



Brego
Driven by Data

Car Market Insight

April 2026

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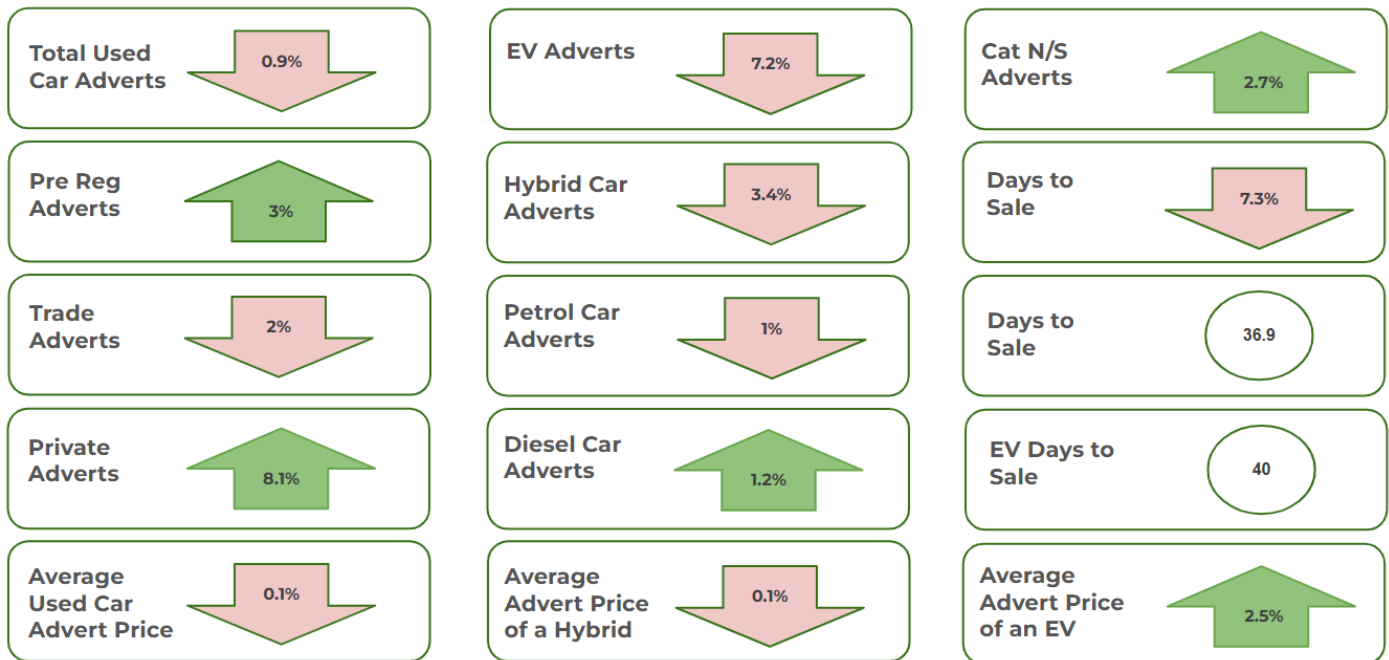
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April Monthly Car Market Insight

The April Monthly Insight report reviews what happened in the UK automotive sector during the month with some comparisons to March 2026, whilst also highlighting key economic indicators that influenced consumer and dealer behaviour during the month.

Key Used Car Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of April when compared with market activity experienced in March:-



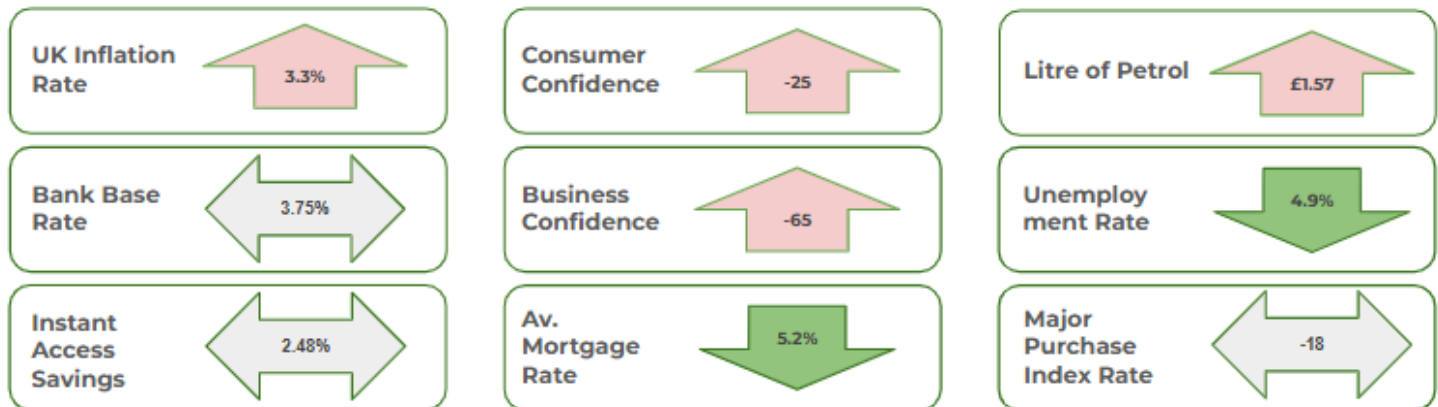
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This month's data paints a very different picture to March as the used car market appears to have taken a downward turn. Feedback from dealers nationwide has been very indifferent with many reporting a marked downturn in footfall and online leads. Activity seems to be focussed around older cars or EVs due to the geopolitical position and the state of the UK government which has negatively impacted consumer confidence across all retail sectors

Unlike the 14.1% increase in used car sales last month there has been a drop of 7.2% in comparison to March which would not normally be the case in an April market that really should be showing strength. The total volume of used car adverts has decreased by a nominal 0.9% suggesting that supply is matching demand but this equally may reflect the fact that dealers are buying less stock, something confirmed by the slow down in wholesale activity. It is also interesting to see a notable 8.1% increase in private adverts as the public seek to change cars for what appears to be cheaper models.

The coming weeks will be an important period for the used car market and it is imperative that the UK economy settles as quickly as possible to bring a boost to retail demand.

Key UK Economic Indicators



Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

The April economic KPIs shed some light on the difficulties in the UK economy which has been influenced by what is happening on a global level. Unfortunately this data is likely to deteriorate further in May as the war in the Middle East continues to pressure fuel and energy costs. In addition the Prime Minister is also under significant pressure and there is great interest in what will happen in May after the local elections have been settled with high expectations of a swing away from Labour to the Reform party.

The increase in the cost of living that was widely predicted has begun to hit home and the rate of inflation jumped to 3.3%, lower than many had expected, but this is likely to jump again next month as costs continue to rise. This has directly affected consumer confidence which dropped to -25 during April which was a four point decline and the largest drop in a year. This has meant consumers have been less comfortable spending money on big ticket items.

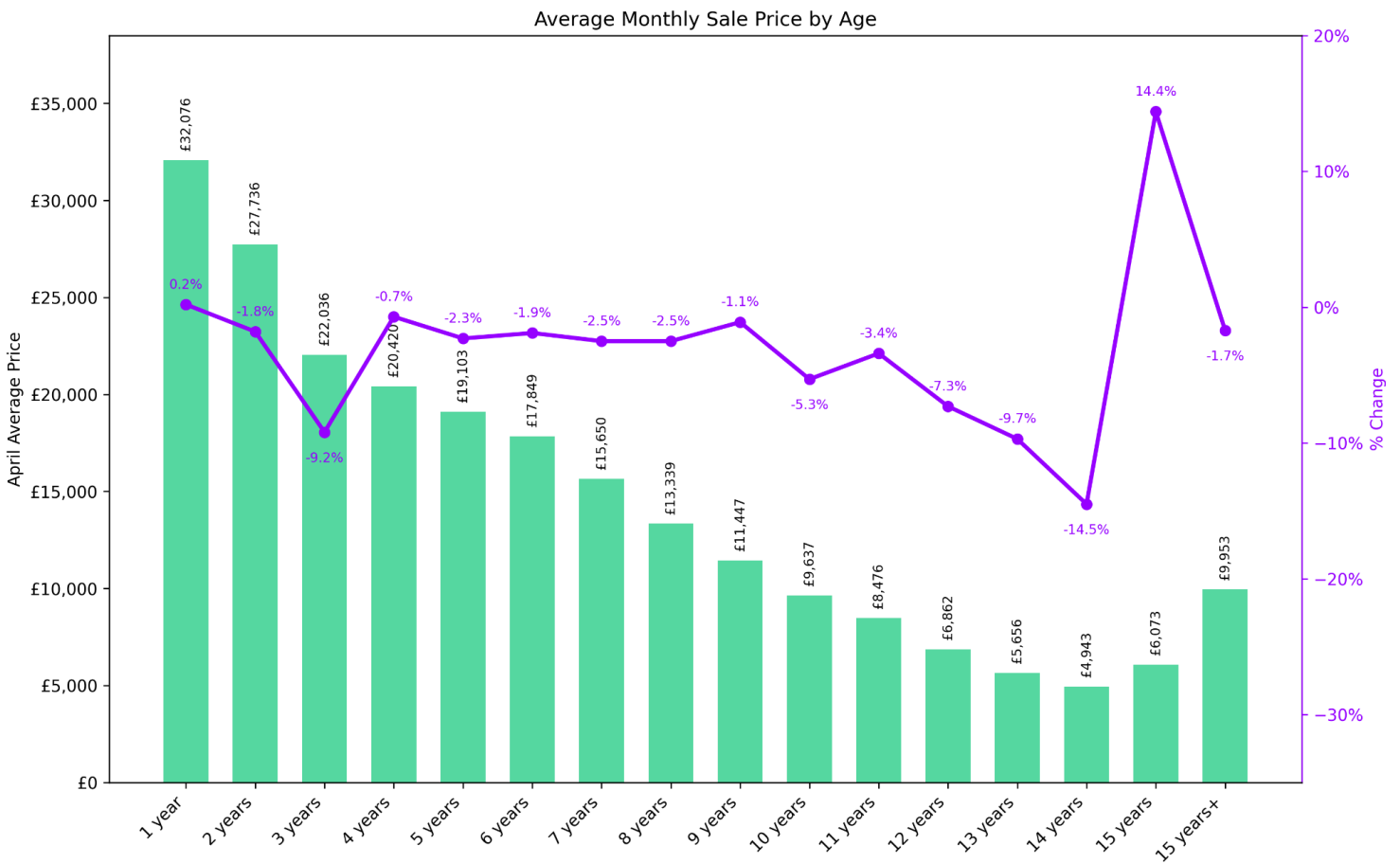
In addition, business confidence has also been hit hard. This quarterly figure dropped by 46 points to -65 which is the lowest level it has been since Q2 2020 at the height of the pandemic. Businesses nationwide are experiencing a rise in the cost of materials and energy which has hit productivity and profitability whilst order books have slimmed down causing a real cause for concern and as such pessimism is running high.

If there is anything positive this month it is the reduction in the rate of unemployment, although this rate is influenced by activity some months previously and there are warnings that it will increase again in the coming weeks. There was also a slight drop in mortgage rates although only by 0.2 or a percentage point which is not enough to rekindle the almost completely stagnant property market with the more expensive end of the market hit particularly badly.

The resolution of the war in the Middle East is imperative for a return to global harmony and the President of the United States seems to be taking a slightly different approach in a bid to stabilise matters. This is due to rampant cost increases in the United States and his own waning popularity with the voting public.

Average Monthly Sale Price Movement by Age

The chart below gives a breakdown of the Average Monthly Sale Price movements by age. The average sale price is shown at the end of the bars and the % change in retail price is shown by the purple line.



Data Powered by Brego Insight

This chart is important because it quantifies the monthly change in the market experienced during April. As expected the average price shown by the green bars declines as the vehicle ages, with an uplift for 15+ year old cars that will include some higher priced classic cars. This is something that is not always true for other asset types for which Brego provides insight.

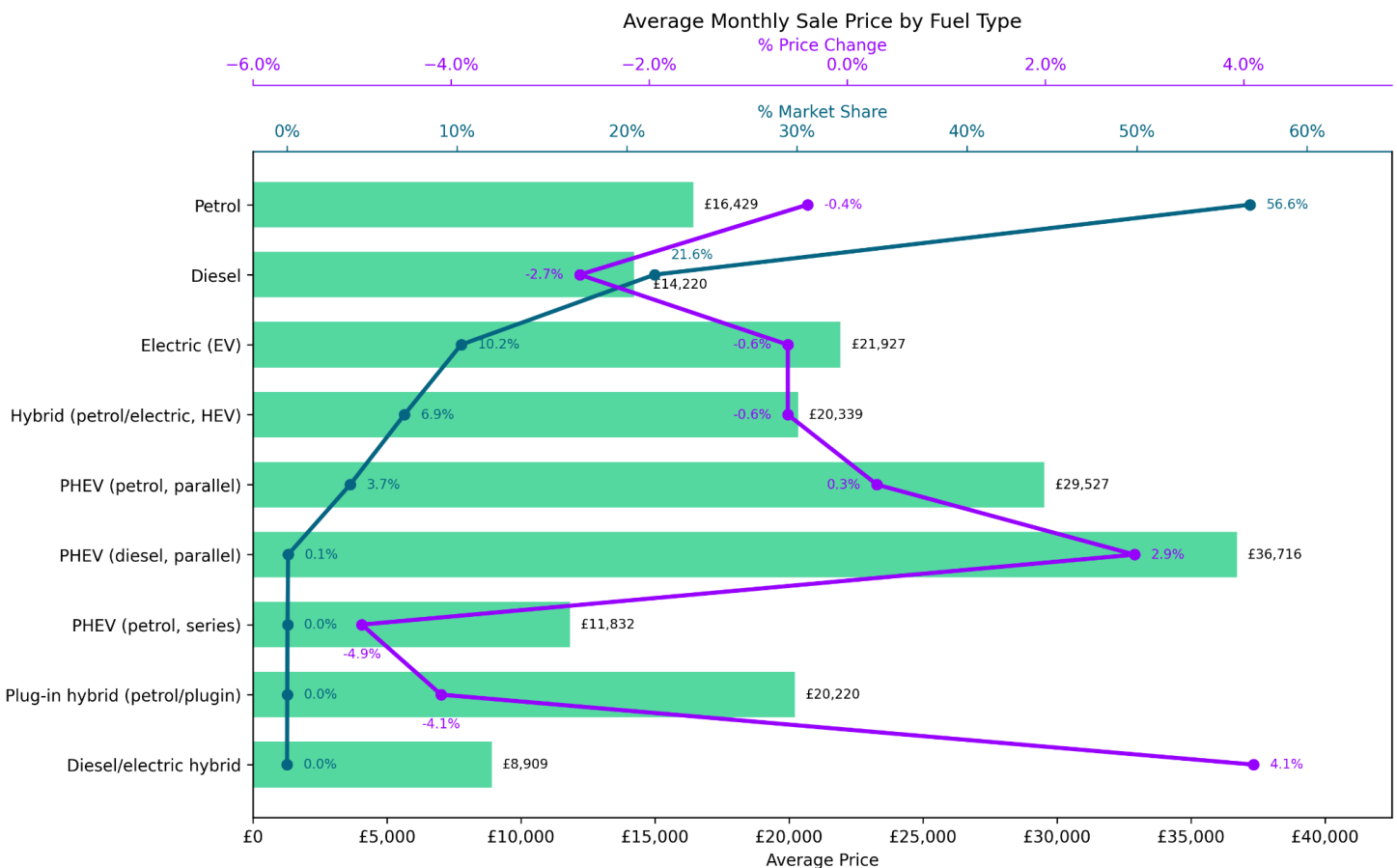
Overall the average retail sale price of cars decreased by 2.8% to £14,454 which is a change of £341 on average. Of specific note, high drops in the average sale prices for three, twelve, thirteen and fourteen year old cars show where the consumer has been seeking lower cost cars. The drop

for three year old cars is likely to reflect an increase in lower cost stock availability due to tactical defleet activity from larger vendors and will probably bounce back in May.

The devil is always in the detail, and using the Brego Insight tool allows users to drill more deeply into what ages and sectors were truly driving activity.

Average Monthly Sale Price Movement by Fuel Type

The chart below gives a breakdown of the Average Monthly Sale Price movements by fuel type. The average sale price is shown at the end of the bars and the % change in retail price is shown by the purple line and the % of market share is shown by the blue line.



Data Powered by Brego Insight

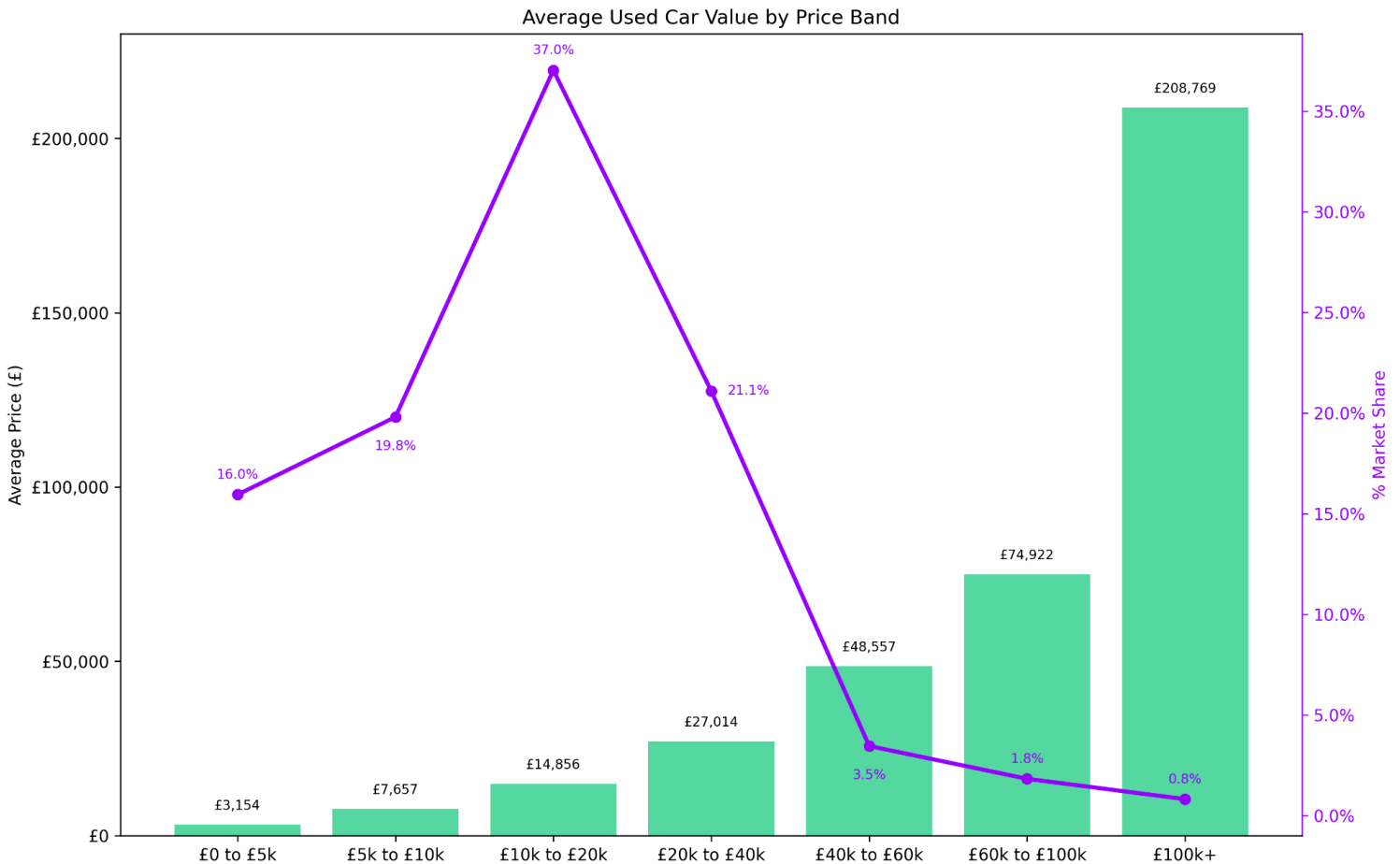
This month's data shows some interesting nuances in the market and the first and most important area to highlight is that the average sale price for most fuel types has decreased. This shows that consumers are looking to buy cheaper cars and is in line with the reduced consumer confidence and cost of living increase in recent weeks.

Of equal note is the overall decrease in the share of sales for most fuel types, except for EV's which recorded an increase of 1% in this data sample. This reinforces the view that retail buyers

are worried about the increase in the cost of fuel and have turned to EVs as a way of reducing travelling costs. Further adoption of this propulsion type is important and any improvement in adoption should be welcome.

Average Used Car Value by Price Band

The chart below gives a breakdown of the Average Used Car Price of advert listings by price band. The Average Price is shown above the bars and the % share of the market for each price range is shown by the purple line.



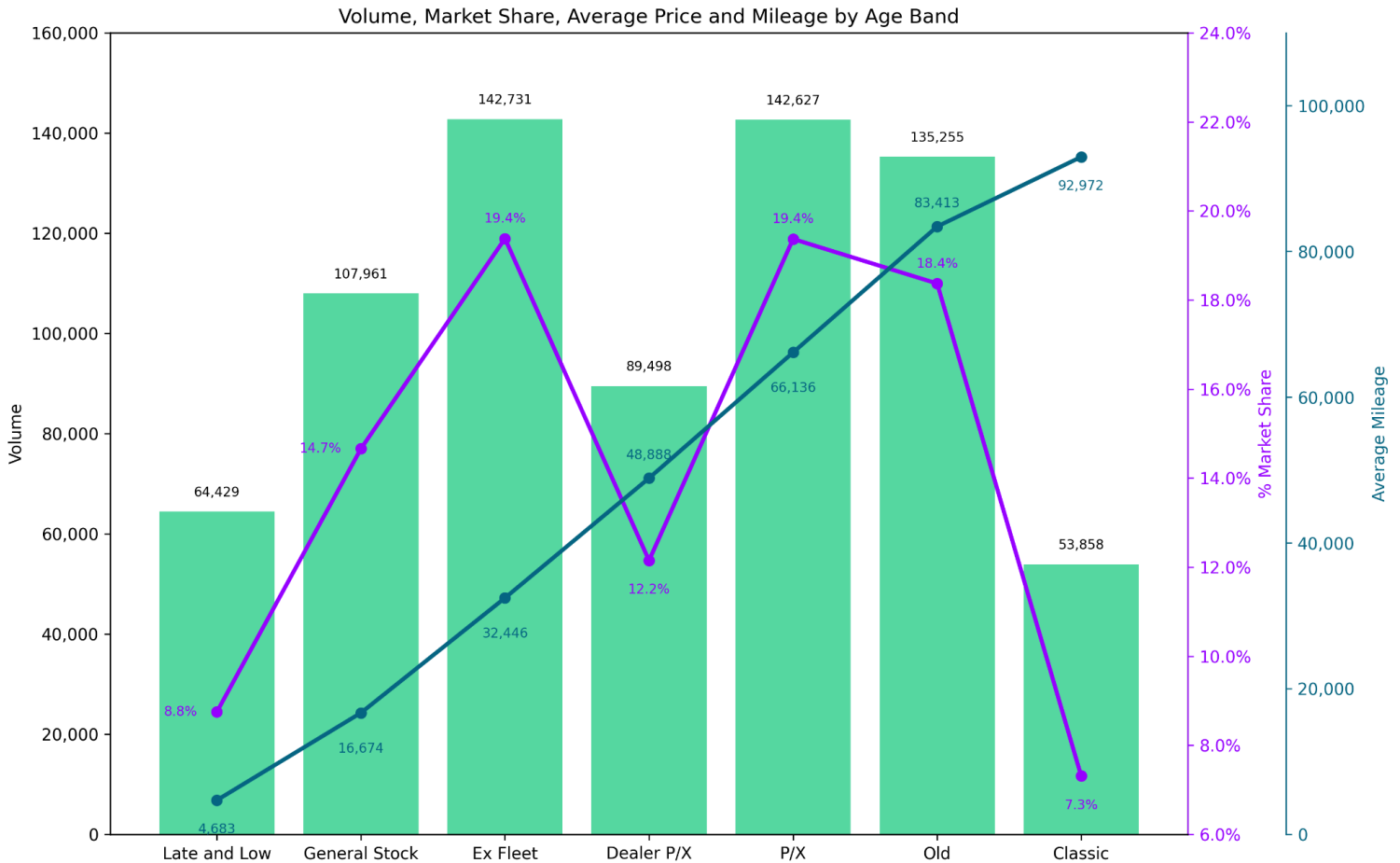
Data Powered by Brego Insight

As usual this chart looks similar to the March data although there are some minor shifts that give a hint of what is happening when analysing the market through this lens. There has been an increase of 1.6% in the number of cars on offer in the £0 - £5k price bracket which takes the market share to 16%. This is worth noting as some of the market feedback indicated that sales of older cars were strong and this almost contradicts that.

However the biggest shift in data is for the £10k to £20k and £20k to £40k price brackets where the volume of cars dropped 3.1% and 4.5% respectively suggesting either higher sales levels or constricted supply. This represents a reduction in market share of 0.7 of a percentage point.

Market Analysis by Age Profile

This is a detailed chart and looks at the market by Sector combined with the Average Price on top of the bar and the Average Mileage and % of Market Share by the blue and purple lines respectively.



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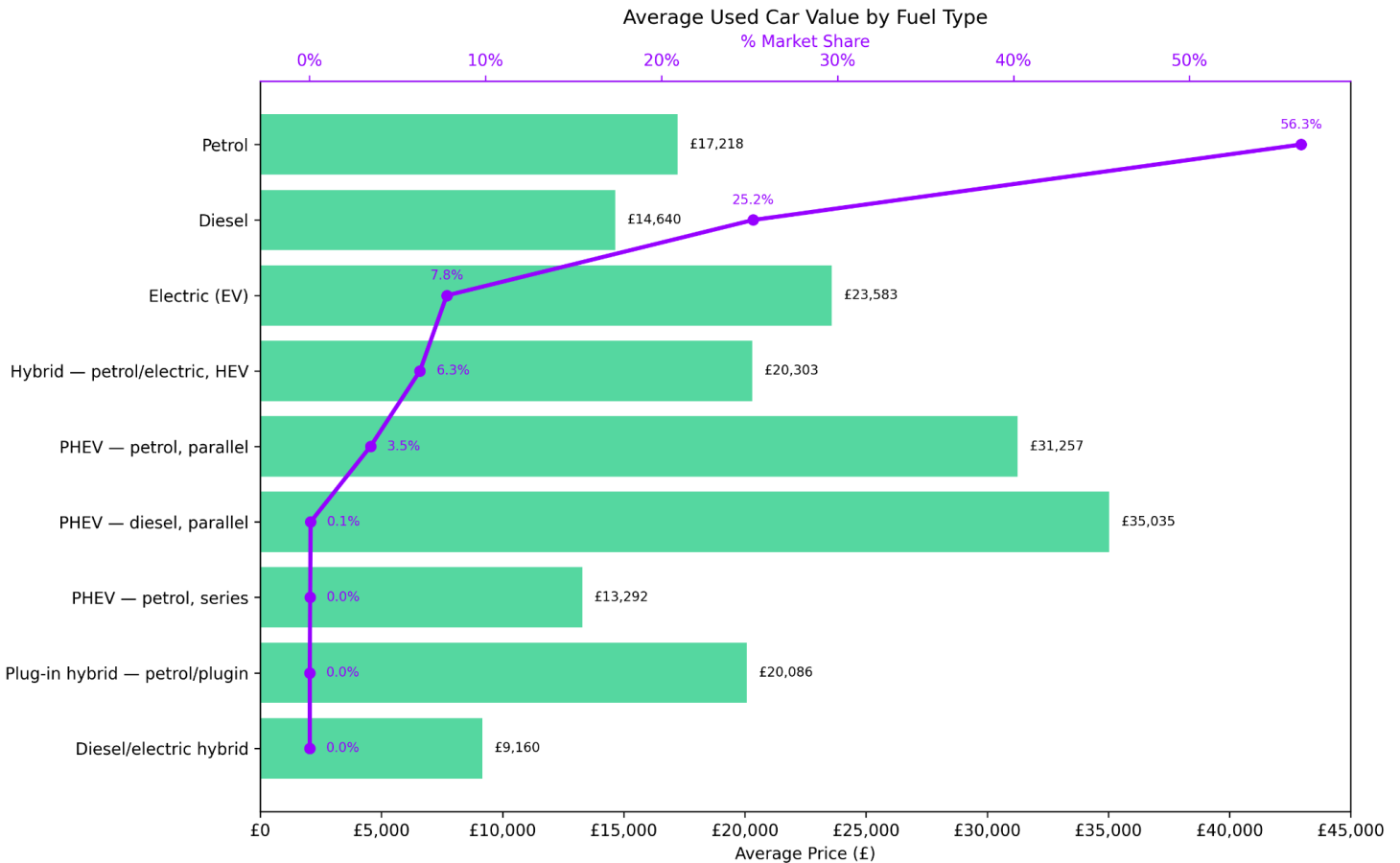
Viewing market data by vehicle segment always raises some interesting shifts in the market and this month is no different. There are two key changes in the data and the first relates to the average price for Late and Low stock which has seen an increase of 1.1% or £397. This supports earlier evidence that there is demand for cheaper cars of this age.

The second is the change in market share for Ex Fleet stock which shows a contraction of 1 percentage point and this is closely followed by a reduction of 0.8 of a percentage point for General Stock. This suggests that there were higher sales of cars aged 1 to 5 years old or a

reduction of stock availability. The latter is more likely in this instance given the other market indicators.

Average Used Car Value by Fuel Type

The data in this chart dissects the market by fuel type and relates to advert listings with the Average Price to the right of the bar and the purple line showing the % of Market Share.



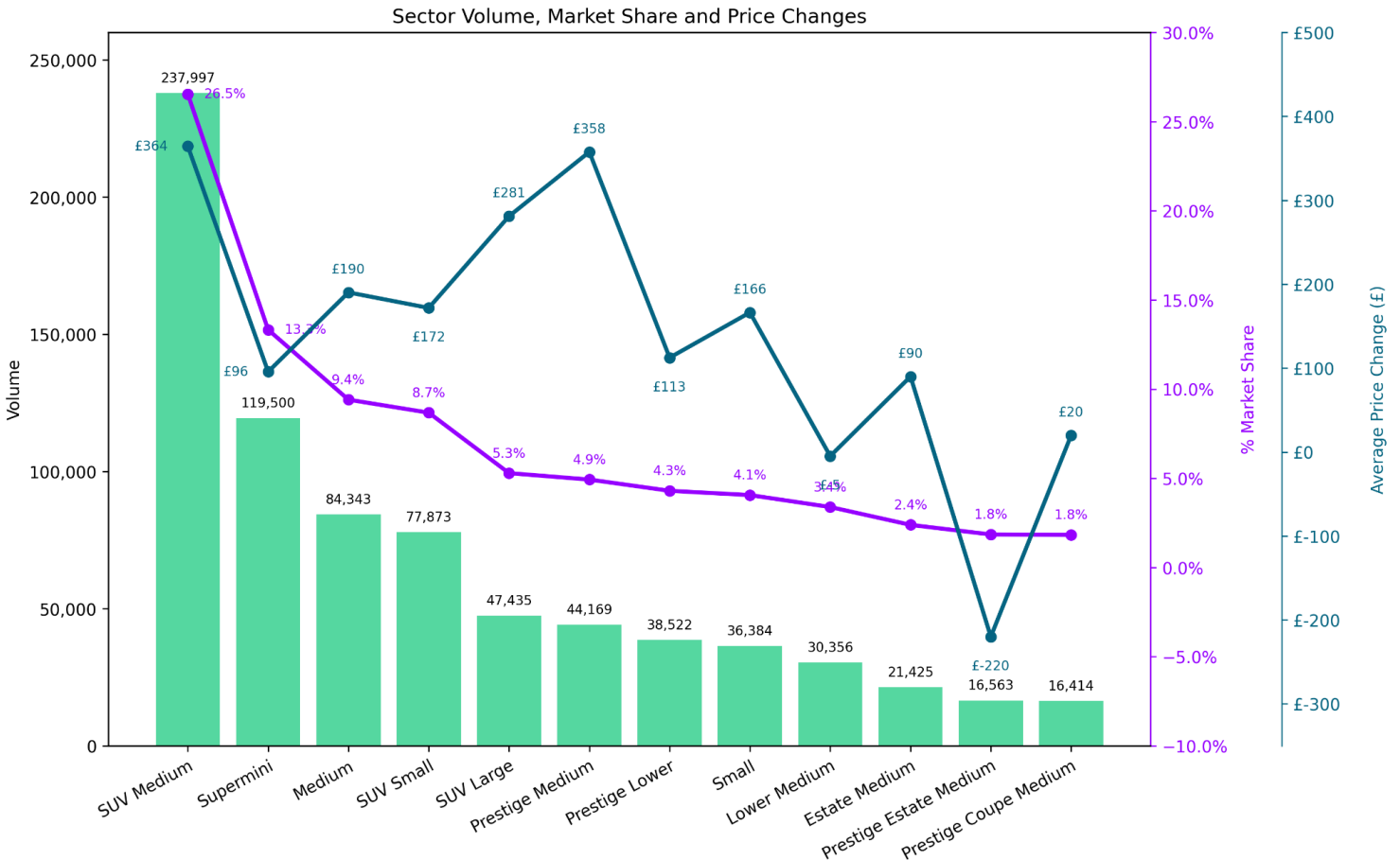
Data Powered by Brego Insight

The fuel type data shows another view of the April market and the glaring change here is the drop in the volume of EVs listed for sale. Market share has dropped by 0.6 percentage points to 7.8% and that is a decline of 7.5% in advertised product, fully underlining the demand for this type of car right now. This is sales driven as it is common knowledge that more EVs are now hitting the used market.

It is also interesting to see that the number of diesel cars advertised has increased by 1% and that has increased the market share by 0.5 of a percentage point to 25.2%. This is a little surprising given the fact that diesel cars give good fuel economy, but considering that the cost of a litre of diesel is now approaching £1.90 it shows that the consumer is not really aware of the potential cost saving of running a diesel car overall and is more worried about headline figures.

Used Car Performance by Market Sector

This is a fairly detailed chart and shows the Volume of cars advertised in the market by the bars. The blue line shows the month on month change in the Average Price by sector and the purple line the % of Market Share. This chart covers the 12 largest market sectors.



Data Powered by Brego Insight

This is always an interesting view of the market and in April the top 12 sectors covered 86% of the whole market, down 0.4 of a percentage point on March. This is the second month in a row this has declined at this rate and highlights that consumers are buying more cars outside of the Top 12 sectors. Deeper research will in all likelihood show this is due to an increase in demand for convertibles

From an average price perspective the biggest change in pound note terms impacted the Prestige Medium sector an increase of £358. However, in percentage terms Small cars showed an increase of 2.5%, closely followed by SUV Medium cars at 1.9%. SUV Medium also showed the biggest change in market share with a 0.4 percentage point increase taking it to 26.5%.

As ever, this data set warrants further investigation, and those customers with access to the Brego Dealer platform can use the Brego Insight tool to probe the nuances in each sector.

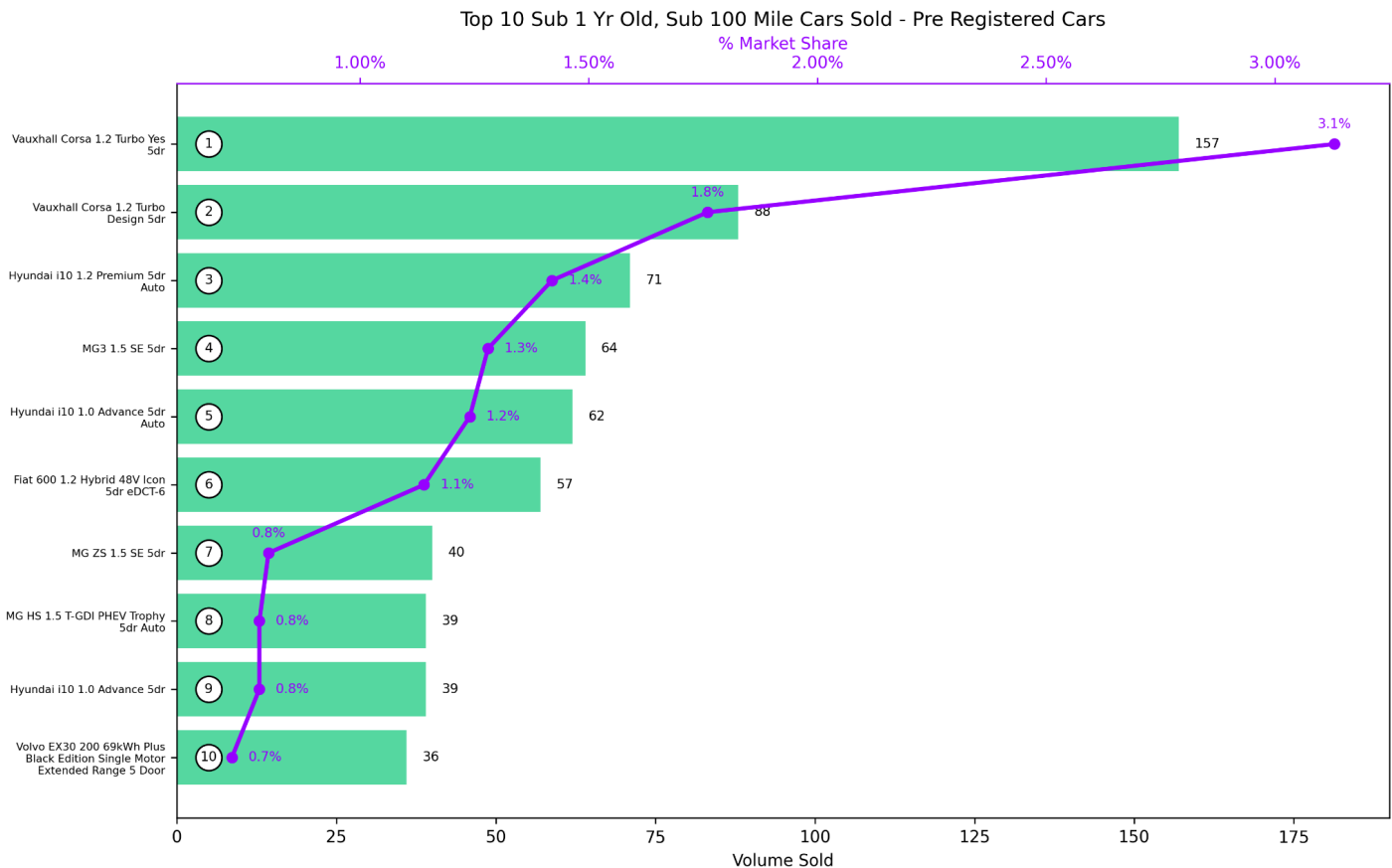
For context the Best Selling Cars in the SUV Medium sector for the month were:-

Rank	Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	Nissan Qashqai	7,747	6.9%	£12,723	28.5
2	Kia Sportage	5,407	4.8%	£17,689	32.9
3	Ford Kuga	4,572	4.1%	£14,288	31.3
4	Volkswagen Tiguan	3,896	3.5%	£19,663	35.4
5	Hyundai Tucson	3,846	3.4%	£18,372	28.5

Data Powered by Brego Insight

Top 10 Pre-Registered Cars

The bars in this chart show the Volume of Cars sold by individual top selling model derivatives with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

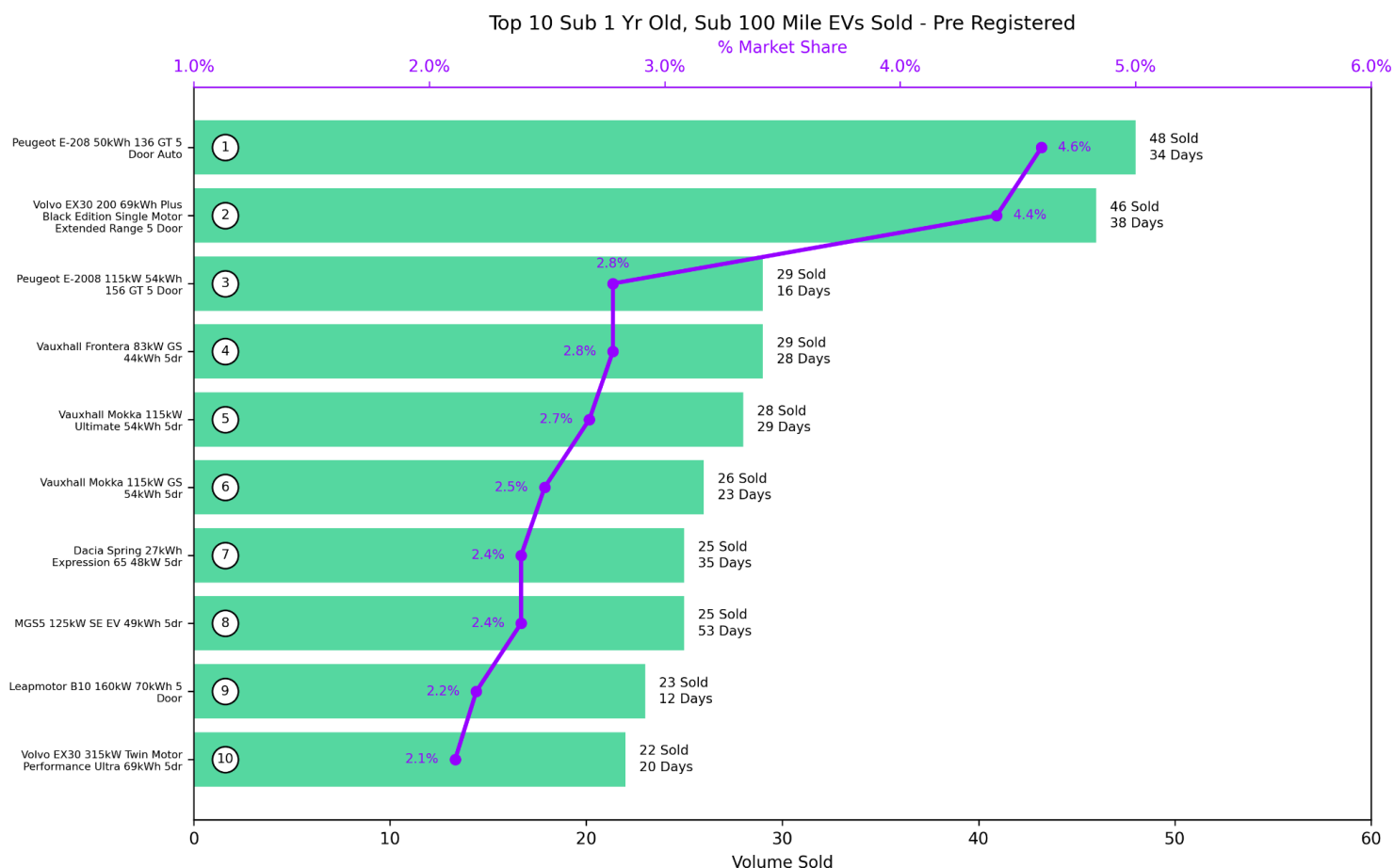
Overall this data shows that the volume of the Top 10 Pre Registered cars in April dropped by 24.9 percentage points despite the fact that overall Pre Registered adverts increased by 3% for the whole market. This shows that dealers registered a more eclectic mix of cars

The top two cars remained the same month on month and this month Stellantis product took a more reasonable three of the Top 10 spots, a figure shared with MG and Hyundai. It is worth noting that the three spots taken by Hyundai were all for the i10 models.

The total market share for the Top 10 dropped by 1.5% to 13% and the average days to sale decreased significantly to 23.5 days highlighting these were probably recently registered models.

Top 10 Pre-Registered EVs

The bars in this chart show the Volume of EVs sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

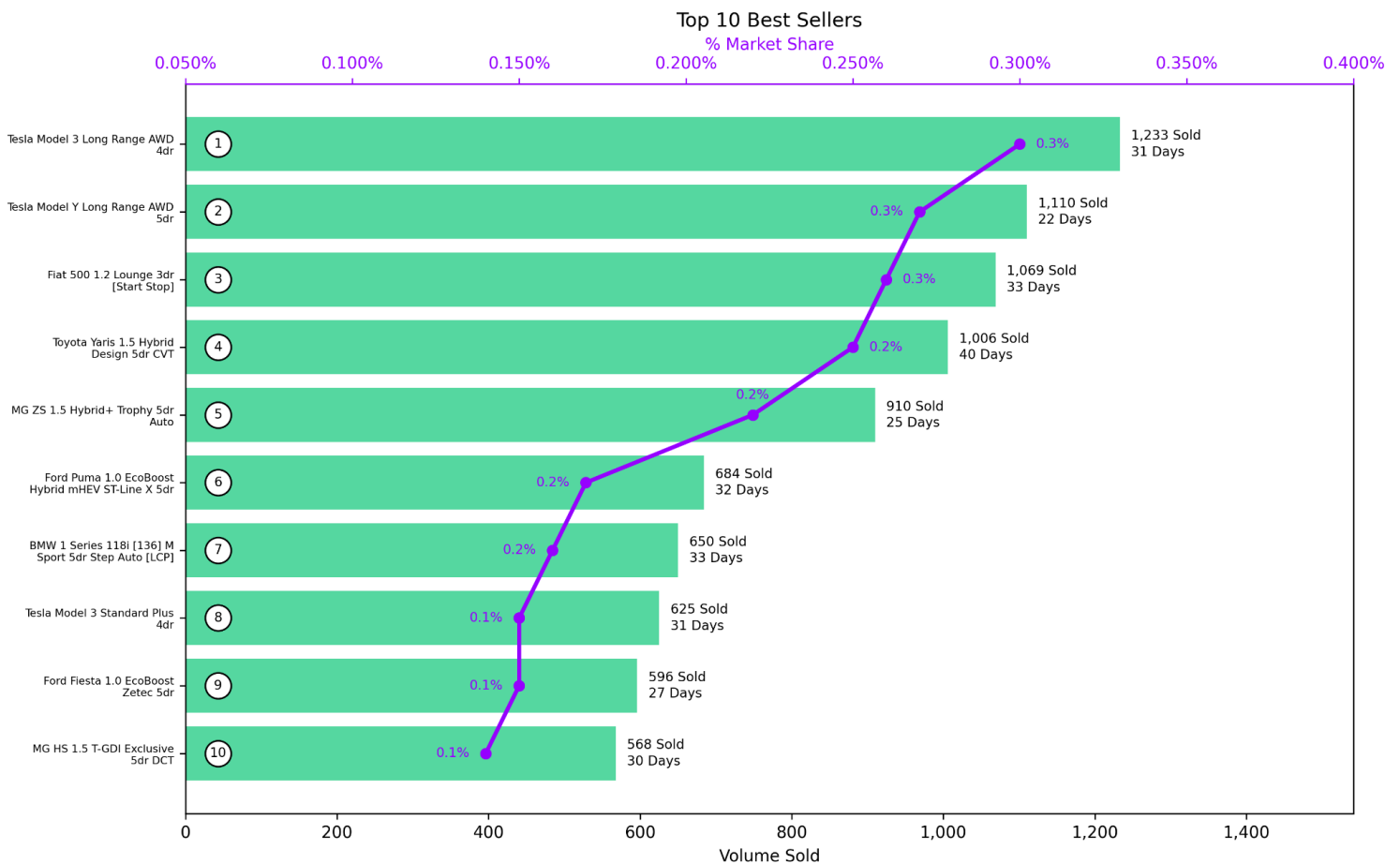
For April there was a significant drop in the number of the Top 10 best selling Pre-Registered EVs with a decline of 22.6 percentage points, which is not far different from the performance in

the whole Pre Registered market. There was also a significant 14% jump in average price taking it to £22,859 showing that more expensive models hit the mark in this slice of the market data. This was primarily driven by the entry of the Leapmotor and the Volvo EX30 Plus Black Edition. The other new entrant was the Peugeot E-208 at the top of the table.

The percentage of market share for the Top 10 dropped by 1.8 percentage points to 28.8% and the average days to sale also dropped by 3.3 days to 28.7.

Top 10 Best Selling Used Cars

The bars in this chart show the Volume of Cars sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



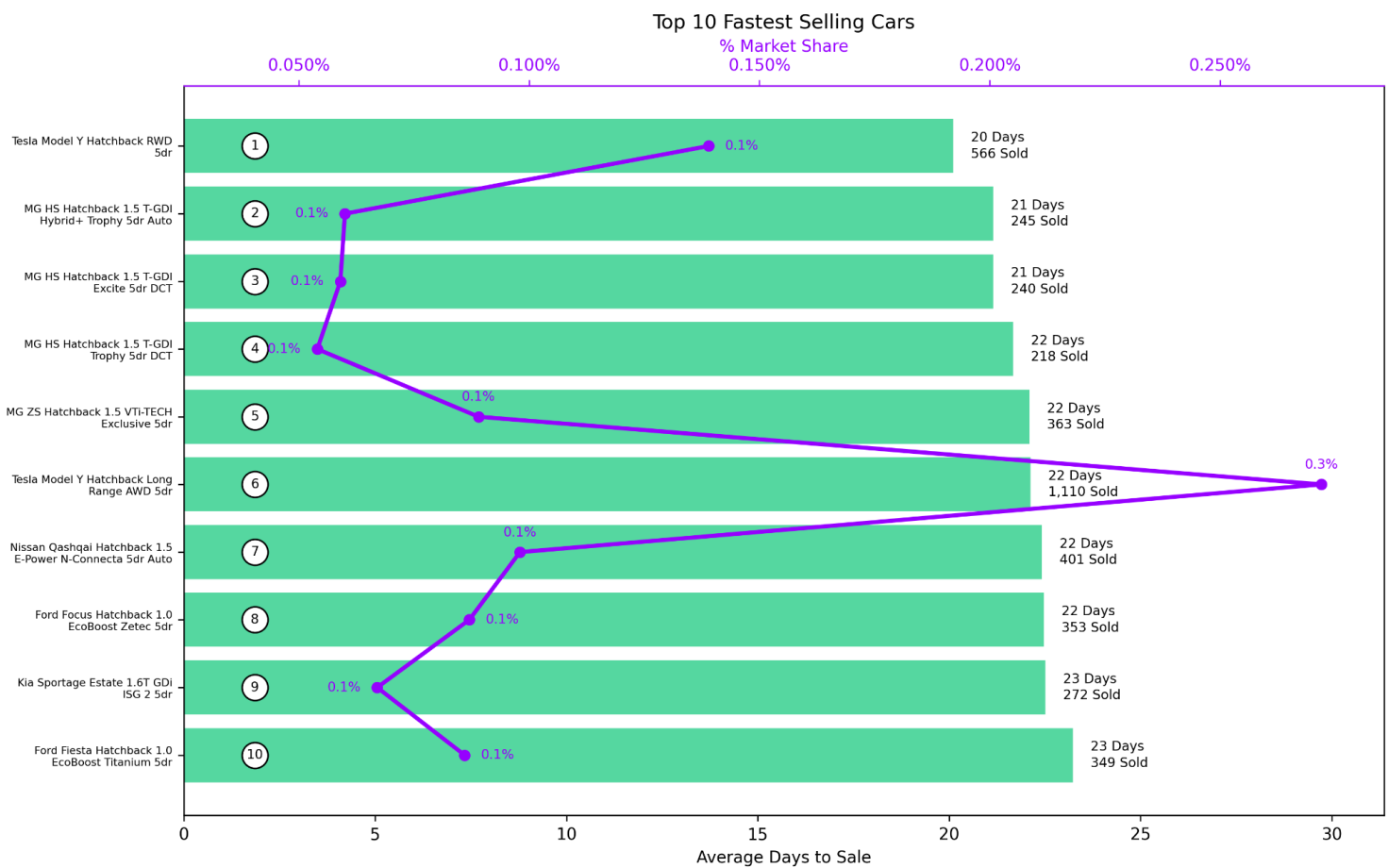
Data Powered by Bregio Insight

The April Top 10 Best Sellers were almost exactly the same as in March, albeit in a different order. There was only one new entry in the form of the MG HS 1.5 T-GDI Exclusive in tenth spot.

At a high level the volume of cars in the Top 10 dropped by 2.5% again showing that market demand was more spread out. Interestingly the average price remained almost even at £15,113 although that is to be expected on the basis that that nine were the same derivatives as the previous month. In total the market share moved by just 0.02 of a percentage point to 2.07% and there was an overall drop of 1.4 days in the time it took to sell a car.

Top 10 Fastest Selling Used Cars

The bars in this chart show the Average Days to Sale by individual fastest selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line. This is based on model derivatives that sold in volumes of at least 200 in the month:-



Data Powered by Bregio Insight

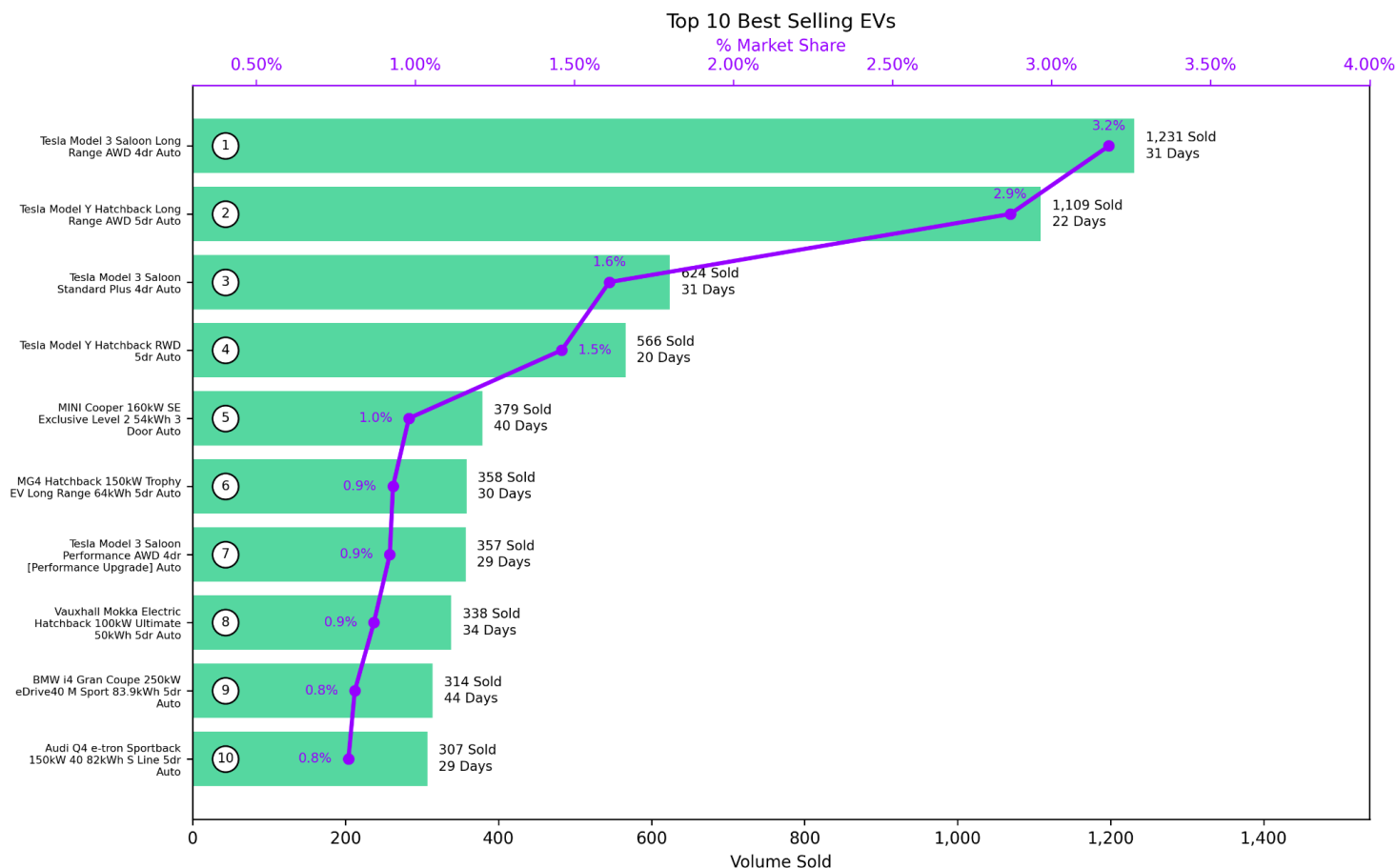
This month's data has seen a change to the criteria of the data set and as such there is a bit of a change to the Top 10 with five models carried over from March, albeit in slightly different positions, and five new entries. Of note is the fact that there are four MG HS variants in the list and they take second to fifth spot.

The average days to sale has seen a nominal 0.8 day reduction taking it to 21.9 and the overall share of the market has remained broadly similar at 1.01%. The biggest change has been in the

number of units sold in the Top 10 with a large drop of 25.4 percentage points affirming that the April market has been about a greater spread of derivatives being sold. The average sale price has increased by 1.4% to £16,309.

Top 10 Best Selling EVs

The bars in this chart show the Volume sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



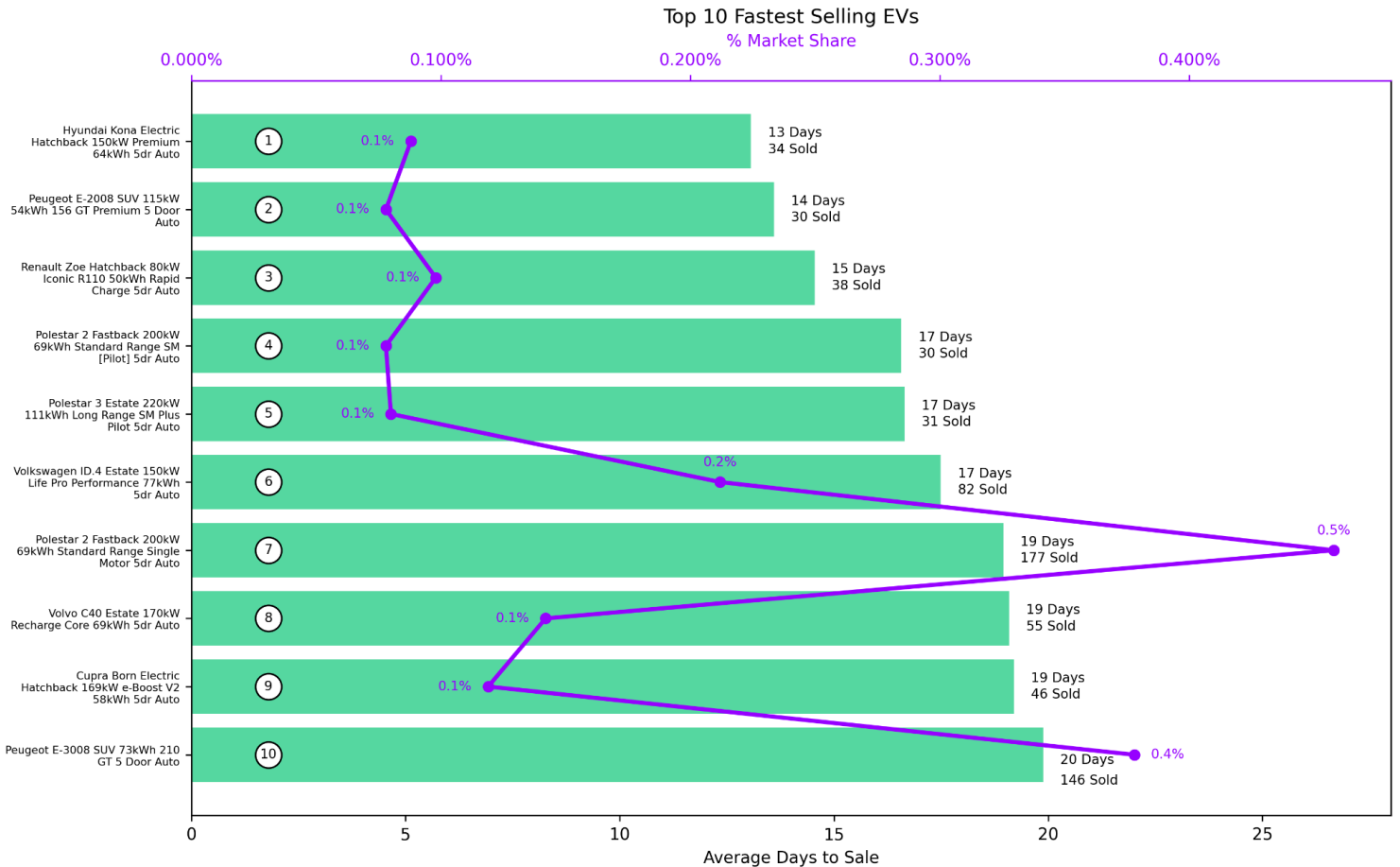
Data Powered by Bregio Insight

For the fourth month running Tesla took five of the Top 10 Best Selling EV spots with the top four being exactly the same derivatives as in March. There are three new entries in the form of the Vauxhall Mokka, BMW i4 Gran Coupe and the Audi Q4 e-Tron.

The volume of the Top 10 sold increased by 7.5% to 5,583 and the average sale price increased by 3.4% to £19,469 and this was due to the entry of the BMW with its average price of £31,071. The market share was also very consistent at 14.4% reflecting a drop of 0.1 of a percentage point. It is interesting to note the consistency of the cars in this list from month to month.

Top 10 Fastest Selling EVs

The bars in this chart show the Average Days to Sale by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

As with the previous fastest selling models list, this month's data has seen a change to the criteria of the data set and as such there is a marked change to the Top 10 with just three cars carried over from last month and seven new entries. That said, this list often sees a greater number of new entries month on month.

At a high level the data shows that the average sale price was £19,880 which ranged from £8,435 for the Renault Zoe to £49,667 for the Polestar 2 in seventh place. The average days to sale improved by 4.4 days to 16.9 but the overall percent of market share for the Top 10 dropped by four percentage points to 1.7%. Once again this highlights that retail customers are buying a wider range of models than last month and to be honest this is a positive.

Finally the volume of the Top 10 dropped from 2037 to 669 from March to April which is a change of 67.2%.

Summary

Sadly April was not the month that the UK auto sector had hoped for, tarnished by the geopolitical position driven by the activities of the United States in the Middle East. The knock on effects on fuel prices following the closure of the Strait of Hormuz has forced different buying patterns in the market due to dropping consumer confidence and the start of what could be a fairly long period of economic unrest and inflation coupled with an increase in the bank base rate in the coming weeks.

If there is any form of positive news from this period, it is that the consumer has found greater interest in EVs on the misguided assumption that we may run out of petrol and diesel. That said, this increase in the adoption of EVs is absolutely necessary as the industry still surges towards a ban on sales of new petrol and diesel cars in 2030.

The coming weeks will be vital for retailers in the UK and for the auto sector, which has already weathered so much in the last six months, a speedy solution is imperative.

Rest assured, Brego will ensure you get a full view of the month's activity rather than an almost full month view as given by some valuation providers to ensure you are driving your business with the latest and most accurate insight.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting edge AI driven Insight tool to help bring detail and clarity to the complex UK used car market.