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# Car Market Insight

August 2026

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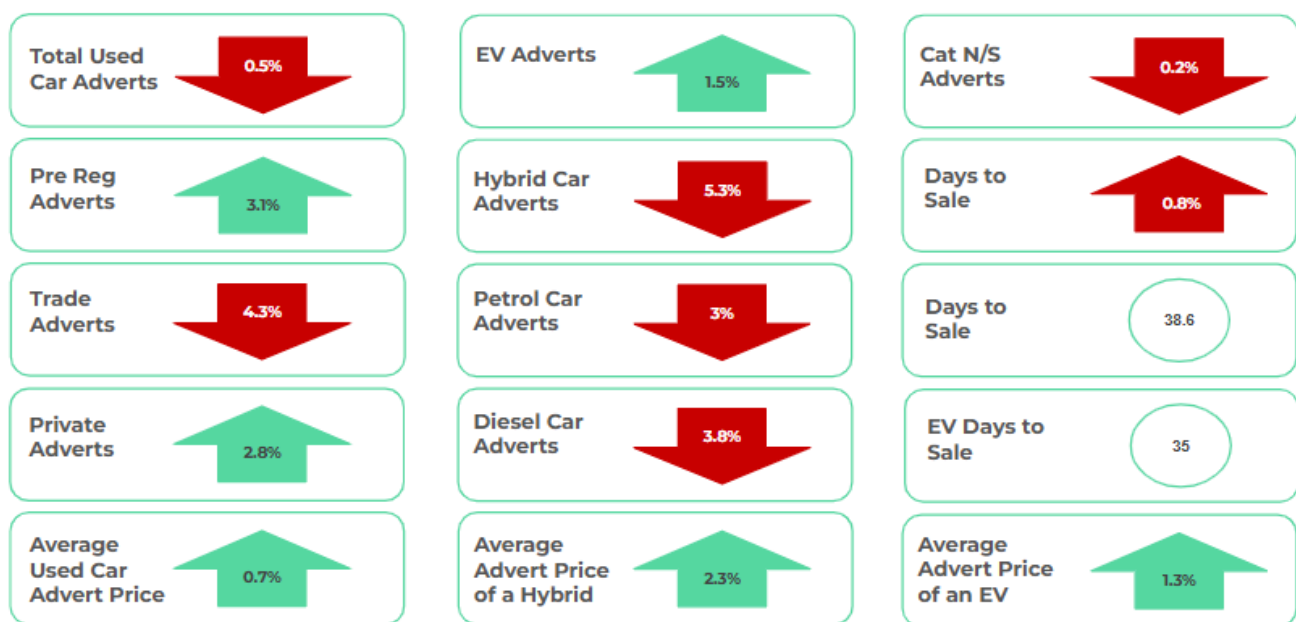
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# August Monthly Car Market Insight

The August Monthly Insight report reviews what happened in the UK automotive sector during the month with data comparisons to July 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 August when compared with market activity experienced in July: -



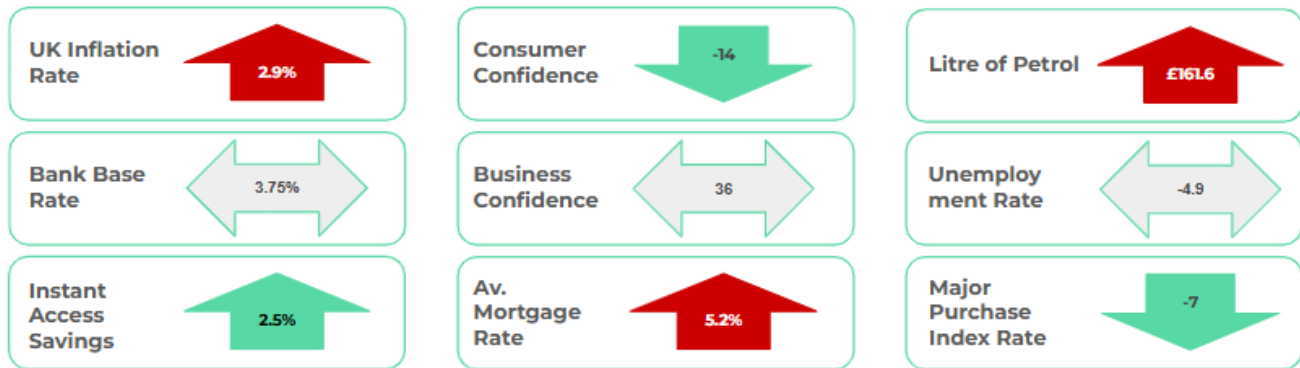
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The August KPIs paint a more mixed picture than July, which is not altogether surprising given the geo-political position and the influence of both the weather and the summer holiday period. Sales declined by 1.5% and total used car adverts fell by 0.5%. Trade adverts dropped by a more notable 4.3%, although private adverts increased by 2.8%. At the same time pre-registered adverts rose by 3.1%, which indicates that the supply of very young stock remained elevated after the end-of-half-year registration activity highlighted last month.

Fuel type movements were also varied. EV adverts increased by 1.5%, while petrol, diesel and hybrid adverts fell by 3%, 3.8% and 5.3% respectively. The average advertised price increased by 0.7%, with hybrid and EV average prices rising by 2.3% and 1.3% suggesting both sales of lower-priced cars and perhaps higher value stock coming through from the wholesale market.

The average days to sale increased by 0.8% to 38.6 days. This is only a modest deterioration, but it brings the whole-market measure back above the July figure of 38.3 days. EVs performed better than the wider market at an average of 35 days to sale.

## Key UK Economic Indicators



Data Courtesy of Trading Economics, Gemini AI and [www.gov.uk](http://www.gov.uk)

The August economic indicators are interesting and help explain why the automotive market became a little more measured. Inflation increased from 2.6% to 2.9% which was largely expected and is forecast to increase further in the coming months. However, consumer confidence improved to -14, and the major purchase index also rose to -7. These indicators suggest that consumers became less cautious about larger discretionary purchases.

In addition, the Bank of England base rate remained at 3.75%, and the average instant access savings rate rose to 2.5%, further strengthening a perceived positive economic position. However, the average two-year mortgage rate increased to 5.2%. Higher borrowing costs are not helpful for either household affordability or vehicle finance, even if stronger savings rates offer a small benefit to consumers holding cash. Petrol also increased to £1.62 per litre, adding another pressure point for motorists.

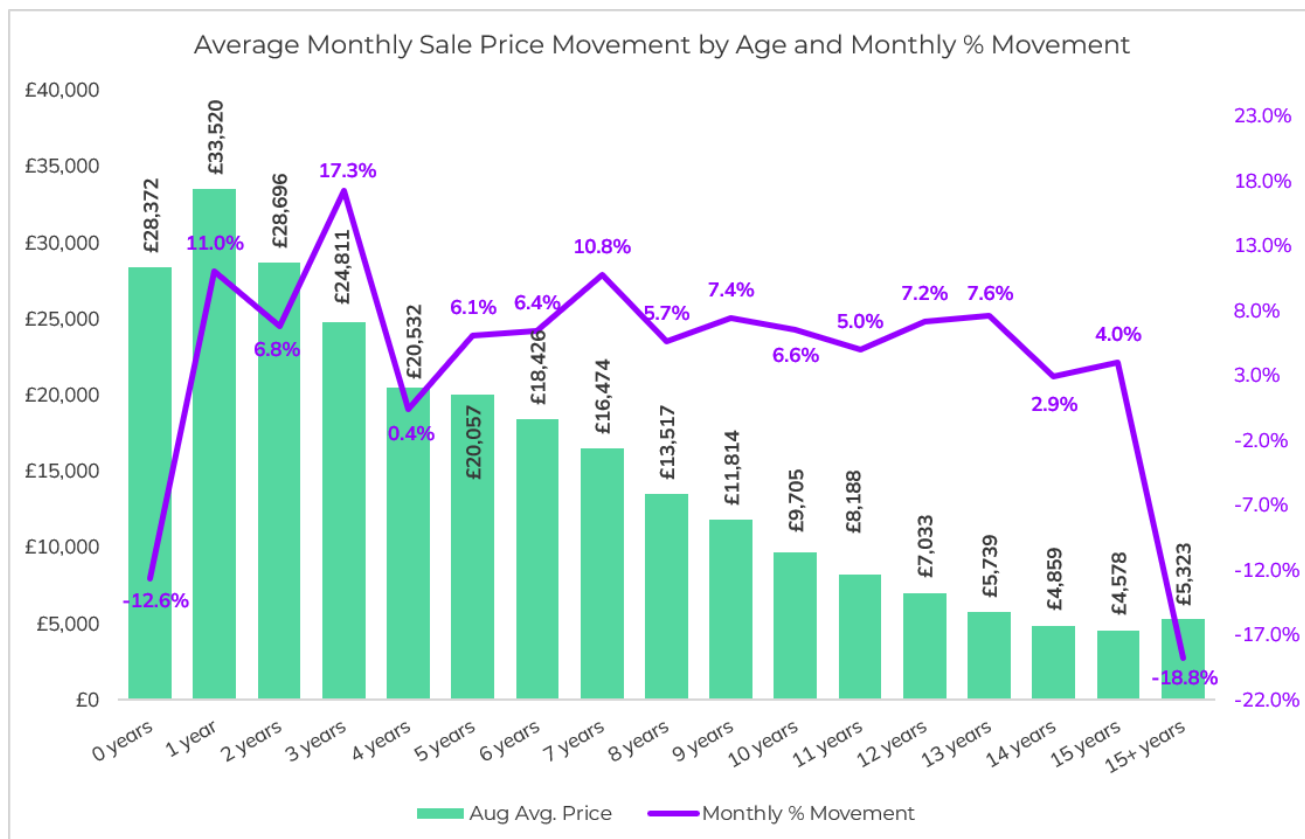
Business confidence remained at 36, although this is a quarterly figure and expected to take a marked downturn when it is updated in December which will reflect what happened in the third quarter. Finally, the unemployment indicator was -4.9%.

In reality, the economic position is perhaps not as good as the data suggests. The war in the Middle East continued to bring concern and instability globally. Indeed, speculation of a third world war began to worry analysts and pundits as Russia started to flex its military presence against those who have supported Ukraine. There was also an increase in the number of thinly veiled threats from the Russian President.

Ultimately, the UK auto industry is doing its best to work with somewhat hesitant consumer demand and it is fair to highlight that retail car sales have outperformed the national retail sales position as is often the case.

## Average Monthly Sale Price and Movement by Age

The chart below gives a breakdown of the Average Monthly Sale Price and movements by vehicle age for the month of August. 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

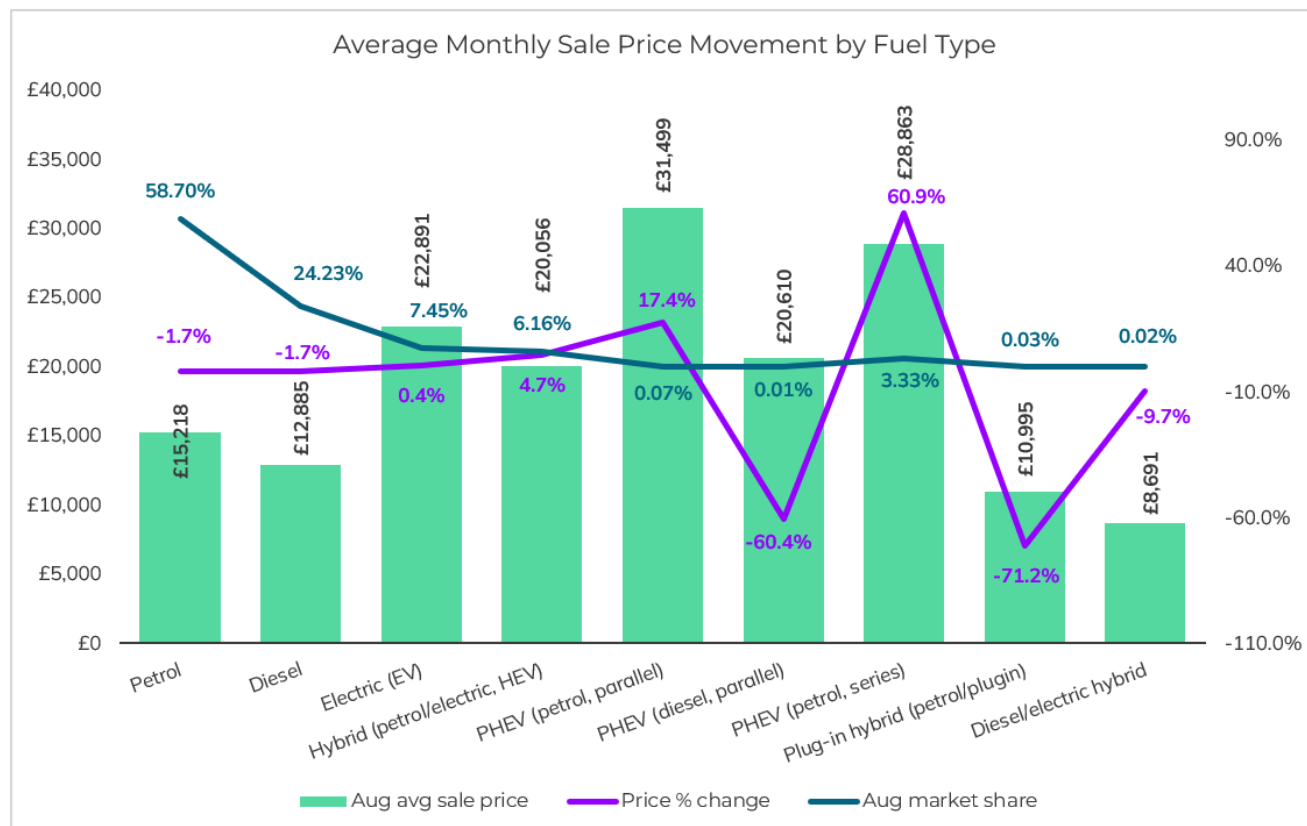
This chart is important because it quantifies the monthly change in the market experienced during the month of August. As expected, the average price shown by the green bars declines as the vehicles age, with an uplift for cars aged over 15 years that will include some higher priced classic cars. This is something that is not always true for other asset types for which Brego provides insight.

August produced an unusual split by age. Cars under a year old fell by 12.6% to an average sale price of £28,372, which is consistent with continued pre-registration activity and the greater availability of discounted nearly new stock. Cars over fifteen years old also fell sharply, down 18.8% to £5,323.

Between those two ends of the age range, every cohort from one to fifteen years recorded an increase in average sale price. The largest uplift was for three-year-old cars at 17.3%, followed by one-year-old and seven-year-old cars at 11% and 10.8% respectively. The movements are significant and suggest that the mix of cars sold within each age band had a major influence during the holiday month.

## 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

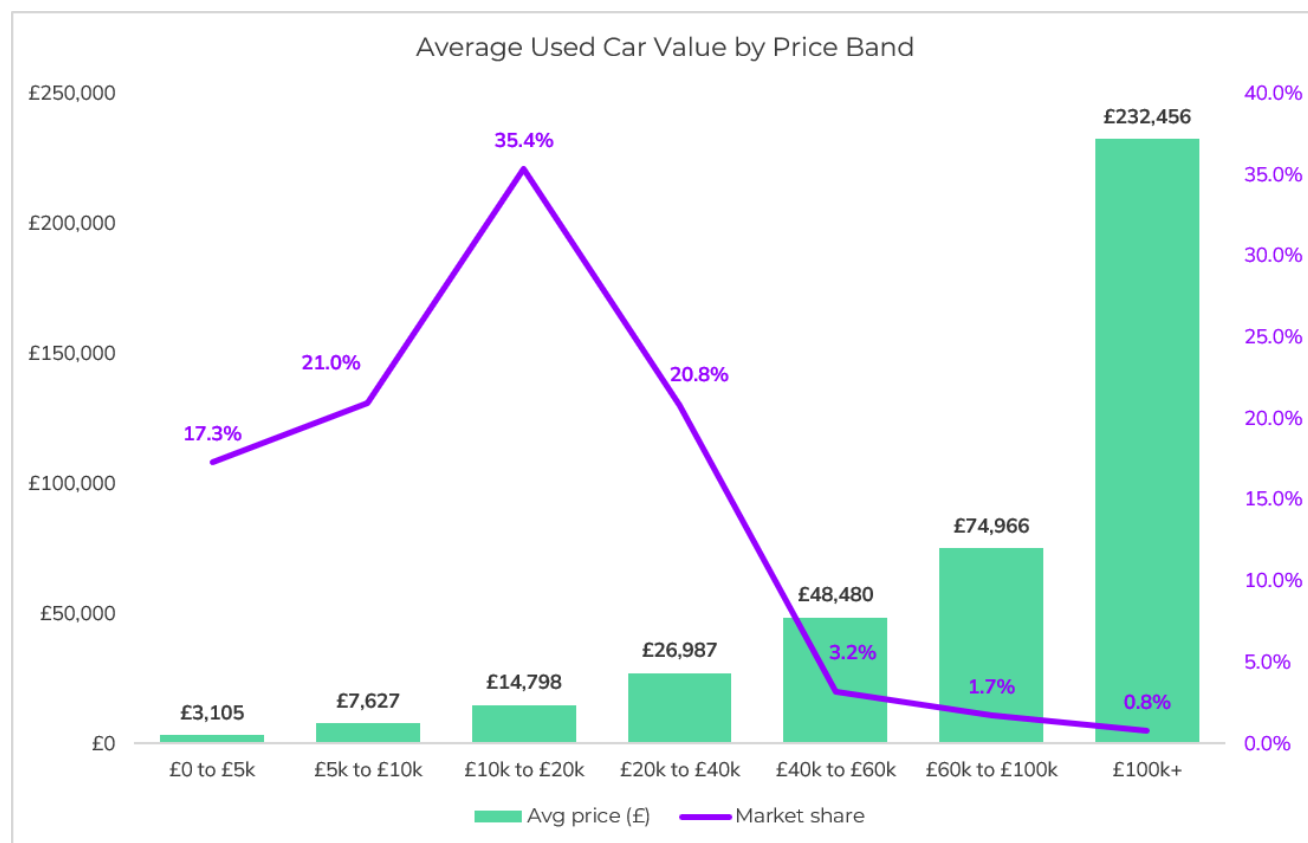
Analysing the market by fuel type is key as the ZEV mandate pushes EV adoption and during August there were some interesting nuances. The green bars show the average sale price, the purple line the % price change and the blue line the % of the August market share.

Petrol remained the largest fuel type and increased its share of sales by 1.06 percentage points to 58.7%, even though its average sale price dropped by 1.7% to £15,218. Diesel followed a similar price pattern, falling by 1.7% to £12,885, while its market share was broadly stable at 24.2%.

EV share increased by 0.28 of a percentage point to 7.45% and the average EV sale price edged up by 0.4% to £22,891. Hybrids moved in the opposite direction on share, down 0.11 of a percentage point, although their average sale price increased by 4.7% to £20,056. Some of the plug-in categories show very large percentage movements, but their very small volumes mean these should be treated with caution.

## 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.



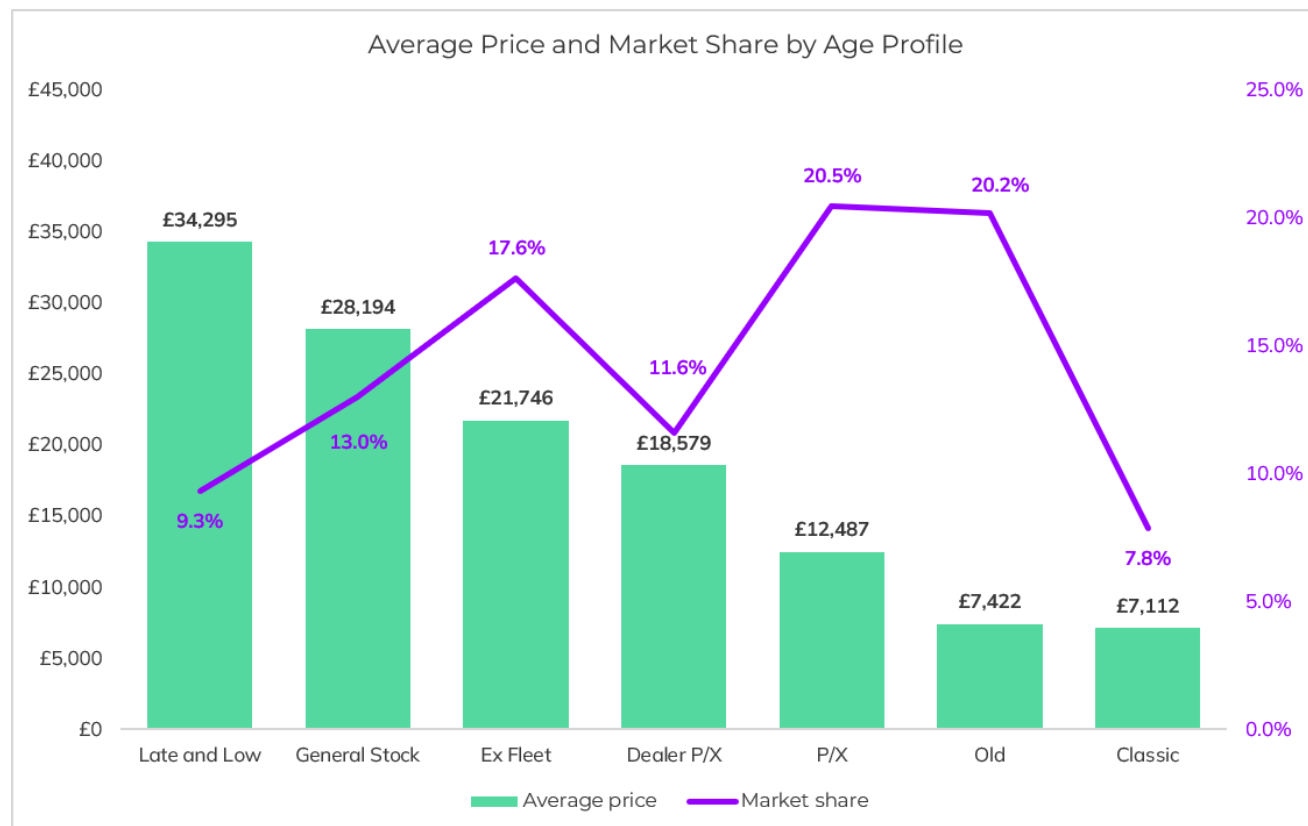
Data Powered by Brego Insight

The advertised price-band view was broadly stable below £100,000. Average prices moved by less than 0.4% in every band from £0 to £99,999, with the only increase being £63 or 0.1% in the £40,000 to £59,999 cohort. The £100,000+ band was the clear exception, increasing by £5,696 or 2.5% to £232,456. This is due to some high-end classic Ferrari product hitting the advertising data.

Market share shifted towards lower-priced cars. The £0 to £4,999 band increased by 0.77 of a percentage point and £5,000 to £9,999 increased by 0.31 of a percentage point. The largest reduction was 0.74 of a percentage point for the £10,000 to £19,999 band, although it remained the largest part of the market at 35.4%. This price band is often the sweet spot as finance payments work out to be competitive when compared to the age and quality of cars on sale.

## Market Analysis by Age Profile

The chart below gives a breakdown of the Average Used Car Price by age profile. The Average Price is shown above the bars and the % share of the market for each market profile is shown by the purple line.



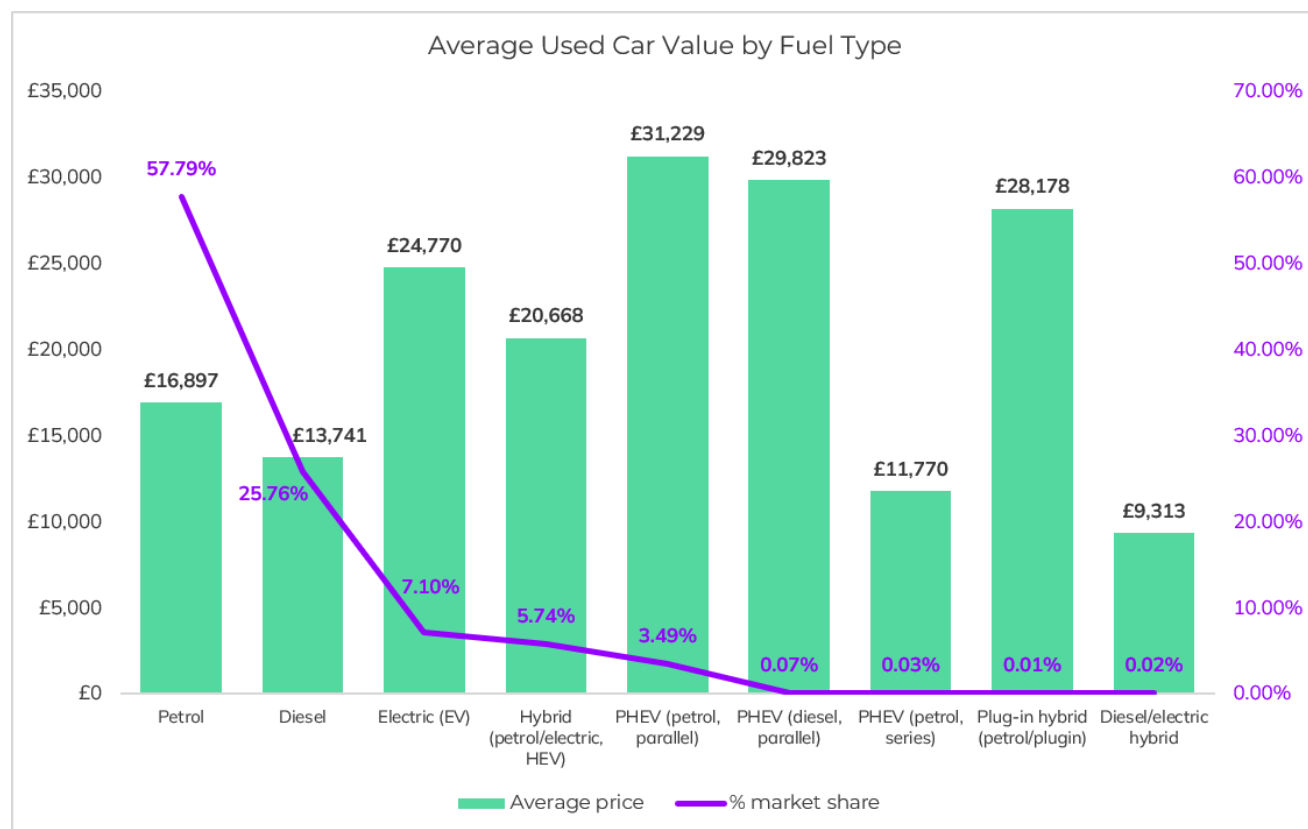
Data Powered by Brego Insight

The total number of adverts in the age-profile dataset reduced by 5.3% during August. The largest volume falls were within Ex Fleet and General Stock, down by 10,925 and 8,306 cars respectively. This reinforces the wider KPI showing a reduction in trade advertising and may reflect both seasonal stock discipline and fewer retail-ready cars entering the market. That said, economic concerns will also have had an impact leading dealers to be more careful with stock levels.

The average prices were generally stable. Dealer P/X and Old stock were the only profiles to increase, by 0.4% and 0.5% respectively. Late and Low recorded the largest fall at 2% or £687 suggesting sales of higher value cars, while P/X decreased by 1.5% or £187. Market share moved towards older stock, with the Old and P/X profiles gaining 0.39 and 0.33 of a percentage point.

## Average Used Car Value by Fuel Type

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



Data Powered by Brego Insight

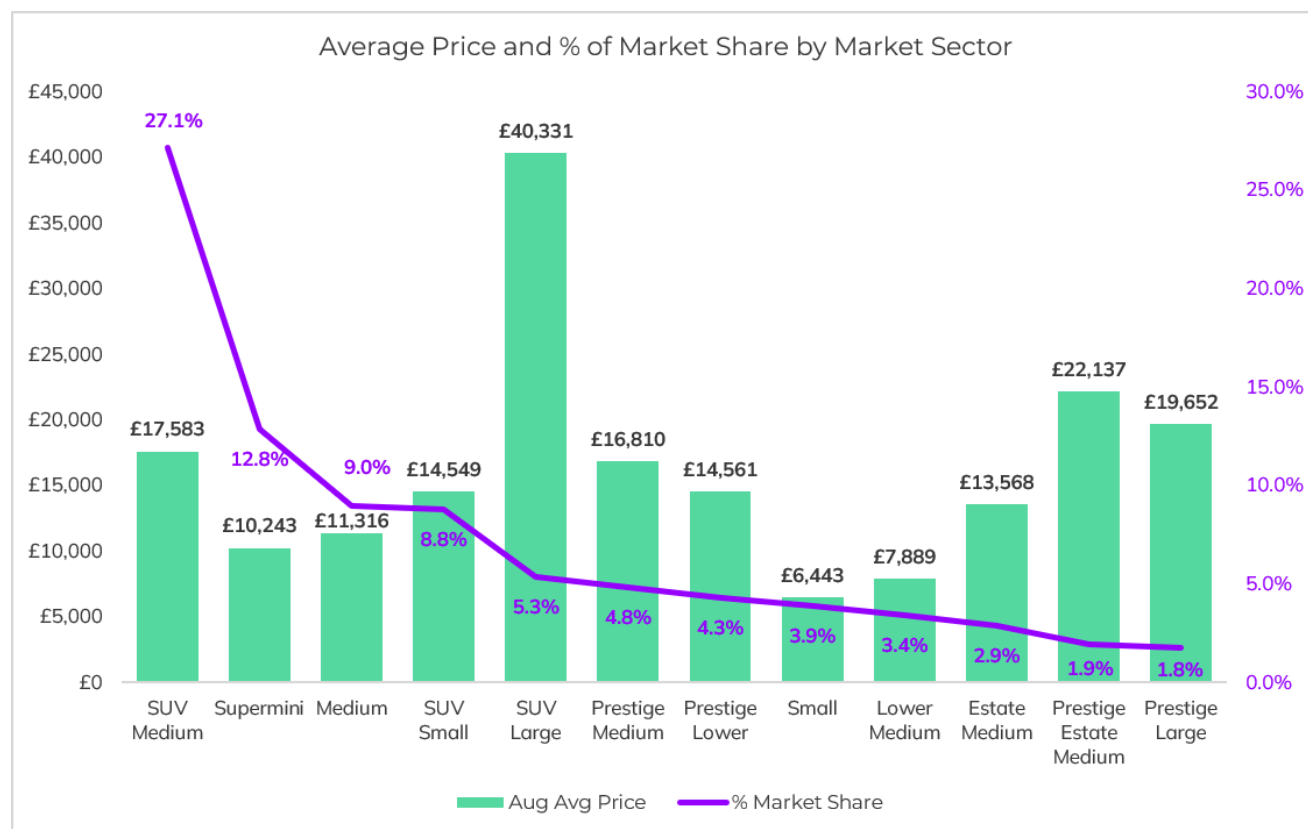
As expected, petrol continued to dominate advertised stock with a 57.8% share up by 0.13 of a percentage point and its average price fell by 1.2% to £16,897. Diesel was also stable in share terms at 25.8%, although its average advertised price fell by 2.5% to £13,741. EV stock increased its share by 0.09 of a percentage point to 7.1% which is lower than might have been expected given the increase of EVs in the used market. Its average advertised price was almost unchanged at £24,770.

Hybrids were the strongest of the larger fuel categories on price, increasing by 2.6% or £541 to £20,668, despite a 0.24 percentage point reduction in market share.

It is worth highlighting that the large price movements in the smallest plug-in categories were based on very limited market shares and should not be interpreted as a broader market reset, but merely outlier activity.

## Used Car Performance by Market Sector

The data in this chart shows the Average Price advertised in the market by the bars. The purple line shows the % of Market Share. This chart covers the twelve largest market sectors.



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This is always an interesting view of the market and in August the top twelve sectors represented 84.3% of the whole advertised market, down by 1.81 percentage points. The Prestige Large sector re-entered the list in twelfth place at the expense of the MPV Medium sector.

Across the comparable eleven sectors, average prices fell by 1%, which is consistent with more cautious market conditions.

The SUV Medium sector remained by far the largest sector with a 27.1% share, but its average price fell by 2.1% or £365 to £17,583. The largest percentage price reduction was 3.1% in the Small car sector. Prestige Estate Medium was the only comparable sector to record an increase, rising by 0.3% to £22,137.

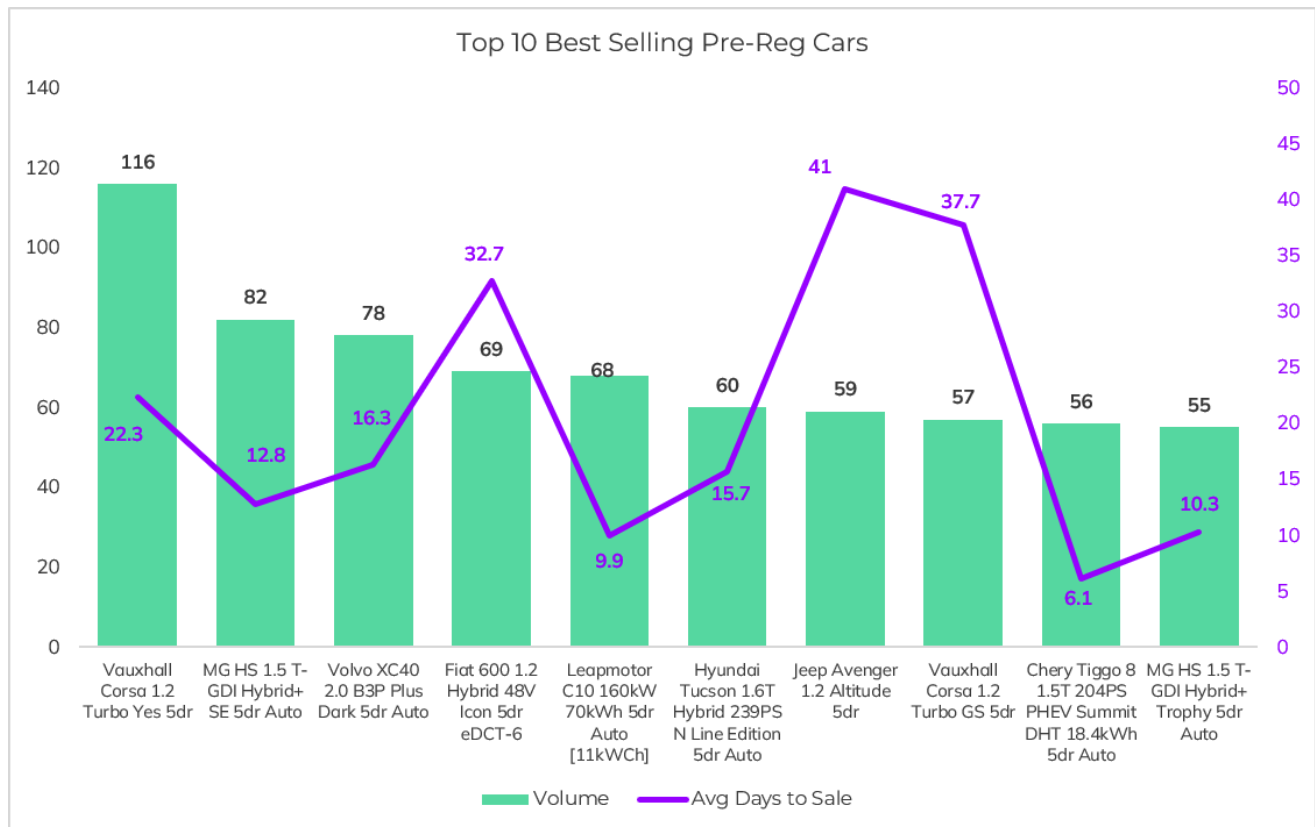
For context, the Best-Selling Cars in the Prestige Estate Medium sector for the month were: -

| Rank | Derivative                                   | Sold Volume | Market Share | Avg Sale Price | Avg Days to Sale |
|------|----------------------------------------------|-------------|--------------|----------------|------------------|
| 1    | BMW 3 Series Touring 320i M Sport Step Auto  | 112         | 1.66%        | £33,292        | 42.1             |
| 2    | Audi A4 Avant 40 TFSI 204 S Line S Tronic    | 104         | 1.54%        | £24,132        | 38.6             |
| 3    | Audi A4 Avant 35 TFSI Black Edition S Tronic | 70          | 1.04%        | £22,165        | 33.9             |
| 4    | BMW 3 Series Touring 330e M Sport Step Auto  | 60          | 0.89%        | £18,319        | 30.6             |
| 5    | Audi A4 Avant 35 TFSI S Line S Tronic        | 57          | 0.84%        | £21,760        | 29.5             |

Data Powered by Brego Insight

## Top 10 Best Selling 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 shown above the bars and the Average Days to Sale are shown by the purple line.



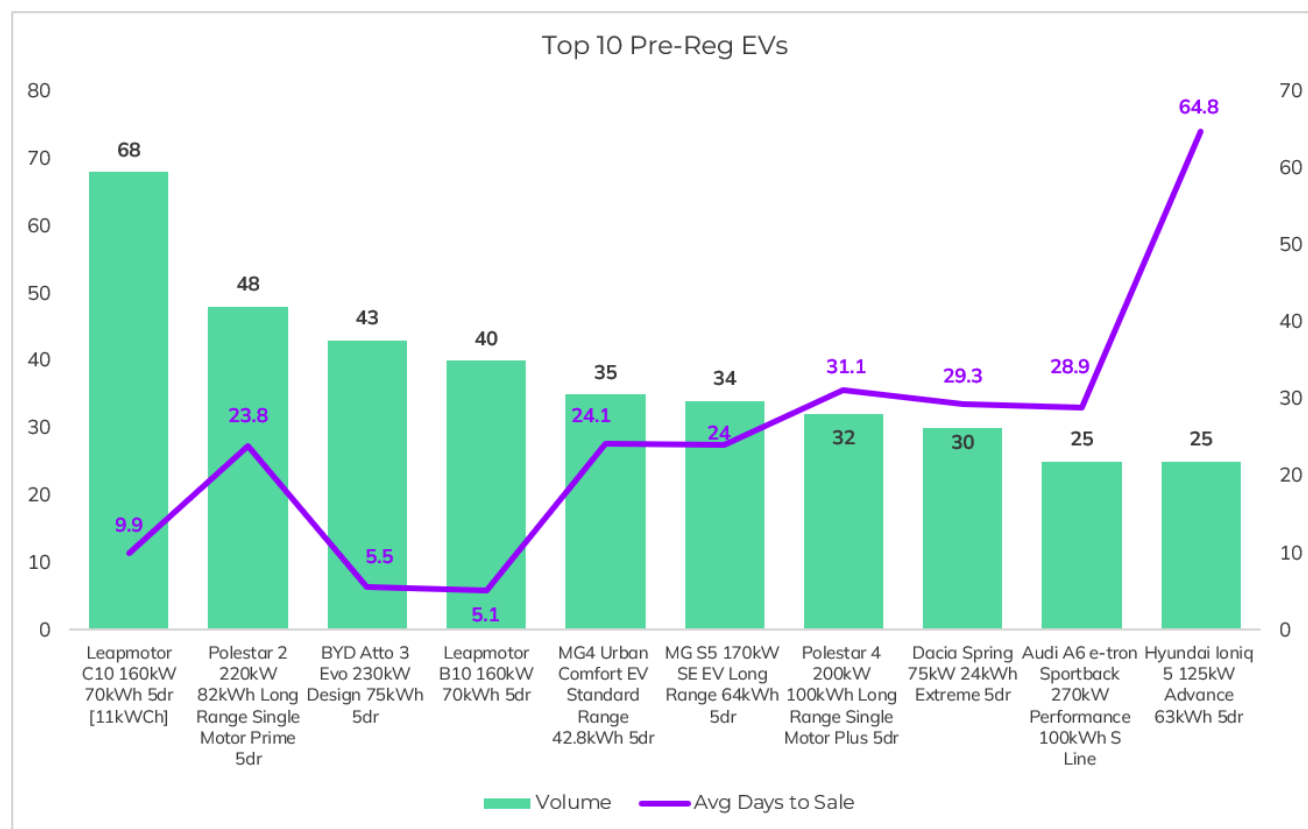
Data Powered by Brego Insight

The Top 10 pre-registered cars accounted for 700 sales in August, an increase of 20.1% on the 583 achieved by July's Top 10. The list changed substantially once again, with only the Vauxhall Corsa Turbo Yes, Leapmotor C10, Jeep Avenger and Chery Tiggo 8 retained from July. Hybrid models were far more prominent and accounted for five of the ten places.

The average sale price was £24,621, marginally lower than July, while average days to sale increased by 2.1 days to 20.5. The Chery Tiggo 8 was the fastest seller at 6.1 days, closely followed by the Leapmotor C10 at 9.9 days and the MG HS Hybrid+ Trophy at 10.3 days. At the other end of the list, the Jeep Avenger and Vauxhall Corsa Turbo GS took more than 37 days to sell.

## Top 10 Best Selling Pre-Registered EVs

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



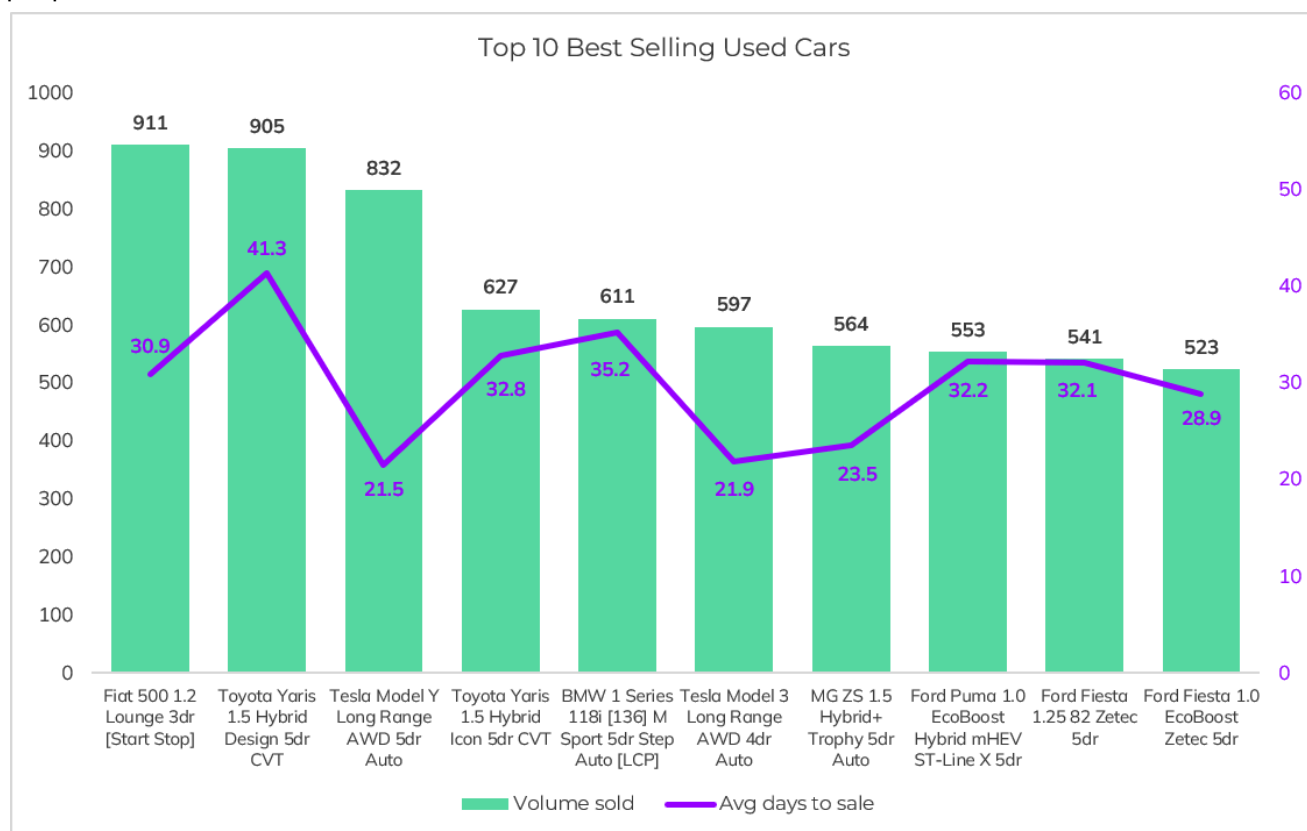
Data Powered by Brego Insight

This chart looks purely at pre-registered EVs at a derivative level. The Top 10 recorded 380 sales, a 7.1% reduction compared with July. Along with the lower volume, the list represented 36.9% of the pre-registered EV market which was down 3.1 percentage points compared to July. The Leapmotor C10 retained first place on 68 sales, and the Polestar 2 retained second place on 48.

The overall average sale price increased by 18% to £27,262, reflecting the inclusion of higher-value models such as the Polestar 4 and Audi A6 e-tron. Average days to sale increased by 1.5 days to 24.7. The Leapmotor B10 and BYD Atto 3 were particularly quick sellers at 5.1 and 5.5 days, while the Hyundai Ioniq 5 was the slowest and took 64.8 days and materially affected the average.

## Top 10 Best Selling Used Cars

The bars in this chart show the Volume of Cars sold by individual top selling derivatives, with the number of each sold shown outside the bar and the Average Days to Sale are shown by the purple line.



Data Powered by Brego Insight

The Top 10 Best Seller list in August was largely similar to July but with one new entry in the form of the Ford Fiesta 1.0 EcoBoost Zetec 5dr in tenth spot at the expense of the Ford Puma that was in tenth spot in July.

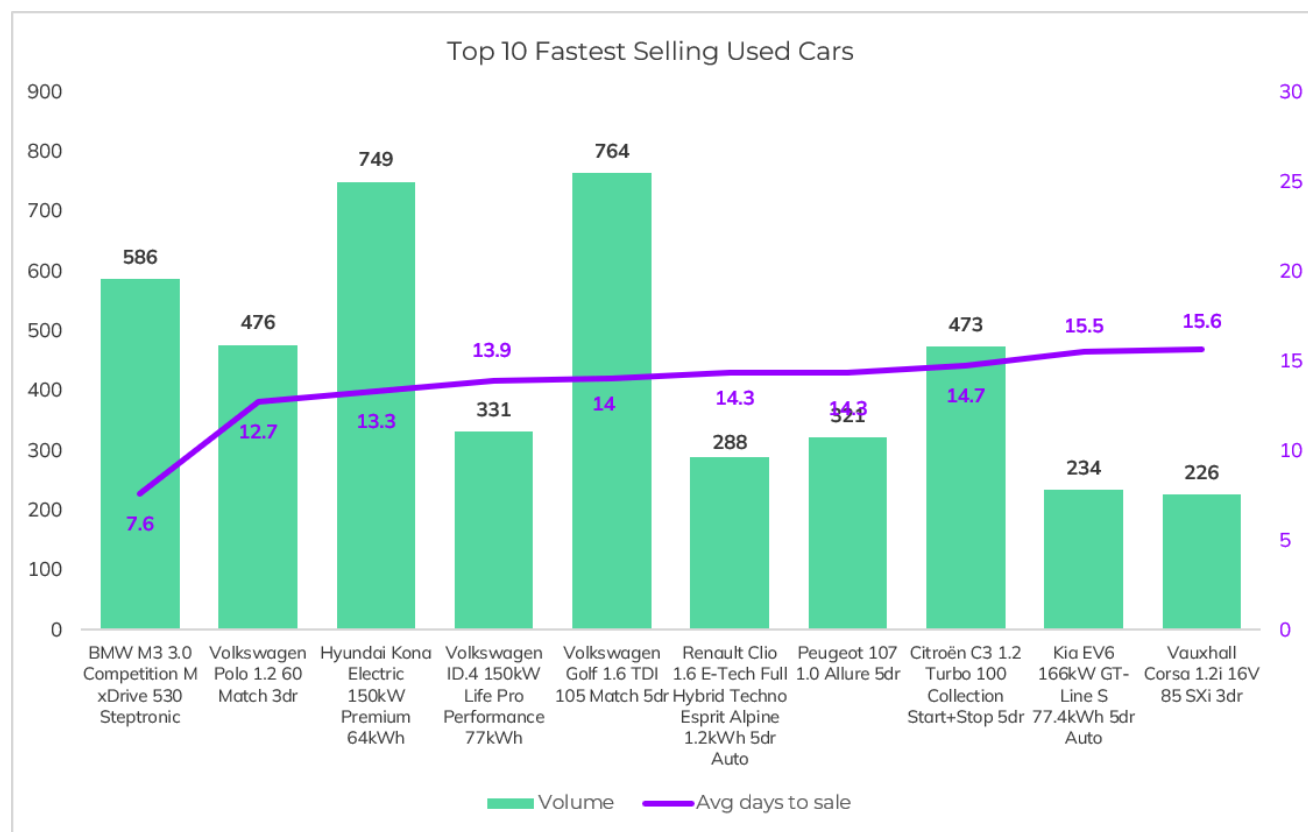
The Fiat 500 Lounge moved up into first place on 911 sales, narrowly ahead of the Toyota Yaris Hybrid Design on 905. Tesla remained prominent with the Model Y Long Range in third and the Model 3 Long Range in sixth, while the Toyota Yaris occupied two positions.

Total sales across the Top 10 fell by 2.4% to 6,664 and the average sale price decreased by 7% to £14,023. The lower average was influenced by three older Fiat and Ford derivatives priced

below £5,000. Average days to sale improved slightly to 30 days and the Top 10 retained approximately 1.7% of whole-market sales.

## Top 10 Fastest Selling Used Cars

The bars in this chart show the Volume of Cars sold by individual top selling derivatives, with the number of each sold shown outside the bar and the Average Days to Sale is shown by the purple line.



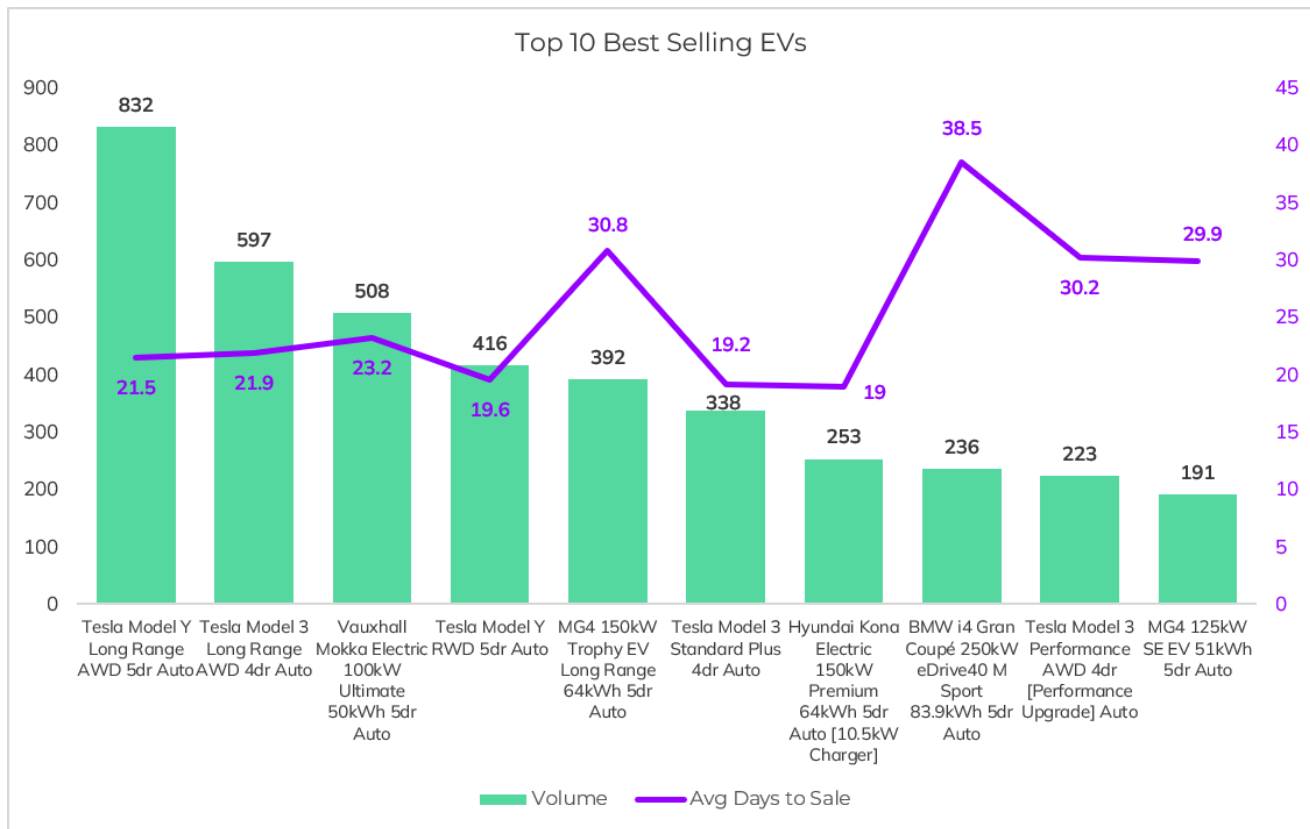
Data Powered by Brego Insight

The data for the Top 10 Fastest Selling used cars uses a base of two hundred sales to avoid rare outliers distorting the results. The BMW M3 Competition xDrive was the fastest selling qualifying used car in August at 7.6 days, although its average price of £62,116 makes it a very different proposition from the other cars in the list. The Volkswagen Polo followed at 12.7 days, with the remaining cars selling in less than 15.6 days.

Three of the Top 10 cars were EVs, demonstrating that well-priced electric stock can move quickly even though performance varies materially by derivative. The average price across the ten was £16,692, but this was heavily influenced by the BMW; the remaining nine averaged £11,641.

## 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 shown outside the bar and the Average Days to Sale is shown by the purple line.



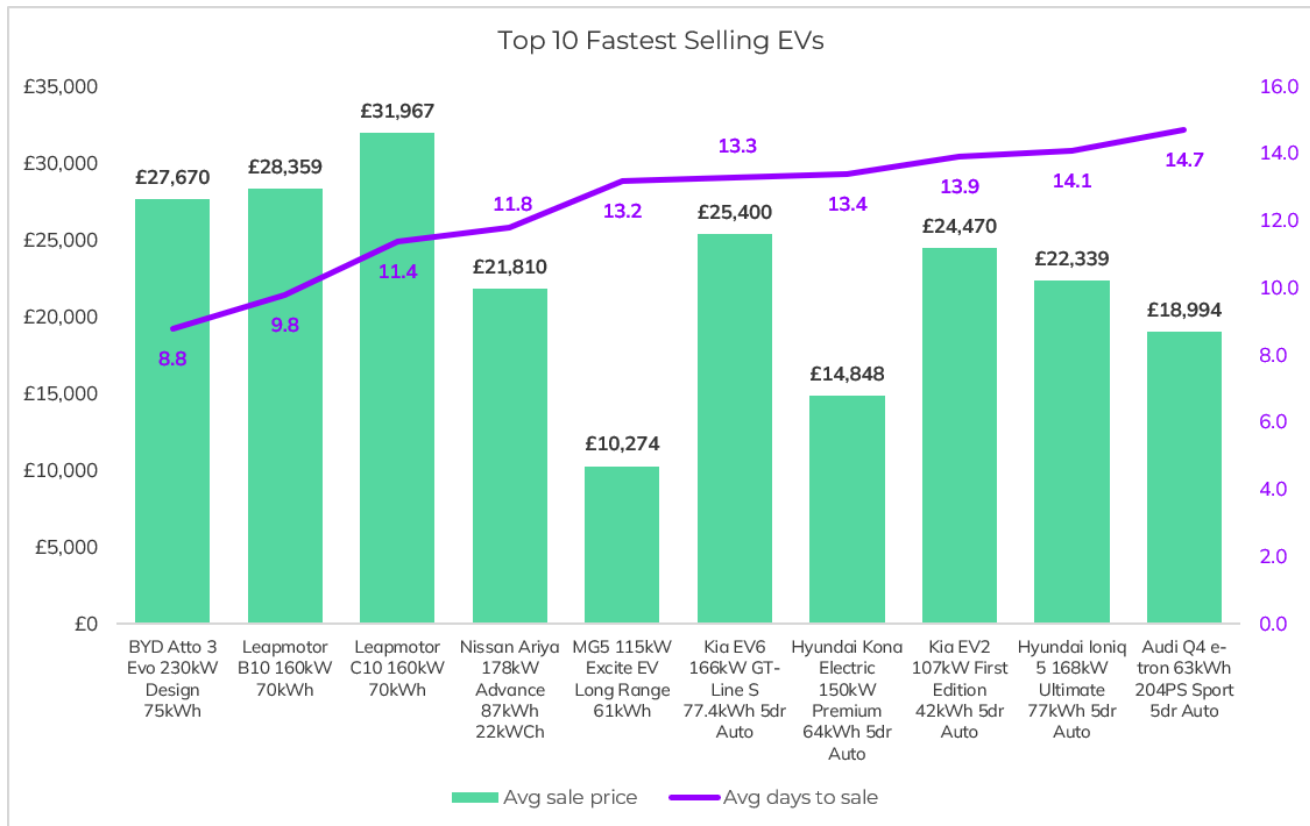
Data Powered by Brego Insight

The August data reveals that Tesla continued to dominate the best-selling EV list with five of the ten places and the top two positions. The Model Y Long Range led on 832 sales, followed by the Model 3 Long Range on 597. The Vauxhall Mokka Electric remained a strong non-Tesla performer in third place with 508 sales.

The Top 10 volume increased by 7.2% to 3,986 and market share of used EV sales increased by 1.01 percentage points to 14%. However, the average sale price fell by 7.9% to £18,874 and average days to sale increased by 1.6 days to 25.4. The BMW i4 was again the slowest seller in the list at 38.5 days.

## Top 10 Fastest Selling EVs

The bars in this chart show the fastest selling EVs by individual top selling derivatives, with the number of each sold shown outside the bar and the Average Days to Sale shown by the purple line. The data is based on a minimum of 30 sales per derivative.



Data Powered by Bregio Insight

The data for the Top 10 Fastest Selling EVs uses a base of thirty sales to avoid rare outliers distorting the results.

In August, the BYD Atto 3 Evo was the fastest selling qualifying EV at 8.8 days. It was followed by the Leapmotor B10 at 9.8 days and the Leapmotor C10 at 11.4 days, giving newer Chinese brands three of the first five positions. The list is made up of four Chinese models and interestingly four Korean with a single entry each from Germany and Japan.

The average sale price across the ten was £22,613, ranging from £10,274 for the MG5 to £31,967 for the Leapmotor C10. The range in price and body style shows that rapid EV sales were not confined to one narrow part of the market.

## Summary

August was a more measured month than July, which is not unexpected during the peak summer holiday period. Total adverts reduced slightly and trade advertising fell by 4.3%, while average days to sale edged up to 38.6. Consumer confidence and the major purchase index improved against a backdrop of higher inflation, mortgage rates, and fuel costs, giving buyers more reasons to take their time before committing.

Private and pre-registered adverts increased, EV advert volume rose by 1.5% and the average advertised price across the market increased by 0.7%. EVs also sold faster than the whole market at an average of 35 days. The best-selling EV list grew both in volume and its share of EV sales, although lower average prices and slower days to sale show that the detail remains important.

The clearest pricing pressure remained among cars under a year old, where average sale prices dropped by 12.6%. This supports the view that continued pre-registration activity and the supply of discounted nearly new stock is shaping that part of the market. Elsewhere, most age cohorts achieved higher average sale prices, but this was set against lower advertised volumes and is likely to have been influenced by model mix.

Dealers therefore entered September with a market that was stable but selective. Stock quality, realistic pricing, and careful derivative selection remained central to performance, particularly for EVs and nearly new cars. The devil is always in the detail.

Rest assured, Brego will ensure you get a full view of each 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.**