presso 1.0 2022	
R162,900.00	Suzuki S-Presso 1.0 2023	
R174,900.00	Suzuki S-Presso 1.0 2024	
R178,900.00	Suzuki S-Presso 1.0 2025	





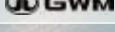























In the COVID period, and immediately following it, we notice fairly significant acceleration of certain trends that will be highlighted in the rest of this report, but when it comes to the new vehicle market, the **impact of those changes are most noticeable from around 2023** (see table on next page for brand market share movements).

The startling swing in some brands' market share has occurred in less than three years. This not only has a significant **impact on the composition of the New Vehicle market and OEM dynamics locally, but also on the Used market down the line.**



New Vehicle Sales: Brand Market Share Movements

(Past 3 Years)

New Vehicle Sales by Manufacturer		2023	2024	2025 (first half)
 TOYOTA	TOYOTA	27.87%	25.78%	25.02%
 SUZUKI	SUZUKI AUTO	9.92%	12.30%	13.02%
 VOLKSWAGEN GROUP SA	VOLKSWAGEN GROUP SA	13.40%	13.58%	11.10%
 HYUNDAI	HYUNDAI AUTOMOTIVE SA	6.35%	6.30%	6.74%
 FORD	FORD MOTOR COMPANY	6.09%	6.71%	6.23%
 GWM	GWM SA	3.99%	3.91%	4.56%
 CHERY	CHERY AUTO SA	3.27%	4.21%	4.43%
 ISUZU	ISUZU MOTORS SA	3.93%	4.11%	4.05%
 MAHINDRA	MAHINDRA	2.32%	2.66%	3.53%
 KIA	KIA SOUTH AFRICA	3.83%	3.05%	3.24%
 RENAULT	RENAULT	4.35%	3.27%	3.04%
 NISSAN	NISSAN	5.85%	4.60%	2.89%
 BMW GROUP SA	BMW GROUP SA	2.74%	2.58%	2.81%
 OMODA	OMODA AND JAECCO SA	0.00%	0.70%	1.98%
 JETOUR	JETOUR SA	0.00%	0.00%	1.29%
 STELLANTIS	STELLANTIS	0.94%	1.23%	1.23%
 MERCEDES-BENZ	MERCEDES-BENZ	1.43%	1.14%	0.99%
 JLR	JAGUAR LAND ROVER	0.66%	0.58%	0.57%
 MAZDA	MAZDA SA	0.73%	0.63%	0.50%
 BAIC	BAIC	0.00%	0.42%	0.50%
 JAC	JAC MOTORS SA	0.21%	0.34%	0.45%
 HONDA	HONDA	0.68%	0.60%	0.41%
 MITSUBISHI	MITSUBISHI MOTORS SA	0.63%	0.46%	0.38%
 PORSCHE	PORSCHE	0.27%	0.26%	0.22%
 VOLVO	VOLVO CARS	0.26%	0.29%	0.17%
 PROTON SA	PROTON SA	0.13%	0.18%	0.12%
 FOTON	FOTON SA	0.00%	0.00%	0.48%
 SUBARU	SUBARU	0.13%	0.11%	0.08%
 FERRARI	SCUDERIA SA	0.01%	0.01%	0.00%

Most of the significant shifts in the South African new vehicle market - at a brand level - started taking place since the introduction of **Chery in 2021 opened the floodgates to more Chinese entrants**. In the space of two and a half years (2025 column shows new vehicle market share for the first half of 2025), traditional market leaders **Toyota and Volkswagen have shed 10% and 17% share respectively**.

In fact, most of the so-called legacy brands have lost market share, with **Nissan shedding a massive 51%** in the shown period, **Renault 40%** and **Mercedes-Benz 31%**. The only "traditional" brands that have grown share recently (and amidst the influx of the Chinese brands) are **Hyundai (6%), Ford (2%), Isuzu (3%) and BMW (3%)**.

The **Stellantis group's figure is somewhat misleading** as it has already **started flatlining during 2025**, and the 2024 number was impacted significantly by a number of **affordable vehicle introductions, significantly boosting Stellantis' total volume from a small base**.

Of the non-Chinese brands, **Suzuki and Mahindra have emerged as the strongest performers in recent years, growing market share from 2023 by 31% and 52% respectively**. **GWM/Haval's re-entry in 2017 immediately saw it gain traction**, and it has continued to grow steadily since then, **with a decent 14% market share growth in the past 2 ½ years**. **Chery has climbed by 35%** in the same period. **Jaecoo, Omoda and Jetour weren't even in the market in 2023 but already have achieved similar or bigger market share than some established brands, such as Mercedes-Benz and Mazda**.

If the approach of successful recent brand introductions such as **Chery, Omoda/Jaecoo and Jetour** are examined, there are a number of other new brands that could potentially also make a big impact, further eroding legacy brand market share. **Brands to look out for include BYD, MG and now also India's Tata**.

Used Vehicle Market

The table below shows the **NATIS used vehicle registrations for the passenger car and LDV (light-delivery vehicle)** classes, per year, from 2016 to 2024. In the last column, some adjustments have been made to the numbers to account for re-registrations (*without sale*) and dealer-to-dealer trades. Also note further adjustments for the **% of bakkies under LDVs to get to a 'purer' view of consumer sales**.

While 2024 represented one of the more successful years in some time, the general trend is quite flat, hovering around the 1 million vehicle mark. As is the case with the New vehicle market, the surface numbers **hide dramatic changes that only deeper analysis can reveal**. Though access to detailed brand/model sales are lacking in the Used vehicle space, finance data by TransUnion and Vehicle enquiry trends on Cars.co.za **shed some light on the hidden turmoil**.

Year	Total	Motor Cars	LDVS	Est. Consumer Sales **
2016	1,396,645	1,081,449	315,196	977,217
2017	1,400,859	1,089,014	311,845	980,552
2018	1,416,400	1,104,327	312,073	991,719
2019	1,437,896	1,117,256	320,640	1,006,428
2020	1,175,005	907,655	267,350	821,941
2021	1,408,469	1,086,039	322,430	985,078
2022	1,404,458	1,084,842	319,616	982,445
2023	1,411,607	1,087,295	324,312	987,169
2024	1,483,724	1,143,247	340,477	1,037,637



Leads on Cars.co.za

2015 vs 2020 (Covid) vs 2025 (First-Half)

Rank	2015		2020		2025	
	Make Model	Lead Share	Make Model	Lead Share	Make Model	Lead Share
1	 Volkswagen Polo	8.4%	 Volkswagen Polo	6.9%	 Volkswagen Polo	6.6%
2	 BMW 3 Series	4.0%	 Toyota Hilux	5.0%	 Toyota Hilux	5.2%
3	 Volkswagen Golf	3.9%	 BMW 3 Series	3.9%	 Volkswagen Polo Vivo	4.3%
4	 Volkswagen Polo Vivo	3.7%	 Ford Ranger	3.6%	 Ford Ranger	4.2%
5	 Toyota Hilux	2.9%	 Mercedes-Benz C-Class	3.4%	 Mercedes-Benz C-Class	2.9%
6	 Mercedes-Benz C-Class	2.7%	 Volkswagen Golf	3.3%	 BMW 3 Series	2.4%
7	 Audi A4	2.7%	 Volkswagen Polo Vivo	3.3%	 Volkswagen Golf	2.2%
8	 Audi A3	2.4%	 Toyota Fortuner	2.1%	 Toyota Quantum	1.7%
9	 Isuzu KB	2.1%	 Ford Fiesta	1.7%	 Toyota Fortuner	1.7%
10	 BMW 1 Series	2.0%	 Toyota Corolla	1.7%	 Hyundai i20	1.5%
11	Ford Ranger	2.0%	Isuzu KB	1.6%	Nissan NP200	1.5%
12	Ford Fiesta	2.0%	BMW 1 Series	1.5%	Toyota Corolla	1.5%
13	Toyota Corolla	1.9%	Audi A4	1.4%	Toyota Avanza	1.3%
14	Opel Corsa	1.8%	Audi A3	1.4%	Suzuki Swift	1.2%
15	Toyota Fortuner	1.4%	Chevrolet Utility	1.2%	Isuzu KB	1.2%
16	Toyota Yaris	1.3%	Nissan NP200	1.2%	Ford Fiesta	1.1%
17	Chevrolet Spark	1.3%	Hyundai i20	1.2%	Isuzu D-Max	1.1%
18	Ford Focus	1.1%	Ford EcoSport	1.0%	Kia Rio	1.0%
19	Volkswagen Citi	1.0%	Kia Rio	1.0%	Suzuki Ertiga	1.0%
20	Ford Figo	1.0%	Mercedes-Benz A-Class	0.9%	Kia Picanto	0.9%
21	Volkswagen Jetta	1.0%	Ford Figo	0.9%	BMW 1 Series	0.9%
22	Chevrolet Cruze	0.9%	Toyota Yaris	0.8%	Renault Kwid	0.9%
23	Chevrolet Utility	0.9%	Toyota Avanza	0.8%	Hyundai Grand i10	0.9%
24	Opel Corsa Utility	0.9%	Ford Focus	0.8%	Toyota Starlet	0.8%
25	Volkswagen Amarok	0.8%	Volkswagen Amarok	0.8%	Ford EcoSport	0.8%

While the used-vehicle leads table looks, at first glance, remarkably similar today (*compared with 2015*) there are a few movements to note. Ten years ago, Chevrolet still had three models in the Top 25, and Opel two. Today, these two brands no longer feature. Instead Suzuki, Hyundai, Kia and Renault now make the list, all with affordable vehicles.

The first Chinese model on the list (2025), is the **Haval Jolion in 52nd position with 0.4% share of leads** on Cars.co.za 2025 YTD. This just illustrates how long it can take for the Used car market to accurately reflect the New car space, and also how competitive it has become (note how the VW Polo's gap to 2nd has shrunk). **Toyota Avanza and Suzuki Ertiga** demand is also reflected in other segments of this report. Note that effectively **Isuzu KB and D-Max is one model** (though recorded separately).

In very general terms, it is worth noting that the only "pricey" vehicles (in the Top 25) that **have maintained or grown lead share from 2020 to 2025 are the Toyota Hilux and Ford Ranger**, reflecting the **general shift towards Double-Cabs as family/leisure/luxury vehicles**. As for the rest, there is a **clear shift towards demand for more affordable vehicles**, with lead share on **BMW 1 & 3 Series, Mercedes-Benz C-Class and VW Golf all in decline**.

Body Type Trends

As is reflected by global trends, the rise of the crossover body type has been pronounced in South Africa in the past decade, and in fact the **Chinese brands have been wise to focus their efforts on this segment**, particularly when it comes to **compact and mid-size vehicles** of this nature.

As the distinctions between **Crossovers and SUVs** have become increasingly difficult to define, we have combined these for the purpose of this report. It is our view that consumers generally view them as the same thing.

Stock on Cars.co.za by Body Type

Focus Year	Cabriolet	Coupe	Double Cab Bakkie	Dropside	Extended Cab Bakkie	Hatchback	MPV/Bus	Panel Van	Sedan	Single Cab Bakkie	Station Wagon	SUV/Crossover
2015	1.62%	2.88%	5.57%	0.25%	0.53%	36.49%	4.06%	0.75%	22.34%	6.42%	0.50%	18.58%
2016	1.33%	2.68%	7.14%	0.25%	1.02%	36.85%	3.92%	0.81%	20.09%	6.76%	0.43%	18.72%
2017	1.25%	2.60%	6.48%	0.27%	0.71%	36.36%	4.09%	0.76%	20.08%	6.78%	0.37%	20.26%
2018	1.25%	2.56%	7.14%	0.31%	0.96%	34.89%	3.83%	0.80%	18.62%	6.83%	0.38%	22.45%
2019	1.18%	2.54%	8.02%	0.29%	1.19%	33.21%	3.82%	0.86%	15.84%	6.44%	0.31%	26.32%
2020	1.14%	2.63%	8.21%	0.27%	1.12%	33.69%	4.23%	0.86%	15.87%	6.37%	0.27%	25.33%
2021	1.13%	2.47%	8.22%	0.29%	1.16%	33.52%	4.03%	0.83%	16.28%	6.40%	0.32%	25.35%
2022	0.97%	2.24%	10.22%	0.30%	1.47%	29.54%	3.63%	0.73%	13.23%	6.55%	0.29%	30.82%
2023	0.76%	1.90%	11.05%	0.26%	1.36%	26.52%	4.12%	0.91%	11.46%	6.03%	0.31%	35.32%
2024	0.67%	1.76%	10.19%	0.28%	1.36%	27.13%	4.03%	0.96%	10.19%	6.16%	0.23%	37.02%
2025	0.59%	1.59%	11.01%	0.34%	1.55%	25.88%	3.66%	1.01%	8.86%	6.13%	0.27%	39.10%



The table on the previous page shows the change in **stock levels on Cars.co.za since 2015, according to body type**. The most significant drops in share of stock come from the **Sedan and Hatchback segments, with almost all of their losses having been the SUV/Crossover and Double-Cab segments' gains**. Note the slight decline in MPV/Bus stock share, and compare with Leads (below).

When it comes to the Leads submitted (*Demand*) trend on Cars.co.za, the **decline in the fortunes of the Sedan body shape is not as pronounced**, and neither is the **dramatic rise of the SUV/Crossover**. Hatchbacks have taken a big knock however. Interestingly, **Leads for MPV/Bus are up significantly (now bigger than Single-Cabs)**, but stock is down.

Leads on Cars.co.za by Body Type

Focus Year	Cabriolet	Coupe	Double Cab Bakkie	Dropside	Extended Cab Bakkie	Hatchback	MPV/Bus	Panel Van	Sedan	Single Cab Bakkie	Station Wagon	SUV/Crossover
2015	1.09%	2.25%	5.99%	0.25%	0.72%	39.84%	4.23%	0.94%	21.50%	6.64%	0.36%	16.21%
2016	1.37%	2.54%	7.22%	0.24%	0.81%	36.46%	4.39%	0.97%	20.55%	6.13%	0.44%	18.87%
2017	1.40%	2.95%	7.18%	0.19%	0.81%	34.80%	5.12%	0.84%	20.10%	6.64%	0.44%	19.53%
2018	1.35%	2.90%	7.03%	0.24%	0.84%	35.93%	4.25%	0.86%	21.17%	6.82%	0.53%	18.06%
2019	1.37%	2.98%	7.35%	0.26%	0.96%	34.47%	4.46%	0.90%	20.46%	6.48%	0.44%	19.88%
2020	1.35%	3.06%	8.39%	0.34%	1.25%	31.89%	4.37%	0.90%	19.34%	8.01%	0.45%	20.65%
2021	1.27%	2.84%	8.91%	0.29%	1.43%	30.99%	4.88%	0.92%	18.61%	7.62%	0.38%	21.87%
2022	1.16%	2.37%	8.83%	0.31%	1.34%	31.52%	5.36%	0.93%	17.50%	7.45%	0.33%	22.90%
2023	0.98%	2.19%	9.55%	0.26%	1.27%	31.21%	5.73%	0.83%	16.02%	6.96%	0.28%	24.72%
2024	0.98%	2.20%	9.41%	0.28%	1.29%	31.20%	7.53%	0.91%	15.82%	6.77%	0.20%	23.39%
2025	0.85%	2.02%	10.26%	0.30%	1.41%	30.51%	8.01%	1.04%	14.33%	7.35%	0.21%	23.70%



Drill-Down by Body Type

Most In-Demand Vehicles on Cars.co.za (Used)



SUV/Crossover

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Toyota Fortuner 3.0 D-4D	1.0%	Toyota Fortuner 3.0 D-4D	0.9%	Toyota Fortuner 2.4 GD-6	0.6%
2	Hyundai ix35 2.0	0.6%	Hyundai ix35 2.0	0.5%	Toyota Fortuner 2.8 GD-6	0.5%
3	Chevrolet Captiva 2.4	0.4%	Toyota RAV4 2.0	0.5%	Toyota Fortuner 3.0 D-4D	0.5%
4	Volkswagen Tiguan 1.4 TSI	0.4%	Toyota Fortuner 2.4 GD-6	0.5%	Toyota Urban Cruiser 1.5	0.5%
5	Jeep Compass 2.0	0.4%	Toyota Fortuner 2.8 GD-6	0.4%	Mazda CX-5 2.0	0.4%
6	Toyota RAV4 2.0	0.3%	Ford EcoSport 1.5	0.4%	VW Tiguan 1.4 TSI	0.4%
7	Kia Sportage 2.0	0.3%	Volkswagen Tiguan 1.4 TSI	0.4%	VW T-Cross 1.0 TSI	0.4%
8	Land Rover Discovery 4 3.0 TDV6	0.3%	Hyundai Tucson 2.0	0.4%	Toyota RAV4 2.0	0.4%
9	Volkswagen Tiguan 2.0 TDI	0.3%	Mazda CX-3 2.0	0.3%	Nissan Magnite Acenta	0.4%
10	Nissan Qashqai 1.6	0.2%	Land Rover Discovery 4 3.0 TDV6	0.3%	Hyundai Tucson 2.0	0.3%
11	Toyota Fortuner 2.5 D-4D	0.2%	Ford EcoSport 1.0	0.3%	Ford EcoSport 1.0	0.3%
12	Toyota Land Cruiser Prado 3.0 D	0.2%	Ford EcoSport 1.5 TDCi	0.3%	BMW X3 xDrive20d	0.3%
13	Nissan Juke 1.6	0.2%	Mazda CX-5 2.0	0.3%	Ford EcoSport 1.5	0.3%
14	Audi Q5 2.0 TFSI	0.2%	BMW X5 xDrive30d	0.3%	BMW X5 xDrive30d	0.3%
15	BMW X3 xDrive20d	0.2%	Ford Everest XLT	0.2%	Mazda CX-3 2.0	0.3%
16	Ford EcoSport 1.5	0.2%	BMW X3 xDrive20d	0.2%	Chery Tiggo 4 Pro 1.5	0.2%
17	Audi Q5 2.0 TDI	0.2%	Volkswagen Tiguan 2.0 TDI	0.2%	Suzuki Jimny 1.5	0.2%
18	Toyota Land Cruiser Prado 4.0 V6	0.2%	Kia Sportage 2.0	0.2%	Renault Kiger 1.0	0.2%
19	Chevrolet Trailblazer 2.8	0.2%	Nissan X-Trail 2.5	0.2%	Hyundai ix35 2.0	0.2%
20	Dodge Journey 3.6 V6	0.2%	Renault Duster 1.5 dCi	0.2%	Ford Everest XLT	0.2%

With the **top 4 positions on this table**, Toyota appears to have this important segment wrapped up, but currently the **Fortuner is not growing** in terms of lead share on Cars.co.za. It appears to have stabilized. **Mazda's CX-5 remains popular** in the used market, and **lower down the**

list the appearance of Chery Tiggo 4 Pro and Suzuki Jimny for the first time is noted, as well as the fact that **affordable entrants from Nissan (Magnite) and its sibling (Renault Kiger) are in demand.**



Double Cab Bakkie

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Toyota Hilux 3.0 D-4D	0.8%	Ford Ranger XL	0.7%	Ford Ranger Wildtrak	1.0%
2	Volkswagen Amarok 2.0 BiTDI	0.5%	Ford Ranger XLT	0.7%	Ford Ranger XLT	0.9%
3	Isuzu KB 300 D-Teq	0.5%	Toyota Hilux 2.8 GD-6	0.7%	Toyota Hilux 2.4 GD-6	0.8%
4	Ford Ranger XL	0.4%	Toyota Hilux 3.0 D-4D	0.6%	Ford Ranger XL	0.8%
5	Isuzu KB 250 D-Teq	0.3%	Ford Ranger Wildtrak	0.5%	Toyota Hilux 2.8 GD-6	0.6%
6	Ford Ranger XLT	0.3%	Toyota Hilux 2.4 GD-6	0.5%	Toyota Hilux 2.8 GD-6 Legend	0.4%
7	Nissan Navara 2.5 dCi	0.2%	Volkswagen Amarok 2.0 BiTDI	0.4%	Volkswagen Amarok 2.0 BiTDI	0.4%
8	Toyota Hilux 2.7	0.2%	Isuzu KB 250 D-Teq	0.3%	Toyota Hilux 3.0 D-4D	0.3%
9	Toyota Hilux 2.5 D-4D	0.1%	Isuzu KB 300 D-Teq	0.3%	GWM P-Series 2.0 TD	0.3%
10	Isuzu KB 300 TDi	0.1%	Nissan Navara 2.5 dCi	0.2%	Isuzu KB 300 D-Teq	0.3%
11	Ford Ranger XLS	0.1%	Toyota Hilux 3.0 D-4D Legend	0.2%	Isuzu KB 250 D-Teq	0.3%
12	Ford Ranger Wildtrak	0.1%	Toyota Hilux 2.7	0.2%	Ford Ranger Raptor	0.2%
13	Volkswagen Amarok 2.0 TDI	0.1%	Ford Ranger 2.2 TDCi	0.2%	Isuzu D-Max X-Rider	0.2%
14	Mazda BT-50 3.0 CRDi	0.1%	Ford Ranger XLS	0.2%	Ford Ranger XLS	0.2%
15	Ford Ranger 3.0 TDCi	0.1%	Toyota Hilux 2.5 D-4D	0.2%	Isuzu D-Max 250 HO	0.2%
16	Ford Ranger 2.5D	0.1%	Nissan NP300 2.5 TDi	0.1%	Volkswagen Amarok 3.0 TDI	0.2%
17	Toyota Hilux 3.0 D	0.1%	Volkswagen Amarok 3.0 TDI	0.1%	Isuzu D-Max 1.9	0.2%
18	GWM Steed 5 2.5 TCI	0.1%	Nissan Navara 2.3 D	0.1%	Nissan Navara 2.3 D	0.1%
19	Nissan Hardbody 2.4	0.1%	Volkswagen Amarok 2.0 TDI	0.1%	Nissan NP300 2.5 TDi	0.1%
20	Mazda B-Series B2500	0.1%	Isuzu KB 300 TDi	0.1%	Toyota Hilux 2.5 D-4D	0.1%

In this sizable segment the **Ford Ranger has solidified its lead** (reminder, this for used stock listed on Cars.co.za), being represented by a variety of variants in the Top 20. The **GWM P Series is a notable climber, as is the pricey Ranger Raptor**. In terms of overall performance, this segment has nearly doubled in terms of share of leads

submitted, compared with 2015, and is still growing in share. It is also worth noting that **South African consumers appear to prefer higher-specification Double-Cabs**, another indication that these are **today's preferred luxury / status symbols**.



Hatchbacks

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Volkswagen Polo 1.4	2.6%	Volkswagen Polo Vivo 1.4	2.0%	Volkswagen Polo Vivo 1.4	2.9%
2	Volkswagen Polo Vivo 1.4	2.6%	Volkswagen Golf GTI	1.5%	Volkswagen Polo 1.0 TSI	2.4%
3	Volkswagen Polo 1.2 TSI	1.6%	Volkswagen Polo 1.0 TSI	1.4%	Suzuki Swift 1.2	1.3%
4	Volkswagen Golf GTI	1.3%	Volkswagen Polo 1.2 TSI	1.2%	Volkswagen Polo 1.2 TSI	1.2%
5	Volkswagen Polo 1.6	1.3%	Volkswagen Polo 1.6	1.0%	Volkswagen Golf GTI	1.1%
6	Ford Fiesta 1.4	1.2%	Volkswagen Polo GTI	0.8%	Volkswagen Polo GTI	0.9%
7	Volkswagen Golf 1.4 TSI	1.1%	Hyundai i20 1.4	0.7%	Hyundai i20 1.4	0.7%
8	Opel Corsa 1.4	1.1%	Volkswagen Polo 1.4	0.7%	Hyundai i20 1.2	0.6%
9	Ford Figo 1.4	0.9%	Volkswagen Golf 1.4 TSI	0.6%	Kia Picanto 1.0	0.6%
10	BMW 1 Series 118i	0.7%	Ford Fiesta 1.4	0.6%	Toyota Starlet 1.5	0.6%
11	Chevrolet Spark L	0.6%	Ford Fiesta 1.0	0.5%	Hyundai Grand i10 1.0	0.5%
12	Volkswagen Polo GTI	0.6%	BMW 1 Series 118i	0.5%	Ford Fiesta 1.0	0.5%
13	Chevrolet Spark LS	0.5%	Ford Figo 1.4	0.5%	Renault Kwid Dynamique	0.5%
14	BMW 1 Series 116i	0.5%	Volkswagen Golf R	0.4%	Renault Triber 1.0	0.5%
15	Toyota Yaris T1	0.5%	Renault Clio 0.9 T	0.4%	Volkswagen Polo Vivo 1.6	0.4%
16	Hyundai i20 1.4	0.4%	Hyundai i20 1.2	0.4%	BMW 1 Series 118i	0.4%
17	Volkswagen Golf 1.6	0.4%	Kia Picanto 1.0	0.4%	Volkswagen Golf R	0.3%
18	Audi A3 1.8 TFSI	0.4%	Kia Rio 1.4	0.3%	Ford Figo 1.4	0.3%
19	Volkswagen Citi Chico	0.4%	Mercedes-Benz A-Class A200	0.3%	Kia Rio 1.4 Tec	0.3%
20	Kia Picanto 1.1	0.4%	Kia Rio 1.4 Tec	0.3%	Volkswagen Golf 1.4 TSI	0.3%

The decline in lead share of the Hatchback segment is quite pronounced when comparing the figure in 2015 (39.84%) with the current lead share of 30.51%. However, it remains the largest lead share segment on Cars.co.za by some margin. In the space of five years the Suzuki Swift has shot up into third place from outside of the Top 20. The persistent desirability of Volkswagen's pricey GTI variants (even Golf R) of the Polo and Golf is noted.

The decision by some brands to classify their vehicles differently to where they traditionally would fit has an impact that should be noted. The Renault Triber, for example, appears on this table but in reality is a compact MPV. Similarly, the Suzuki S-Presso, South Africa's cheapest car, is classified as a crossover (logically it should be a hatchback).



MPVs/Minibus

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Toyota Avanza 1.5	0.3%	Toyota Avanza 1.5	0.6%	Toyota Quantum 2.5	1.1%
2	Volkswagen Kombi 2.0 TDI	0.3%	Toyota Quantum 2.5	0.3%	Suzuki Ertiga 1.5	1.1%
3	Toyota Quantum 2.7	0.3%	Hyundai H-1 2.5 CRDi	0.3%	Toyota Avanza 1.5	1.1%
4	Toyota Verso 1.6	0.1%	Volkswagen Kombi 2.0 TDI	0.3%	Toyota Quantum 2.7	0.4%
5	Hyundai H-1 2.5 CRDi	0.1%	Toyota Quantum 2.7	0.2%	Hyundai H-1 2.5 CRDi	0.4%
6	Toyota Verso 1.8	0.1%	Toyota Avanza 1.3	0.1%	Toyota Rumion SX	0.4%
7	Toyota Quantum 2.5	0.1%	Hyundai H-1 2.4	0.1%	Volkswagen Kombi 2.0 TDI	0.2%
8	Mercedes-Benz B-Class B200	0.1%	Mercedes-Benz V-Class V250d	0.1%	Mercedes-Benz V-Class V250d	0.1%
9	Volkswagen Kombi 1.9 TDI	0.1%	Toyota Rush 1.5	0.1%	Mercedes-Benz Vito 116 CDI	0.1%
10	Mercedes-Benz Vito 115 CDI	0.1%	Volkswagen Caravelle 2.0 BiTDI	0.1%	Nissan NV350 Impendulo	0.1%
11	Chevrolet Orlando 1.8	0.1%	Mercedes-Benz B-Class B200	0.1%	Volkswagen Caravelle 2.0 BiTDI	0.1%
12	Mazda 5 2.0	0.1%	Nissan NV350 Impendulo	0.1%	Toyota Rumion S	0.1%
13	Volkswagen Touran 2.0 TDI	0.1%	Volkswagen Caddy Maxi	0.1%	Toyota Avanza 1.3	0.1%
14	Toyota Avanza 1.3	0.1%	Toyota Verso 1.6	0.1%	Volkswagen Caddy Maxi	0.1%
15	Hyundai H-1 2.4	0.1%	Mercedes-Benz B-Class B180	0.1%	Toyota Rush 1.5	0.1%
16	Volkswagen Caravelle 2.5 TDI	0.1%	Mercedes-Benz A-Class A180 CDI	0.1%	Hyundai H-1 Multicab	0.1%
17	Mercedes-Benz A-Class A170	0.1%	Mercedes-Benz Vito 116 CDI	0.1%	Suzuki Ertiga 1.4	0.1%
18	Mercedes-Benz A-Class A160	0.1%	Mercedes-Benz B-Class B200 CDI	0.1%	Toyota Rumion Auto	0.1%
19	Nissan Livina 1.6	0.1%	Datsun Go+ 1.2	0.1%	Toyota Quantum 2.8 14 Seat	0.1%
20	Mercedes-Benz A-Class A180 CDI	0.1%	Mercedes-Benz Viano 3.0 CDI	0.1%	Volkswagen Caddy 1.6	0.1%

The growing used MPV/Minibus segment (by Leads submitted on Cars.co.za) is, as to be expected, **dominated by the Toyota Quantum**. When it comes to more affordable seven-seaters, desired by ride-hailing operators, the ageing **Toyota Avanza still garners a lot of leads** and is actually still showing growing demand (at a lower price level).

Suzuki's fast-growing Ertiga matches the Quantum on leads. When it comes to the **mid-size MPVs, VW's Caddy is the only vehicle to receive substantial demand**. But when the focus moves to the **larger vehicles**, there are several big players. **Hyundai's H-1 has remained in demand**, but at the **pricier end** the desirability of the **Mercedes V-Class and Vito is obvious**.



Sedan

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	BMW 3 Series 320i	1.9%	BMW 3 Series 320i	1.6%	BMW 3 Series 320i	0.9%
2	Audi A4 1.8 T	1.5%	Mercedes-Benz C-Class C180	1.0%	Mercedes-Benz C-Class C200	0.9%
3	Mercedes-Benz C-Class C180	1.0%	BMW 3 Series 320d	0.8%	Mercedes-Benz C-Class C180	0.8%
4	Toyota Corolla 1.6	0.7%	Mercedes-Benz C-Class C200	0.8%	Toyota Corolla 1.6	0.7%
5	BMW 3 Series 320d	0.7%	Toyota Corolla 1.6	0.8%	Volkswagen Polo Vivo 1.4	0.6%
6	Mercedes-Benz C-Class C200	0.7%	Volkswagen Polo 1.6	0.6%	BMW 3 Series 320d	0.6%
7	Toyota Corolla Quest 1.6	0.6%	Volkswagen Polo Vivo 1.4	0.6%	Toyota Corolla Quest 1.6	0.5%
8	Volkswagen Polo Vivo 1.4	0.6%	Toyota Corolla Quest 1.6	0.5%	Volkswagen Polo 1.4	0.4%
9	Chevrolet Cruze 1.6	0.6%	Audi A4 1.8 T	0.5%	Volkswagen Polo 1.6	0.3%
10	Toyota Corolla 1.3	0.5%	Volkswagen Polo 1.4	0.4%	Nissan Almera 1.5	0.3%
11	Volkswagen Polo 1.6	0.5%	Toyota Corolla 1.3	0.3%	Toyota Corolla Quest 1.8	0.3%
12	Audi A4 2.0 TDI	0.5%	Audi A4 2.0 TDI	0.3%	BMW 3 Series 318i	0.2%
13	Volkswagen Polo 1.4	0.4%	Volkswagen Jetta 1.4 TSI	0.3%	Mercedes-Benz C-Class C220d	0.2%
14	Volkswagen Jetta 1.4 TSI	0.3%	Mercedes-Benz CLA 200	0.3%	Hyundai Accent 1.6	0.2%
15	Mazda 3 1.6	0.3%	Hyundai Accent 1.6	0.2%	Volkswagen Jetta 1.4 TSI	0.2%
16	Audi A4 2.0 TFSI	0.3%	BMW 3 Series 318i	0.2%	Mercedes-Benz CLA 200	0.2%
17	Chevrolet Aveo 1.6	0.3%	Nissan Almera 1.5	0.2%	Toyota Etios XS	0.2%
18	BMW 3 Series 316i	0.2%	Volkswagen Polo Vivo 1.6	0.2%	Audi A4 1.8 T	0.2%
19	Audi A3 1.4 TFSI	0.2%	Mazda 3 1.6	0.2%	Toyota Corolla 1.8	0.2%
20	BMW 3 Series 318i	0.2%	Chevrolet Cruze 1.6	0.2%	Toyota Corolla 1.3	0.1%

Besides the data showing that the **BMW 320i** and **Mercedes-Benz C180/C200** continue to be the leaders, it is notable that the **lead share percentages have shrunk**. Most of the major players are attracting a small share of the overall leads these days, but **Toyota's Corolla Quest (now discontinued)**, is an exception. The **Nissan Almera**, also discontinued, has also **shown signs of greater demand** in the used space, but as it ages this is likely to change soon.

Looking ahead, which sedans are likely to replace these darlings of the ride-hailing world? Just **outside of the Top 20 the Suzuki Dzire has posted the biggest growth of share**, and the **Honda Ballade is also increasing its share**

of leads. In general, this segment has shrunk in terms of lead share from 21.5% to 14.33% and there are no realistic reasons why the trend would be reversed.

The **Chinese brands do offer attractive sedans** in their home market, but most of those are relatively **high-tech and expensive**, and would compete at a problematic price point in South Africa where brand is still important, and where crossovers and Double-Cab bakkies are preferred. The Chinese brands have also made a concerted effort to shift away from the very bottom end of the market as they **elevate the overall "Made in China" brand**.



Single Cab Bakkie

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Chevrolet Utility 1.4	0.9%	Nissan NP200 1.6	1.1%	Nissan NP200 1.6	1.2%
2	Toyota Hilux 2.5 D-4D	0.6%	Chevrolet Utility 1.4	1.0%	Chevrolet Utility 1.4	0.6%
3	Nissan NP200 1.6	0.4%	Toyota Hilux 2.5 D-4D	0.6%	Toyota Hilux 2.4 GD	0.4%
4	Isuzu KB 250D	0.3%	Toyota Hilux 3.0 D-4D	0.3%	Toyota Hilux 2.4 GD-6	0.3%
5	Toyota Hilux 3.0 D-4D	0.3%	Toyota Hilux 2.0	0.3%	Toyota Hilux 2.0	0.3%
6	Opel Corsa Utility 1.4	0.3%	Toyota Hilux 2.4 GD-6	0.2%	Toyota Hilux 2.5 D-4D	0.3%
7	Opel Corsa Utility 1.4i	0.3%	Nissan NP200 1.5 dCi	0.2%	Nissan NP200 1.5 dCi	0.3%
8	Ford Bantam 1.3	0.2%	Toyota Hilux 2.4 GD	0.2%	Mahindra Pik Up 2.2	0.2%
9	Toyota Hilux 2.0	0.2%	Nissan NP300 2.5 TDi	0.2%	Hyundai H100 Bakkie 2.6 D	0.2%
10	Ford Ranger XL	0.2%	Ford Ranger 2.2 TDCi	0.2%	Nissan NP300 2.5 TDi	0.2%
11	Ford Bantam 1.6	0.2%	Isuzu KB 250 D-Teq	0.2%	Toyota Hilux 3.0 D-4D	0.2%
12	Opel Corsa Utility 1.7	0.2%	Ford Ranger XL	0.2%	Ford Ranger XL	0.2%
13	Toyota Hilux 3.0 D	0.2%	Isuzu KB 250D	0.2%	Isuzu KB 250 D-Teq	0.1%
14	Isuzu KB 250 D-Teq	0.1%	Ford Bantam 1.3	0.1%	Opel Corsa Utility 1.4i	0.1%
15	Chevrolet Utility 1.8	0.1%	Toyota Hilux 3.0 D-4D Legend	0.1%	Ford Ranger 2.2 TDCi	0.1%
16	Ford Ranger XLS	0.1%	Chevrolet Utility 1.8	0.1%	Isuzu KB 250D	0.1%
17	Kia K-Series Pick-Up 2700	0.1%	Kia K-Series Pick-Up 2700	0.1%	Isuzu D-Max 250 HO	0.1%
18	Volkswagen Amarok 2.0 TDI	0.1%	Hyundai H100 Bakkie 2.6 D	0.1%	Chevrolet Utility 1.8	0.1%
19	Nissan 1400	0.1%	Opel Corsa Utility 1.4i	0.1%	Nissan NP300 2.0	0.1%
20	Toyota Hilux 2.7	0.1%	Ford Bantam 1.6	0.1%	Kia K-Series Pick-Up 2700	0.1%

The presence of five half-tonne pickups still in the Top 20 of Single Cabs (*by leads/demand, first half 2025*), is noted. **With no obvious replacements in sight, the expectation is that alternatives could be the cheaper one-tonners from China/India and compact panel vans (though data does not support the latter theory yet).**

Hyundai H100/Kia K-Series may also be considerations. Given the appearance of **several older-generation vehicles in this list, it is clear that age is not a major barrier (currently)**. This segment is stable, having grown slightly in terms of lead share from **6.64% in 2015 to 7.35% in the first half of 2025**.



Cabriolet/Convertible

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Mercedes-Benz SLK 200	0.08%	Mercedes-Benz SLK 200	0.08%	Mercedes-Benz SLK 200	0.06%
2	Audi A3 1.8 TFSI	0.07%	BMW 3 Series 335i	0.05%	Audi A3 1.8 TFSI	0.04%
3	MINI Convertible Cooper S	0.06%	Audi A3 1.8 TFSI	0.05%	Fiat 500 Cabriolet	0.03%
4	BMW 1 Series 120i	0.05%	BMW 1 Series 135i	0.04%	BMW 1 Series 125i	0.03%
5	Volkswagen Golf Cabriolet	0.04%	BMW 1 Series 120i	0.04%	BMW 3 Series 330i	0.02%
6	BMW 1 Series 135i	0.03%	Audi A5 2.0 TFSI	0.04%	Audi A5 2.0 TFSI	0.02%
7	Peugeot 206 CC 1.6	0.03%	Volkswagen Golf Cabriolet	0.04%	MINI Convertible Cooper	0.02%
8	Audi A5 2.0 TFSI	0.03%	Mercedes-Benz SLK 350	0.04%	BMW 1 Series 120i	0.02%
9	Audi TT Roadster	0.03%	BMW 3 Series 330i	0.04%	BMW M4 F83	0.02%
10	BMW 3 Series 330i	0.02%	BMW 1 Series 125i	0.03%	BMW 2 Series 220i	0.02%
11	MINI Convertible Cooper	0.02%	BMW 4 Series 420i	0.03%	BMW 1 Series 135i	0.02%
12	Peugeot 206 CC 2.0	0.02%	MINI Convertible Cooper S	0.03%	Mercedes-Benz E-Class E400	0.02%
13	Mercedes-Benz SLK 350	0.02%	Fiat 500 Cabriolet	0.03%	Volkswagen Golf Cabriolet	0.02%
14	Opel Astra 2.0	0.02%	BMW 2 Series 220i	0.02%	BMW 3 Series 330Ci	0.02%
15	Audi A4 3.0	0.02%	Audi TT Roadster	0.02%	Mercedes-Benz SLK 350	0.02%
16	BMW 1 Series 125i	0.02%	Porsche Boxster	0.02%	Mercedes-Benz E-Class E350	0.01%
17	Volkswagen Eos 2.0 T	0.02%	BMW 3 Series 330Ci	0.02%	Mercedes-Benz C-Class C200	0.01%
18	BMW 3 Series 330Ci	0.02%	MINI Convertible Cooper	0.02%	BMW 4 Series 420i	0.01%
19	Porsche Boxster S	0.02%	Porsche Boxster S	0.02%	Mercedes-Benz SL 500	0.01%
20	Renault Megane CC	0.02%	BMW M4 F83	0.02%	BMW 4 Series 428i	0.01%

As indicated by the lead share percentages, **this is a very small market**. Overall, Cabriolets' current share of leads on Cars.co.za is down slightly compared with where it was in 2015, but in the years in-between it had actually grown.

Currently, it appears to be in decline. The decade-long leadership of the **Mercedes-Benz SLK200 is noted**. There was **far greater brand variety a decade ago**, particularly at the lower end of the market.



Coupe

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Kia Cerato Coupé	0.15%	Kia Cerato Coupé	0.11%	Ford Mustang GT	0.09%
2	Audi TT Coupé	0.15%	Mercedes-Benz C-Class C180	0.10%	BMW 4 Series 420d	0.08%
3	Volkswagen Scirocco 2.0 TSI	0.14%	Mercedes-Benz C-Class C230	0.09%	Mercedes-Benz C-Class C200	0.07%
4	Mercedes-Benz C-Class C230	0.13%	Audi TT Coupé	0.08%	Mercedes-Benz C-Class C250	0.06%
5	BMW 1 Series 125i	0.12%	BMW 4 Series 420i	0.08%	Toyota 86 2.0	0.06%
6	Volkswagen CC 2.0 TDI	0.10%	Audi A5 2.0 TFSI	0.08%	Mercedes-Benz C-Class C180	0.06%
7	Audi A5 2.0 TFSI	0.10%	Mercedes-Benz C-Class C200	0.08%	BMW 4 Series 420i	0.05%
8	Volkswagen Scirocco 1.4 TSI	0.10%	BMW M4 F82	0.08%	Audi TT Coupé	0.05%
9	Toyota 86 2.0	0.09%	Toyota 86 2.0	0.07%	BMW M4 F82	0.05%
10	BMW 1 Series 120d	0.07%	BMW 4 Series 420d	0.07%	BMW 2 Series 220d	0.05%
11	Mercedes-Benz C-Class C180	0.06%	Volkswagen Scirocco 2.0 TSI	0.07%	Hyundai Veloster 1.6 GDi	0.05%
12	BMW 1 Series 135i	0.06%	Hyundai Veloster 1.6 GDi	0.07%	BMW 2 Series 220i	0.04%
13	BMW 3 Series 325i	0.06%	BMW 1 Series 125i	0.06%	BMW 2 Series 218i	0.04%
14	Volkswagen Scirocco R	0.06%	BMW 2 Series 220i	0.06%	Kia Cerato Coupé	0.04%
15	Volkswagen Beetle 1.4 TSI	0.04%	Ford Mustang GT	0.05%	Volkswagen Scirocco 2.0 TSI	0.03%
16	Renault Megane Coupé	0.04%	Volkswagen Scirocco 1.4 TSI	0.05%	BMW 1 Series 125i	0.03%
17	Mercedes-Benz C-Class C250	0.03%	BMW 3 Series 325i	0.05%	Volkswagen Beetle 1.4 TSI	0.03%
18	Volkswagen CC 2.0 TSI	0.03%	Volkswagen Scirocco R	0.05%	BMW M2 Coupé	0.03%
19	Volkswagen Beetle 1.2 TSI	0.03%	BMW 1 Series 120d	0.05%	Mercedes-AMG C-Class C63	0.03%
20	Mercedes-Benz CLC 200	0.03%	Volkswagen CC 2.0 TDI	0.05%	BMW 1 Series 135i	0.03%

The rise of the **Ford Mustang** has been the most notable in this small segment, which is down slightly from 2015 (currently representing 2.02% of leads on Cars.co.za). It needs to be noted, however, that in the years between 2015 and 2025 this segment had reached a share of as high as

3.06%, so in effect this segment is currently contracting in terms of leads submitted on Cars.co.za. As with Cabriolets, **there aren't many "affordable" coupe offerings from mainstream brands anymore.**



Extended Cab Bakkie

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Isuzu KB 250 D-Teq	0.1%	Toyota Hilux 2.8 GD-6	0.3%	Toyota Hilux 2.4 GD-6	0.3%
2	Isuzu KB 300 D-Teq	0.1%	Toyota Hilux 2.4 GD-6	0.2%	Ford Ranger XL	0.2%
3	Ford Ranger 3.0 TDCi	0.1%	Ford Ranger XL	0.2%	Toyota Hilux 2.8 GD-6 Legend	0.2%
4	Ford Ranger XLS	0.1%	Ford Ranger XLS	0.2%	Toyota Hilux 2.8 GD-6	0.2%
5	Ford Ranger 2.5 D	0.1%	Isuzu KB 300 D-Teq	0.1%	Ford Ranger XLS	0.1%
6	Ford Ranger XL	0.1%	Ford Ranger 2.2 TDCi	0.1%	Ford Ranger XLT	0.1%
7	Ford Ranger 2.5D	0.1%	Isuzu KB 250 D-Teq	0.1%	Isuzu KB 300 D-Teq	0.1%

There are only three major players in the used **Extended Cab segment** in South Africa and it's a relatively close-run competition between the **Toyota Hilux and Ford Ranger**. **Toyota** has actually increased its share most since 2015 (*small base*) in terms of leads generated on used examples

on Cars.co.za. This segment currently constitutes **1.41% of leads generated** on Cars.co.za, up significantly compared with 2015, but in reality there has been no growth here (*in terms of share of leads on Cars.co.za*) since around 2020.





Panel Vans

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Volkswagen Caddy Panel Van	0.3%	Volkswagen Caddy Panel Van	0.2%	Volkswagen Caddy Panel Van	0.2%
2	Volkswagen Transporter Panel Van	0.1%	Volkswagen Transporter Panel Van	0.1%	Toyota Quantum 2.5	0.1%
3	Toyota Avanza Panel Van	0.1%	Hyundai H-1 Panel Van	0.1%	Mercedes-Benz Sprinter 515	0.1%
4	Mercedes-Benz Sprinter 315	0.0%	Toyota Avanza Panel Van	0.1%	Mercedes-Benz Sprinter 516	0.1%
5	Mercedes-Benz Vito 115 CDI	0.0%	Volkswagen Crafter 50	0.0%	Volkswagen Crafter 50	0.1%
6	Chevrolet Spark Pronto	0.0%	Toyota Quantum 2.7	0.0%	Volkswagen Crafter 35	0.1%
7	Toyota Quantum 2.5	0.0%	Datsun Go+ 1.2	0.0%	Volkswagen Transporter Panel Van	0.1%
8	Volkswagen Crafter 50	0.0%	Toyota Quantum 2.5	0.0%	Toyota Quantum 2.7	0.0%
9	Toyota Quantum 2.7	0.0%	Chevrolet Spark Pronto	0.0%	Toyota Avanza Panel Van	0.0%
10	Hyundai H-1 Panel Van	0.0%	Mercedes-Benz Sprinter 515	0.0%	Hyundai H-1 Panel Van	0.0%

With the demise of the half-tonne pickup sector, there were some expectations that some buyers would shift to compact panel vans, but in reality this segment has remained flat (in terms of share of leads of submitted on Cars.co.za, while the ageing and discontinued Nissan NP200 is actually still growing in lead share). There is some evidence in our data to support that there might be **growth on the**

horizon fuelled by newcomers in the Panel Van space, but you'll have to look outside of this Top 10. This list remains dominated by the bigger Panel Vans (save for the VW Caddy and declining Avanza). Just **outside of the Top 10 sits a whole host of rivals that have posted gains, including; Suzuki Eeco, Opel Combo, Nissan Magnite.**



Dropside

Dropside Pickups - Leads

	Make/Model	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Hyundai H100 Bakkie	0.12%	0.17%	0.18%	0.22%	0.20%	0.22%	0.18%	0.22%	0.21%
2	JAC X200		0.00%	0.00%	0.00%	0.00%	0.01%	0.01%	0.01%	0.02%
3	Mahindra Pik Up		0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.01%	0.02%
4	TATA Super Ace	0.04%	0.04%	0.04%	0.06%	0.05%	0.05%	0.03%	0.02%	0.02%
5	JMC Carrying	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%
6	Daihatsu Gran Max	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%	0.01%
7	JAC N-Series			0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%

This is a small segment in South Africa (currently 0.3% of all leads generated on Cars.co.za) and relatively stable, and the **Hyundai H100** remains the dominant player in this segment.



Transmission Trends

It is important to keep in mind that the Used vehicle market lags the New vehicle market, but is not immune to it.

The new products coming into the market are **largely shaped by demands outside of this country**, where a big-scale shift to automatic has been happening for some time.

However, in certain segments in **South Africa the shift to Automatic has been delayed.**

NOTE: Automatic includes DCT/CVT/AMT

Used Vehicles

General Trend

Vehicle Stock

Year	Automatic	Manual
2015	35.14%	64.86%
2016	34.91%	65.09%
2017	36.75%	63.25%
2018	39.01%	60.99%
2019	43.50%	56.50%
2020	43.80%	56.20%
2021	43.70%	56.30%
2022	49.71%	50.29%
2023	55.00%	45.00%
2024	55.87%	44.13%
2025	58.48%	41.52%

The table above breaks down the **percentage of vehicle stock** on Cars.co.za with either manual or automatic transmissions, by year. With a near full-scale shift towards automatic transmission (*including CVT/AMT/dual-clutch*) vehicles in the OEM space, the decline in manual-transmission stock is not unexpected, but the rate at which Automatic vehicles are becoming more prevalent in the post-COVID era is an eye-opener.

Leads Submitted

Year	Automatic	Manual
2015	31.41%	68.59%
2016	38.32%	61.68%
2017	38.99%	61.01%
2018	36.74%	63.26%
2019	41.68%	58.32%
2020	43.14%	56.86%
2021	44.17%	55.83%
2022	45.14%	54.86%
2023	48.04%	51.96%
2024	48.69%	51.31%
2025	48.88%	51.12%

The above table breaks down the percentage of **leads submitted** (*intent to purchase*) on vehicles listed on Cars.co.za with either manual or automatic transmissions, by year. Interestingly, however, the split in terms of leads between manual and automatic transmission vehicles is holding steady since 2023, with manual still being slightly ahead. This could be an indication that there are still certain segments of the market where manuals remain particularly resilient.

Listing Views

Year	Automatic	Manual
2017	33.66%	66.34%
2018	32.03%	67.97%
2019	38.16%	61.84%
2020	39.71%	60.29%
2021	42.74%	57.26%
2022	55.60%	44.40%
2023	58.23%	41.77%
2024	62.35%	37.65%
2025	62.66%	37.34%

The above table breaks down the percentage of **listing views** (*interest/consideration indicator*) on vehicles listed on Cars.co.za with either manual or automatic transmissions, by year. In terms of listing views (*the step before submitting a lead*), automatics have surged ahead, with a near-full swap in percentages in less than a decade. In terms of consideration, then, automatics are accelerating ahead.



Drill-Down

In which categories or price bands are manuals still strong, or is the full-scale shift to automatic preference the case in all segments?

Stock - Double-Cab Bakkies

Year	Automatic	Manual
2015	25.03%	74.97%
2016	25.42%	74.58%
2017	33.58%	66.42%
2018	37.12%	62.88%
2019	43.98%	56.02%
2020	46.01%	53.99%
2021	48.27%	51.73%
2022	56.91%	43.09%
2023	61.49%	38.51%
2024	66.69%	33.31%
2025	70.91%	29.09%

The above table shows the stock trend for **Double-Cab bakkies** listed on Cars.co.za. It shows a near full reversal in the past decade, and the gap between the two types of transmissions is still widening.

Leads - Double-Cab Pickups

Year	Automatic	Manual
2015	20.59%	79.41%
2016	24.49%	75.51%
2017	27.21%	72.79%
2018	27.13%	72.87%
2019	33.72%	66.28%
2020	38.81%	61.19%
2021	41.26%	58.74%
2022	44.07%	55.93%
2023	49.95%	50.05%
2024	55.70%	44.30%
2025	57.31%	42.69%

(Table Above) The leads share split shows the **shift to Automatic** is happening in the Double-Cab market, but perhaps not quite as fast as the composition of stock is changing. There must still be pockets of strong demand for manual double-cabs at certain price points.

Stock - Single-Cab Pickups

Year	Automatic	Manual
2015	0.64%	99.36%
2016	0.71%	99.29%
2017	1.37%	98.63%
2018	2.34%	97.66%
2019	3.32%	96.68%
2020	3.04%	96.96%
2021	2.94%	97.06%
2022	3.47%	96.53%
2023	5.19%	94.81%
2024	5.87%	94.13%
2025	6.30%	93.70%

By contrast, the **Single-Cab Bakkie** (table above) market is still dominated by Manuals, BUT... the shift has started to happen, albeit slowly. A very big percentage of Manual Single-Cab stock on Cars.co.za are of the discontinued half-tonne bakkies, and with no likely similar replacements on the horizon, this segment will eventually see a fairly significant shift to Automatic as well as the composition is changed by the addition of new-generation one-tonne single-cabs, of which **Automatic is likely to make up a growing portion.**

Leads - Single-Cab Pickups

Year	Automatic	Manual
2015	0.30%	99.70%
2016	0.30%	99.70%
2017	0.48%	99.52%
2018	0.98%	99.02%
2019	1.91%	98.09%
2020	1.85%	98.15%
2021	1.87%	98.13%
2022	1.68%	98.32%
2023	2.30%	97.70%
2024	2.73%	97.27%
2025	3.19%	96.81%

The trend continues on the Leads front for Single-Cabs (table above), but significantly slower. Preference is still **heavily biased towards Manual** and this is likely to continue for a long period of time (see previous comment regarding half-tonne bakkies).

Stock - Hatchbacks

Year	Automatic	Manual
2015	14.86%	85.14%
2016	15.87%	84.13%
2017	17.06%	82.94%
2018	19.01%	80.99%
2019	22.36%	77.64%
2020	22.25%	77.75%
2021	22.90%	77.10%
2022	27.53%	72.47%
2023	29.77%	70.23%
2024	30.86%	69.14%
2025	33.17%	66.83%

Again, the above table for hatchbacks (showing stock on Cars.co.za) shows that the market shift to automatic has picked up speed since 2019, following an **increased focus on automatic hatchbacks, even in the more affordable categories, in the new-car market. Importantly, however, for now, there is double the amount of manual stock compared with automatics in the used market.**

Leads - Hatchbacks

Year	Automatic	Manual
2015	16.92%	83.08%
2016	23.71%	76.29%
2017	24.36%	75.64%
2018	20.68%	79.32%
2019	26.25%	73.75%
2020	28.19%	71.81%
2021	28.28%	71.72%
2022	29.97%	70.03%
2023	32.46%	67.54%
2024	32.72%	67.28%
2025	34.15%	65.85%

On the leads side (table above for hatchbacks) the trend mirrors stock, showing that the **used car market (in terms of demand) is aligned with the evolution of the stock profile.**

Stock - SUVs/Crossovers

Year	Automatic	Manual
2015	62.99%	37.01%
2016	62.78%	37.22%
2017	63.80%	36.20%
2018	64.54%	35.46%
2019	67.28%	32.72%
2020	69.48%	30.52%
2021	68.26%	31.74%
2022	72.77%	27.23%
2023	76.67%	23.33%
2024	78.07%	21.93%
2025	80.10%	19.90%

The above table shows stock levels on Cars.co.za for automatic/ manual SUVs and crossovers. This is a segment that has always been **dominated by automatics, but the growth in auto still continues, having now reached over 80%.**

Leads - SUVs/Crossovers









Year	Automatic	Manual
2015	59.44%	40.56%
2016	64.22%	35.78%
2017	65.40%	34.60%
2018	63.78%	36.22%
2019	67.23%	32.77%
2020	69.07%	30.93%
2021	69.74%	30.26%
2022	71.17%	28.83%
2023	73.18%	26.82%
2024	75.82%	24.18%
2025	76.77%	23.23%

The situation in terms of leads for SUVs/Crossovers follows the stock table trend, but it is worth noting that deeper exploration of this segment is required as it **stretches wide, and includes numerous drivetrains and vehicle sizes/prices etc.**

Where are the pockets of demand for Manual & Automatic, respectively?

In general, however, it is clear that there is a consistent and strong shift to Automatic across all the major volume segments. But that does not mean that Manual is dead across the board. By comparing stock levels and leads in the various price segments in the market, and including bodytype and transmission, we have noted the following;










Between R100K and R150K

Body	Transmission	Demand/ Supply Performance
 Hatchback	Automatic	352.15%
 Hatchback	Manual	208.19%
 MPV/Bus	Manual	1104.63%
 SUV/ Crossover	Automatic	302.11%
 SUV/ Crossover	Manual	149.18%
 Sedan	Automatic	341.99%
 Sedan	Manual	295.54%
 Single Cab Bakkie	Manual	207.05%

In the R100k-R150 segment the following trends are noted;

- Exceedingly strong demand for **Automatic and Manual hatchbacks**, but a lot **more stock** for the Manuals.
- Significant demand for **Manual MPVs/Minibusses** based on the number of leads placed on a **relatively small pool of stock**.
- Very strong demand for **Manual SUV/Crossovers and significant stock**. Not many Autos around at this price level, but good demand.
- Very strong demand for **Sedans, manual or automatic**.
- Very strong demand for **Manual Single-Cab Bakkies, largely half-tonne**.











Between R150K and R200K

Body	Transmission	Demand/ Supply Performance
 Double Cab Bakkie	Manual	461.23%
 Hatchback	Automatic	167.48%
 Hatchback	Manual	90.66%
 MPV/ Bus	Manual	850.85%
 SUV/ Crossover	Automatic	191.93%
 SUV/ Crossover	Manual	85.28%
 Sedan	Automatic	157.45%
 Sedan	Manual	128.23%
 Single Cab Bakkie	Manual	126.74%

In the R150k-R200k price range the following is noted;

- Very high demand for **Manual Double-Cabs**, but not a lot of stock.
- Very strong demand for **hatchbacks**, and big volume, but the supply/demand differential for Autos is significantly higher (*there is about 1/4 the stock of Manual only*).
- Exceptional demand for **Manual MPVs/Busses**, with insufficient supply.
- Demand (*Leads*) for Manual/Automatic SUV/Crossover seems strong and evenly matched between Manual and Automatic, but there is a lot **more Manual stock**.
- **Sedans (Manual and Auto) remain in demand** in this price range.
- Very strong demand for **Manual Single-Cabs**.













Between R200K and R250K

Body	Transmission	Demand/Supply Performance
 Double Cab Bakkie	Manual	212.36%
 Dropside	Manual	112.17%
 Hatchback	Automatic	104.56%
 Hatchback	Manual	40.03%
 MPV/Bus	Manual	510.79%
 SUV/Crossover	Automatic	111.66%
 SUV/Crossover	Manual	49.00%
 Sedan	Automatic	112.37%
 Sedan	Manual	58.22%
 Single Cab Bakkie	Manual	102.80%

In the R200k-R250k segment the following was noted;

- One price bracket up and stock of **Manual Double Cabs nearly doubles**, coupled with very strong demand.
- Though a low volume segment, demand and supply is well matched for Drop sides in this price bracket.
- There is **huge demand for Manual and Automatic hatchbacks** (*equal lead support*) in this price bracket, but supply of Manual hatchbacks is nearly double.
- **MPVs/Busses continue to show strong demand**, with insufficient stock to satisfy.
- Leads (*demand*) for **Automatic SUVs/Crossovers pull clear of the Manuals**, but there is still significant volume in the latter.
- Strong support for **Automatic sedans**, but Manuals start fading in terms of demand slightly.
- **Single-Cab Manual bakkies demand appears well-matched** with supply.










Between R250K and R300K

Body	Transmission	Demand/Supply Performance
 Coupe	Automatic	259.59%
 Double Cab Bakkie	Automatic	290.37%
 Double Cab Bakkie	Manual	132.55%
 Extended Cab Bakkie	Automatic	127.45%
 Extended Cab Bakkie	Manual	196.48%
 Hatchback	Automatic	80.01%
 Hatchback	Manual	32.28%
 MPV/Bus	Automatic	248.68%
 MPV/Bus	Manual	270.92%
 SUV/Crossover	Automatic	79.42%
 Sedan	Automatic	103.80%
 Single Cab Bakkie	Manual	72.15%

In the R250k to R300k segment we note the following;

- Though a small segment, there appears to be good **demand for the Automatic Coupe stock that is available.**
- Another small segment appears to be hitting a sweet spot of Supply/Demand, namely for **Extended Double Cabs, with Demand equally split between the two transmission types.**
- Very strong **demand for Automatic Double Cabs**, with a big jump in available stock.
- Big volume for **Manual and Automatic hatchbacks**, Significantly more stock of Manual hatchbacks but the Leads race is being won by **Automatics.**
- **MPV/bus are in big demand**, and there is **not nearly enough Automatic stock.**
- Big volume for **Automatic SUV/Crossovers** and **good demand as well.**
- **Automatic sedans** still represent good stock volume, **matched with demand.**
- Still good volume for **Single-Cab Pickups** but **demand is softening at this price level.**











Between R300K and R350K

Body	Transmission	Demand/ Supply Performance
 Coupe	Automatic	145.42%
 Double Cab Bakkie	Automatic	143.81%
 Double Cab Bakkie	Manual	125.10%
 Extended Cab Bakkie	Manual	133.32%
 Hatchback	Automatic	79.64%
 MPV/ Bus	Manual	111.55%
 SUV/ Crossover	Automatic	56.86%
 Sedan	Automatic	130.95%
 Single Cab Bakkie	Manual	44.38%

In the R300k to R350k segment, note the following;

- Strong Demand for Manual and Auto Double-Cabs, well-matched to stock.
- Extended Cab Bakkies (*Manual and Auto*) demand is well-matched to stock.
- Automatic hatchbacks are still in demand, but there is a lot of stock out there. Interest in Manuals is declining at this price level but there remains a lot of stock, so the market will be extremely competitive.
- Strong Demand and rising stock for the manual MPVs/Busses.
- Very low interest in manual sedans at this level, but automatic sedans still shine.
- The competitive nature of the SUV/Crossover segment becomes more apparent, even for automatics. Overall volume remains the biggest in the market, however.
- Demand for Single-Cab bakkies halved compared with the previous price bracket.









Between R350K and R400K

Body	Transmission	Demand/ Supply Performance
 Coupe	Automatic	145.38%
 Double Cab Bakkie	Automatic	126.78%
 Double Cab Bakkie	Manual	116.20%
 Extended Cab Bakkie	Manual	117.09%
 Extended Cab Bakkie	Automatic	81.74%
 Hatchback	Automatic	81.74%
 MPV/ Bus	Manual	176.90%
 SUV/ Crossover	Automatic	48.16%
 SUV/ Crossover	Manual	43.50%
 Sedan	Automatic	110.18%

In the R350k to R400k segment note the following;

- For the relatively small segment of Coupes, Automatic supply is well-matched with demand.
- Though small compared with most segments, Demand for Extended Cab bakkies is well-matched to stock at this price level.
- Supply/Demand for both Manual/Automatic Double Cabs is still increasing.
- Good volume for Automatic hatchbacks, but Demand dipping sharply at this price level.
- Demand for Manual MPVs/Buses show good opportunity.
- Automatic sedans hold steady, with good volume, too, but manual is dead.
- Single-Cab demand continues to decline at this price level but there is quite a lot of stock.
- Huge amount of Automatic SUV/Crossover stock, so the competition is fierce out there at this price level.







Between R400K and R450K

Body		Transmission	Demand/ Supply Performance
	Double Cab Bakkie	Automatic	79.02%
	Double Cab Bakkie	Manual	74.57%
	Hatchback	Automatic	62.62%
	MPV/Bus	Automatic	163.84%
	MPV/Bus	Manual	177.61%
	SUV/ Crossover	Automatic	35.43%
	Sedan	Automatic	126.47%
	Single Cab Bakkie	Manual	23.14%

In the R400k-R450k segment note the following;

- At this price level demand for **Automatic Double-Cabs remains strong**, but is well-matched with supply. **Manual Double-Cabs also holding** on well, at about **half the size of Automatic**.
- Some **volume and demand left for Automatic Hatchbacks**, most likely at the **Premium/Performance side** of the market, with the **GTI variants of Volkswagen's Golf and Polo ranges accounting for big volume**.
- A **big dip in stock and leads for MPV/Busses** as the price segment moves beyond the e-hailing 7-seater vehicles.
- Demand for Automatic Sedans** remains strong.
- Lots of **stock of Automatic SUV/Crossovers** but indications are that this **segment is very competitive/crowded**.

Between R450K and R500K










Body		Transmission	Demand/ Supply Performance
	Coupe	Automatic	73.92%
	Double Cab Bakkie	Automatic	82.69%
	Hatchback	Automatic	63.72%
	MPV/Bus	Manual	238.21%
	SUV/ Crossover	Automatic	33.28%
	Sedan	Automatic	97.19%

In the R450k to R500k price segment note the following;

- Automatic Coupe** stock remains **well balanced with demand**.
- Stock for **Auto Double-Cabs continues to rise**, and is well matched with demand. At this price level it is clear that the preference swings quite noticeably away from Manual.
- Automatic hatchbacks** still have **traction**.
- Uptick in **MPV/Bus demand** as we move to pricier segments. Driven by vehicles such as the Toyota Quantum, Hyundai H-1, and VW Kombi.
- Volume **potential remains in the Automatic sedan segment**.
- The voluminous **Automatic SUV/crossover** segment is likely very competitive. **Lots of stock, potentially under pressure from new vehicles as well**.








Between R500K and R600K

Body	Transmission	Demand/Supply Performance
 Coupe	Automatic	78.29%
 Double Cab Bakkie	Automatic	61.41%
 Double Cab Bakkie	Manual	40.94%
 Extended Cab Bakkie	Automatic	53.14%
 Hatchback	Automatic	45.05%
 MPV/Bus	Automatic	90.12%
 MPV/Bus	Manual	236.08%
 SUV/Crossover	Automatic	39.98%
 Sedan	Automatic	90.12%

In the R500k to R600k price segment the following is noted;

- A relatively **strong price bracket for Automatic Coupes**, with **decent stock levels** nearly matched with leads.
- An upturn in both stock and leads for Double-Cab automatic bakkies at this price level.
- Quite a lot of **Automatic Extended Cab bakkies are listed, but demand is lagging** at this price level.
- Still relatively **decent support for Automatic hatchbacks**.
- **Supply/Demand for Automatic MPVs/Minibusses is well balanced**, but there is **more demand for Manual versions, and supply is lagging**.
- **Automatic Sedan lead volume remains good**, and very closely matched with supply.
- Huge **stock of SUV/Crossovers (automatic)**. Likely a very competitive market. By Leads, this is the **biggest segment in this price bracket**, slightly pipping Automatic Double Cabs.

Between R600K and R700K






Body	Transmission	Demand/Supply Performance
 Coupe	Automatic	68.67%
 Double Cab Bakkie	Automatic	45.50%
 Hatchback	Automatic	52.46%
 SUV/Crossover	Automatic	37.69%
 Sedan	Automatic	74.18%

In this R600k to R700k price segment note the following;

- **Automatic Coupes remain surprisingly robust** in this price segment.
- Fairly significant slide in stock and **demand for Automatic Double Cabs** but volume remains good.
- Demand for **Automatic hatchbacks starts slipping significantly**.
- **Automatic sedans**, perhaps surprisingly, still holding up well, with demand well-matched with supply.
- **SUV's/Crossovers (Auto) segment remains ultra-competitive**. At this price level it has the most stock items, as well as the most leads.







Between R700K and R800K

Body	Transmission	Demand/ Supply Performance
 Double Cab Bakkie	Automatic	43.45%
 Hatchback	Automatic	41.55%
 MPV/ Bus	Automatic	51.94%
 SUV/ Crossover	Automatic	37.00%
 Sedan	Automatic	55.60%

Note the following for the R700k-R800k segment;

- **Automatic Double-Cab is the second biggest segment** at this price level, in terms of **both stock and leads, but it is competitive.**
- At this price level there appears to be **bigger scope for Automatic MPVs/Busses than hatchbacks.**
- **Automatic Sedans are still the third-biggest type** in this segment, with **demand relatively well-matched with supply.**
- **SUVs/Crossovers are still the biggest segment at this price level, but extremely competitive with huge stock numbers, so consumers have a lot of choice.**

Between R800K and R900K





Body	Transmission	Demand/ Supply Performance
 Double Cab Bakkie	Automatic	29.87%
 Hatchback	Automatic	41.66%
 MPV/ Bus	Automatic	73.80%
 SUV/ Crossover	Automatic	33.11%

Between R800k and R900k note the following;

- **Automatic Coupes remain consistent, well matched supply/demand.**
- **Good supply of Automatic Double-Cab bakkies and second-most Lead share in this price segment.**
- **Plenty of premium Automatic hatchbacks in stock, and reasonable support.**
- **Huge stock number for Automatic SUVs/Crossovers and nearly double as much demand as for Automatic Double-Cabs in this price segment.**










Between R900K and R1M

Body	Transmission	Demand/ Supply Performance
 Double Cab Bakkie	Automatic	30.83%
 MPV/ Bus	Automatic	66.14%
 SUV/ Crossover	Automatic	31.71%
 Sedan	Automatic	39.68%

In the R900k to R1m price bracket note the following;

- The **biggest segments are SUV/Crossover(Auto)/ Double-Cab Bakkie(Auto)/ and perhaps surprisingly, MPV/Bus**, largely driven by **Mercedes-Benz V-Class and Volkswagen Caravelle**.
- **Coupes remain relatively resilient**, with the **BMW 2/4 Series, Mercedes-Benz C-Class and Ford Mustang** delivering the stock and demand.
- An uptick in stock and demand for Manual Double-Cabs, largely driven by the **Toyota Land Cruiser 79 and older Land Rover Double-Cab stock**.







Between R1m and R1.2m

Body	Transmission	Demand/ Supply Performance
 Coupe	Automatic	46.53%
 Double Cab Bakkie	Automatic	32.58%
 Double Cab Bakkie	Manual	77.34%
 Hatchback	Automatic	39.52%
 MPV/ Bus	Automatic	59.26%
 SUV/ Crossover	Automatic	34.73%
 Sedan	Automatic	44.82%

In the R1.0m to R1.2m segment, note the following;

- The **Top 3 remains SUV/Crossover, Double-Cab and MPV/Bus**.
- Interestingly, at this higher price level, both stock and leads are up (compared with the previous price bracket) for **the Automatic SUV/Crossover segment**.
- **Auto Coupes and Sedans remain desirable** and in supply at this **high price level**.

Greater than R1.2M

Body	Transmission	Demand/ Supply Performance
 Cabriolet	Automatic	53.96%
 Coupe	Automatic	52.71%
 Double Cab Bakkie	Automatic	45.24%
 MPV/ Bus	Automatic	56.20%
 SUV/ Crossover	Automatic	40.25%
 Sedan	Automatic	57.16%

Over R1.2m the situation we note the following;

- **SUV/Crossovers** are by far the biggest segment, nearly **10x bigger than MPV/Bus in second**.
- **Auto Coupes** become a **bigger segment than sedans**

Top 20 Pre-Owned Automatics in SA

(Leads on Cars.co.za)

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Mercedes-Benz C-Class C180	1.0%	BMW 3 Series 320i	1.2%	Ford Ranger Wildtrak	1.0%
2	BMW 3 Series 320i	1.0%	Volkswagen Golf GTI	1.1%	Mercedes-Benz C-Class C200	0.9%
3	Volkswagen Golf GTI	0.7%	Mercedes-Benz C-Class C180	1.1%	Volkswagen Polo 1.0 TSI	0.9%
4	Audi A4 1.8 T	0.7%	Mercedes-Benz C-Class C200	0.9%	Volkswagen Polo GTI	0.9%
5	Mercedes-Benz C-Class C200	0.6%	Volkswagen Polo GTI	0.8%	Volkswagen Golf GTI	0.8%
6	Toyota Fortuner 3.0 D-4D	0.6%	BMW 3 Series 320d	0.7%	Ford Ranger XLT	0.8%
7	Volkswagen Polo GTI	0.6%	Toyota Hilux 2.8 GD-6	0.6%	BMW 3 Series 320i	0.8%
8	BMW 3 Series 320d	0.5%	Volkswagen Polo 1.0 TSI	0.5%	Mercedes-Benz C-Class C180	0.8%
9	Volkswagen Polo 1.6	0.5%	Ford Ranger XLT	0.5%	BMW 3 Series 320d	0.6%
10	Audi A3 1.4 TFSI	0.4%	Ford Ranger Wildtrak	0.5%	Toyota Hilux 2.8 GD-6	0.5%
11	Audi A4 2.0 TDI	0.4%	Toyota Fortuner 3.0 D-4D	0.4%	Toyota Hilux 2.8 GD-6 Legend	0.5%
12	BMW 1 Series 118i	0.4%	Volkswagen Golf R	0.4%	Ford Ranger XL	0.5%
13	Volkswagen Polo Vivo 1.4	0.3%	Toyota Fortuner 2.4 GD-6	0.4%	Toyota Fortuner 2.4 GD-6	0.5%
14	Land Rover Discovery 4 3.0 TDV6	0.3%	Toyota Fortuner 2.8 GD-6	0.4%	Toyota Fortuner 2.8 GD-6	0.5%
15	Audi A3 1.8 TFSI	0.3%	BMW 1 Series 118i	0.3%	Hyundai H-1 2.5 CRDi	0.4%
16	Toyota Hilux 3.0 D-4D	0.3%	Mercedes-Benz A-Class A200	0.3%	Suzuki Swift 1.2	0.4%
17	Audi A5 2.0 TFSI	0.3%	Land Rover Discovery 4 3.0 TDV6	0.3%	Toyota Hilux 2.4 GD-6	0.4%
18	BMW 3 Series 316i	0.2%	Toyota RAV4 2.0	0.3%	Hyundai i20 1.4	0.3%
19	Toyota Corolla Quest 1.6	0.2%	Audi A4 1.8 T	0.3%	Mazda CX-5 2.0	0.3%
20	Toyota Land Cruiser Prado 3.0 D	0.2%	BMW X5 xDrive30d	0.3%	Mercedes-Benz A-Class A200	0.3%

When it comes to most in-demand automatics, the table above illustrates a clear shift away from **being dominated by premium brand sedans/hatchbacks**. In 2015 there was only one Double Cab in the Top 20, but currently there are six. Five Audis featured in the list in 2015, but today there are none.



Top 20 Manuals in SA

(Leads on Cars.co.za)

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	Volkswagen Polo 1.4	3.1%	Volkswagen Polo Vivo 1.4	2.4%	Volkswagen Polo Vivo 1.4	3.4%
2	Volkswagen Polo Vivo 1.4	2.8%	Volkswagen Polo 1.6	1.5%	Volkswagen Polo 1.0 TSI	1.5%
3	Volkswagen Polo 1.2 TSI	1.4%	Volkswagen Polo 1.4	1.3%	Nissan NP200 1.6	1.2%
4	Volkswagen Polo 1.6	1.3%	Nissan NP200 1.6	1.1%	Toyota Quantum 2.5	1.2%
5	Ford Fiesta 1.4	1.2%	Chevrolet Utility 1.4	1.0%	Toyota Hilux 2.4 GD-6	1.0%
6	Opel Corsa 1.4	1.1%	Volkswagen Polo 1.2 TSI	1.0%	Toyota Avanza 1.5	1.0%
7	Volkswagen Golf 1.4 TSI	0.9%	Volkswagen Polo 1.0 TSI	0.8%	Suzuki Ertiga 1.5	1.0%
8	BMW 3 Series 320i	0.9%	Ford Ranger XL	0.8%	Volkswagen Polo 1.2 TSI	1.0%
9	Ford Figo 1.4	0.9%	Toyota Hilux 2.5 D-4D	0.7%	Volkswagen Polo 1.4	0.9%
10	Chevrolet Utility 1.4	0.9%	Toyota Hilux 3.0 D-4D	0.7%	Suzuki Swift 1.2	0.9%
11	Toyota Hilux 3.0 D-4D	0.8%	Toyota Hilux 2.4 GD-6	0.7%	Ford Ranger XL	0.7%
12	Audi A4 1.8 T	0.8%	Ford Fiesta 1.4	0.7%	Hyundai i20 1.2	0.6%
13	Toyota Hilux 2.5 D-4D	0.7%	Toyota Corolla 1.6	0.6%	Chevrolet Utility 1.4	0.6%
14	Chevrolet Cruze 1.6	0.7%	Isuzu KB 250 D-Teq	0.6%	Toyota Corolla 1.6	0.5%
15	Ford Ranger XL	0.6%	Toyota Avanza 1.5	0.6%	Volkswagen Polo 1.6	0.5%
16	Chevrolet Spark L	0.6%	Hyundai i20 1.4	0.5%	Isuzu KB 250 D-Teq	0.5%
17	Volkswagen Golf GTI	0.6%	Toyota Fortuner 3.0 D-4D	0.5%	Toyota Quantum 2.7	0.4%
18	Isuzu KB 250 D-Teq	0.6%	Ford Ranger 2.2 TDCi	0.5%	Hyundai Grand i10 1.0	0.4%
19	Toyota Corolla 1.6	0.6%	Ford Figo 1.4	0.5%	Renault Triber 1.0	0.4%
20	Toyota Corolla 1.3	0.5%	BMW 3 Series 320i	0.5%	Kia Picanto 1.0	0.4%

Things look more familiar in the manual car market, but even on this most-in-demand list it is clear that many are losing market share. The demand for the (now discontinued) compact bakkies stands out, as does the rise of the MPVs/Busses (Toyota Quantum, Suzuki Ertiga, Toyota Avanza, Renault Triber). Hyundai has remained strong in the manual space with its compact hatchbacks.



The Rise of the Chinese Car Brands

- The major Chinese brands, **GWM/Haval and Chery**, have grown by **14% and 35%** respectively since January 2023 alone.
- Two Chinese vehicles currently in the Top 10 of new-car sellers, the **Haval Jolion Pro and Chery Tiggo 4 Pro**.
- **6.5% of all stock** on Cars.co.za is currently Chinese, but only **3.24% of leads are**.
- There are currently **17 Chinese brands** operating in South Africa, with more on the way.
- In a very short space of time, January 2023 to mid-2025, Chinese brands have collectively grown new vehicle market share from around **7.5% to around 15%, 100% growth**.
- Cross-consideration of legacy brands with Chinese brands is declining, while cross-consideration of **Chinese brands with other Chinese brands is increasing**, showing accelerating public acceptance and a move away from legacy brands *(with exceptions)*.
- The **resale value** of the most popular Chinese models **match those of rival legacy brands** *(with exceptions)*.



Chinese Vehicles

In South Africa

In 2015 Chinese brands occupied a very small part of the local market. Most of the brands that formed part of the initial Chinese launch wave (2005 - 2015) had either exited the market, or were repositioning.

Most notably, the arrival of the **Haval H2** in **mid-2017** signalled the second phase of the Chinese motor industry's attempts to make inroads into the South African market. **Chery's official return in 2021** added **considerable impetus to the second Chinese wave.**



New Vehicles

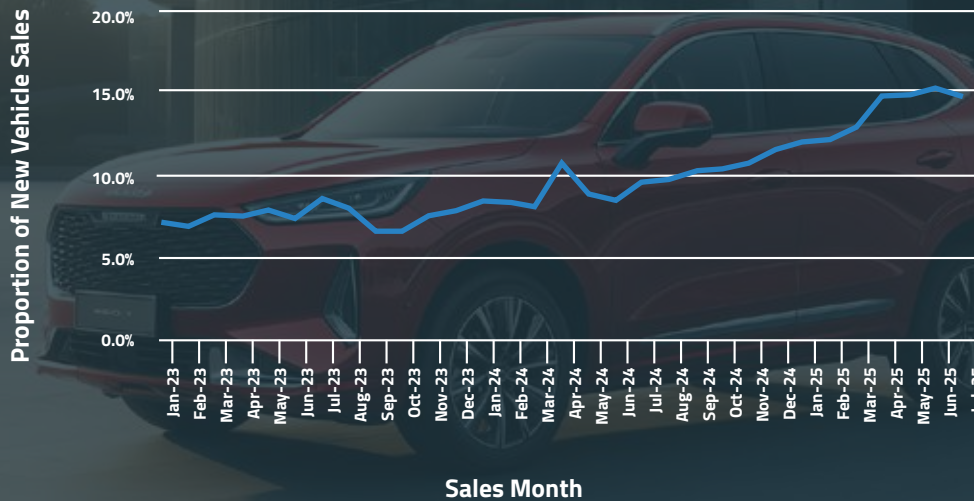
Chinese Market Share growth

If we look at the new-vehicle sales charts and compare 2015 with 2025, then you would not be wrong to describe the Chinese sales performance as simply breathtaking.

In 2015 there were no Chinese-made models that threatened the Top 30 (nevermind the Top 10), but by 2020 the Haval H2 had crept into the Top 20, and was fifth overall for Crossover/SUVs, setting the theme for what was to come.

Currently two Chinese vehicles are firmly in the Top 10 (Haval Jolion Pro, Chery Tiggo 4 Pro), with others in the Top 25 (Omoda C5, Chery Tiggo 7 Pro) or near it.

Chinese Proportion of New Vehicle Sales



If we look at New Vehicle Sales data from January 2023 to July 2025, then it is clear that the market share of Chinese brands is growing fast. **Note that the above table still excludes newer arrivals such as GAC, BYD and MG, and so the real-world market share figure is even bigger.**

Chinese vehicle brands are experiencing a surge in South Africa due to several key factors. Firstly, they offer **value for money, with lower purchase prices and more features compared to legacy brands**, making them appealing to cost-conscious buyers. Additionally, these brands have a strong alignment with South Africa's ongoing **SUV boom**, catering to the growing demand for this vehicle type. The tech-rich offerings of Chinese vehicles, which include **advanced infotainment, driver-assistance, and comfort features as standard at lower price points, attract tech-savvy consumers**. Moreover, there have been noticeable advances in **styling, fit, and finish**, which have helped overcome past perceptions of poor build quality. **Aggressive market expansion through rapid dealership growth is improving access to sales, service, and spare**

parts, making these vehicles more accessible to consumers. Lastly, Chinese brands offer **competitive fuel efficiency and a growing range of plug-in hybrid electric vehicles (PHEVs)** and electric vehicles (EVs) to cater to evolving demand.

It is worth noting that almost all well-performing Chinese vehicles compete in largely the same category (*compact to mid-size crossover*), with similar specifications and drivetrains. Well-priced and **offering exceptional showroom appeal**, these vehicles have **seriously impacted legacy brands' ability to compete in the R300 000 to R600 000 price range** of the new vehicle market.











It could be argued that, with an **ever-increasing number of compact and mid-size crossovers from the Chinese brands, cannibalization is inevitable**. The bigger Chinese brands with **large dealer networks and strong OEM support** from China are likely to not only **win on the sales charts, but also in endurance**. It is possible, perhaps likely, that some of the smaller players will not find their local presence sustainable.

Used Vehicles

Chinese Acceptance

The continuous strong sales from particularly Haval (*ever since the H2 launch in 2017*) and Chery, since its market reintroduction in 2021, as well as the introduction of several more brands in recent years (*notably Jaecoo, Omoda, Jetour*), have seen stock levels of Chinese vehicles increasing significantly in the pre-owned market.











Stock - Per Country

Year	Other	Swedish	South Korean	Japanese	Italian	Indian	German	French	English	Chinese	American
											
2015	0.48%	0.88%	10.20%	23.61%	0.77%	0.63%	41.55%	3.20%	3.29%	0.75%	14.62%
2016	0.38%	0.63%	9.98%	25.05%	0.82%	0.64%	38.73%	3.36%	2.88%	0.58%	16.96%
2017	0.31%	0.65%	9.89%	25.63%	0.80%	0.55%	39.39%	3.22%	2.91%	0.48%	16.16%
2018	0.34%	0.81%	10.62%	27.04%	0.75%	0.56%	36.64%	3.94%	3.24%	0.67%	15.39%
2019	0.28%	0.93%	9.55%	28.98%	0.79%	0.53%	35.42%	4.26%	3.24%	0.84%	15.17%
2020	0.26%	0.87%	9.47%	28.70%	0.84%	0.76%	35.40%	4.84%	3.17%	1.16%	14.54%
2021	0.71%	0.89%	9.54%	28.85%	0.73%	0.99%	35.27%	4.69%	3.03%	1.32%	13.97%
2022	0.23%	0.82%	9.45%	31.20%	0.75%	0.96%	32.43%	5.10%	2.77%	2.04%	14.24%
2023	0.36%	0.73%	9.72%	30.86%	0.66%	0.98%	31.08%	5.00%	2.71%	3.10%	14.79%
2024	0.53%	0.69%	9.61%	31.07%	0.60%	1.02%	29.59%	4.89%	2.86%	5.18%	13.95%
2025	0.89%	0.72%	9.08%	32.08%	0.48%	1.18%	28.38%	4.79%	2.81%	6.45%	13.13%

The above table shows stock levels on Cars.co.za for the past decade, per country of those vehicles' brand origin (*not manufacture*). While it is clear that traditional **German brands have shed the most**, they still **account for nearly 30% of all stock on Cars.co.za**. It is also important to note that the **rise in "Japanese" vehicle stock** is largely driven by vehicles made in India by Japanese brands (*Toyota and Suzuki being the main drivers*).

In reality, the **"Made-in-India" vehicle figure is significantly higher**. Chinese brands currently account for **around 6.5% of all stock on Cars.co.za**, and given current new-vehicle sales performance, the growth in that market share percentage will accelerate.

Leads - Per Country

Year	Other	Swedish	South Korean	Japanese	Italian	Indian	German	French	English	Chinese	American
											
2015	0.35%	0.83%	6.38%	23.23%	0.67%	0.37%	46.90%	2.45%	2.69%	0.76%	15.38%
2016	0.38%	0.69%	6.27%	23.03%	0.70%	0.40%	46.99%	2.54%	2.78%	0.57%	15.66%
2017	0.46%	0.74%	7.57%	25.21%	0.63%	0.56%	44.21%	2.95%	2.77%	0.75%	14.14%
2018	0.45%	0.73%	9.18%	25.26%	0.66%	0.63%	41.98%	3.39%	2.74%	0.71%	14.27%
2019	0.41%	0.78%	9.01%	25.34%	0.62%	0.66%	42.80%	3.17%	2.81%	0.78%	13.63%
2020	0.34%	0.72%	8.34%	27.54%	0.57%	0.65%	41.48%	3.12%	2.84%	0.89%	13.50%
2021	0.39%	0.70%	8.88%	29.04%	0.58%	0.65%	39.70%	3.05%	2.72%	1.17%	13.12%
2022	0.32%	0.63%	9.68%	29.27%	0.51%	0.69%	38.54%	3.33%	2.70%	1.77%	12.55%
2023	0.33%	0.50%	9.50%	31.50%	0.44%	0.75%	37.06%	3.53%	2.60%	2.15%	11.64%
2024	0.47%	0.47%	9.72%	32.52%	0.42%	0.74%	36.85%	3.25%	2.23%	2.40%	10.92%
2025	0.54%	0.45%	9.28%	34.75%	0.33%	0.92%	34.32%	3.48%	2.06%	3.24%	10.63%

When it comes to Leads (*by country of brand origin - not manufacture*), the **Japanese and German brands continue to dominate**. The stock share of **South Korean brands have dropped slightly in the past 10 years**, but leads (*as a percentage*) are up, and in other areas of this report the rising popularity of the **Hyundai Grand i10**, in particular, **needs to be acknowledged**.















Although just shy of **6.5% of stock carried on Cars.co.za are Chinese**, the share of used leads (3.24%) is lagging. This appears to support the theory that attractively-priced, new Chinese vehicles may be putting **pre-owned Chinese vehicles under pressure** at the top end, while new, **high-value offerings from Toyota** and others may be doing the same at lower price levels.

There may also still be some reluctance and **doubt in the minds of South African consumers** regarding the **long-term ownership experience of ageing Chinese vehicles** (*though we find no evidence of those concerns being well-founded, particularly when it comes to the major, well-established Chinese brands*).

That said, **brands like Toyota and, more recently, Hyundai and Kia, have taken decades to build a reputation** for quality and reliability as well as a stable dealership network to achieve their high regard. It is only to be expected that some buyers will be looking at the **new brands with some skepticism** (*particularly in the pre-owned space*).



Leads - Used Vehicle Chinese Brands

Make	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
 BAIC			0.08%	0.56%	2.18%	2.41%	1.39%	1.58%	3.36%	2.73%	4.22%
 BYD										0.11%	0.43%
 CHERY	20.64%	35.61%	41.93%	30.90%	22.41%	16.53%	12.29%	14.00%	21.77%	26.58%	24.35%
 FOTON	1.90%	1.14%	2.06%	5.84%	2.22%	2.74%	1.93%	1.22%	0.83%	0.56%	2.08%
 GAC MOTOR										0.02%	0.16%
 GWM	72.25%	55.11%	45.83%	45.20%	41.43%	37.65%	33.21%	28.56%	22.72%	19.97%	18.79%
 HAVAL	0.00%	0.00%	2.25%	9.35%	23.94%	32.00%	44.50%	50.03%	45.22%	39.15%	32.98%
 JAC				0.27%	0.62%	1.60%	1.74%	1.73%	2.16%	2.65%	3.61%
 JAECCO										1.29%	2.01%
 JETOUR										0.45%	2.47%
 MG	3.22%	4.07%	2.74%	3.21%	3.22%	4.14%	2.67%	1.54%	1.47%	0.99%	0.77%
 ADV										0.10%	0.07%
 MG										0.44%	1.09%
 OMODA									1.90%	4.95%	6.98%

Studying the share of pre-owned leads (of Chinese brands) on Cars.co.za, it is clear that the **dominant players remain GWM/Haval and Chery. Omoda is increasing its slice of the Chinese pie fast** and the growth of Jetour in a very short period of time is also impressive. Quietly, BAIC is growing.

When we analyze demand (leads submitted) vs supply (stock) on Cars.co.za, the following is noted with regards to Chinese vehicles;

- In terms of stock, there has been **strong growth in the R150 000 to R600 000 price range for SUVs and Crossovers**, as one would expect. The biggest volume of **Chinese Double-Cab stock currently sits between the R250 000 and R600 000 price extremes.**
- Chinese **SUVs and crossovers are currently in high demand in the pre-owned market under R250 000**, but over that price point the market becomes very competitive (a lot of stock in the system) for these vehicles, and buyers are potentially still looking elsewhere (other, traditional brands, or perhaps new vehicles - even from China itself). Again this is to be expected, as the **Chinese brands are still very aggressively pursuing growth in the new-vehicle market**, with very well-priced offerings.
- When it comes to **Chinese Double Cabs, demand is more robust**, particularly in the R250 000 to R300 000 price range. In fact, demand matches supply well up to around R400 000, after which it starts dropping off. This is largely driven by the **GWM P-Series.**



Most In-Demand Pre-Owned Chinese Vehicles in South Africa

(Based on leads placed on Cars.co.za)

Rank	2015			2020			2025		
	Make Model Variant	Lead Share		Make Model Variant	Lead Share		Make Model Variant	Lead Share	
1	 GWM Steed 5 2.5 TCi Double-Cab	0.1%		 Haval H1 1.5 VVT	0.1%		 Chery Tiggo 7 Pro 1.5 T Executive	0.1%	
2	 GWM Steed 5 2.2 MPi Double-Cab	0.0%		 Haval H2 1.5T Luxury Auto	0.1%		 Haval Jolion 1.5T Super Luxury Auto	0.1%	
3	 GWM H5 2.4	0.0%		 Haval H2 1.5T City	0.0%		 Haval H1 1.5 VVT	0.1%	
4	 GWM Hover 2.4 MPi	0.0%		 Chery QQ3 0.8 TE	0.0%		 Chery Tiggo 7 Pro 1.5 T Distinction Auto	0.1%	
5	 GWM Florid 1.5 Cross	0.0%		 Chery Tiggo 1.6 TX	0.0%		 Haval Jolion 1.5T Premium Auto	0.1%	
6	 GWM Steed 5 2.5 TCi Single-Cab	0.0%		 Haval H2 1.5T Luxury	0.0%		 Chery Tiggo 4 Pro 1.5 Comfort Auto	0.1%	
7	 Chery Tiggo 2.0 TXE	0.0%		 GWM Steed 5 2.2 MPi Double-Cab	0.0%		 Haval H2 1.5T Luxury Auto	0.1%	
8	 Chery Tiggo 2.0 TX	0.0%		 Haval H2 1.5T City Auto	0.0%		 Omoda C5 1.5T Style	0.1%	
9	 Chery Tiggo 1.6 TX	0.0%		 GWM Steed 5 2.2 MPi Workhorse Single-Cab	0.0%		 Chery Tiggo 4 Pro 1.5 LiT Auto	0.1%	
10	 GWM Steed 5 2.0 VGT Double-Cab	0.0%		 Chery QQ3 0.8 TX	0.0%		 Chery Tiggo 4 Pro 1.5 LiT	0.1%	
11	Chery QQ3 0.8 TE	0.0%		GWM Steed 5 2.2 MPi Base Double-Cab	0.0%		Haval H6 GT 2.0T Super Luxury 4X4 Auto	0.1%	
12	Chery QQ3 1.1 TXE	0.0%		Chery QQ3 1.1 TXE	0.0%		Omoda C5 1.5 Street	0.1%	
13	GWM Double-Cab 2.8 TDi Lux	0.0%		GWM M4 1.5	0.0%		Haval Jolion 1.5T City	0.1%	
14	GWM Florid 1.5 Super Lux	0.0%		GWM Florid 1.5 Cross	0.0%		GWM P-Series PV 2.0 TD LS Auto Double-Cab	0.1%	
15	GWM H5 2.0 VGT	0.0%		Haval H6C 2.0T Luxury Auto	0.0%		Haval H2 1.5T Luxury	0.1%	
16	GWM Steed 5 2.2 MPi Workhorse Single-Cab	0.0%		GWM H5 2.4	0.0%		Chery Tiggo 4 Pro 1.5 T Elite Auto	0.1%	
17	Chery Tiggo 2.0 TXE Auto	0.0%		GWM Florid 1.5 Super Lux	0.0%		Haval Jolion 1.5T City Plus DCT	0.1%	
18	GWM Steed 5 2.5 TCi 4x4 Double-Cab	0.0%		Chery QQ3 1.1 TE	0.0%		Haval Jolion 1.5T Luxury Auto	0.1%	
19	GWM Steed 5 2.0 VGT 4x4 Double-Cab	0.0%		GWM Steed 5 2.0 VGT Double-Cab	0.0%		GWM Steed 5 2.2 MPi Workhorse Single-Cab	0.1%	
20	GWM Steed 3 2.2 Lux Double-Cab	0.0%		GWM Steed 5 2.5 TCi Double-Cab	0.0%		BAIC X55 1.5T Premium Auto	0.1%	
21	Chery QQ3 0.8 TX	0.0%		GWM H5 2.0 VGT Auto	0.0%		Haval Jolion Pro 1.5T Super Luxury DCT	0.0%	
22	GWM H5 2.4 4x4	0.0%		GWM Double-Cab 2.2 MPi Anniversary Edition	0.0%		Haval Jolion Pro 1.5T Premium DCT	0.0%	
23	GWM Hover 2.4 MPi Limo	0.0%		Haval H6C 2.0T Premium Auto	0.0%		GWM P-Series PV 2.0 TD LT Auto Double-Cab	0.0%	
24	GWM M4 1.5	0.0%		GWM Steed 5 2.2 MPi Safety Double-Cab	0.0%		Haval H6 2.0T Premium Auto	0.0%	
25	GWM Steed 2.4 Double-Cab	0.0%		GWM Steed 5 2.5 TCi 4x4 Double-Cab	0.0%		GWM P-Series CV 2.0 TD DLX 4x4 Auto Double-Cab	0.0%	

The expected brands and models appear in the Top 25 of the Chinese models in the South African used-vehicle market (based on Leads on Cars.co.za). It is notable how the make-up of the Chinese offering has changed in South Africa in the past ten years, **shifting from budget and affordable bakkie focused, to a higher price point, more sophisticated vehicle** (even in the bakkie market).

It needs to be noted, however, that the more affordable Chinese vehicles are **extremely price-sensitive in the used**

vehicle market, and that demand quickly fades when they are priced in too close proximity to new alternatives.

After a relatively slow start, the performance of the **GWM P-Series** is increasingly strong (in the New and Used segments). BAIC is a brand that operates relatively quietly in South Africa, but there is decent demand for its **X55**. Higher up the price scale, it is interesting to note that the stylish (and relatively unique, at its price point) **Haval H6 GT**, is receiving good support.

Chinese Vehicle

Cross-Consideration











Using Cars.co.za lead data, which are linked to a single user (mobile phone number), we are able to determine which other vehicles a single user had looked at in the same period of time as considering the focus (in this instance, Chinese) vehicle.











In the tables below we focus on some of the most popular Chinese vehicles. We will also be comparing any noted trends with those of similarly-priced **Legacy brand vehicles**, in this instance the **Toyota Corolla Cross** and **Ford Ranger**.

Only vehicles younger than 5 years (in the indicated Year) and with less than 200 000km on the odo were considered. Using the first table below as an example, the 2.25% figure in the 2025 column for **Chery Tiggo 4 Pro (Used)** means that 2.25% of consumers who placed a lead for a **Haval Jolion** also placed a lead for a used **Chery Tiggo 4 Pro**.

Note Year indicates the year the Lead was placed.

Haval Jolion











Rank	Alternate	2022	2023	2024	2025
1	 Haval Jolion (Used)	7.97%	12.61%	11.99%	12.29%
2	 Haval Jolion (New)	12.35%	8.77%	5.44%	5.90%
3	 Chery Tiggo 4 Pro (Used)	0.74%	1.39%	1.82%	2.25%
4	 Haval H6 (Used)	1.00%	1.67%	2.84%	2.10%
5	 Chery Tiggo 7 Pro (Used)	0.37%	0.88%	1.25%	2.10%
6	 Toyota Corolla Cross (Used)	0.90%	1.16%	2.00%	2.01%
7	 Haval H2 (Used)	2.85%	3.43%	1.93%	1.86%
8	 Volkswagen Polo (Used)	1.79%	1.84%	2.87%	1.86%
9	 Ford Ranger (Used)	1.74%	1.53%	1.87%	1.37%
10	 Omoda C5 (New)	0.00%	0.27%	0.66%	1.37%











Rank	Alternate	2022	2023	2024	2025
11	 Kia Seltos (Used)	1.00%	1.26%	1.21%	1.28%
12	 Chery Tiggo 4 Pro (New)	1.00%	1.09%	0.96%	1.22%
13	 Volkswagen Polo Vivo (Used)	0.53%	0.99%	1.43%	1.22%
14	 Toyota Starlet (Used)	0.47%	0.44%	0.98%	1.13%
15	 Toyota Urban Cruiser (Used)	0.47%	0.58%	0.75%	1.06%
16	 Volkswagen T-Cross (Used)	0.74%	1.29%	1.16%	0.97%
17	 Suzuki Swift (Used)	0.37%	0.48%	0.64%	0.94%
18	 Toyota Hilux (Used)	1.32%	0.88%	0.86%	0.94%
19	 Omoda C5 (Used)	0.00%	0.17%	0.34%	0.91%
20	 GWM P-Series (Used)	0.58%	0.54%	0.61%	0.91%

The **Haval Jolion** is a slightly more expensive vehicle than the Chery Tiggo 4 Pro, and this is also reflected in the type of other vehicles considered with it in the Used market. Nevertheless, the Tiggo 4 Pro is increasingly seen as an alternative, as is the Tiggo 7 Pro.

A **new** Omoda C5 also appears to be a rising consideration (even more so than a used example), as is a **new** Chery Tiggo 4 Pro. Of all the legacy brand alternatives, the Toyota Corolla Cross is considered most often.

Chery Tiggo 4 Pro

Rank	Alternate	2022	2023	2024	2025
1	 Chery Tiggo 4 Pro (Used)	4.63%	8.57%	9.67%	11.58%
2	 Chery Tiggo 4 Pro (New)	7.37%	9.21%	6.11%	5.60%
3	 Haval Jolion (Used)	1.47%	2.01%	1.94%	2.54%
4	 Nissan Magnite (Used)	0.74%	1.37%	1.67%	2.47%
5	 Renault Kiger (Used)	0.21%	1.32%	1.45%	2.16%
6	 Volkswagen Polo (Used)	1.58%	2.60%	2.33%	1.92%
7	 Toyota Urban Cruiser (Used)	0.84%	1.37%	1.36%	1.79%
8	 Chery Tiggo 7 Pro (Used)	0.21%	0.54%	1.16%	1.65%
9	 Toyota Starlet (Used)	0.63%	1.03%	1.21%	1.55%
10	 Hyundai Venue (Used)	0.74%	0.88%	1.53%	1.51%

Rank	Alternate	2022	2023	2024	2025
11	 Kia Sonet (Used)	0.95%	0.83%	1.53%	1.51%
12	 Nissan Magnite (New)	0.84%	1.03%	1.04%	1.41%
13	 Ford Ranger (Used)	1.58%	1.08%	1.19%	1.34%
14	 Toyota Corolla Cross (Used)	0.32%	1.03%	1.65%	1.31%
15	 Volkswagen T-Cross (Used)	1.26%	1.27%	1.50%	1.27%
16	 Ford EcoSport (Used)	1.26%	1.57%	1.19%	1.27%
17	 Volkswagen Polo Vivo (Used)	0.95%	1.37%	1.38%	1.24%
18	 Kia Seltos (Used)	0.42%	1.03%	1.21%	1.20%
19	 Hyundai i20 (Used)	0.63%	1.03%	1.14%	1.17%
20	 Omoda C5 (New)	0.00%	0.29%	0.44%	1.17%

When it comes to the **Chery Tiggo 4 Pro**, more of the affordable mainstream brands' offerings appear to be in its crosshairs, and a (*new or used*) **Nissan Magnite**, seems to be a strong alternative. A new **Omoda C5** is also increasingly being considered.



GWM P-Series

Rank	Alternate	2022	2023	2024	2025	Rank	Alternate	2022	2023	2024	2025
1	GWM P-Series (Used)	6.54%	10.28%	10.81%	17.66%	11	Toyota Corolla Cross (Used)	0.22%	0.60%	0.84%	1.15%
2	Ford Ranger (Used)	4.16%	5.42%	5.41%	6.40%	12	JAC T8 (Used)	0.28%	0.37%	0.84%	1.15%
3	Isuzu D-Max (Used)	1.83%	2.36%	3.36%	3.82%	13	Chery Tiggo 7 Pro (Used)	0.11%	0.37%	0.51%	0.95%
4	Toyota Hilux (Used)	2.72%	2.83%	2.74%	2.63%	14	Peugeot Landtrek (Used)	0.33%	0.32%	0.77%	0.91%
5	GWM P-Series (New)	7.26%	4.26%	4.31%	2.58%	15	GWM Steed 5 (Used)	0.33%	0.74%	0.66%	0.91%
6	Nissan Navara (Used)	1.61%	2.36%	2.30%	2.24%	16	Suzuki Swift (Used)	0.22%	0.56%	0.66%	0.91%
7	Mahindra Pik Up (Used)	0.11%	1.44%	1.13%	1.62%	17	Haval H6 (Used)	0.44%	0.56%	1.06%	0.86%
8	Haval Jolion (Used)	0.61%	0.74%	0.99%	1.43%	18	Chery Tiggo 4 Pro (Used)	0.33%	0.23%	0.62%	0.86%
9	Ford Ranger (New)	1.22%	1.39%	1.24%	1.24%	19	Toyota Fortuner (Used)	1.39%	1.30%	0.62%	0.81%
10	Volkswagen Polo (Used)	1.33%	0.93%	1.24%	1.19%	20	Suzuki Ertiga (Used)	0.17%	0.14%	0.44%	0.81%

The **GWM P-Series** had a relatively slow start in the South African market, but appears to be gaining momentum. The **Ford Ranger** and **Isuzu D-Max** are the two most-often considered rival brand vehicles (*and increasingly so*), but interestingly enough, the likelihood of the **Toyota Hilux** being considered in combination with the **P-Series** appears to be declining (*albeit slowly*). **P-Series shoppers** are also considering Chinese **crossovers** such as the **Haval Jolion** and **Chery Tiggo 7 Pro**.























Haval as a Brand

Rank	Alternate	2018	2019	2020	2021	2022	2023	2024	2025
1	HAVAL Haval (Used)	1.85%	7.85%	13.26%	13.16%	14.70%	17.01%	18.84%	17.54%
2	HAVAL Haval (New)	8.33%	6.81%	5.95%	6.98%	8.31%	6.13%	6.33%	6.90%
3	TOYOTA Toyota (Used)	5.56%	4.59%	5.33%	4.84%	6.75%	6.53%	7.44%	6.80%
4	CHERY Chery (Used)	0.46%	0.44%	0.09%	0.17%	0.77%	2.16%	4.04%	5.27%
5	VW Volkswagen (Used)	3.70%	4.20%	4.54%	4.45%	5.51%	5.81%	6.14%	4.82%
6	Ford Ford (Used)	8.10%	6.17%	7.00%	6.48%	6.44%	4.98%	5.00%	4.01%
7	HYUNDAI Hyundai (Used)	5.79%	5.82%	6.56%	6.90%	5.99%	6.28%	5.41%	3.94%
8	SUZUKI Suzuki (Used)	1.62%	2.27%	1.81%	2.00%	2.65%	2.72%	3.18%	3.91%
9	KIA Kia (Used)	3.70%	3.60%	4.05%	3.31%	3.87%	3.87%	4.07%	3.87%
10	NISSAN Nissan (Used)	4.63%	3.36%	3.39%	3.92%	3.29%	4.28%	3.68%	3.36%
11	RENAULT Renault (Used)	3.24%	3.95%	4.05%	3.78%	3.67%	3.77%	3.43%	2.70%
12	CHERY Chery (New)	0.00%	0.00%	0.13%	0.06%	1.30%	1.58%	1.42%	1.96%
13	MAZDA Mazda (Used)	3.70%	3.50%	4.36%	3.56%	3.33%	3.11%	2.07%	1.84%
14	TOYOTA Toyota (New)	1.16%	1.38%	1.72%	1.45%	2.21%	1.76%	1.77%	1.82%
15	SUZUKI Suzuki (New)	1.16%	0.99%	0.88%	1.14%	1.28%	1.49%	1.74%	1.70%
16	BMW BMW (Used)	2.31%	3.26%	2.20%	2.09%	1.89%	2.17%	1.71%	1.63%
17	GWM GWM (Used)	2.55%	1.14%	1.01%	0.92%	1.03%	1.13%	1.28%	1.58%
18	OMODA Omoda (New)	0.00%	0.00%	0.00%	0.00%	0.00%	0.16%	0.61%	1.37%
19	Mercedes-Benz Mercedes-Benz (Used)	1.16%	2.22%	2.38%	2.42%	1.82%	1.61%	1.63%	1.33%
20	MAHINDRA Mahindra (Used)	0.93%	1.73%	1.15%	1.31%	1.33%	1.50%	1.52%	1.28%

It is noted that many of the **legacy brands are declining in terms of consideration along with Haval** (in the used vehicle space). As more Chinese brands are launched and **stock volume grows in the used market**, consideration is shifting to these rival Chinese brands. Outside of the Top 20 above, the remaining legacy brands are also declining in cross-consideration, with the **newer Chinese brands picking up their losses** (Jaecoo, Jetour, BAIC, MG etc.).





















Chery as a Brand

Rank	Alternate	2021	2022	2023	2024	2025
1	 Chery (Used)	2.93%	5.11%	11.11%	13.86%	15.71%
2	 Chery (New)	0.00%	9.41%	11.98%	8.08%	8.23%
3	 Toyota (Used)	5.85%	5.30%	5.63%	6.96%	6.67%
4	 Haval (Used)	2.93%	3.93%	4.93%	5.65%	5.98%
5	 Volkswagen (Used)	3.90%	6.12%	5.99%	5.78%	5.00%
6	 Hyundai (Used)	6.34%	4.02%	4.57%	4.80%	4.37%
7	 Suzuki (Used)	2.93%	2.74%	2.52%	3.33%	4.31%
8	 Kia (Used)	1.95%	3.93%	3.65%	3.92%	4.15%
9	 Nissan (Used)	4.88%	3.20%	3.11%	3.59%	3.73%
10	 Ford (Used)	6.83%	5.02%	4.31%	4.00%	3.54%
11	 Renault (Used)	7.32%	2.65%	2.52%	2.71%	3.07%
12	 Suzuki (New)	1.46%	1.74%	2.08%	2.18%	2.01%
13	 Haval (New)	0.98%	4.02%	2.74%	1.63%	1.90%
14	 Mazda (Used)	2.44%	2.19%	2.81%	2.49%	1.88%
15	 Toyota (New)	1.46%	3.11%	2.30%	1.73%	1.69%
16	 Omoda (New)	0.00%	0.00%	0.51%	0.78%	1.48%
17	 GWM (Used)	0.49%	1.00%	0.84%	1.02%	1.43%
18	 Isuzu (Used)	1.46%	1.10%	1.50%	1.29%	1.35%
19	 Nissan (New)	0.98%	1.64%	1.35%	1.27%	1.35%
20	 BMW (Used)	1.95%	2.37%	2.34%	1.90%	1.27%

There are **big similarities** between the Haval and Chery cross-consideration brand tables, but it does appear likely that **Chery is attracting a slightly more budget-oriented audience**. This is not unexpected, to some degree, given the fact that **Haval's** product line-up has more higher priced offerings than **Chery**. Just outside of the Top 20, the major **movers in terms of consideration** along with the Chery brand (*new or used*) are all Chinese (*Jetour, Jaecoo, BAIC and MG*).
























Toyota Corolla Cross (Non-Chinese, same segment reference)

Rank	Alternate	2021	2022	2023	2024	2025
1	 TOYOTA Toyota Corolla Cross (Used)	16.67%	5.16%	11.37%	12.30%	13.99%
2	 TOYOTA Toyota Corolla Cross (New)	16.67%	11.02%	8.67%	5.50%	5.87%
3	 TOYOTA Toyota Hilux (Used)	0.00%	2.01%	2.11%	2.01%	2.59%
4	 TOYOTA Toyota Urban Cruiser (Used)	0.00%	0.57%	1.29%	1.83%	2.47%
5	 Volkswagen Polo (Used)	16.67%	1.43%	1.71%	2.11%	2.02%
6	 Volkswagen T-Cross (Used)	0.00%	1.27%	1.57%	1.67%	1.87%
7	 Ford Ranger (Used)	0.00%	1.35%	1.94%	2.06%	1.84%
8	 TOYOTA Toyota Fortuner (Used)	0.00%	1.15%	1.29%	1.50%	1.57%
9	HAVAL Haval Jolion (Used)	0.00%	0.70%	0.95%	1.36%	1.48%
10	 TOYOTA Toyota Starlet (Used)	0.00%	0.53%	0.90%	1.16%	1.44%
11	ISUZU Isuzu D-Max (Used)	0.00%	0.90%	0.90%	1.18%	1.39%
12	 TOYOTA Toyota Corolla Quest (Used)	0.00%	0.94%	1.26%	1.15%	1.21%
13	 Volkswagen Polo Vivo (Used)	0.00%	0.90%	0.56%	1.30%	1.19%
14	 TOYOTA Toyota Starlet Cross (New)	0.00%	0.00%	0.00%	0.71%	1.03%
15	 TOYOTA Toyota Corolla (Used)	33.33%	1.68%	1.46%	1.44%	1.01%
16	HAVAL Haval Jolion (New)	0.00%	0.90%	0.81%	0.73%	0.94%
17	 TOYOTA Toyota RAV4 (Used)	0.00%	2.25%	1.97%	1.75%	0.92%
18	 Mazda CX-5 (Used)	0.00%	0.70%	1.60%	1.19%	0.88%
19	 Chery Tiggo 4 Pro (Used)	0.00%	0.12%	0.59%	1.05%	0.85%
20	 Chery Tiggo 7 Pro (Used)	0.00%	0.04%	0.42%	0.59%	0.85%
21	 Kia Seltos (Used)	0.00%	0.98%	0.98%	1.07%	0.83%

We have included the **Toyota Corolla Cross** here as a reference. For buyers looking at this popular **Toyota**, **Chinese vehicles are starting to appear on the radar**, with the **Haval Jolion (new or used)** being the most often considered (of the Chinese vehicles). But in general **Corolla Cross buyers still appear to prefer a legacy brand (but indications are that the Chinese are coming into focus)**. **Corolla Cross buyers also seem quite keen on pickups**, with the **Toyota Hilux, Ford Ranger and Isuzu D-Max** all appearing high on the cross-consideration table.



Ford Ranger (Non-Chinese, same segment reference)

Rank	Alternate	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	 Ford Ranger (Used)	19.14%	19.99%	17.84%	19.84%	17.11%	15.97%	17.47%	19.64%	19.32%
2	 Ford Ranger (New)	4.54%	4.13%	2.73%	2.90%	2.26%	2.78%	4.46%	6.17%	7.52%
3	 TOYOTA Toyota Hilux (Used)	6.70%	5.91%	5.94%	6.89%	6.94%	6.49%	5.65%	5.13%	6.21%
4	 ISUZU Isuzu D-Max (Used)	0.01%	0.03%	0.25%	0.86%	1.43%	2.37%	3.11%	3.99%	4.11%
5	 NISSAN Nissan Navara (Used)	1.47%	1.21%	1.07%	1.19%	1.14%	1.50%	1.72%	1.69%	1.76%
6	 Volkswagen Polo (Used)	1.53%	1.86%	2.07%	1.84%	1.88%	2.08%	1.91%	1.93%	1.62%
7	 GWM GWM P-Series (Used)	0.00%	0.00%	0.00%	0.00%	0.22%	0.51%	0.82%	0.96%	1.57%
8	 TOYOTA Toyota Fortuner (Used)	1.82%	1.72%	1.81%	1.85%	1.63%	1.74%	1.66%	1.82%	1.53%
9	 Volkswagen Amarok (Used)	2.65%	2.16%	1.37%	1.81%	1.46%	1.09%	1.12%	1.32%	1.12%
10	 Volkswagen Polo Vivo (Used)	0.91%	1.06%	1.21%	1.06%	1.18%	1.18%	1.12%	1.26%	1.04%
11	 TOYOTA Toyota Hilux (New)	0.68%	0.72%	0.77%	1.09%	1.12%	1.07%	0.99%	0.79%	0.96%
12	 TOYOTA Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.49%	0.87%	0.96%
13	 Ford Everest (Used)	0.49%	0.78%	1.03%	1.51%	1.66%	1.24%	1.18%	1.15%	0.91%
14	 BMW 3 Series (Used)	1.57%	1.52%	1.69%	1.26%	1.19%	1.19%	1.06%	0.70%	0.88%
15	 ISUZU Isuzu D-Max (New)	0.02%	0.03%	0.23%	0.42%	0.60%	0.73%	0.75%	0.80%	0.87%
16	 NISSAN Nissan NP200 (Used)	0.77%	0.96%	0.85%	1.09%	1.08%	1.10%	0.94%	1.06%	0.81%
17	 mahindra Mahindra Pik Up (Used)	0.00%	0.02%	0.06%	0.18%	0.27%	0.33%	0.61%	0.63%	0.67%
18	 Volkswagen Tiguan (Used)	0.49%	0.58%	0.66%	0.66%	0.71%	0.86%	0.73%	0.64%	0.64%
19	 TOYOTA Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.01%	0.12%	0.31%	0.46%	0.49%	0.63%
20	 SUZUKI Suzuki Swift (Used)	0.15%	0.10%	0.15%	0.17%	0.22%	0.32%	0.41%	0.68%	0.60%
21	 Mercedes-Benz C-Class (Used)	1.39%	1.61%	1.73%	1.40%	1.26%	0.91%	0.82%	0.76%	0.59%

The Ford Ranger cross-consideration table reveals that for the most part, its traditional rivals (*Hilux, Navara*) are stable in terms of being considered, but note that the **Isuzu D-Max** figure is misleading as the model name changed from **KB to D-Max in 2018**. **GWM's P-Series is the one rival bakkie that is posting the strongest gains on this table** - but interestingly the Chinese contender does not feature as strongly on the Hilux (0.65%) cross-consideration table. This could be because the P-Series is seen as **more of a lifestyle vehicle than a workhorse**, and the Ranger itself has built a reputation as probably the go-to lifestyle Double-Cab in the market.

What is quite interesting in general is that **Suzuki, a volume-selling brand at the affordable end of the market, is not appearing highly as a brand considered along with the Chinese offerings**, but the Toyotas based on Suzukis are (*Urban Cruiser, Starlet, Starlet Cross*).



Resale Value

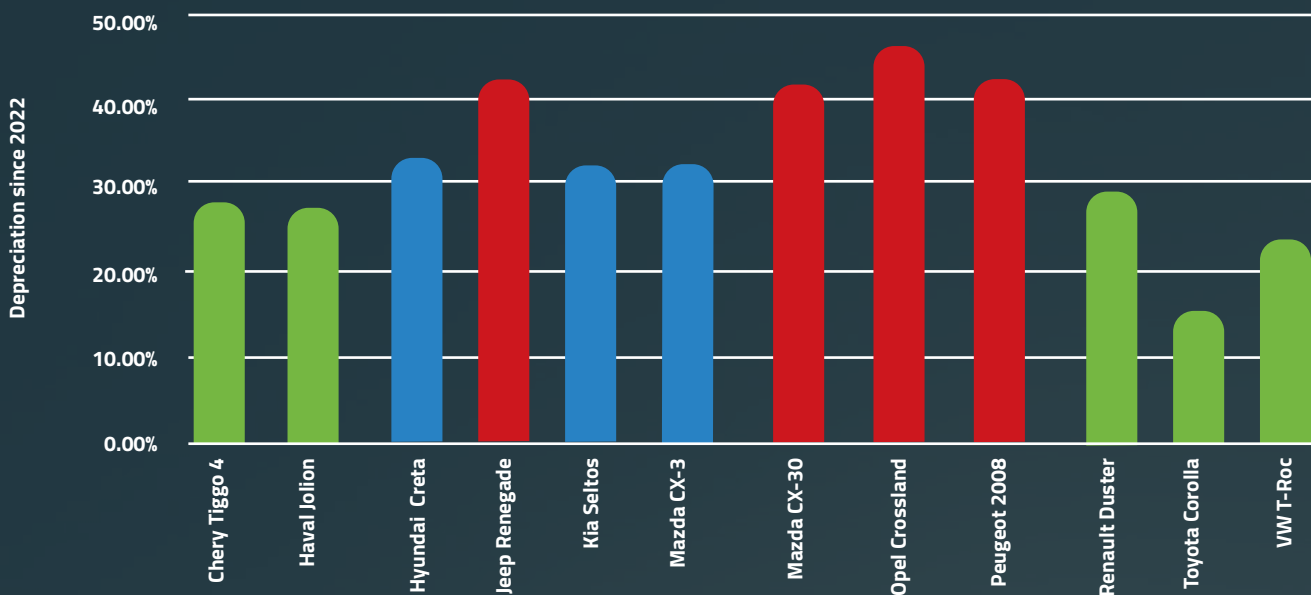
Offering exceptional standard specification and attractive warranties/service plans when new, the desirability of the value for money offered by Chinese vehicles is carried over into the pre-owned market.

Consequently, residuals are looking healthy for most of the major players. It does mean, however, that for consumers replacing a relatively young Chinese vehicle, a still well-priced **New Chinese vehicle may be an attractive option.** This could also account for the extreme competitiveness in the Used Crossover

segment, where affordable Chinese crossovers can struggle to sell if priced even slightly too high.

Note the residual tables are calculated using pricing data on Cars.co.za for 2022 models (three year listing price change).

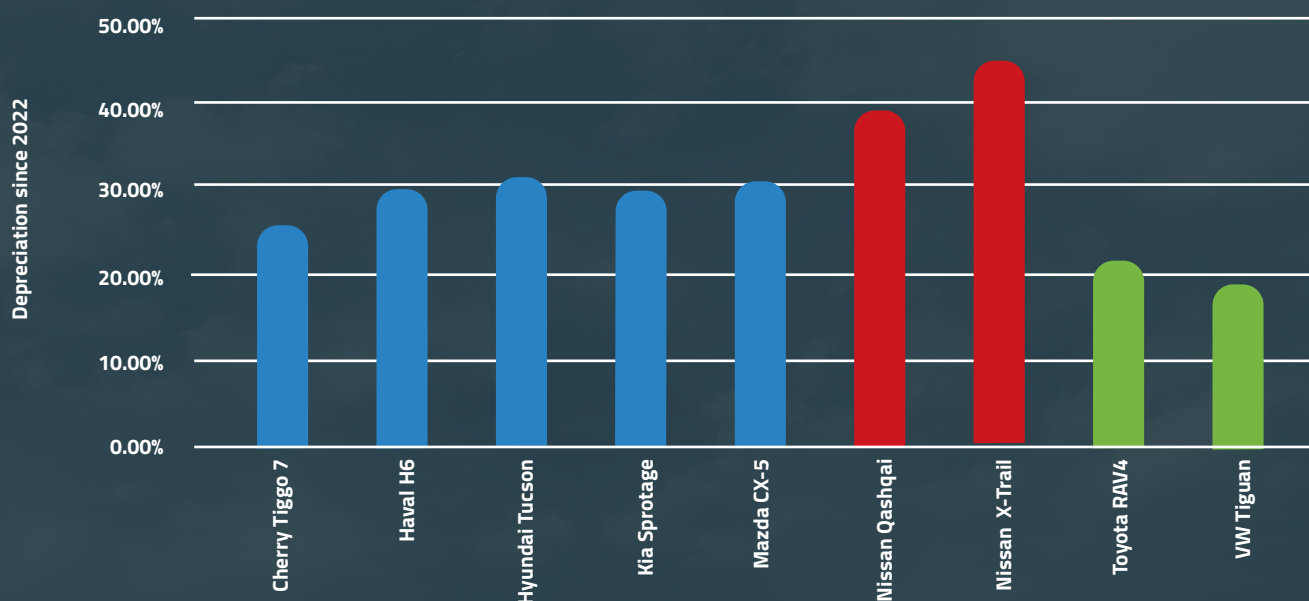
Compact Crossover



In this very competitive segment the **Toyota Corolla Cross** boasts incredibly strong residuals. The major players from China (**Chery Tiggo 4 Pro** and **Haval Jolion**), are doing well, too. **Renault's Duster** is a perennial favourite in the used market, but this is for the well-priced previous-generation model.



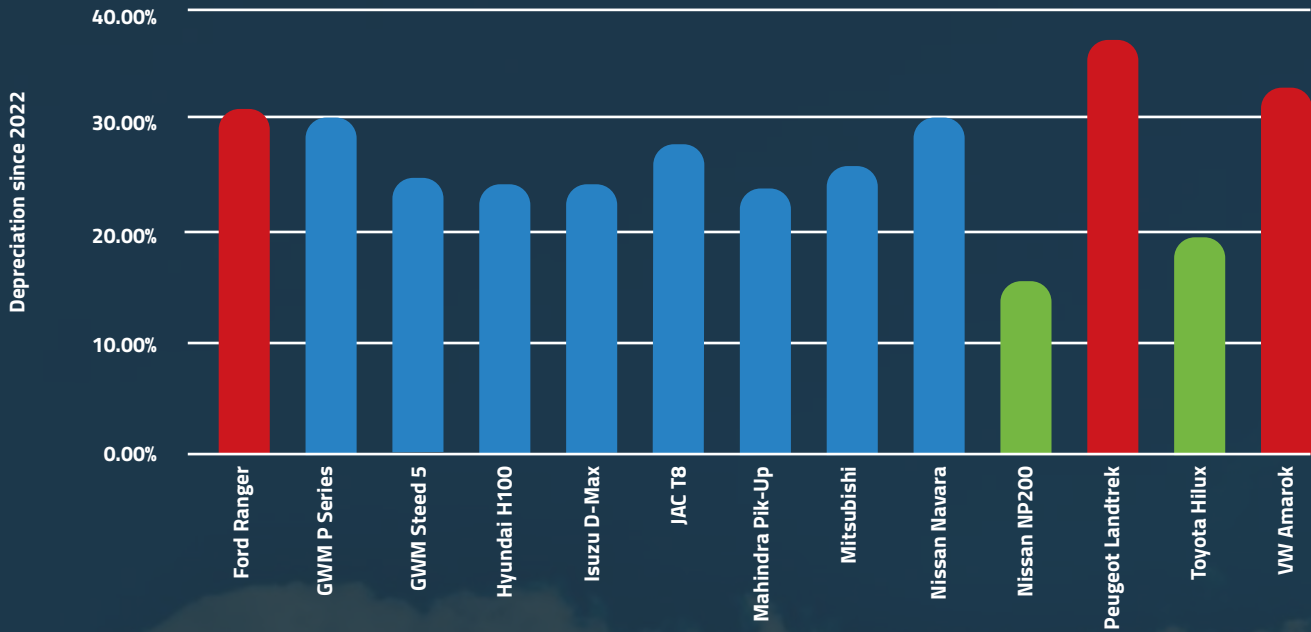
Family Crossover



The traditional stalwarts of the segment (**the Toyota RAV4 and VW Tiguan**) lead the way in this highly competitive segment. Chinese brands are matching the other brands on depreciation, but the data indicates that Nissan's recent versions of the **Qashqai and X-Trail** were overpriced in the market.



Pick-Ups



The situation in the bakkie segment is pretty evenly matched, save for some outliers. The **Peugeot Landtrek** was always going to struggle a bit in terms of depreciation. The **Nissan NP200** residuals benefited from demand at a time when the vehicle was on run-out. **Toyota's Hilux** has always been stronger than the rest, and the remainder of the rivals are pretty evenly matched. The affordable **GWM Steed 5** and **Mahindra Pickup** are holding value relatively well, with these vehicles potentially filling a void left by the departure of the half-tonne pickups.



Conclusion

GWM/Haval and the Chery brands (Chery, Jaecoo, Omoda and Jetour) are established and with their growing line-ups and dealership footprint, seem **poised to grow their market presence even further.** If we look at product line-up and dealership roll-out strategies, as well as marketing efforts, we would predict that **MG and BYD also seem well-placed for strong growth in the coming years.**

With Chinese brands almost all competing in the same space of the market, the risk of cannibalization is

strong, and those who can should also consider other segments, notably the **MPV/Minibus category and affordable pickups.**

In the pre-owned market specifically, the supply of **used Chinese vehicles is growing rapidly,** but the market for them is competitive, particularly as the main players are still relatively closely priced to new offerings. While the **Chinese new vehicles remain exceptionally well-priced, used-car dealers should be wary of overpaying for Chinese used stock.**



New Energy Vehicles - Awaiting a Spark

- While NEV new-vehicle market share **doubled in 2024, around 75%** of the sales came from one vehicle, Toyota's Corolla Cross!
- Pure **electric vehicle sales are stuck in reverse** in the new vehicle market (*actual decline in Q1 2025*).
- **Diesel is not dead.** Since 2015 to 2025, the stock share (*on Cars.co.za*) of used Diesel vehicles has **grown by 28%**, as have leads (*demand*).
- The only **passenger car in the Top 20 of most-in-demand diesels** in South Africa (*based on Cars.co.za leads in 2025*), is the **BMW 320d**.
- **Volvo's EX30 is the most in-demand pure EV** in South Africa (*based on leads on Cars.co.za*).

New Energy Vehicles

In South Africa

While the world continues to move away from diesel towards battery-electric and hybrid vehicles, the New and Used car market stats tell a very different story in South Africa.

Ultimately, the make-up of the market will be dictated by what vehicles are sold here by OEMs in the new-vehicle market, but the trends indicate **appetite for diesel remains and petrol remains very strong. Only Hybrid (including Plug-in Hybrid) is showing signs of potential (significant) growth potential at the moment.**



New Vehicle Market

Though Hybrids have been on sale in South Africa for more than two decades, courtesy of Toyota's Prius, this type of vehicle has struggled to gain traction. There are signs, however, that the shift is finally happening.

According to the industry representative body, collective NEV sales (note, Naamsa seemingly doesn't include mild hybrids in this group) from the **21 brands active** in this space last year (2024) increased **100.6% year on year to 15 611 units**. That means **NEVs comprised 3.0%** of South Africa's total new-vehicle market for 2024 (515 853 units), up from **1.47% in 2023**.

	Year 2020	Year 2021	Year 2022	Year 2023	Year 2024	Q2:2024	Q2:2025
Plug-in hybrid	77	51	122	368	738	160	547
Traditional hybrid	155	627	4,070	6,485	13,616	3,543	2,837
Electric	92	218	502	929	1,257	419	294
Total NEVs	324	896	4,694	7,782	15,611	4,122	3,678

Last year's **15 611-unit performance** was, of course, a **record for NEV sales in South Africa**. As a reminder, this part of the local market enjoyed **significant year-on-year gains of 421.7%** (to 4 674 units) in 2022 and 65.7% (to 7 746 units) in 2023, though obviously off comparatively low bases.

According to Naamsa, sales of fully electric vehicles for Q4 2024 came in at **184 units**, down from **209 units** in Q4 2023 and likewise down from **324 units in Q3 2024**. That puts South Africa's **EV sales total for 2024 at 1 257 units, up 35.3% year on year** and eclipsing the previous high of 929 units achieved in 2023. Take note, however, that this figure excludes local sales from BYD, which unfortunately doesn't report sales numbers to Naamsa.

Interestingly, sales of **plug-in hybrids** in South Africa in Q4 2024 outstripped those of fully electric vehicles, ending the 3-month reporting period on **260 units (more than double Q4 2023's effort)**. However, our calculations suggest plug-in hybrids were still outsold by EVs locally over the whole of 2024, with PHEVs ending the year on 728 units (again, more than doubling 2023's tally of 336 units). It's our understanding that the **BMW X1 xDrive30e was SA's best-selling PHEV last year**.

Finally, that brings us to traditional hybrids, which yet again accounted for the overwhelming majority of NEV registrations in 2024, mostly thanks to dual-powered versions of the locally-built **Corolla Cross (which we'd estimate represented nearly 75% of this segment's sales)**. In the final quarter of the year, as many as **4 157 units** were registered, which – based on our arithmetic – pushes the HEV figure for 2024 to **13 604 units (a 108.7% year-on-year improvement)**.

Thus far in 2025 the NEV new vehicle sales performance has been a mixed bag. Sales of fully **electric vehicles in South Africa dipped 16.4% year on year in Q1 2025**, though total new-energy vehicle registrations climbed thanks to increased hybrid sales. Based on figures reported to the industry representative body, SA's total **new-vehicle market registered year-on-year growth of 10.5% in Q1 2025, ending this reporting period on 144 426 units**.

Meanwhile, **NEV sales** for the opening 3 months of the year came in at **3 487 units**, up 14.0% compared with Q1 2024. That figure **represents approximately 2.4% of the total new-vehicle market**.

The slowdown in NEV growth locally in Q1 2025 is thanks to the sales performance of purely battery-powered vehicles, with Naamsa's figures showing that **EV sales dipped 16.4% year on year to 276 units (or 0.19% of the total market)**. Take note, however, this figure excludes local sales from BYD, which is likely to become a driving force in the local EV market.

What about plug-in hybrids? Well, Naamsa's figures show that local **PHEV sales increased 70.9% year on year to 241 units in Q1 2025**. As such, the PHEV segment already looks well positioned to exceed 2024's record of 728 units (which itself was more than double 2023's tally of 336 units) before the end of 2025.

Finally, traditional hybrids again accounted for the overwhelming majority of NEV registrations, thanks largely to sales of the Corolla Cross. In Q1 2025, HEV sales in South Africa grew **14.8% year on year to 2 970 units, representing a whopping 85.2% of the NEV total**. With a raft of new hybrid (as well as PHEV) models recently

launched by Chery in particular, we expect the **NEV tally to grow**, especially as these new variants are likely to benefit from competing in the same (*more-or-less*) segment as the **Toyota Corolla Cross, which has already shown that there is volume on offer.**

When it comes to pure electric vehicles, the market has not yet seen the arrival of its **breakthrough car.** BYD's

imminent Dolphin Surf, which is likely to be similarly priced to a reasonably priced, Polo-sized hatchback in the local market, could well be the defining moment, but it needs to be emphasised that price alone is unlikely to be a determining factor in creating an EV revolution. The South African consumer is very likely to remain **cautious about charging infrastructure and reliability of the national power grid.**

Used Vehicles

Diesel resilience... but Hybrid on the rise

Stock - Fuel Type

Year	Diesel	Electric	Hybrid	Petrol
2015	24.58%	0.00%	0.10%	75.31%
2016	26.37%	0.01%	0.11%	73.52%
2017	26.46%	0.01%	0.11%	73.42%
2018	28.17%	0.01%	0.10%	71.73%
2019	31.06%	0.01%	0.13%	68.79%
2020	30.89%	0.02%	0.14%	68.95%
2021	29.69%	0.01%	0.13%	70.17%
2022	31.43%	0.04%	0.23%	68.30%
2023	33.21%	0.09%	0.49%	66.20%
2024	31.37%	0.17%	1.00%	67.46%
2025	31.67%	0.23%	1.31%	66.80%

The table above shows the composition of stock on Cars.co.za, split among the four powertrain types, for the past decade. Perhaps against expectations following the global industry's **rapid shift to Hybrid and EV after the Volkswagen Dieselgate debacle, Diesel has not only been resilient, but has also grown.** Its gains have come at the cost of Petrol, but it is worth noting that the Hybrid stock pool is growing, EVs are still a non-entity. But perhaps most interestingly, it looks like both Diesel and Petrol have started flatlining in recent years (*Diesel from around 2019 and Petrol from around 2022*). Recently, Hybrid has picked up significantly (but as we will see later, this growth is driven almost entirely by a handful of models, and one in particular... **the Toyota Corolla Cross**).

Leads - Fuel Type

Year	Diesel	Electric	Hybrid	Petrol
2015	25.52%	0.00%	0.07%	74.41%
2016	28.55%	0.00%	0.11%	71.33%
2017	28.85%	0.01%	0.10%	71.04%
2018	26.61%	0.00%	0.08%	73.30%
2019	28.19%	0.00%	0.10%	71.71%
2020	30.67%	0.01%	0.11%	69.22%
2021	31.52%	0.01%	0.10%	68.37%
2022	30.15%	0.02%	0.22%	69.61%
2023	30.77%	0.03%	0.25%	68.95%
2024	30.61%	0.04%	0.42%	68.92%
2025	31.12%	0.06%	0.49%	68.33%

When it comes to leads submitted on Cars.co.za (*an intent to purchase indicator*), **Petrol and Diesel have also flatlined, again from around 2020, and since then Hybrid has started picking up, with some extra momentum from 2022** (*Toyota Corolla Cross launched in late 2021*).



Market favourites

by powertrain type

The following four tables show the most in-demand used vehicles across the four different powertrain types. Note that the 2025 figures are for the first half of 2025, based on Cars.co.za leads.

Petrol - Used Market Leads (Demand)

Rank	2015			2020			2025		
	Make Model Variant	Lead Share		Make Model Variant	Lead Share		Make Model Variant	Lead Share	
1	 Volkswagen Polo Vivo 1.4	3.2%		 Volkswagen Polo Vivo 1.4	2.6%		 Volkswagen Polo Vivo 1.4	3.5%	
2	 Volkswagen Polo 1.4	3.1%		 Volkswagen Polo 1.6	1.6%		 Volkswagen Polo 1.0 TSI	2.4%	
3	 BMW 3 Series 320i	1.9%		 BMW 3 Series 320i	1.6%		 Suzuki Swift 1.2	1.3%	
4	 Volkswagen Polo 1.6	1.8%		 Volkswagen Golf GTI	1.5%		 Nissan NP200 1.6	1.2%	
5	 Volkswagen Polo 1.2 TSI	1.6%		 Volkswagen Polo 1.0 TSI	1.4%		 Volkswagen Polo 1.2 TSI	1.2%	
6	 Audi A4 1.8 T	1.5%		 Volkswagen Polo 1.4	1.3%		 Volkswagen Golf GTI	1.1%	
7	 Volkswagen Golf GTI	1.3%		 Volkswagen Polo 1.2 TSI	1.2%		 Suzuki Ertiga 1.5	1.1%	
8	 Ford Fiesta 1.4	1.2%		 Mercedes-Benz C-Class C180	1.2%		 Toyota Avanza 1.5	1.1%	
9	 Volkswagen Golf 1.4 TSI	1.1%		 Nissan NP200 1.6	1.1%		 Mercedes-Benz C-Class C200	1.0%	
10	 Mercedes-Benz C-Class C180	1.1%		 Chevrolet Utility 1.4	1.0%		 Volkswagen Polo 1.4	0.9%	
11	Opel Corsa 1.4	1.1%		Mercedes-Benz C-Class C200	1.0%		BMW 3 Series 320i	0.9%	
12	Ford Figo 1.4	0.9%		Volkswagen Polo GTI	0.8%		Volkswagen Polo GTI	0.9%	
13	Chevrolet Utility 1.4	0.9%		Toyota Corolla 1.6	0.8%		Mercedes-Benz C-Class C180	0.8%	
14	Toyota Corolla 1.6	0.7%		Hyundai i20 1.4	0.7%		Hyundai i20 1.4	0.7%	
15	Mercedes-Benz C-Class C200	0.7%		Ford Fiesta 1.4	0.7%		Toyota Corolla 1.6	0.7%	
16	BMW 1 Series 118i	0.7%		Toyota Avanza 1.5	0.6%		Hyundai i20 1.2	0.6%	
17	Chevrolet Cruze 1.6	0.7%		Volkswagen Golf 1.4 TSI	0.6%		Volkswagen Polo 1.6	0.6%	
18	Toyota Corolla Quest 1.6	0.6%		Audi A4 1.8 T	0.5%		Chevrolet Utility 1.4	0.6%	
19	Chevrolet Spark L	0.6%		Hyundai ix35 2.0	0.5%		Kia Picanto 1.0	0.6%	
20	Volkswagen Polo GTI	0.6%		Toyota Corolla Quest 1.6	0.5%		Toyota Starlet 1.5	0.6%	

With two entrants into the Top 20 (*Swift, Ertiga*), at very high lead share percentages, Suzuki has made the biggest moves. Reasonably expensive models such as the **VW Golf/Polo GTI, Mercedes-Benz C-Class and BMW 320i** still make the rankings today, but have significantly shed lead share.

Diesel - Used Market Leads (Demand)

Rank	2015		2020		2025	
	Make Model Variant	Lead Share	Make Model Variant	Lead Share	Make Model Variant	Lead Share
1	 Toyota Hilux 3.0 D-4D	1.1%	 Toyota Hilux 2.8 GD-6	1.1%	 Toyota Hilux 2.4 GD-6	1.4%
2	 Toyota Fortuner 3.0 D-4D	1.0%	 Ford Ranger XL	1.1%	 Toyota Quantum 2.5	1.2%
3	 Toyota Hilux 2.5 D-4D	0.7%	 Toyota Fortuner 3.0 D-4D	0.9%	 Ford Ranger XL	1.2%
4	 BMW 3 Series 320d	0.7%	 Toyota Hilux 2.4 GD-6	0.9%	 Ford Ranger Wildtrak	1.0%
5	 Isuzu KB 300 D-Teq	0.6%	 Toyota Hilux 3.0 D-4D	0.9%	 Ford Ranger XLT	0.9%
6	 Ford Ranger XL	0.6%	 BMW 3 Series 320d	0.8%	 Toyota Hilux 2.8 GD-6	0.8%
7	 Isuzu KB 250 D-Teq	0.6%	 Toyota Hilux 2.5 D-4D	0.7%	 Toyota Hilux 2.8 GD-6 Legend	0.6%
8	 Volkswagen Amarok 2.0 BiTDI	0.6%	 Ford Ranger XLT	0.7%	 BMW 3 Series 320d	0.6%
9	 Audi A4 2.0 TDI	0.6%	 Isuzu KB 250 D-Teq	0.6%	 Toyota Fortuner 2.4 GD-6	0.6%
10	 Volkswagen Polo 1.9 TDI	0.4%	 Ford Ranger Wildtrak	0.5%	 Toyota Fortuner 2.8 GD-6	0.5%
11	Isuzu KB 250D	0.3%	Ford Ranger 2.2 TDCi	0.5%	Toyota Fortuner 3.0 D-4D	0.5%
12	Volkswagen Polo 1.2 TDI	0.3%	Volkswagen Amarok 2.0 BiTDI	0.5%	Isuzu KB 250 D-Teq	0.5%
13	Ford Ranger XLS	0.3%	Toyota Fortuner 2.4 GD-6	0.5%	Toyota Hilux 3.0 D-4D	0.5%
14	Volkswagen Kombi 2.0 TDI	0.3%	Isuzu KB 300 D-Teq	0.5%	Toyota Hilux 2.5 D-4D	0.4%
15	Ford Ranger XLT	0.3%	Ford Ranger XLS	0.4%	Hyundai H-1 2.5 CRDi	0.4%
16	Land Rover Discovery 4 3.0 TDV6	0.3%	Toyota Fortuner 2.8 GD-6	0.4%	Toyota Hilux 2.4 GD	0.4%
17	Volkswagen Tiguan 2.0 TDI	0.3%	Toyota Hilux 3.0 D-4D Legend	0.4%	Volkswagen Amarok 2.0 BiTDI	0.4%
18	Audi A3 2.0 TDI	0.3%	Hyundai H100 Bakkie 2.6 D	0.3%	Isuzu KB 300 D-Teq	0.4%
19	Nissan Navara 2.5 dCi	0.3%	Nissan NP300 2.5 TDi	0.3%	Hyundai H100 Bakkie 2.6 D	0.4%
20	Toyota Fortuner 2.5 D-4D	0.2%	Land Rover Discovery 4 3.0 TDV6	0.3%	Ford Ranger XLS	0.4%

No major surprises in the diesel rankings, except noting that **VW/Audi, which used to be a diesel passenger car market leader**, has all but disappeared from the list - a consequence of the post-Diesalgate changes made by the brand regarding its model lineup.

Only one **non-bakkie/SUV in the Top 20 currently - the BMW 320d**. It is worth noting that two upcoming brands' offerings sit just outside of the **Top 20 currently (Mahindra Pik-Up and GWM P-Series)**, in **22nd and 23rd places respectively**.

Hybrid - Used Market Leads (Demand)

Rank	2015			2020			2025		
	Make Model Variant	Lead Share		Make Model Variant	Lead Share		Make Model Variant	Lead Share	
1	 Toyota Yaris Hybrid	0.02%		 BMW i8 Coupe	0.02%		 Toyota Corolla Cross Hybrid	0.16%	
2	 Toyota Auris Hybrid	0.01%		 Toyota Yaris Hybrid	0.01%		 Toyota RAV4 Hybrid	0.04%	
3	 Lexus CT 200h	0.01%		 Toyota Auris Hybrid	0.01%		 Toyota Corolla Hybrid	0.04%	
4	 Toyota Prius 1.8	0.01%		 BMW 3 Series Hybrid	0.01%		 Haval H6 Hybrid	0.02%	
5	 BMW 3 Series Hybrid	0.00%		 BMW i3 REX	0.01%		 Toyota Corolla Cross GR-S	0.02%	
6	 Toyota Prius	0.00%		 Volvo XC90 T8	0.01%		 Haval Jolion Hybrid	0.02%	
7	 Honda Jazz Hybrid	0.00%		 Lexus CT 200h	0.01%		 Toyota Auris Hybrid	0.01%	
8	 Lexus RX 450h	0.00%		 Mercedes-Benz S-Class S400	0.00%		 Haval Jolion Pro	0.01%	
9	 Honda Insight Hybrid	0.00%		 Lexus GS 450h	0.00%		 Suzuki Grand Vitara 1.5	0.01%	
10	 Mercedes-Benz S-Class S400	0.00%		 Lexus RX 450h	0.00%		 BMW i8 Coupe	0.01%	
11		0.00%		 Mercedes-Benz C-Class C350e	0.00%		 Mercedes-Benz S-Class S400	0.01%	
12		0.00%		 BMW i8 Roadster	0.00%		 Volvo XC60 B5	0.01%	
13		0.00%		 Mercedes-Benz E-Class E300d	0.00%		 Toyota Yaris Hybrid	0.01%	
14		0.00%		 Lexus ES 300h	0.00%		 Honda Fit Hybrid	0.01%	
15		0.00%		 Lexus UX 250h	0.00%		 Lexus RX 450h	0.01%	
16		0.00%		 BMW 5 Series Hybrid	0.00%		 Lexus UX 250h	0.01%	
17		0.00%		 Porsche Cayenne S	0.00%		 Haval H6 GT Hybrid	0.01%	
18		0.00%		 Honda Insight Hybrid	0.00%		 GWM Tank 300 2.0T	0.01%	
19		0.00%		 Toyota Prius	0.00%		 Lexus NX 350h	0.00%	
20		0.00%		 Toyota Prius 1.8	0.00%		 Volvo XC90 T8	0.00%	

The Hybrid table is particularly interesting as it shows that the market is dominated by a single model - **Toyota's locally manufactured Corolla Cross** (the GR-S variant's share is shown separately here, but could be combined). What is also noticeable is that **Haval** has quickly made inroads with its still-new **Jolion and H6 hybrids**, a strong indicator that the market is ready for well-priced hybrids, particularly in the crossover space. Also note the **swift rise of the GWM Tank 300 2.0T**, but stock volumes remain low.

This particular - currently very small segment of the market - could be the next opportunity for growth. It will be interesting to see market response to **Chery's recent hybrid introductions**. Our view is that the Chinese offerings will significantly grow this segment, but potentially not the **crossover/SUV segment overall** - in other words, a shift to **hybrid with time, but at the cost of traditional petrol crossovers**.

Electric - Used Market Leads (Demand)

Rank	2015			2020			2025		
	Make Model Variant	Lead Share		Make Model Variant	Lead Share		Make Model Variant	Lead Share	
1	 Nissan Leaf	0.001%		 BMW i3 Standard	0.005%		 Volvo EX30 Motor	0.007%	
2	 BMW i3 Standard	0.000%		 Jaguar I-Pace SE 90kWh	0.001%		 BMW i3 Standard	0.006%	
3	0	0.000%		 Jaguar I-Pace 90kWh	0.001%		 BYD Dolphin	0.003%	
4	0	0.000%		 Jaguar I-Pace S 90kWh	0.000%		 MINI Hatch Cooper SE	0.003%	
5	0	0.000%		 Nissan Leaf	0.000%		 Volvo XC40 P8 Recharge	0.003%	
6	0	0.000%		 BMW i3 S	0.000%		 Mercedes-Benz EQB 350	0.003%	
7	0	0.000%		0	0.000%		 BMW iX3	0.003%	
8	0	0.000%		0	0.000%		 GWM Ora 400	0.003%	
9	0	0.000%		0	0.000%		 BYD Atto 3 Extended	0.003%	
10	0	0.000%		0	0.000%		 GWM Ora 300	0.002%	
11	0	0.000%		0	0.000%		Jiayuan Eidola 4S	0.002%	
12	0	0.000%		0	0.000%		Volvo XC40 P6	0.002%	
13	0	0.000%		0	0.000%		BMW i7 xDrive60	0.002%	
14	0	0.000%		0	0.000%		Mercedes-Benz EQA 250	0.002%	
15	0	0.000%		0	0.000%		BMW iX xDrive40	0.002%	
16	0	0.000%		0	0.000%		MG Cyberster 4WD	0.002%	
17	0	0.000%		0	0.000%		BYD Seal	0.002%	
18	0	0.000%		0	0.000%		Audi e-tron 55	0.001%	
19	0	0.000%		0	0.000%		Mercedes-Benz EQE 350	0.001%	
20	0	0.000%		0	0.000%		BMW iX1 xDrive30	0.001%	

As indicated by the need to show the above percentages to the third decimal point, this is a really small segment (*in terms of lead share*). However, the table shows two things mainly; One, that there is indeed some growth and Two, that the sheer number of EVs on offer has grown very significantly. As widely reported in the media, the **Volvo EX30** does appear to be the most in-demand EV, but perhaps surprisingly **BMW's ageing and discontinued i3** remains relatively popular. With three new models already in the **Top 20**, **China's BYD** could be the brand that finally shakes up this segment.

Conclusion

As it stands right now, the **NEV market** (*new and used*), is driven almost entirely by the locally-manufactured **Toyota Corolla Cross**. What the staggering success of this model has shown is that buyers in the **Medium Crossover** segment are willing to opt for such a vehicle (*though the Toyota badge certainly helps*) if it is well-priced. We expect the latest additions from **Chery and Haval in particular to grow**

the Hybrid (*including Plug-In*) segment of the NEV market through the remainder of 2025, provided stock is available.

When it comes to **Pure Electric**, the arrival of the keenly priced (*just how keenly, remains to be seen*) **BYD Dolphin Surf** would be a good test for real consumer appetite in this segment.



2025 - Thus Far

- **New-vehicle price inflation dropped** to a record low of **1.7% in Q2 2025**.
- The **used and new vehicle market collectively topped 200 000 units** in July 2025 for the first time in our measured period (*since January 2023*).
- Fuelled by the e-hailing/rental service industries, the **demand for 7-seat MPVs/Minibusses in the R100 000 and R400 000** is currently far outstripping supply and a hot spot of the market.
- The **compact- and mid-size market for SUVs/ Crossovers is incredibly competitive**, and some players, notably the Chinese, are under pressure by attractive new car offers (*from their own brands*), making the **R200 000 to R400 000 used-car** segment particularly tricky to navigate.
- Although discontinued, the demand for the **Nissan NP200 remains fierce**. Even the aged **Chevrolet Utility is in demand**. South Africans love half-tonne pickups (*at affordable prices*).



The Market in 2025

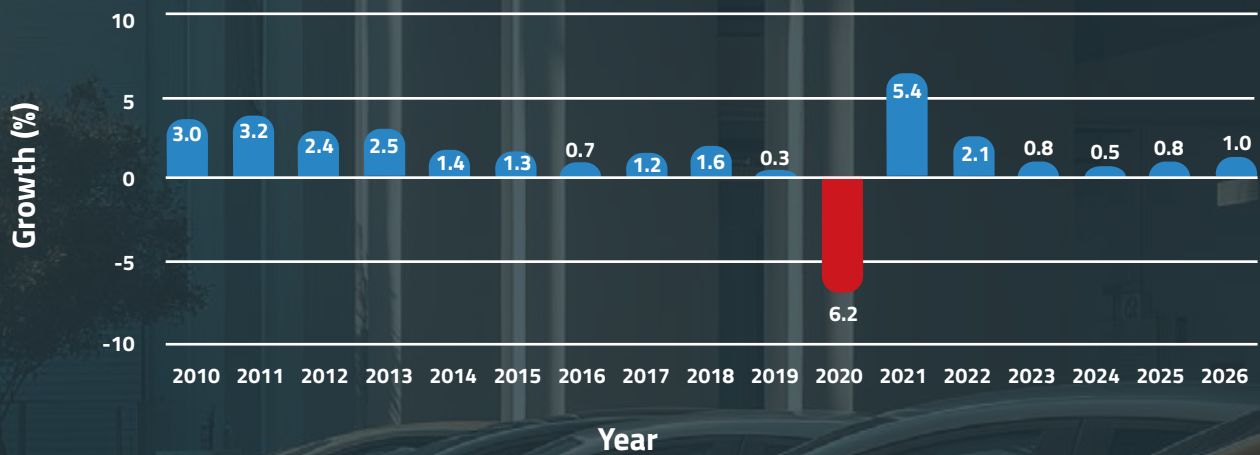
Opportunities & Challenges

South Africa's economic recovery remains delicate, with notable improvements in mining, manufacturing, and retail performance.

However, full-year **GDP growth is still projected at 1% in 2025**. While lower interest rates and more stable energy provide some relief, structural bottlenecks, weak investment appetite, and global uncertainty will **continue to constrain growth**.



GDP Growth



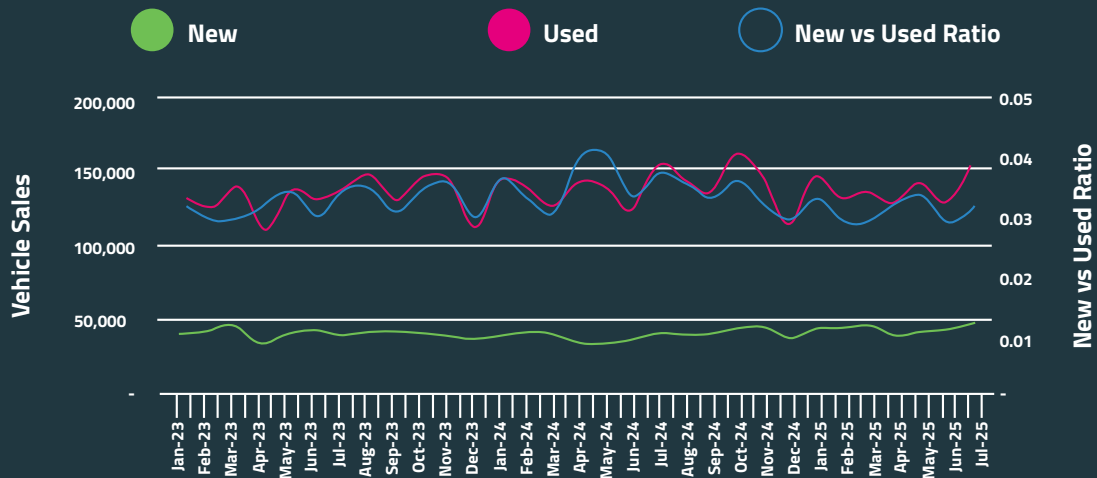
Monetary conditions are easing, with the South African Reserve Bank (SARB) reducing the **repo rate by 25 basis points to 7.00%** in July 2025, marking its fifth cut since September 2024. With June inflation at 3.0% and the Bank targeting the lower **end of the 3–6%** range, there is potential for further easing over the next year, offering support to households. Headline **CPI inflation averaged 2.9% in Q2**, aided by a stable rand. However, July saw an increase to **3.5% year-on-year as fuel deflation narrowed, food inflation accelerated**, and the **12.7% electricity adjustment** began to take effect. With the SARB aiming to anchor inflation near **3%**, **policymakers** are likely to proceed cautiously, maintaining slightly higher rates to manage expectations, especially amid multi-year wage agreements.

South Africa's **passenger vehicle exports** experienced a sharp **decline of 24.6% year-on-year in Q2 2025**, with July down **20.7% and year-to-date volumes 15% lower**. This decline reflects both softer global demand and significant trade challenges, particularly from the United States – historically a top four export market for South African-made vehicles.

The reimposition of a **30% tariff on general exports to the US**, effective 7 August 2025, in addition to the **25% Section 232 automotive tariff introduced in April**, has severely impacted competitiveness. Higher landed costs make South African exports less attractive compared to those from countries with preferential or **zero-duty access under agreements like USMCA**.

The **US market, along with Germany, the UK, and France, forms the backbone of South Africa's export portfolio**, with premium models like **VW's Polo GTI heavily reliant on this channel**. Original Equipment Manufacturers (**OEMs**) now face difficult production, employment, and investment decisions, with ripple effects across the component and logistics value chain. While committed to exports, the industry is accelerating efforts to expand market share in **Africa and Asia and fast-track the NEV transition** to safeguard production capacity. Policy support for component makers and urgent trade negotiations are essential to **prevent long-term erosion of South Africa's industrial base**.

New vs Used Vehicle Sales



As the graph above illustrates, the Used to New ratio continues to reduce (*4 consecutive quarters now*) – indicating a slight momentum shift to new car sales over the past year, in line with early 2023. If we look at the new vehicle sales charts in this report, it is evident that **South Africans are currently shopping for bakkies and compact crossovers**. The models that are dominating the new vehicle sales charts show that **Double-Cabs above R700 000 have started to replace legacy premium brand sedans as South Africa’s most desirable luxury vehicles**. The rest of the new vehicle market’s top sellers are bunched within a fairly narrow price band – between roughly **R250 000 and R600 000**. This is an area of the market where a **huge amount of stock is concentrated in the used vehicle market, and so attractive new vehicles are logically placing pressure on used stock**.

The recent rebound in **new-car sales** has been driven by **several key factors**. **Lower interest rates,**

with five cuts since September 2024, have made financing more accessible. This, combined with firmer consumer confidence and exceptionally **low new-vehicle inflation**, has created a favorable market environment. New-vehicle **inflation dropped from 2.2% in Q1 2025 to a record low of 1.7% in Q2**, and further **eased to 1.5% in July**, according to Stats SA. Competitive pricing pressure, **OEM incentives, and a more favorable rand-import cost balance** have helped temper price growth, with hatchbacks at just **1.1% inflation and SUVs/MPVs at 1.4%**. This marks one of the most competitive pricing environments in recent years, offering buyers greater value and stimulating demand.

Another interesting aspect to note regarding the combined new and used markets at the moment is that, for the first time in this measured period (*since January 2023*), the market **collectively exceeded 200 000 units in July 2025, with upticks in both New and Used**.



Which cars are in demand right now?

For the following tables (divided into price bands) we have used 2025 Cars.co.za stock and lead data to calculate where demand is decently matched with potential volume - in other words, the focus has been placed on cars that are in demand, but of which there is actually enough stock in the market. We would suggest to dealers that good examples of these particular vehicles should be a priority.

R100K and R150K

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Avanza 1.5 SX	2355.77%	 Renault Triber 1.0 Expression	422.85%
 Volkswagen Polo 1.2 TSI Highline (81kW)	1144.00%	 Renault Triber 1.0 Dynamique	415.58%
 Volkswagen Polo GP 1.2 TSI Comfortline (66kW)	724.65%	 Toyota Agya 1.0 Auto	401.49%
 Volkswagen Polo Vivo 1.4 Comfortline 5-dr	658.76%	 Suzuki Swift 1.2 GL	400.42%
 Hyundai i20 1.4 Fluid	539.45%	 Suzuki Swift 1.2 GA	394.06%
 Hyundai i20 1.2 Motion	531.23%	 Suzuki Dzire 1.2 GA	390.49%
 Hyundai i20 1.2 Fluid	507.45%	 Volkswagen Polo Vivo GP 1.4 Conceptline 5-dr	390.13%
 Volkswagen Polo Vivo 1.4 Trendline 5-dr	495.76%	 Chevrolet Utility 1.4	384.59%
 Volkswagen Polo GP 1.2 TSI Trendline (66kW)	492.19%	 Hyundai Grand i10 1.0 Fluid	376.06%
 Hyundai Grand i10 1.0 Motion Auto	423.27%	 Toyota Corolla Quest 1.6	359.52%



R150 000 - R200 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Avanza 1.5 SX	849.80%	 Kia Rio 1.4 Tec 5-dr	237.50%
 Volkswagen Polo 1.2 TSI Highline (81kW)	602.58%	 Volkswagen Polo Vivo 1.6 Comfortline Auto 5-dr	226.95%
 Volkswagen Polo 1.0 TSI Comfortline	596.72%	 Volkswagen Polo 1.0 TSI Trendline	216.19%
 Hyundai i20 1.4 Motion Auto	473.50%	 Hyundai Creta 1.6 Executive	197.18%
 Volkswagen Polo 1.2 TSI Highline Auto (81kW)	394.66%	 Suzuki Dzire 1.2 GA	190.66%
 Hyundai i20 1.2 Fluid	309.78%	 Nissan NP300 2.5 TDi LWB Single-Cab	177.33%
 Volkswagen Polo GP 1.2 TSI Comfortline (66kW)	292.19%	 Suzuki Swift 1.2 GL Auto	176.22%
 Hyundai H100 Bakkie 2.6D	285.50%	 Toyota Starlet 1.4 XS	174.88%
 Hyundai i20 1.4 Fluid Auto	270.85%	 Toyota Yaris 1.5 XS Auto 5-dr	174.37%
 Toyota Starlet 1.5 XI	240.71%	 Kia Rio 1.2 5-dr	167.88%





















R200 000 - R250 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Suzuki Ertiga 1.5 GL	613.09%	 Toyota Corolla 1.6 Prestige Auto	147.57%
 Volkswagen Polo 1.0 TSI Highline Auto (85kW)	361.02%	 Nissan Magnite 1.0 Visia AMT	133.73%
 Toyota Hilux 2.4 GD Single-Cab	344.37%	 Nissan Magnite 1.0 Acenta AMT	122.17%
 Mazda CX-5 2.0 Active Auto	249.23%	 Isuzu D-Max 250 HO Fleetside Safety Single-Cab	119.45%
 Ford Ranger 2.2 TDCi XL Double-Cab	206.07%	 Hyundai H100 Bakkie 2.6D Dropside	117.43%
 Volkswagen Polo 1.0 TSI Comfortline Auto	185.59%	 Chery Tiggo 4 Pro 1.5 LiT	115.23%
 Chery Tiggo 4 Pro 1.5 Comfort Auto	179.32%	 Nissan X-Trail 2.5 Acenta 4x4 Auto	112.50%
 Suzuki Baleno 1.5 GL Auto	166.72%	 Honda Amaze 1.2 Comfort Auto	111.72%
 Hyundai Tucson 2.0 Premium Auto	161.84%	 Suzuki Swift 1.2 GL+ Auto	109.97%
 Volkswagen Polo 1.0 TSI Comfortline	152.36%	 Suzuki Vitara Brezza 1.5 GL Auto	108.46%























R250 000 - R300 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Volkswagen Polo GTI 1.8 TSI Auto	459.18%	 Volkswagen Polo 1.0 TSI Comfortline	131.69%
 Toyota Rumion 1.5 SX	380.71%	 Ford Ranger 2.2 TDCi XL Auto Double-Cab	121.53%
 Suzuki Ertiga 1.5 GA	333.68%	 Volkswagen Polo 1.0 TSI Comfortline Auto	118.90%
 Suzuki Ertiga 1.5 GL	305.94%	 Mazda CX-5 2.0 Active Auto	116.25%
 BMW 3 Series 320i M Sport Auto	262.00%	 Audi A3 Sedan 1.0 TFSI Auto 30 TFSI	116.09%
 Suzuki Ertiga 1.5 GL Auto	219.50%	 Isuzu D-Max 250 HO Hi-Rider Double-Cab	114.59%
 Suzuki Fronx 1.5 GL Auto	160.48%	 Toyota Hilux 2.0 VVTi Single-Cab	108.52%
 Haval Jolion 1.5T Luxury Auto	143.83%	 Haval Jolion 1.5T Premium Auto	107.31%
 Volkswagen Polo 1.0 TSI Highline Auto (85kW)	139.05%	 Toyota RAV4 2.0 GX Auto	104.95%
 Toyota Hilux 2.4 GD Single-Cab	132.04%		



R300 000 - R350 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Volkswagen Polo 2.0 GTI Auto (147kW)	336.95%	 Ford Ranger 2.2 TDCi XLT Auto Double-Cab	137.70%
 Volkswagen Golf VII GTI 2.0 TSI Auto	232.39%	 Chery Tiggo 7 Pro 1.5 T Executive	132.21%
 Ford Ranger 3.2 TDCi Wildtrak Auto Double-Cab	220.76%	 Suzuki Ertiga 1.5 GL Auto	130.34%
 Ford Ranger 3.2 TDCi Wildtrak 4x4 Auto Double-Cab	215.68%	 Toyota Starlet Cross 1.5XS Auto	127.43%
 Ford Ranger 2.0D XLT Auto Double-Cab	194.70%	 Haval Jolion Pro 1.5T Premium DCT	117.88%
 Omoda C5 1.5 Street	168.46%	 Toyota Hilux 2.4 GD-6 Raised Body SRX Extended Cab	117.32%
 Suzuki Ertiga 1.5 GL	156.88%	 Volkswagen Polo 1.0 TSI Comfortline Auto	114.27%
 Omoda C5 1.5T Style	151.31%	 Volkswagen Tiguan 1.4 TSI Comfortline Auto (110kW)	110.48%
 Toyota Rumion 1.5 SX	142.84%	 Toyota Corolla Cross 1.8 XI	110.30%
 Volkswagen Polo 1.0 TSI Highline Auto (85kW)	141.68%	 Toyota Rumion 1.5 S	107.12%



R350 000 - R400 000












Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Hilux 2.8 GD-6 Raised Body Raider Double-Cab Auto	361.29%	 GWM P-Series PV 2.0 TD LS Auto Double-Cab	139.32%
 Volkswagen Golf VII GTI 2.0 TSI Auto	210.76%	 Toyota Hilux 2.4 GD-6 Raised Body SRX Double-Cab	128.99%
 Toyota Fortuner 2.4 GD-6 Raised Body Auto	186.73%	 Ford Ranger 3.2 TDCi Wildtrak 4x4 Auto Double-Cab	116.09%
 Toyota Fortuner 2.4 GD-6 Raised Body	184.18%	 Volkswagen Tiguan 2.0 TDI Highline 4Motion Auto	113.34%
 Volkswagen Polo 2.0 GTI Auto (147kW)	182.74%	 GWM P-Series CV 2.0 TD DLX 4x4 Auto Double-Cab	106.31%
 Mercedes-Benz C-Class C 200 AMG Line Auto	176.82%	 Volkswagen Tiguan 1.4 TSI Comfortline Auto (110kW)	106.20%
 Mercedes-Benz A-Class A 200 Auto	163.44%	 GWM P-Series PV 2.0 TD LT Auto Double-Cab	105.34%
 Volkswagen Polo 1.0 TSI R-Line Auto	150.32%	 Toyota Hilux 2.4 GD-6 Raised Body SRX Extended Cab	101.15%
 Ford Ranger 3.2 TDCi Wildtrak Auto Double-Cab	150.08%		
 Toyota Starlet Cross 1.5XR Auto	143.26%		



R400 000 - R450 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Quantum 2.5 D-4D Sesfikile 16-seat	524.15%	 Toyota Hilux 2.4 GD-6 Raised Body SRX Double-Cab	114.12%
 Volkswagen Golf VII GTI	189.64%	 Volkswagen Polo 2.0 GTI Auto (147kW)	112.47%
 Volkswagen Kombi 2.0 TDI Auto (103kW) Trendline	186.42%	 Ford Ranger 2.0D Double Cab	112.16%
 Volkswagen Golf VII 2.0 TSI R Auto	176.42%	 Mercedes-Benz A-Class A 200 Auto	107.47%
 Toyota Hilux 2.4 GD-6 Raider 4x4 Double-Cab	136.40%	 Jetour X70 Plus 1.5T Deluxe	102.48%
 Toyota Hilux 2.4 GD-6 Raised Body SRX Auto Double-Cab	128.29%	 Toyota Hilux 2.4 GD-6 Raised Body Raider Double-Cab	100.64%

R450 000 - R500 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Quantum 2.5 D-4D Sesfikile 16-seat	462.07%	 Mercedes-Benz A-Class A 200 Sedan	128.94%
 Volkswagen Golf VII	282.76%	 Volkswagen Kombi 2.0 TDI Auto (103kW) Trendline	124.34%
 Hyundai H-1 2.5 CRDi Elite Auto	201.71%	 Toyota Hilux 2.8 GD-6 Raider 4x4 Auto Double-Cab	119.47%
 Toyota Hilux 2.4 GD-6 Raider 4x4 Auto Double-Cab	189.83%	 BMW X5 xDrive30d M Sport Auto	103.93%
 Toyota Hilux 2.4 GD-6 Raised Body Raider Auto Double-Cab	153.50%	 Toyota Fortuner 2.8 GD-6 4x4 Auto	100.96%
 Isuzu D-Max 1.9 DDI HR LS Auto Double-Cab	138.47%		





R500 000 - R600 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Quantum 2.5 D-4D Sesfikile 16-seat	358.16%	 BMW 3 Series 320i M Sport	120.75%
 Toyota Hilux 2.8 GD-6 Raised Body Legend Auto Double-Cab	195.72%	 Toyota Quantum 2.8 GL 11-seat	117.29%
 Ford Ranger 2.0D XLT HR Double Cab Auto	194.97%	 Toyota Hilux 2.8 GD-6 Raised Body Legend Double-Cab	115.87%
 Ford Ranger 2.0D Bi-Turbo Raptor 4x4 Auto Double-Cab	150.39%	 BMW 3 Series 320d M Sport Launch Edition	115.74%
 Hyundai H-1 2.5 CRDi Elite Auto	141.67%	 Mercedes-Benz C-Class C 200 Auto	107.36%
 Toyota Hilux 2.8 GD-6 Raised Body Legend 4x4 Auto Extended Cab	136.81%	 Isuzu D-Max 1.9 DDI HR X-Rider Double-Cab	100.68%
 Volkswagen Golf VII GTI	136.40%	 Toyota Hilux 2.8 GD-6 Raider 4x4 Auto Double-Cab	100.59%
 BMW 3 Series 320d M Sport	129.23%		


R600 000 - R700 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Ford Ranger 2.0 Bi-Turbo Wildtrak Double Cab Auto	170.51%	 Toyota Hilux 2.8 GD-6 Raised Body Legend Auto Double-Cab	115.55%
 Volkswagen Golf 8 GTI 2.0 TSI Auto	158.74%	 Volkswagen Tiguan 2.0 TSI R-Line 4Motion DSG Auto (162kW)	104.71%
 Mercedes-Benz C-Class C 220d Auto	139.81%	 BMW M2 Coupe Auto	103.42%
 Toyota Hilux 2.8 GD-6 Raised Body Legend 4x4 Auto Double-Cab	132.07%		

R700 000 - R800 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Toyota Land Cruiser 79 4.5 D Double-Cab	133.92%	 BMW X5 xDrive30d M Sport	117.93%
 Isuzu D-Max 3.0 DDI V-Cross HR 4x4 Auto Double-Cab	129.07%	 Mercedes-Benz V-Class V 250 Bluetec Avantgarde Auto	106.53%

R800 000 - R900 000

Make Model Variant	Demand/Supply Performance	Make Model Variant	Demand/Supply Performance
 Ford Ranger 3.0 V6 Bi Turbo Ecoboost Raptor 4x4 Auto	158.61%	 Ford Everest 3.0D V6 Platinum AWD Auto	112.33%
 Land Rover Range Rover Sport 3.0 D SE (190kW)	151.56%	 Toyota GR Supra 3.0T	108.26%
 Mercedes-Benz V-Class V 250 Bluetec Avantgarde Auto	151.56%	 Toyota Land Cruiser 79 4.5 D Double-Cab	107.78%
 BMW M2 Competition Auto	128.05%	 Mercedes-Benz GLE 400d 4Matic	100.03%



R900 000 - 1M

Make Model Variant	Demand/Supply Performance
 Mercedes-Benz V-Class V 250d Avantgarde Auto	150.05%
 BMW M5 Auto	136.40%
 Toyota Land Cruiser 200 4.5 D V8 VX Auto	114.66%
 BMW X5 xDrive 530d M Sport	112.02%
 Mercedes-Benz V-Class V 250 Bluetec Avantgarde Auto	101.51%

1M - 1.2M

Make Model Variant	Demand/Supply Performance
 Mercedes-Benz GLC Coupe 300d 4Matic	140.95%
 Mercedes-Benz V-Class V 250d Avantgarde Auto	123.41%
 BMW X7 M50d	116.20%

1.2M - R1.4M

Make Model Variant	Demand/Supply Performance
 Mercedes-Benz GLE Coupe 400d 4Matic	132.91%
 Mercedes-Benz V-Class V 300d Avantgarde AMG Line	116.92%
 Mercedes-Benz V-Class V 250d Avantgarde Auto	114.66%

Studying the above tables, and also their reverse (vehicles ranked according to very poor demand) shows that the market is incredibly price sensitive. Using the popular **Chery Tiggo 4 Pro** as an example, we can see that there is **very high demand in the R200 000 to R250 000 bracket**, enough for the Chinese model to achieve two positions on the in-demand table for that price segment. However, move over the R250 000 threshold and the demand drops so fast that it actually appears in the reverse of the next price segment's demand table - the position of a brand new **Chery Tiggo 4 Pro** at R269 900 will undoubtedly be the biggest obstacle for a used **Tiggo 4 Pro** in that price segment.

There is a very similar trend visible for other vehicles in the fiercely competitive compact crossover segment (**including the fast-selling Haval Jolion**), and so dealers should be careful to not overpay for

such stock and to price aggressively. There is a **lot of stock out there and consumers are hunting for the best price**, and are also considering well-priced new offerings, further complicating matters.

Another hot spot in the market right now is for **compact MPVs**, particularly **Suzuki's Ertiga**. At the lower end the Toyota Avanza continues to find buyers easily, but variants of the **Ertiga** are in demand across multiple price brackets, and it's being considered by a startling number of buyers who are also looking at other bodyshapes at the same time, an indication that it can't just all be for e-hailing operators. Its sibling, the **Toyota Rumion**, is also **climbing the charts**.

In the higher price segments, the demand for **Hyundai's H-1**, **Volkswagen's Kombi/Caravelle** and, in particular, the **Mercedes-Benz V-Class** is noted.

Cross-Consideration

Which cars are buyers considering together?

Using Cars.co.za lead data (assigned to individual buyers via their mobile phone numbers) we are able to track which vehicles are under consideration together. In the tables below we focus on some of the most popular, volume-selling used vehicles in South Africa.



Volkswagen Polo

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Volkswagen Polo (Used)	25.79%	24.68%	22.52%	21.14%	20.10%	21.23%	18.88%	20.55%	23.09%	24.20%	24.09%
2	Volkswagen Polo Vivo (Used)	8.98%	8.08%	7.67%	7.41%	7.33%	7.29%	7.79%	8.97%	7.74%	8.10%	7.35%
3	Volkswagen Polo (New)	4.27%	3.51%	3.42%	2.88%	3.65%	4.48%	3.35%	3.52%	3.61%	3.11%	3.26%
4	Toyota Hilux (Used)	0.76%	0.86%	0.84%	1.00%	1.16%	1.68%	1.85%	2.08%	1.70%	1.63%	1.82%
5	Volkswagen Polo Vivo(New)	1.45%	1.33%	1.33%	1.42%	1.32%	1.42%	1.09%	1.40%	1.40%	1.27%	1.82%
6	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.15%	0.58%	1.14%	1.39%	1.70%
7	Ford Ranger (Used)	0.62%	0.78%	0.84%	1.17%	1.42%	1.58%	1.56%	1.50%	1.53%	1.61%	1.58%
8	Hyundai i20 (Used)	2.41%	2.40%	2.23%	2.03%	1.68%	1.45%	1.47%	1.61%	1.39%	1.54%	1.55%
9	Volkswagen T-Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.21%	0.40%	0.70%	1.24%	1.88%	1.41%
10	Kia Rio (Used)	1.76%	2.09%	2.13%	1.87%	1.47%	1.39%	1.37%	1.51%	1.62%	1.65%	1.19%
11	Suzuki Ertiga (Used)	0.00%	0.01%	0.02%	0.02%	0.05%	0.05%	0.11%	0.18%	0.43%	0.72%	1.11%
12	Volkswagen Golf(Used)	3.54%	4.24%	4.14%	4.29%	4.33%	4.25%	3.13%	3.01%	2.53%	1.77%	1.04%
13	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%	0.35%	0.74%	1.03%
14	Suzuki Swift (Used)	0.15%	0.21%	0.25%	0.27%	0.25%	0.27%	0.26%	0.46%	0.74%	1.03%	1.01%
15	Toyota Corolla Quest (Used)	0.26%	0.42%	0.63%	0.66%	0.85%	0.82%	1.14%	1.16%	1.04%	1.04%	0.99%
16	Isuzu D-Max (Used)	0.00%	0.00%	0.00%	0.02%	0.06%	0.24%	0.37%	0.63%	0.71%	0.87%	0.93%
17	Audi A3 (Used)	1.53%	1.79%	1.81%	2.08%	2.21%	1.89%	1.66%	1.39%	1.18%	1.09%	0.93%
18	Hyundai Grand i10 (Used)	0.09%	0.24%	0.38%	0.48%	0.35%	0.38%	0.44%	0.57%	0.63%	0.67%	0.84%
19	BMW 3 Series (Used)	1.87%	1.93%	1.77%	1.83%	1.90%	1.66%	1.37%	1.06%	1.10%	0.84%	0.77%
20	Toyota Rumion (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.04%	0.22%	0.55%	0.75%

When it comes to the VW Polo in the Used Market, the numbers thus far in 2025 do seem to indicate that buyers are starting to consider **other, non-VW alternatives, particularly bakkies.**

And while a new Volkswagen Polo Vivo appears to be a rising consideration, the biggest hatchback movers are the **Toyota Starlet** and **Suzuki Swift**. Toyota's Corolla Cross is also being considered. The appearance of the **Suzuki Ertiga** on the list is somewhat surprising.



Toyota Hilux

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Toyota Hilux (Used)	22.97%	22.59%	20.74%	20.71%	19.73%	21.13%	19.87%	19.41%	20.59%	21.90%	22.32%
2	Ford Ranger (Used)	7.53%	7.43%	7.53%	7.05%	6.90%	7.07%	6.32%	5.75%	5.84%	6.06%	6.23%
3	Isuzu D-Max (Used)	0.00%	0.00%	0.01%	0.04%	0.38%	1.23%	1.62%	2.62%	3.61%	4.71%	5.27%
4	Toyota Hilux (New)	3.75%	3.99%	3.14%	3.54%	3.72%	4.10%	3.99%	3.92%	3.94%	3.69%	4.69%
5	Toyota Fortuner (Used)	2.72%	2.72%	2.85%	2.65%	2.97%	2.92%	2.75%	2.53%	2.61%	3.04%	3.40%
6	Volkswagen Polo (Used)	2.12%	2.03%	1.70%	1.88%	1.96%	2.01%	2.03%	2.55%	2.19%	2.32%	1.87%
7	Ford Ranger (New)	0.95%	1.89%	1.60%	1.16%	1.05%	1.00%	0.86%	1.09%	1.44%	1.79%	1.79%
8	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%	0.55%	1.00%	1.35%
9	Nissan Navara (Used)	1.13%	1.32%	1.01%	0.96%	0.83%	0.88%	0.91%	1.11%	1.21%	1.21%	1.35%
10	Volkswagen Polo Vivo (Used)	1.00%	1.13%	1.03%	1.25%	1.25%	1.11%	1.18%	1.45%	1.06%	1.43%	1.21%
11	Nissan NP200 (Used)	0.96%	0.83%	0.85%	0.93%	0.91%	1.06%	1.13%	1.23%	0.96%	1.22%	1.07%
12	Toyota Quantum (Used)	0.53%	0.30%	0.44%	0.45%	0.41%	0.59%	0.61%	0.68%	0.70%	0.99%	1.05%
13	Isuzu D-Max (New)	0.00%	0.00%	0.02%	0.02%	0.37%	0.61%	0.71%	0.97%	0.99%	0.95%	1.03%
14	Toyota Corolla Quest (Used)	0.28%	0.45%	0.51%	0.58%	0.65%	0.69%	0.62%	0.80%	0.71%	0.80%	0.88%
15	Volkswagen Amarok (Used)	2.72%	2.53%	2.31%	1.72%	1.38%	1.68%	1.26%	1.15%	1.02%	0.97%	0.88%
16	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.12%	0.29%	0.46%	0.62%	0.85%
17	Suzuki Ertiga (Used)	0.00%	0.02%	0.03%	0.02%	0.02%	0.04%	0.07%	0.16%	0.30%	0.57%	0.71%
18	GWM P-Series (Used)	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.14%	0.29%	0.44%	0.58%	0.65%
19	Toyota Urban Cruiser (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.09%	0.19%	0.33%	0.55%	0.65%
20	Mercedes-Benz C-Class (Used)	1.49%	1.44%	1.49%	1.43%	1.59%	1.46%	1.18%	0.99%	0.85%	0.87%	0.63%

The **Toyota Hilux's strong appeal in the local market** is evident here with very little movement in its headline number (which indicates that a buyer putting through a lead on a used Hilux is just as likely today to do so on another used Hilux, as in 2015), and there is even a marginal **increase for the consideration of a new Hilux, along with a used example.**

Most of the other prominent bakkies have shown small growth in cross-consideration with the Hilux, with the

relatively new **GWM P-Series** also appearing on the list. With new examples of the **Hilux, Ranger and D-Max also appearing on the Top 20**, it is clear that the purchase of a bakkie is a high priority.

It is also interesting to note the frequent consideration of other Toyota brand vehicles, even including the **Starlet and Corolla Cross.**





Ford Ranger

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Ford Ranger (Used)	20.06%	19.28%	19.14%	19.99%	17.84%	19.84%	17.11%	15.97%	17.47%	19.64%	19.32%
2	Ford Ranger (New)	4.23%	5.93%	4.54%	4.13%	2.73%	2.90%	2.26%	2.78%	4.46%	6.17%	7.52%
3	Toyota Hilux (Used)	7.78%	7.17%	6.70%	5.91%	5.94%	6.89%	6.94%	6.49%	5.65%	5.13%	6.21%
4	Isuzu D-Max (Used)	0.00%	0.00%	0.01%	0.03%	0.25%	0.86%	1.43%	2.37%	3.11%	3.99%	4.11%
5	Nissan Navara (Used)	1.74%	1.67%	1.47%	1.21%	1.07%	1.19%	1.14%	1.50%	1.72%	1.69%	1.76%
6	Volkswagen Polo (Used)	1.79%	1.77%	1.53%	1.86%	2.07%	1.84%	1.88%	2.08%	1.91%	1.93%	1.62%
7	GWM P-Series (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.51%	0.82%	0.96%	1.57%
8	Toyota Fortuner (Used)	1.83%	1.66%	1.82%	1.72%	1.81%	1.85%	1.63%	1.74%	1.66%	1.82%	1.53%
9	Volkswagen Amarok (Used)	3.24%	3.35%	2.65%	2.16%	1.37%	1.81%	1.46%	1.09%	1.12%	1.32%	1.12%
10	Volkswagen Polo Vivo (Used)	0.66%	1.02%	0.91%	1.06%	1.21%	1.06%	1.18%	1.18%	1.12%	1.26%	1.04%
11	Toyota Hilux (New)	1.31%	0.89%	0.68%	0.72%	0.77%	1.09%	1.12%	1.07%	0.99%	0.79%	0.96%
12	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.49%	0.87%	0.96%
13	Ford Everest (Used)	0.33%	0.35%	0.49%	0.78%	1.03%	1.51%	1.66%	1.24%	1.18%	1.15%	0.91%
14	BMW 3 Series (Used)	1.68%	1.82%	1.57%	1.52%	1.69%	1.26%	1.19%	1.19%	1.06%	0.70%	0.88%
15	Isuzu D-Max (New)	0.00%	0.00%	0.02%	0.03%	0.23%	0.42%	0.60%	0.73%	0.75%	0.80%	0.87%
16	Nissan NP200 (Used)	0.58%	0.70%	0.77%	0.96%	0.85%	1.09%	1.08%	1.10%	0.94%	1.06%	0.81%
17	Mahindra Pik Up (Used)	0.00%	0.00%	0.00%	0.02%	0.06%	0.18%	0.27%	0.33%	0.61%	0.63%	0.67%
18	Volkswagen Tiguan (Used)	0.47%	0.41%	0.49%	0.58%	0.66%	0.66%	0.71%	0.86%	0.73%	0.64%	0.64%
19	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.12%	0.31%	0.46%	0.49%	0.63%
20	Suzuki Swift (Used)	0.00%	0.06%	0.15%	0.10%	0.15%	0.17%	0.22%	0.32%	0.41%	0.68%	0.60%

For Ford Ranger shoppers, the consideration of a new Ranger along with a used example is more likely than in the Hilux's case. This potentially illustrates a stronger **desire for a Ranger specifically**. **GWM's P-series** appears to be a significantly bigger consideration for **Ranger buyers** than for those eyeing a **Hilux**. The consideration of Nissan's locally-built **Navara** appears to be stable.





Volkswagen Polo Vivo

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Volkswagen Polo Vivo (Used)	24.34%	21.57%	19.90%	19.61%	18.27%	17.19%	15.34%	16.98%	18.82%	19.90%	21.18%
2	Volkswagen Polo (Used)	11.41%	10.55%	10.19%	9.81%	10.26%	10.69%	10.93%	12.33%	11.37%	10.73%	8.78%
3	Volkswagen Polo Vivo (New)	4.11%	3.64%	3.53%	3.13%	2.62%	3.20%	2.44%	2.80%	3.11%	2.88%	4.51%
4	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.29%	0.93%	1.82%	2.09%	3.33%
5	Hyundai i20 (Used)	3.91%	4.15%	3.38%	2.85%	2.34%	1.96%	1.90%	2.41%	2.54%	2.58%	2.27%
6	Suzuki Swift (Used)	0.30%	0.35%	0.46%	0.42%	0.46%	0.54%	0.59%	1.17%	1.56%	2.13%	2.22%
7	Hyundai Grand i10 (Used)	0.16%	0.38%	0.79%	0.92%	0.93%	0.95%	0.90%	1.23%	1.39%	1.69%	1.93%
8	Toyota Hilux (Used)	0.46%	0.62%	0.67%	0.87%	1.03%	1.36%	1.50%	1.63%	1.21%	1.34%	1.41%
9	Renault Kwid (Used)	0.00%	0.00%	0.20%	0.49%	0.93%	0.97%	1.02%	1.10%	1.52%	1.53%	1.30%
10	Kia Rio (Used)	1.26%	1.89%	2.08%	2.06%	1.66%	1.48%	1.59%	1.71%	1.90%	1.99%	1.23%
11	Suzuki Ertiga (Used)	0.00%	0.02%	0.02%	0.04%	0.05%	0.08%	0.15%	0.22%	0.40%	0.70%	1.23%
12	Ford Ranger (Used)	0.29%	0.58%	0.67%	0.88%	1.17%	1.34%	1.37%	1.17%	1.32%	1.39%	1.22%
13	Toyota Corolla Quest (Used)	0.35%	0.63%	0.93%	0.96%	1.44%	1.46%	1.60%	1.51%	1.32%	1.01%	1.15%
14	Renault Kiger (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%	0.25%	0.50%	0.77%	1.15%
15	Renault Tribler (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.10%	0.20%	0.58%	0.86%	1.12%
16	Nissan NP200 (Used)	0.47%	0.58%	0.77%	0.90%	0.79%	0.98%	1.05%	0.97%	0.98%	0.97%	1.01%
17	Kia Picanto (Used)	0.89%	0.96%	1.24%	1.15%	1.00%	1.09%	1.18%	1.25%	1.47%	1.24%	1.00%
18	Toyota Rumion (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.18%	0.44%	0.84%
19	Toyota Urban Cruiser (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%	0.24%	0.48%	0.75%	0.82%
20	Toyota Vitz (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.07%	0.17%	0.77%

The **Toyota Starlet**, **Hyundai Grand i10** and **Suzuki Swift** have risen the most in terms of being considered along with the **Volkswagen Polo Vivo**. The appearance of the **Renault Kiger** and **Toyota Urban Cruiser** on the list, along with the decline in consideration of the **Polo** (*likely price related*) and the absence of any other Volkswagens, could indicate that the upcoming locally-built compact **Volkswagen Tengo crossover** is a hit on the horizon (2027).





Suzuki Swift

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Suzuki Swift (Used)	12.28%	8.94%	6.50%	7.54%	8.03%	7.25%	7.08%	11.81%	13.98%	15.35%	16.13%
2	Suzuki Swift (New)	2.09%	2.71%	2.81%	2.60%	1.95%	2.77%	2.89%	4.91%	6.07%	5.57%	5.15%
3	Hyundai Grand i10 (Used)	0.52%	1.54%	1.39%	1.58%	2.17%	1.98%	2.18%	3.29%	2.78%	3.18%	3.71%
4	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.21%	1.20%	2.08%	2.43%	3.48%
5	Volkswagen Polo Vivo (Used)	4.27%	3.44%	2.72%	2.49%	2.08%	2.04%	2.29%	3.16%	3.11%	3.20%	2.90%
6	Kia Picanto (Used)	3.48%	2.59%	2.02%	2.47%	2.73%	2.58%	2.37%	3.33%	3.11%	2.57%	2.87%
7	Hyundai i20 (Used)	4.62%	5.62%	3.41%	3.39%	2.22%	1.39%	1.58%	2.33%	2.44%	2.16%	2.29%
8	Suzuki Dzire (Used)	0.61%	0.85%	0.70%	0.76%	0.29%	1.16%	0.63%	0.64%	1.01%	1.38%	1.60%
9	Volkswagen Polo (Used)	2.70%	2.67%	1.95%	2.15%	1.57%	1.47%	1.39%	1.73%	2.16%	2.05%	1.58%
10	Suzuki Baleno (Used)	0.00%	0.00%	0.02%	0.08%	0.43%	0.59%	0.55%	0.84%	0.96%	1.36%	1.56%
11	Renault Kwid (Used)	0.00%	0.00%	0.33%	0.68%	1.43%	1.59%	1.29%	2.27%	1.76%	2.04%	1.49%
12	Toyota Vitz (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%	0.48%	1.49%
13	Nissan Magnite (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%	0.07%	0.53%	0.78%	1.18%
14	Toyota Agya (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	0.94%	1.20%	0.99%	1.08%
15	Renault Kiger (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	0.36%	0.88%	1.01%	1.06%
16	Suzuki Celerio (Used)	0.09%	0.24%	0.49%	0.74%	1.54%	1.22%	1.05%	1.22%	0.90%	0.77%	1.04%
17	Kia Rio (Used)	1.57%	2.30%	1.95%	1.58%	1.16%	1.19%	0.92%	1.49%	1.55%	1.21%	1.02%
18	Suzuki S-Presso (Used)	0.00%	0.00%	0.00%	0.00%	0.02%	0.00%	0.18%	0.87%	1.05%	0.91%	0.99%
19	Renault Triber (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	0.36%	0.68%	0.88%	0.97%
20	Ford Ranger (Used)	0.00%	0.32%	0.65%	0.53%	0.67%	0.82%	1.00%	0.85%	0.96%	1.14%	0.91%

The high consideration of a new Swift along with the used example potentially illustrates that new **Swift pricing is still regarded as being very competitive**. The rest of the table is pretty much as one would expect, with the interesting evidence that the **Swift** is positioned halfway between the entry-level segment and the traditional B-segment hatches. Consequently it appears to appeal to both sets of buyers - for example, **Renault Kwid**, as well as **Renault Kiger**; **Toyota Vitz** as well as **Toyota Starlet**; **Hyundai Grand i10** as well as the **Hyundai i20** and so on.





Toyota Starlet

Rank	Alternate	2020	2021	2022	2023	2024	2025
1	Toyota Starlet (Used)	1.28%	2.89%	8.56%	12.39%	13.29%	14.70%
2	Volkswagen Polo Vivo (Used)	2.56%	1.78%	3.40%	3.65%	3.78%	4.42%
3	Suzuki Swift (Used)	0.00%	0.33%	1.63%	2.08%	2.93%	3.53%
4	Suzuki Baleno (Used)	1.28%	0.50%	1.23%	1.92%	2.30%	3.00%
5	Toyota Starlet (New)	5.13%	2.97%	4.05%	3.62%	2.94%	2.88%
6	Volkswagen Polo (Used)	2.56%	1.24%	2.94%	3.37%	3.34%	2.69%
7	Hyundai i20 (Used)	2.56%	1.32%	2.20%	2.58%	2.54%	2.38%
8	Hyundai Grand i10 (Used)	0.00%	0.41%	1.21%	1.42%	1.87%	2.27%
9	Toyota Urban Cruiser (Used)	0.00%	0.17%	0.96%	1.52%	1.94%	1.77%
10	Suzuki Baleno (New)	0.00%	0.17%	0.81%	1.28%	1.27%	1.40%
11	Nissan Magnite (Used)	0.00%	0.00%	0.12%	0.87%	1.25%	1.40%
12	Toyota Corolla Quest (Used)	2.56%	0.99%	1.70%	1.80%	1.56%	1.33%
13	Toyota Hilux (Used)	5.13%	0.95%	1.21%	1.05%	1.05%	1.31%
14	Renault Kiger (Used)	0.00%	0.00%	0.62%	0.88%	1.11%	1.29%
15	Kia Rio (Used)	2.56%	0.83%	1.80%	1.65%	1.77%	1.20%
16	Kia Picanto (Used)	0.00%	0.45%	0.89%	1.33%	1.14%	1.20%
17	Toyota Corolla Cross (Used)	0.00%	0.00%	0.32%	0.53%	0.98%	1.16%
18	Toyota Vitz (Used)	0.00%	0.00%	0.00%	0.18%	0.47%	1.13%
19	Toyota Aygo (Used)	0.00%	0.54%	1.06%	0.87%	0.86%	1.09%
20	Volkswagen Polo Vivo (New)	1.28%	0.62%	0.96%	0.65%	0.68%	1.00%
21	Suzuki Swift (New)	0.00%	0.12%	0.81%	1.10%	1.01%	1.00%

The **Toyota Starlet** appears to appeal to a similar buyer as for the **Suzuki Swift**, with a near-identical pool of vehicles being cross-considered, albeit with a slight bias in favour of the more expensive models (*within the set of rivals*).





Isuzu D-Max

Rank	Alternate	2019	2020	2021	2022	2023	2024	2025
1	Isuzu D-Max (Used)	2.20%	5.22%	4.14%	8.03%	12.38%	15.08%	16.06%
2	Toyota Hilux (Used)	3.28%	6.16%	4.71%	6.67%	6.51%	7.03%	8.52%
3	Ford Ranger (Used)	2.46%	4.39%	3.77%	5.34%	5.80%	7.04%	6.68%
4	Isuzu D-Max (New)	2.61%	4.24%	3.00%	3.40%	3.67%	3.36%	4.00%
5	Nissan Navara (Used)	0.77%	0.85%	0.91%	1.39%	1.68%	2.14%	2.23%
6	Ford Ranger (New)	0.97%	1.34%	0.79%	1.22%	1.61%	1.64%	1.86%
7	Toyota Fortuner (Used)	1.33%	1.13%	1.25%	1.59%	1.61%	1.60%	1.66%
8	Volkswagen Polo (Used)	0.87%	1.43%	1.17%	1.96%	1.65%	1.85%	1.54%
9	GWM P-Series (Used)	0.00%	0.00%	0.19%	0.50%	0.67%	1.06%	1.52%
10	Isuzu KB (Used)	4.51%	7.08%	5.32%	6.99%	6.41%	2.83%	1.48%
11	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.34%	0.42%	0.87%	1.18%
12	Volkswagen Polo Vivo (Used)	0.72%	0.88%	0.83%	1.29%	1.02%	1.37%	1.03%
13	Mahindra Pik Up (Used)	0.10%	0.09%	0.25%	0.29%	0.73%	0.84%	1.01%
14	Nissan NP200 (Used)	0.67%	1.01%	0.87%	1.01%	1.04%	1.13%	0.99%
15	Toyota Hilux (New)	1.23%	1.16%	1.19%	1.29%	1.08%	1.06%	0.97%
16	Toyota Starlet (Used)	0.00%	0.00%	0.14%	0.43%	0.45%	0.60%	0.89%
17	Suzuki Ertiga (Used)	0.00%	0.09%	0.05%	0.14%	0.29%	0.49%	0.72%
18	Nissan NP300 (Used)	0.77%	0.88%	0.83%	0.83%	0.81%	0.66%	0.70%
19	Toyota Corolla Quest (Used)	0.46%	0.70%	0.56%	0.73%	0.59%	0.56%	0.70%
20	Volkswagen Amarok (Used)	1.18%	1.43%	1.02%	0.99%	0.94%	0.94%	0.68%

The **Isuzu D-Max** (before 2019 called the KB in South Africa) has always had a very loyal following in this country. It has also been accepted for some time that there are some similarities between **Hilux and D-Max owners**, and that appears to come through in this data, with **Hilux** actually posting increases in cross-consideration, while the rest remain relatively flat. Again, **GWM's P-Series** is a relatively new and increasingly considered alternative.





Toyota Fortuner

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Toyota Fortuner (Used)	20.47%	18.35%	16.70%	16.29%	15.52%	15.95%	12.84%	12.64%	14.97%	16.78%	15.79%
2	Toyota Hilux (Used)	4.54%	4.86%	4.34%	4.01%	4.57%	5.47%	5.19%	5.21%	5.35%	6.29%	7.87%
3	Toyota Fortuner (New)	2.96%	2.31%	2.93%	2.59%	1.61%	1.51%	2.42%	2.91%	3.15%	3.69%	3.65%
4	Ford Ranger (Used)	2.96%	3.08%	3.10%	3.10%	3.23%	3.55%	2.79%	3.18%	3.53%	4.44%	3.57%
5	Isuzu D-Max (Used)	0.00%	0.00%	0.00%	0.02%	0.24%	0.42%	0.81%	1.29%	1.84%	2.21%	2.37%
6	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.35%	0.69%	1.54%	1.91%
7	Volkswagen Polo (Used)	1.02%	1.28%	1.10%	1.20%	1.55%	1.24%	1.32%	1.61%	1.28%	1.62%	1.44%
8	Ford Everest (Used)	0.60%	0.33%	0.87%	1.62%	2.01%	2.52%	2.18%	1.88%	1.78%	1.86%	1.33%
9	Ford Ranger (New)	0.60%	0.89%	0.80%	0.76%	0.56%	0.61%	0.61%	1.41%	1.33%	1.64%	1.33%
10	Toyota Hilux (New)	0.96%	0.84%	0.62%	0.70%	0.93%	1.20%	1.47%	1.46%	1.15%	1.16%	1.33%
11	Volkswagen Polo Vivo (Used)	0.73%	0.92%	0.90%	0.88%	0.89%	0.88%	0.76%	1.05%	0.79%	1.07%	1.03%
12	Toyota Urban Cruiser (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%	0.28%	0.31%	0.78%	0.90%
13	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.13%	0.38%	0.46%	0.57%	0.87%
14	Toyota Corolla Cross (New)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.09%	0.69%	0.54%	0.81%	0.84%
15	Toyota RAV4 (Used)	1.27%	1.38%	1.42%	1.24%	1.72%	1.60%	1.43%	1.19%	1.18%	1.38%	0.82%
16	Mercedes-Benz C-Class (Used)	1.92%	1.78%	1.71%	1.75%	2.01%	1.71%	1.27%	0.99%	1.02%	1.02%	0.82%
17	BMW 3 Series (Used)	1.76%	1.69%	1.59%	1.39%	1.39%	1.26%	1.08%	0.94%	1.08%	0.75%	0.79%
18	Toyota Quantum (Used)	0.22%	0.17%	0.32%	0.37%	0.29%	0.38%	0.55%	0.46%	0.61%	0.84%	0.74%
19	Toyota Corolla Quest (Used)	0.27%	0.35%	0.41%	0.48%	0.57%	0.66%	0.60%	0.75%	0.82%	0.80%	0.74%
20	Nissan Navara (Used)	0.53%	0.51%	0.56%	0.53%	0.51%	0.59%	0.66%	0.72%	0.99%	0.75%	0.68%

For many years rival brands have tried to eat into the **Toyota Fortuner's** stronghold on the SUV segment in South Africa, but few have made significant inroads. What the data above shows is that cross-consideration of most other **Toyotas**, however, is increasing, including for a **new Fortuner, used/new Corolla Cross, Urban Cruiser or even a new Hilux**. A used Hilux is also being considered slightly more often. When it comes to rival brands, it seems like the **Isuzu D-Max** is increasingly considered, and for a while **Ford's Ranger and Everest** did, in fact, make progress, but have slipped back again thus far in 2025.





BMW 3 Series

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2016
1	BMW 3 Series (Used)	20.93%	18.14%	15.86%	15.72%	13.19%	11.64%	10.70%	11.38%	12.06%	12.58%	12.61%
2	Mercedes-Benz C-Class (Used)	4.50%	4.03%	4.13%	4.42%	4.25%	3.90%	3.47%	3.15%	3.08%	3.14%	3.50%
3	Ford Ranger (Used)	0.93%	1.31%	1.35%	1.52%	1.92%	1.92%	1.87%	2.36%	2.28%	2.09%	2.88%
4	Volkswagen Polo (Used)	2.97%	3.15%	2.75%	2.89%	3.13%	2.95%	2.60%	2.92%	2.93%	3.02%	2.57%
5	BMW 2 Series (Used)	0.11%	0.32%	0.49%	1.07%	1.35%	1.37%	0.86%	1.69%	1.10%	1.95%	2.38%
6	Ford Ranger (New)	0.17%	0.40%	0.33%	0.38%	0.30%	0.37%	0.42%	0.73%	1.06%	1.05%	1.92%
7	BMW X3 (Used)	0.61%	0.54%	0.61%	0.87%	0.70%	0.78%	0.91%	1.28%	1.72%	2.44%	1.92%
8	Toyota Hilux (Used)	0.91%	0.90%	1.06%	1.12%	1.21%	1.54%	1.82%	2.51%	1.84%	1.85%	1.88%
9	BMW 1 Series (Used)	5.04%	4.71%	4.68%	4.06%	3.57%	2.76%	2.33%	2.45%	2.07%	2.18%	1.69%
10	Volkswagen Golf (Used)	3.12%	3.31%	3.26%	3.27%	3.44%	3.31%	1.96%	2.32%	2.00%	1.68%	1.61%
11	BMW 4 Series (Used)	0.21%	0.54%	0.90%	1.38%	1.88%	2.02%	1.41%	1.49%	1.60%	1.60%	1.42%
12	Audi A3 (Used)	2.25%	2.46%	2.57%	3.04%	3.02%	2.85%	1.99%	1.89%	1.69%	1.35%	1.38%
13	Audi A4 (Used)	4.51%	3.95%	3.52%	3.21%	2.69%	2.44%	1.91%	1.42%	1.12%	1.07%	1.15%
14	Toyota Fortuner (Used)	0.60%	0.65%	0.80%	0.77%	0.88%	1.00%	0.98%	1.03%	1.09%	0.92%	1.11%
15	Volkswagen Polo Vivo (Used)	1.37%	1.28%	1.07%	1.21%	1.50%	1.15%	1.12%	1.35%	1.09%	1.07%	1.11%
16	Volkswagen Tiguan (Used)	0.38%	0.45%	0.55%	0.57%	0.68%	0.82%	0.80%	1.31%	1.51%	1.21%	1.00%
17	Mercedes-Benz A-Class (Used)	0.56%	1.04%	1.41%	1.52%	1.73%	1.73%	1.26%	1.65%	1.66%	1.52%	1.00%
18	BMW X5 (Used)	0.58%	0.47%	0.62%	0.52%	0.51%	0.61%	0.50%	0.85%	0.76%	0.92%	0.81%
19	BMW 3 Series (New)	2.01%	1.70%	2.87%	1.69%	1.12%	1.11%	0.59%	0.62%	0.56%	0.68%	0.77%
20	Toyota Corolla Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.31%	0.47%	0.84%	0.77%

The **BMW 3 Series** tells the story most would have expected - one of decline. The decrease in consideration of traditional rivals (**Mercedes-Benz C-Class/Audi A4 etc.**) further emphasises that South Africans with the money to look at a **3 Series** are increasingly looking at alternatives... and currently bakkies (**notably the Ford Ranger**) are winning. BMW will take some comfort from the fact, though, that other **BMW models (such as the 2 Series and X3)** are posting gains.





Volkswagen Golf

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Volkswagen Golf (Used)	20.33%	17.90%	16.06%	15.02%	14.57%	13.21%	10.46%	11.36%	11.66%	11.60%	9.62%
2	Volkswagen Polo (Used)	8.12%	8.70%	7.61%	7.24%	7.26%	7.03%	6.84%	8.70%	8.79%	8.18%	5.30%
3	Volkswagen Golf (New)	3.77%	2.56%	2.78%	2.46%	1.83%	2.04%	0.99%	0.96%	0.98%	2.03%	3.44%
4	Ford Ranger (Used)	0.97%	1.09%	1.23%	1.47%	1.86%	2.06%	1.59%	2.22%	2.01%	2.75%	2.80%
5	BMW 3 Series (Used)	4.52%	4.16%	3.86%	3.49%	3.49%	3.08%	2.26%	2.43%	2.59%	2.15%	2.45%
6	Toyota Hilux (Used)	0.90%	1.10%	1.16%	1.23%	1.45%	2.19%	1.86%	2.57%	2.50%	2.73%	2.16%
7	BMW 1 Series (Used)	4.19%	4.43%	3.79%	3.09%	2.61%	1.93%	1.60%	1.68%	1.51%	1.58%	1.98%
8	Volkswagen Polo Vivo (Used)	2.41%	2.19%	2.15%	2.06%	2.12%	1.85%	2.33%	2.99%	2.40%	2.58%	1.57%
9	Audi A3 (Used)	3.40%	3.86%	3.54%	3.58%	3.22%	2.58%	2.14%	2.25%	2.10%	1.63%	1.57%
10	Ford Ranger (New)	0.16%	0.31%	0.31%	0.41%	0.28%	0.33%	0.40%	0.52%	0.73%	0.95%	1.46%
11	Volkswagen Tiguan (Used)	0.77%	0.73%	0.72%	0.84%	0.91%	1.09%	1.25%	1.95%	1.59%	1.53%	1.28%
12	Volkswagen Polo (New)	1.33%	1.48%	1.17%	1.47%	1.62%	1.87%	1.18%	1.67%	1.55%	1.25%	1.22%
13	Toyota Hilux (New)	0.20%	0.19%	0.16%	0.24%	0.32%	0.57%	0.59%	0.65%	0.63%	0.43%	1.22%
14	BMW 2 Series (Used)	0.09%	0.27%	0.39%	0.83%	1.07%	1.16%	0.66%	0.73%	0.39%	0.60%	1.11%
15	Mercedes-Benz C-Class (Used)	1.91%	1.64%	1.97%	2.04%	2.14%	2.20%	1.54%	1.40%	1.36%	1.15%	1.11%
16	Toyota Fortuner (Used)	0.51%	0.55%	0.53%	0.68%	0.76%	0.95%	0.73%	0.86%	0.88%	0.75%	0.99%
17	Volkswagen Amarok (Used)	0.54%	0.62%	0.67%	0.55%	0.45%	0.77%	0.65%	0.73%	0.73%	0.80%	0.99%
18	Volkswagen T-Cross (Used)	0.00%	0.00%	0.00%	0.00%	0.01%	0.17%	0.42%	0.89%	0.88%	1.25%	0.93%
19	Volkswagen T-Roc (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%	0.42%	0.75%	0.90%	0.87%
20	Isuzu D-Max (Used)	0.00%	0.00%	0.00%	0.03%	0.08%	0.30%	0.41%	0.83%	0.94%	1.08%	0.87%

As the only remaining traditional **C-segment hatchback** of significant volume left, the Volkswagen Golf table is particularly interesting, but a tricky one to navigate. For some time Volkswagen has focused its attention on pricier **GTI and R variants**, and only recently did a relatively affordable variant re-enter the market (*which is the reason for the increase in consideration of a new Golf in 2025*). The **Golf** used to be considered in close proximity to the more affordable offerings of other premium German brands, but that is in decline. Instead, **Golf buyers are now increasingly also considering bakkies**, and specifically either new or used versions of the **Ford Ranger/Toyota Hilux**.





Kia Picanto

Rank	Alternate	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
1	Kia Picanto (Used)	14.12%	12.05%	11.26%	11.25%	10.34%	11.48%	10.34%	12.92%	11.68%	11.76%	13.87%
2	Hyundai Grand i10 (Used)	0.52%	1.45%	2.41%	2.89%	3.41%	4.22%	3.96%	5.74%	5.08%	5.21%	6.31%
3	Suzuki Swift (Used)	0.95%	1.01%	1.05%	1.17%	1.76%	2.05%	1.45%	3.72%	3.52%	4.70%	5.87%
4	Renault Kwid (Used)	0.00%	0.00%	0.36%	1.45%	2.49%	3.14%	2.76%	3.52%	3.29%	3.10%	3.30%
5	Hyundai Atos (Used)	1.55%	0.51%	0.13%	0.00%	0.13%	0.16%	0.37%	0.98%	1.86%	2.82%	3.05%
6	Hyundai i20 (Used)	4.56%	4.63%	3.63%	3.24%	2.33%	1.81%	1.63%	2.40%	2.30%	2.11%	2.90%
7	Volkswagen Polo Vivo (Used)	3.48%	3.72%	3.81%	3.29%	2.92%	3.29%	2.79%	3.76%	3.33%	3.41%	2.68%
8	Toyota Starlet (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.18%	0.73%	1.51%	1.74%	2.42%
9	Toyota Agya (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.27%	1.02%	1.73%	1.48%	1.91%
10	Renault Kiger (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%	0.26%	0.87%	1.01%	1.91%
11	Volkswagen Polo (Used)	1.81%	1.98%	1.68%	2.60%	1.99%	1.67%	2.05%	2.38%	2.11%	1.91%	1.65%
12	Toyota Vitz (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	0.43%	1.50%
13	Kia Rio (Used)	1.53%	1.96%	2.08%	2.16%	2.23%	1.62%	1.63%	2.54%	2.05%	1.80%	1.47%
14	Hyundai Grand i10 (New)	0.12%	0.16%	0.16%	0.29%	0.68%	0.50%	0.42%	0.41%	0.40%	0.53%	1.32%
15	Kia Picanto (New)	1.07%	2.13%	2.51%	2.07%	3.27%	2.50%	1.70%	3.26%	2.73%	1.60%	1.25%
16	Nissan Magnite (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%	0.10%	0.51%	0.95%	1.25%
17	Ford Figo (Used)	4.29%	4.36%	3.55%	2.91%	2.64%	2.91%	2.28%	2.28%	2.28%	1.50%	1.10%
18	Suzuki Swift (New)	0.17%	0.22%	0.30%	0.31%	0.24%	0.47%	0.34%	1.02%	0.87%	1.26%	1.03%
19	Hyundai Venue (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.13%	0.22%	0.73%	0.57%	0.95%
20	Suzuki S-Presso (Used)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	0.71%	0.94%	0.97%	0.92%

Remarkable consistency from the **Kia Picanto** - buyers are as likely to consider another used **Kia Picanto** when submitting a lead on one of these vehicles, as they were in 2015. That said, a number of rival vehicles are increasingly being cross-considered, most notably the **Hyundai Grand i10**, which is currently one of the most popular used buys on the market. **Suzuki's Swift** and the cheaper **Renault Kwid** also feature high on the list. Interestingly, a number of the slightly pricier alternatives are receiving less cross-consideration, including Kia's own **Rio**, the **Hyundai i20** and **Volkswagen Polo**. People shopping for the **Kia Picanto** at the moment appear to be more focused on maximum affordability than in earlier years.





Nissan Magnite

Rank	Alternate	2015	2016	2017	2018	2019
1	Nissan Magnite (Used)	3.62%	5.01%	8.59%	8.23%	12.43%
2	Nissan Magnite (New)	12.67%	8.91%	7.16%	6.24%	7.24%
3	Renault Kiger (Used)	0.00%	1.25%	3.37%	3.29%	4.34%
4	Toyota Starlet (Used)	0.00%	0.70%	2.01%	2.15%	2.63%
5	Chery Tiggo 4 Pro (Used)	0.00%	0.97%	1.08%	1.54%	2.46%
6	Suzuki Swift (Used)	0.90%	0.56%	1.24%	1.61%	2.25%
7	Toyota Urban Cruiser (Used)	0.90%	2.37%	2.01%	1.81%	2.22%
8	Hyundai Venue (Used)	0.90%	3.20%	2.79%	1.79%	2.22%
9	Ford EcoSport (Used)	1.81%	1.53%	2.71%	2.03%	2.12%
10	Volkswagen Polo Vivo (Used)	0.90%	1.25%	1.74%	1.88%	1.91%
11	Hyundai i20 (Used)	0.45%	1.39%	1.90%	1.95%	1.74%
12	Hyundai Grand i10 (Used)	1.36%	0.28%	0.62%	1.36%	1.74%
13	Renault Kwid (Used)	0.90%	0.56%	0.74%	1.10%	1.54%
14	Volkswagen Polo (Used)	2.26%	2.65%	2.40%	2.39%	1.30%
15	Suzuki Vitara Brezza (Used)	0.00%	0.56%	1.12%	0.74%	1.19%
16	Kia Picanto (Used)	0.90%	0.70%	1.05%	1.07%	1.16%
17	Suzuki Baleno (Used)	0.00%	0.14%	0.81%	0.81%	1.06%
18	Renault Kiger (New)	1.81%	1.95%	1.82%	0.81%	1.02%
19	Kia Sonet (Used)	0.45%	1.11%	0.62%	1.10%	1.02%
20	Volkswagen T-Cross (Used)	0.90%	0.97%	1.47%	1.32%	0.99%

Nissan's only significant remaining volume driver is the **affordable Magnite crossover**. The numbers seem to suggest that consumers looking at the **Magnite** really prefer crossover design (*as opposed to looking purely for affordability*), given the vast number of compact crossovers on the list. The high consideration of a new **Magnite** in tandem with a used **Magnite** points to attractive pricing (*in the new car market*).





Volkswagen T-Cross

Rank	Alternate	2020	2021	2022	2023	2024	2025
1	Volkswagen T-Cross (Used)	3.50%	4.26%	6.77%	10.82%	13.34%	13.13%
2	Volkswagen Polo (Used)	2.58%	2.31%	3.84%	4.63%	6.04%	3.94%
3	Toyota Corolla Cross (Used)	0.00%	0.00%	0.83%	1.18%	1.88%	2.66%
4	Volkswagen Polo Vivo (Used)	1.11%	1.14%	2.07%	1.31%	2.30%	1.79%
5	Volkswagen T-Cross (New)	5.04%	3.57%	4.89%	3.02%	1.74%	1.79%
6	Volkswagen T-Roc (Used)	0.00%	0.28%	0.94%	1.94%	1.50%	1.73%
7	Ford Ranger (Used)	0.98%	1.28%	1.66%	1.67%	1.90%	1.60%
8	Toyota Urban Cruiser (Used)	0.00%	0.08%	0.51%	1.12%	1.39%	1.50%
9	Toyota Hilux (Used)	1.11%	1.17%	1.64%	1.46%	1.53%	1.38%
10	Toyota Starlet (Used)	0.00%	0.25%	0.48%	0.59%	0.91%	1.34%
11	Kia Seltos (Used)	0.25%	0.45%	0.78%	0.68%	0.91%	1.18%
12	Chery Tiggo 4 Pro (Used)	0.00%	0.00%	0.32%	0.55%	1.08%	1.18%
13	Kia Sonet (Used)	0.00%	0.00%	0.19%	0.27%	1.08%	1.15%
14	Volkswagen Tiguan (Used)	2.15%	1.17%	1.91%	1.63%	1.34%	1.12%
15	Haval Jolion (Used)	0.00%	0.11%	0.38%	0.80%	0.89%	1.02%
16	Volkswagen Polo Vivo (New)	0.49%	0.31%	0.70%	0.36%	0.49%	0.99%
17	Hyundai Venue (Used)	0.00%	0.39%	0.24%	0.82%	1.06%	0.99%
18	Isuzu D-Max (Used)	0.37%	0.53%	0.78%	0.72%	0.91%	0.96%
19	Suzuki Swift (Used)	0.37%	0.22%	0.56%	0.59%	0.89%	0.93%
20	Nissan Magnite (Used)	0.00%	0.06%	0.19%	0.80%	1.03%	0.93%

As a legacy brand model competing in one of the most fiercely contested segments of the market, the **Volkswagen T-Cross** table tells the story of an onslaught from all angles. A number of volume sellers are in its crosshairs, but interestingly enough, other mainstream models from Volkswagen, **Toyota and Kia are most-often considered**, but the Chinese contenders (*Chery Tiggo 4 Pro and Haval Jolion*) are increasingly considered as well.



Buying Personas and Vehicle Finance

- South Africans spend an average of **3 hours 36 minutes per day on Social Media**.
- **92% of car buyers conduct online research** before visiting a dealership.
- Over **70% of consumers are optimistic** about their financial outlook for the next 12 months.
- Last year **Gen Z buyers accounted for 27.9%** more vehicle finance agreements than the year before, and these younger buyers rely on social media for information. They now make up around **12% of all finance agreements** (*but it is growing*).
- Nearly **80% of finance agreements** now fall in the under-R500 000 segment, indicative of a demand for affordability.
- The proportion of **younger consumers (18-25)** financing vehicles in the **R250,000–R500,000** range has **surged by over 100% in recent years**, now **representing more than half of finance agreements in this segment**.
- The majority of withdrawals from the new Two-Pot Retirement system fall in the **R5000 to R20 000 category**, with **only 26% exceeding that**.



Evolution of Buying Personas

The automotive industry in South Africa has witnessed a notable transformation in consumer behaviour, with the advent of social media being a key driver.

Based on a recent TransUnion Mobility Insights Report, **South Africans spend an average of 3 hours and 36 minutes each day on social media platforms**, which is reshaping vehicle purchasing personas and providing valuable insights for dealers.



The Rise of the Informed Buyer

Social media platforms such as Facebook, Instagram, and Twitter have empowered consumers with a wealth of information: Car buyers now have access to reviews, recommendations, and advertisements, making them more informed and discerning in their purchasing decisions.

The growing preference for short-form video (*particularly on Instagram Reels and TikTok*) continues to drive engagement and influence vehicle research and decision-making. **Approximately 92% of car buyers conduct online research before visiting a dealership** – with social sentiment, brand presence and engagement all influencing decision-making. This access to information has shifted the power dynamic, enabling buyers to negotiate better deals and make more confident choices.

Today's car buyers are not just **passive recipients of information; they actively engage with content**. Vehicle dealers can leverage social media to interact with potential customers through live videos, virtual showrooms, and interactive posts. This engagement builds trust and fosters a sense of community, making it easier for dealers to convert leads into sales. Additionally, **social media platforms enable real-time communication, allowing dealers to address queries and concerns promptly, further enhancing the customer experience.**

Modern car buyers place significant value on social proof. Highlighting successful case studies and testimonials from satisfied customers can greatly influence purchasing decisions. These real-life examples provide tangible evidence of the **benefits of a robust social media strategy**. User-generated content, such as **reviews and ratings, also plays a crucial role in shaping perceptions and building credibility.**

As social media continues to evolve, so too will the buying personas of car consumers in South Africa. Dealers who adapt to these changes and leverage **social media effectively will be better positioned to attract and retain customers in an increasingly digital marketplace**. By understanding and catering to the diverse needs and preferences of modern car buyers, dealers can **stay ahead of the competition and drive growth in the industry.**

Generational trends in vehicle purchases

TransUnion's Industry Insights Report (Q4 2024) highlighted Generation Z's growing market influence - with a 27.9% YoY increase in vehicle finance volumes. Younger consumers' reliance on social media for research and brand discovery reinforces the need for automotive brands to prioritise digital-first marketing strategies.

Generation	Popular Segments	Key Influences	Online Research Behaviour	Digital & Social Media Influence
Gen Z	Entry-level hatchbacks, compact SUVs, used cars	Affordability, fuel efficiency, digital features, social media trends	<ul style="list-style-type: none"> Relies heavily on social media (TikTok, Instagram, YouTube) for reviews, comparison websites and influencer opinions before purchasing. 	<ul style="list-style-type: none"> Strong preference for influencer marketing, user-generated content (UGC) and short-form content (TikTok, Instagram Reels). Prefers tech-driven, eco-friendly cars. Interactive ads drive engagement.
Millennials	SUVs, crossovers, fuel-efficient sedans	Safety, practicality (young families), affordability, resale value	<ul style="list-style-type: none"> Conduct extensive online research using review sites, manufacturer websites and social media. Likely to engage in online dealership chat before visiting in person. 	<ul style="list-style-type: none"> Facebook, Instagram and YouTube are key research platforms; trust in online reviews and brand reputation. Affordability and financing options are key. Use a mix of influencer content and digital ads to guide decisioning.
Gen X	Midsize SUVs, double-cab bakkies, premium sedans	Reliability, family space, durability, brand loyalty	<ul style="list-style-type: none"> Uses a mix of traditional and online research, including social media. Checks expert reviews, resale value comparisons and dealership websites but still prefers in-person test drives before deciding. 	<ul style="list-style-type: none"> Facebook and YouTube are key research platforms. Prefers expert reviews over influencer content. Digital ads play a role, but final decisions are made in person.
Baby Boomers	Luxury SUVs, high-end sedans, durable bakkies	Comfort, brand prestige, longevity, resale value	<ul style="list-style-type: none"> Less reliant on digital platforms but still consult official manufacturer websites and consumer reports. Prefer in-person dealership visits for discussions and decision-making. 	<ul style="list-style-type: none"> Use Facebook and YouTube for research but prioritise in-person experiences. Trust traditional media over digital-first strategies; rely more on reputation and post-purchase service.

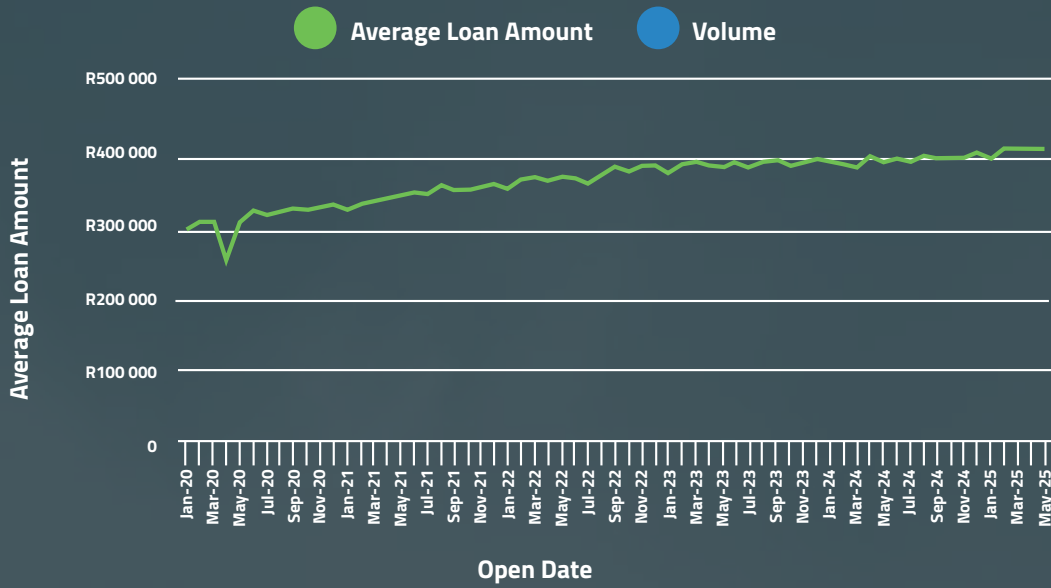
As consumer behaviours continue to evolve, **brands that embrace technology-led, platform-specific marketing strategies will be better positioned to build trust, influence purchase decisions and drive sustainable growth in South Africa's automotive market.**

Vehicle Finance and Affordability

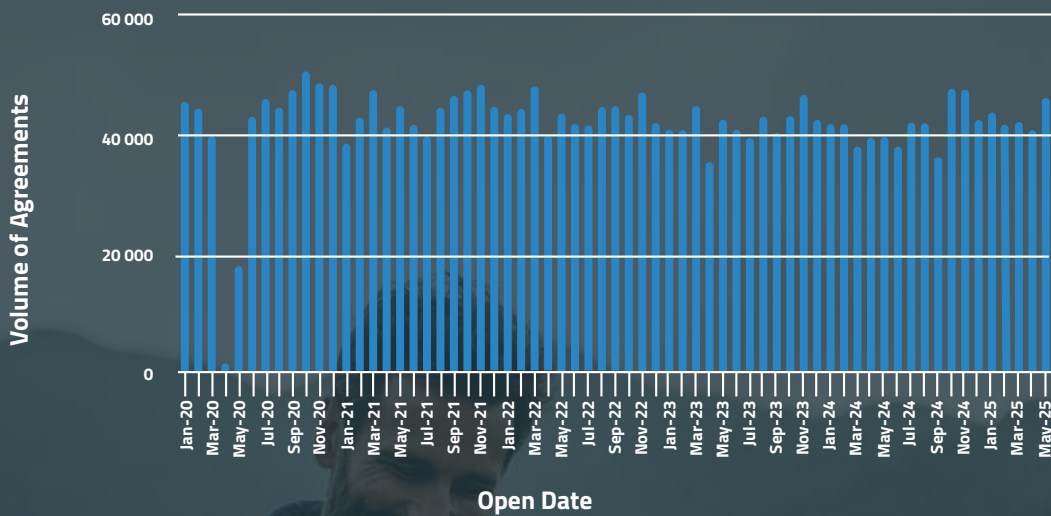
With the exception of the period impacted by COVID and subsequent post-pandemic adjustments, South Africa's vehicle finance market **consistently demonstrates predictable seasonal fluctuations, with demand generally highest in Q4 and lowest in Q2 each year** - a trend that may impact dealership sales cycles and inventory strategies.



New Vehicle Finance Agreements

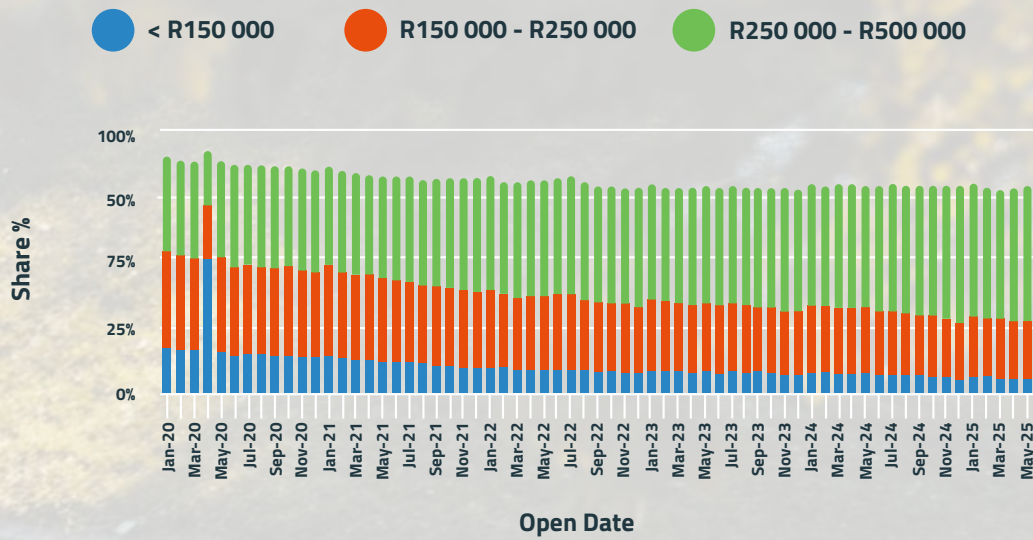


New Finance Agreements



Although vehicle sales and finance agreements have shown slow annual growth over the past two years, the **average financed amount continues to increase**. The pace of growth is however tapering off, which appears to be influenced by the introduction of more budget-friendly brands into the market.

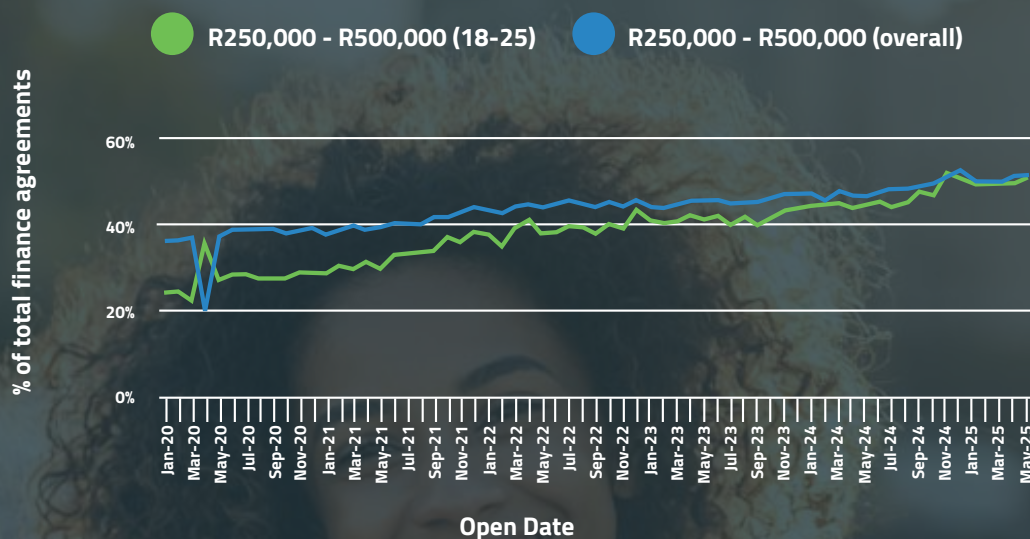
% Contribution: Loan amounts < R500k



An analysis of the average amount financed reveals a notable shift: over the past two years, the number of finance agreements for **vehicles under R250,000 has declined by nearly 20%**. In contrast, agreements for amounts **between R250,000 and R500,000 have seen a significant increase**. Collectively, **these two segments now account for nearly 80% of the vehicle finance market**, underscoring evolving consumer preferences and budget considerations within the dealership environment.

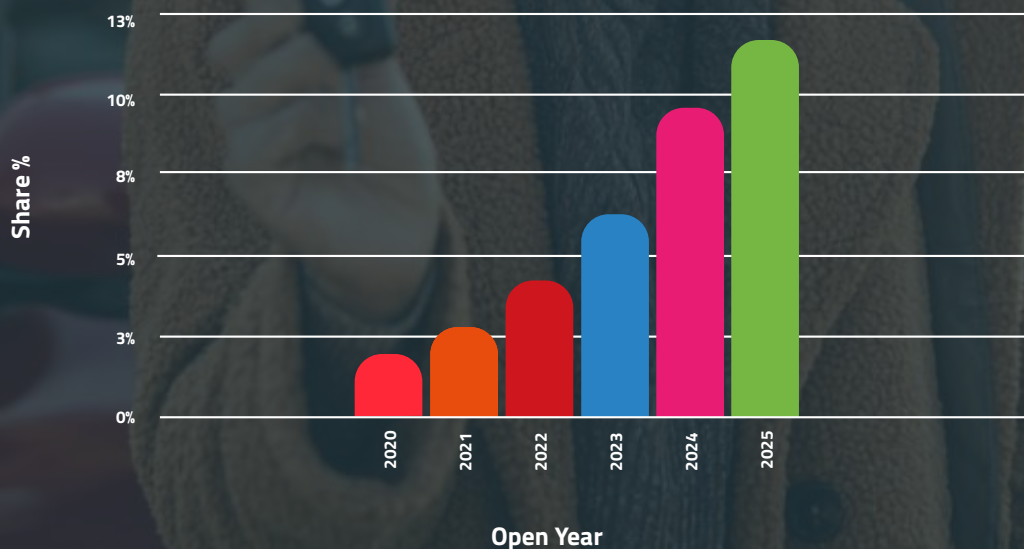


% Contribution: 18-25 Year Old vs Industry



This shift is especially pronounced among younger consumers (*ages 18–25*), where the proportion of financing vehicles in the **R250,000–R500,000** range has surged by over 100% in recent years, now representing more than half of finance agreements in this segment.

% Contribution: Gen Z

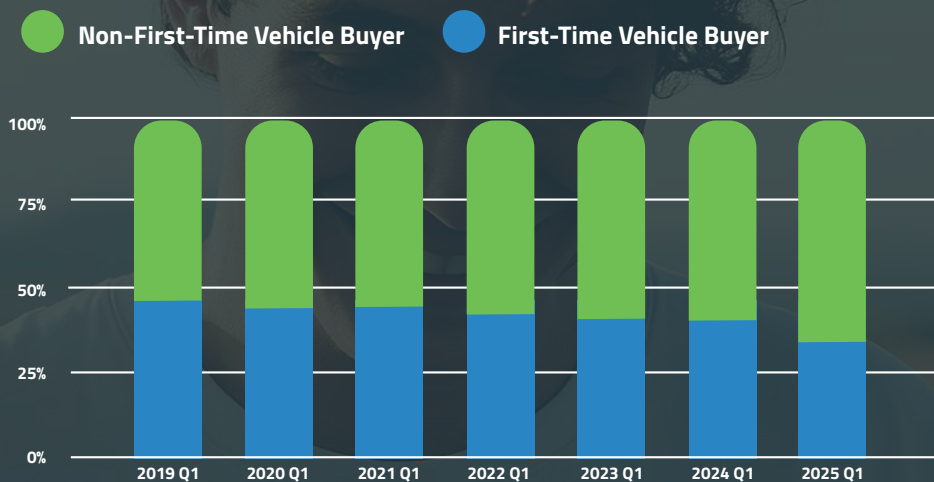


The participation of **Gen Z consumers in the vehicle finance market has seen steady growth** in recent years, now accounting for **over 12% of finance agreements** underwritten. Given that **Gen Z makes up nearly half of the South African population**, this segment is poised for continued expansion as more young consumers come of age. As lenders maintain strict credit criteria, these risk factors may **present ongoing challenges for dealerships aiming to capture market share among younger buyers**.

Repeat-Buyers Dominate Vehicle Finance

In recent years, the automotive industry has observed a notable decline in the portion of consumers financing a vehicle for the first time. This trend is likely driven by several factors, including affordability challenges, tighter credit conditions, and more cautious consumer behaviour among new entrants.

Vehicle Financing Split by Borrower Segment



For banks and financial institutions, this shift is a critical signal. While **repeat buyers offer stability**, the **decline in first-time participation limits** the pipeline for **future growth and raises concerns about access to asset ownership for emerging segments**. If banks and financial institutions are serious about advancing financial inclusion, they need to ask:

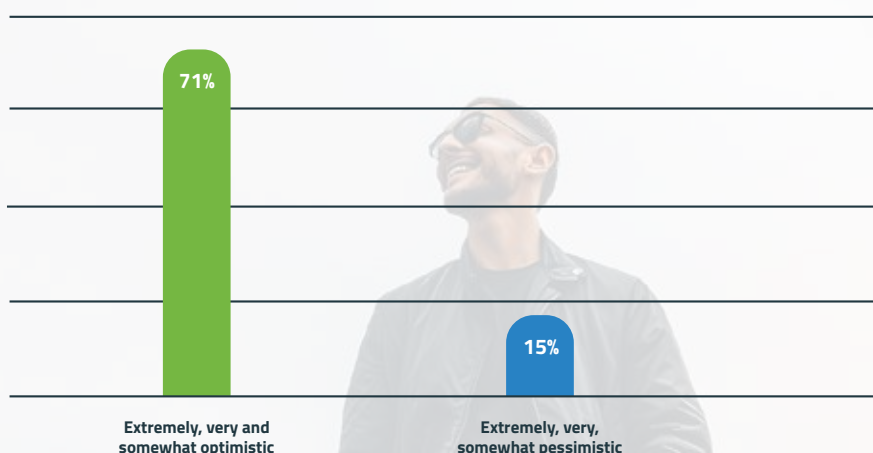
- Are their credit policies unintentionally excluding new entrants?
- Which product innovations or partnerships could lower barriers to entry?

This is an opportunity to **rethink how first-time buyers are supported** - not just as a growth lever, but as a commitment to inclusive economic participation.

How are consumers feeling about their personal finances?

TransUnion's 2025 Q2 Pulse Survey tracks changes in consumer behaviours and attitudes regarding current and future household budgets, spending and debt, as well as their expectations for the future.

Optimism about household finances in next 12 months

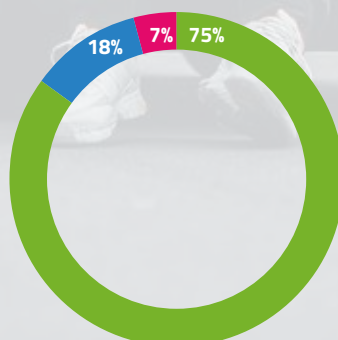


Despite economic headwinds, consumer sentiment remains resilient and forward looking. Over **70% of households are optimistic about their financial outlook over the next 12 months and expect growth in their household income.** This confidence persists even amidst concerns about inflation, interest rate uncertainty and job market volatility.

However, financial strain is still evident with **39% of consumers anticipating difficulties** in meeting their current loan obligations. Additionally, more than half of South Africans feel that they lack sufficient access to credit, highlighting a growing divergence between future optimism and present-day financial stress.

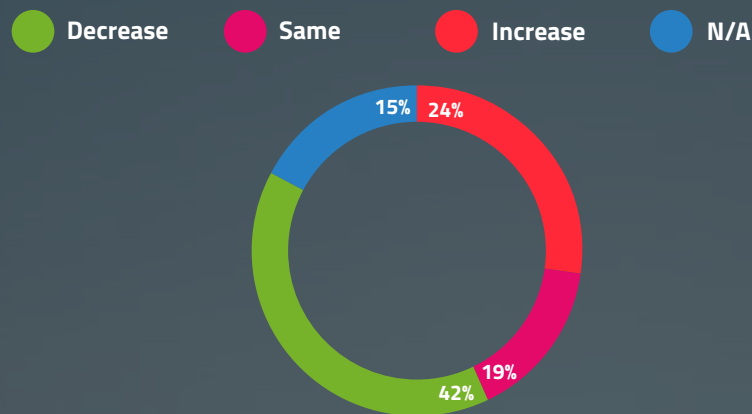
Expected household income change next 12 months

● Same ● Decrease ● Increase



Expected change to household spending over next 3 months

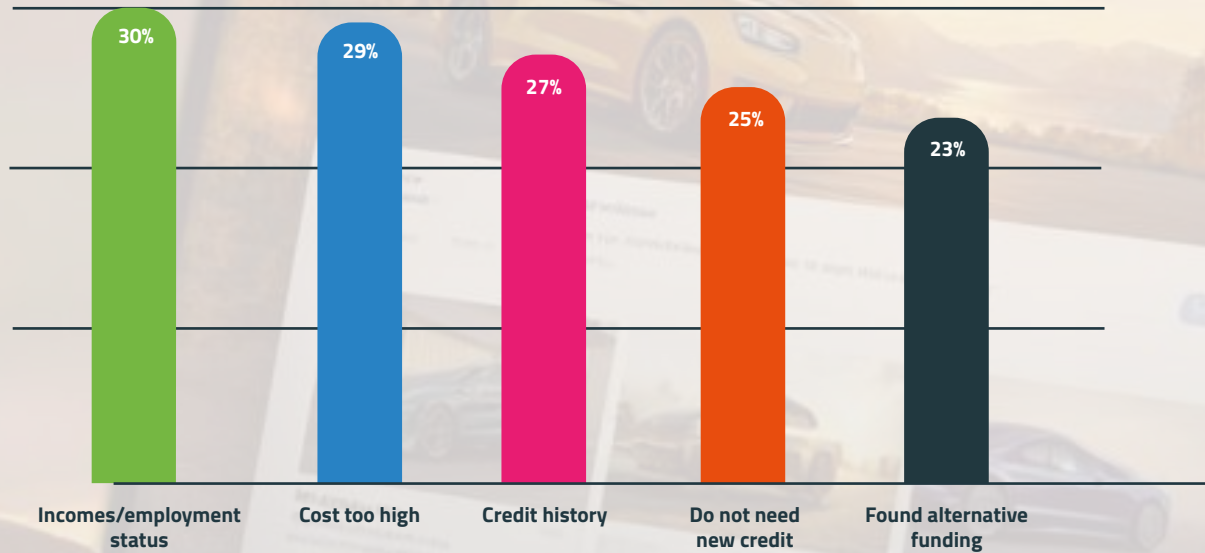
(Large purchases)



The key barriers why consumers **abandon their plans to apply for credit** include the **high cost of credit, income concerns and credit history**. These challenges underscore the **need for alternative to financing approaches** to better serve consumers.

The report indicates that **24% of South African consumers plan to increase their household spending** on large purchases such as vehicles over the next three months. Furthermore, **36% of consumers intend to apply for new credit or refinance existing credit** within the next year, with a **third of those consumers planning to finance or lease a vehicle**.

Reasons for abandoning application for new credit or refinance

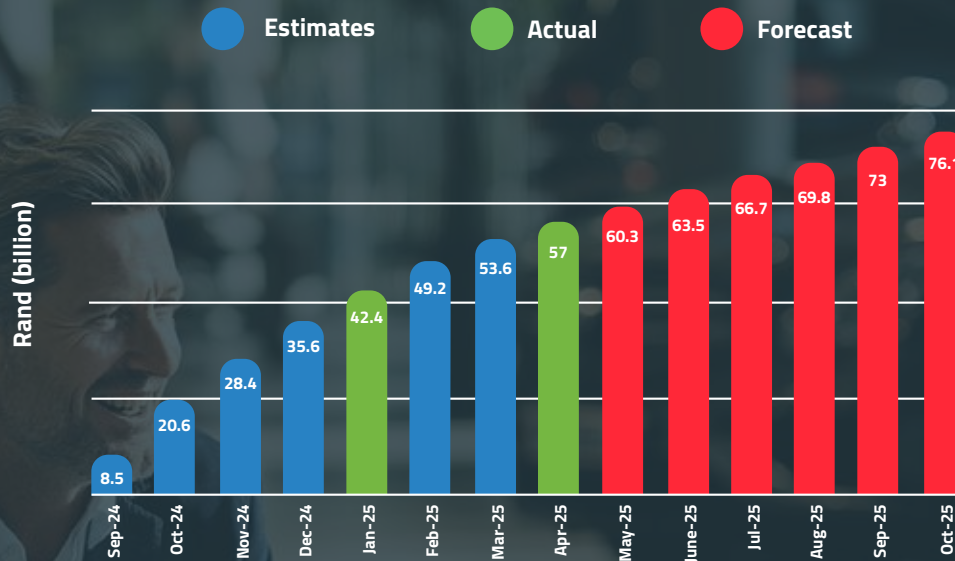


The Two-Pot Retirement System and its impact on vehicle sales and affordability

The introduction of South Africa's two-pot retirement system on 1 September 2024 allows limited annual withdrawals from a "savings pot" while preserving most savings in a "retirement pot."

By October 2024, daily withdrawals peaked at approximately R558 million, and by April 2025, cumulative withdrawals reached around R57 billion, with R42.2 billion paid into South African bank accounts after tax.

Estimated cumulative two-pot withdrawals



The majority of withdrawals ranged **between R5,000 and R20,000, with 26% exceeding R20,000.** This indicates that the **funds were primarily used for short-term household needs such as bills, school fees, debt repayments and vehicle deposits, rather than long-term investments.**

Research by the Actuarial Society of South Africa highlights that a significant portion of these **withdrawals are made by repeat users, underscoring the financial distress many households face.** These withdrawals have become a recurring income stream for many, providing targeted liquidity that has lifted vehicle purchases. This is particularly evident in the used-vehicle market, where funds have been used for deposits and debt repayments,

lowering debt-to-income ratios and easing vehicle finance approvals.

The two-pot system has created a **unique, policy-driven liquidity pulse that has boosted demand, most visibly in the used vehicle segments.** Its muted impact on new vehicles **reflects ongoing affordability and credit constraints.**

Survey evidence suggests that **repeat withdrawals are likely with around one third of prior claimants intending to draw again.** This phenomenon should be viewed not as a structural reset of demand, but as a transient, repeatable catalyst. Success will favour stakeholders who can **anticipate and respond quickly.**

The future of car ownership in SA

Leasing, e-hailing and beyond

The financial strain and high prices lead many South Africans to explore alternative transport solutions. E-hailing, leasing and flexible financing models such as subscriptions and rent-to-buy emerged as viable options, providing access without the need for full ownership. Despite their convenience, these alternatives had limited impact on traditional vehicle buying patterns.

A recent TransUnion Mobility Insights report highlights that while e-hailing is considered as a viable mobility solution, it is **unlikely to replace vehicle ownership**. Barriers to wider e-hailing adoption include limited availability outside metropolitan areas, **personal safety concerns and higher cost compared to vehicle ownership**.

Over the past **18 months, vehicle subscription services have gained traction**. These short-term, flexible vehicle access options appeal to **consumers seeking mobility without long-term financial commitments**. Subscriptions help manage costs and provide convenience, especially for those with **variable income streams or evolving credit profiles**.

Rent-to-buy models are also rising in popularity, particularly among consumers with limited access to traditional credit channels. These agreements, which bundle rental, insurance, warranties and tracking fees, **allow higher risk borrowers to eventually acquire vehicle ownership**.

Although younger generations, particularly Millennials and Gen Z, have shown steady growth in new vehicle finance agreements, **they increasingly prioritise flexibility and short-term, commitment-free mobility over traditional, long-term financing agreements**.

While traditional vehicle ownership remained a key aspiration for many South Africans, alternative financing models **offer new opportunities for access and affordability**, especially among younger and higher-risk borrowers.

About TransUnion

At TransUnion, we don't just report on the automotive industry - we help shape its future. For more than 60 years, our data, insights and technology have been at the heart of South Africa's motor ecosystem, empowering OEMs, dealers, lenders and insurers to see more clearly, move faster, and act with confidence.

In a market where trust is everything, our role is simple but critical: to deliver the most accurate, comprehensive and actionable picture of the automotive landscape. From industry-standard **vehicle valuations and real-time verifications, to advanced credit, fraud and affordability analytics**, we enable our partners to make **smarter decisions that unlock growth and protect consumers.**

What sets us apart is not only the **depth of our data, but the difference it makes.** We are driving

financial inclusion by expanding access to mobility and credit for millions of South Africans, while **powering the industry with intelligence that goes beyond the obvious.**

TransUnion is **more than a credit bureau.** We are the trusted backbone of the automotive value chain - **connecting businesses and consumers, fueling innovation, and enabling the industry to thrive through disruption.** When it comes to the future of mobility, **we don't just keep pace. We set the standard.**



TransUnion