



Car Market Insight

July 2026

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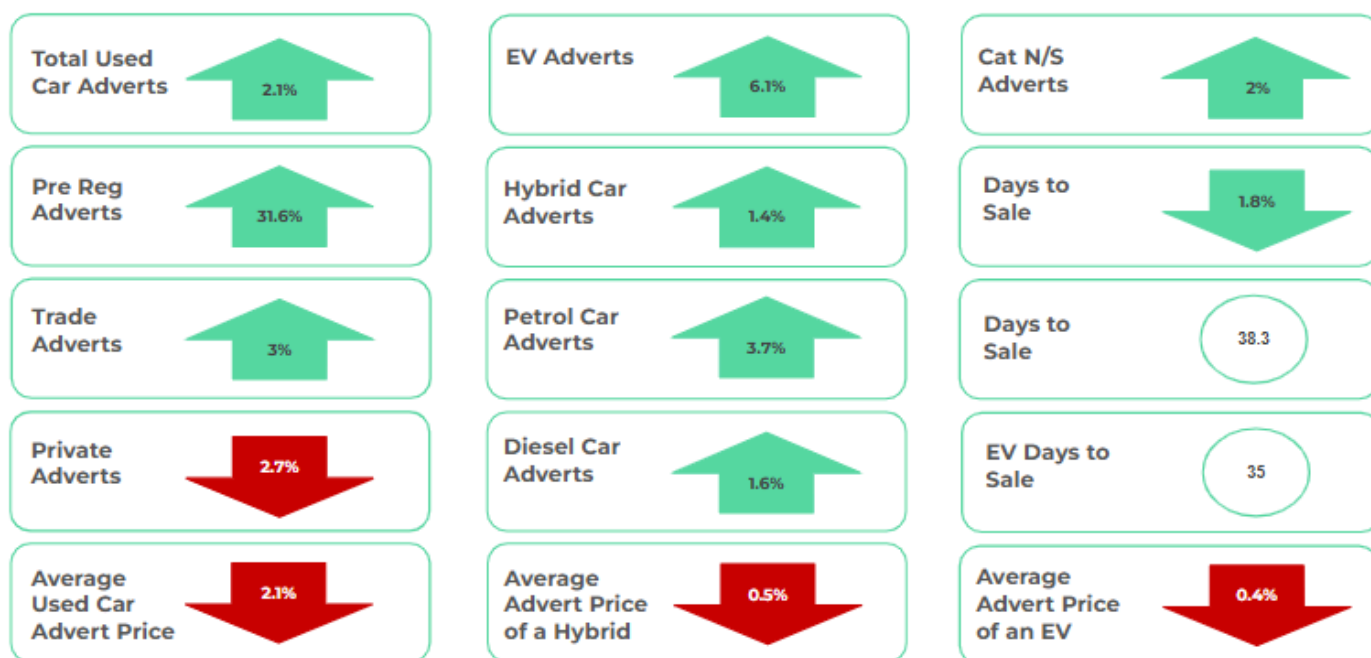
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July Monthly Car Market Insight

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



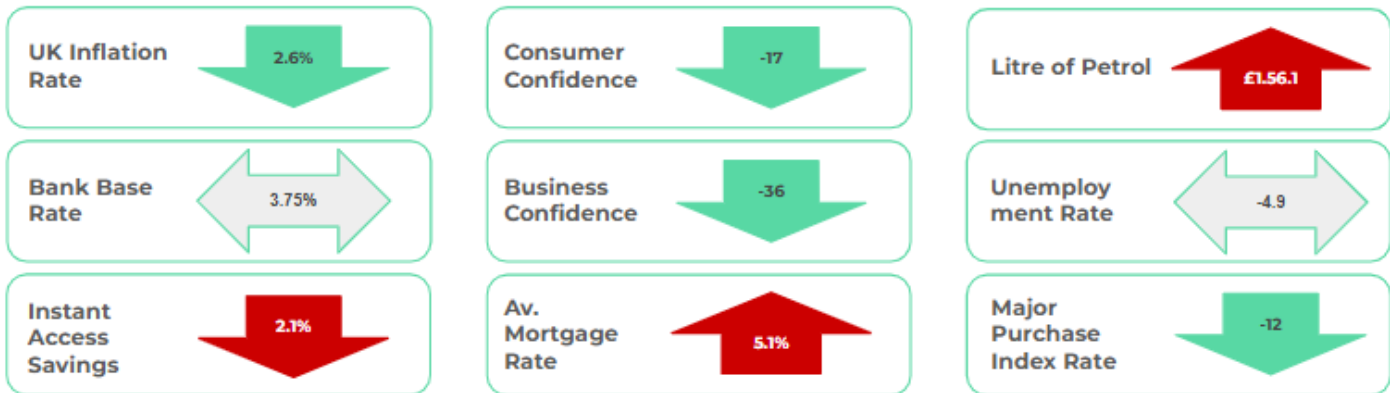
Data Powered by Brego Insight

The July KPIs generally paint a positive picture and infer that the used car market was fairly active although the 2.1% increase in advertised cars is a little surprising given a strong 8.4% increase in sales. This may be the result of an improvement in used car stock availability. There was also a drop of 2.7% in the number of privately advertised cars, and this certainly supports an increase in wholesale stock availability and is to be expected given that schools broke up during the month. For many private vendors, selling their car at the beginning of the summer holiday period is not a priority.

The elephant in the room is the 31.6% increase in the number of pre-registered cars on sale, and this is probably due to the need to get cars registered for bonus purposes at the end of the first half of the year. Those vehicles registered in the final days of June would not have hit the forecourts as a used car until the early part of July. Given the push for EV sales this year in response to the ZEV mandate, this is likely to be repeated in October's data after the September new plate push, and it is certainly something to watch.

It is also worth highlighting that the average days to sale for the whole market dropped by 1.8% to 38.3 reinforcing that demand was generally good, although this was not the case for certain models and fuel types.

Key UK Economic Indicators



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

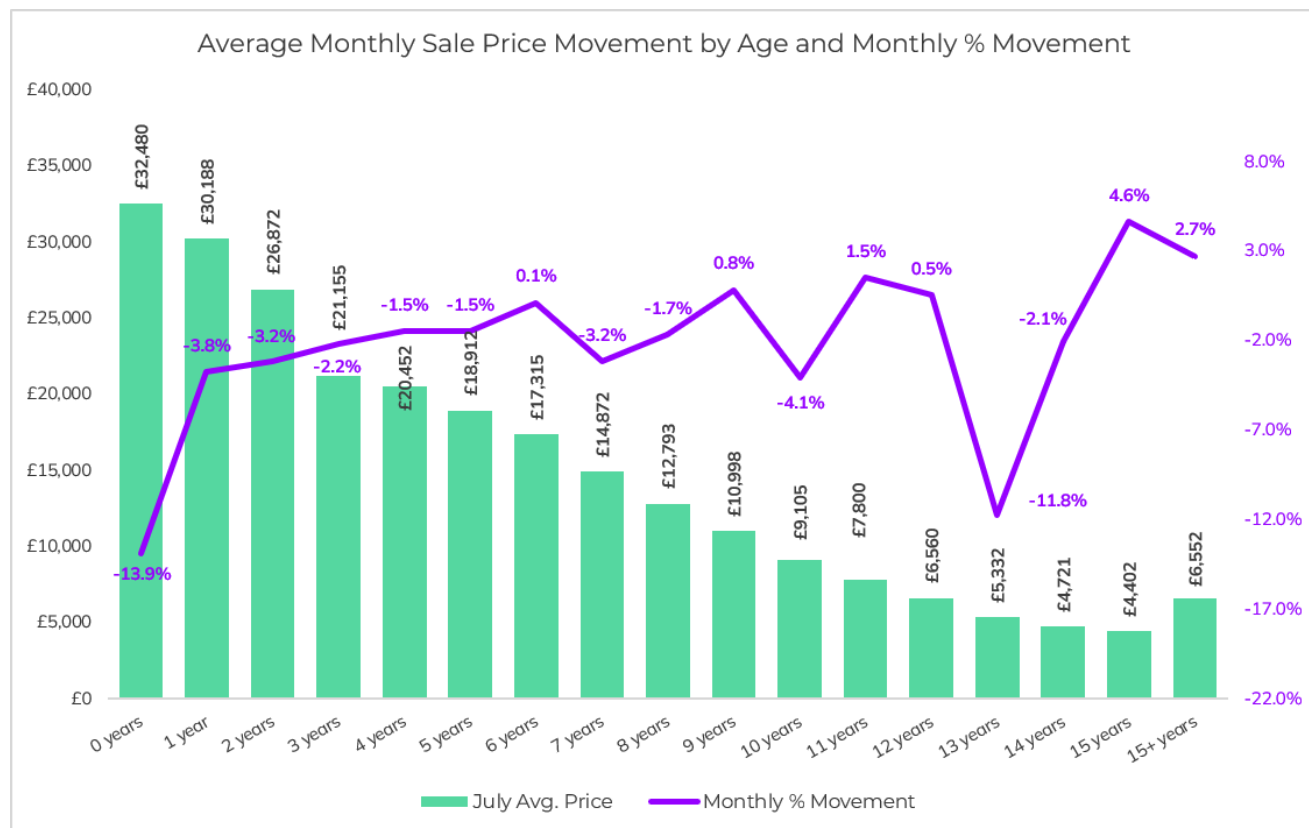
The July economic indicators continue the recent trend of positivity and may have been a contributing factor to the increase in used car sales. Let us also not forget that the new car sector is also in good shape with an 11.7% increase in registrations year on year. In addition, this positive position has been reached despite a deterioration in the conditions in the Middle East and the subsequent rise in the cost of fuel once again, which is now at the third highest end of month level this year. Therefore, generally speaking the UK automotive sector appears to be performing very well.

The drop in the rate of inflation to 2.6% was a little surprising given the recent economic changes and the increase in the energy price cap. It is universally accepted this will increase when the next figures are released on August 19th. Couple the inflation rate with an improvement in consumer and business confidence, not to forget the major purchase index rate, and one can understand why Andy Burnham and John Healey are feeling pleased with themselves especially since the Bank of England also decided to keep the base rate at 3.75% despite warnings of an increase for the past few months.

But there are consistent warning signals in the background. As previously mentioned, fuel and energy costs will continue to rise during the latter part of the year, and mortgage rates are also increasing again. This will significantly impact the consumer and pressure both business and consumer confidence once more. There is also heavy speculation on the tax increases needed to help fund the raft of largely insignificant but newsworthy changes the new Labour leader has made so far. In addition, City analysts have speculated on a number of UK departures from the London Stock Exchange and named at least twenty organisations that are likely to move to the New York Exchange and in doing so reduce the viability and importance of the UK as a global financial capital.

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 July. 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

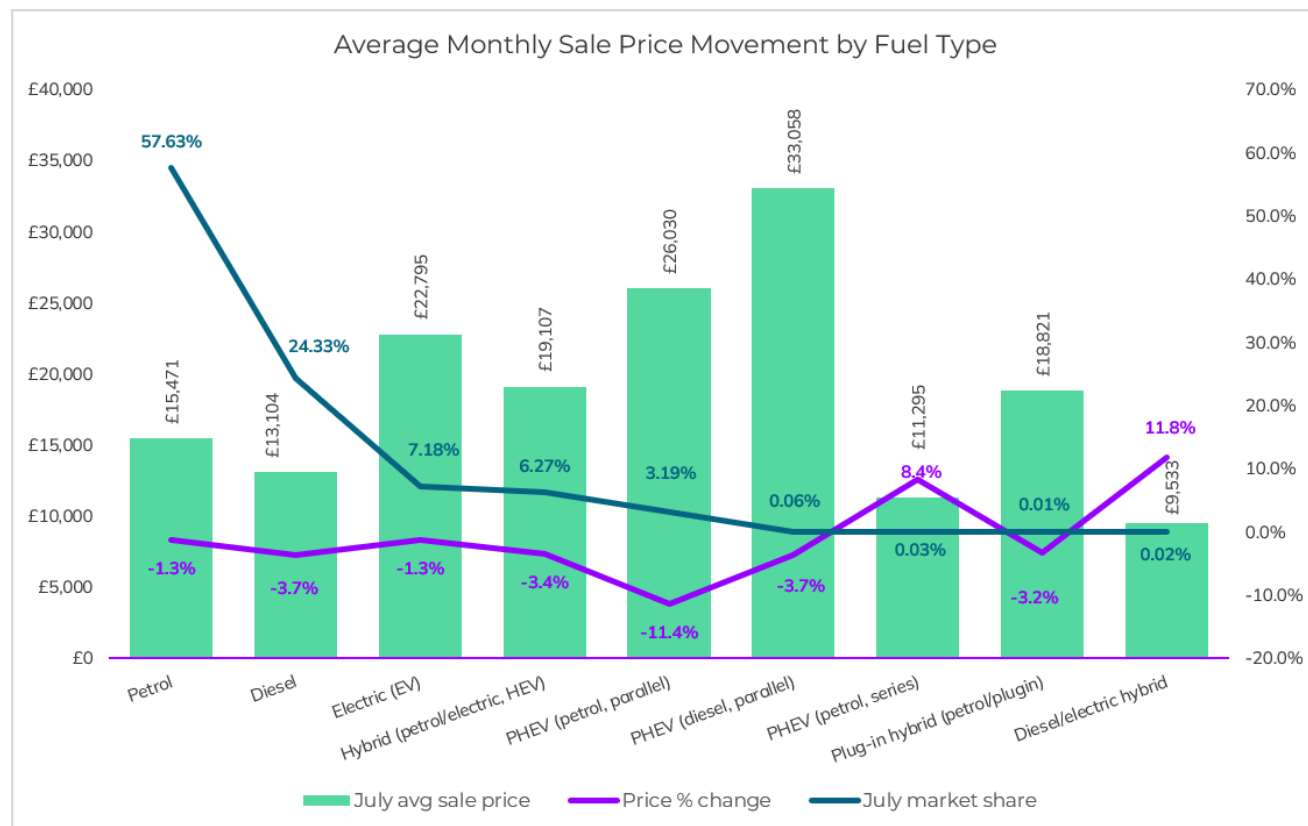
This chart is important because it quantifies the monthly change in the market experienced during the month of July. As expected, the average price shown by the green bars declines as the vehicles age, with an uplift for 15+ year old cars that will include some higher priced classic cars. This is something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

Overall, the Average Sale Price decreased by 3.8% across the market, and this was heavily influenced by a 13.9% decrease in the average sale price of cars under a year old. It is fair to say that this will have been dictated by the pre-registration market. The other big stand out was for thirteen-year-old cars that decreased by 11.8%, although this does bring that age cohort back in line with market expectations as the average sale price was a little higher than expected during June.

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

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

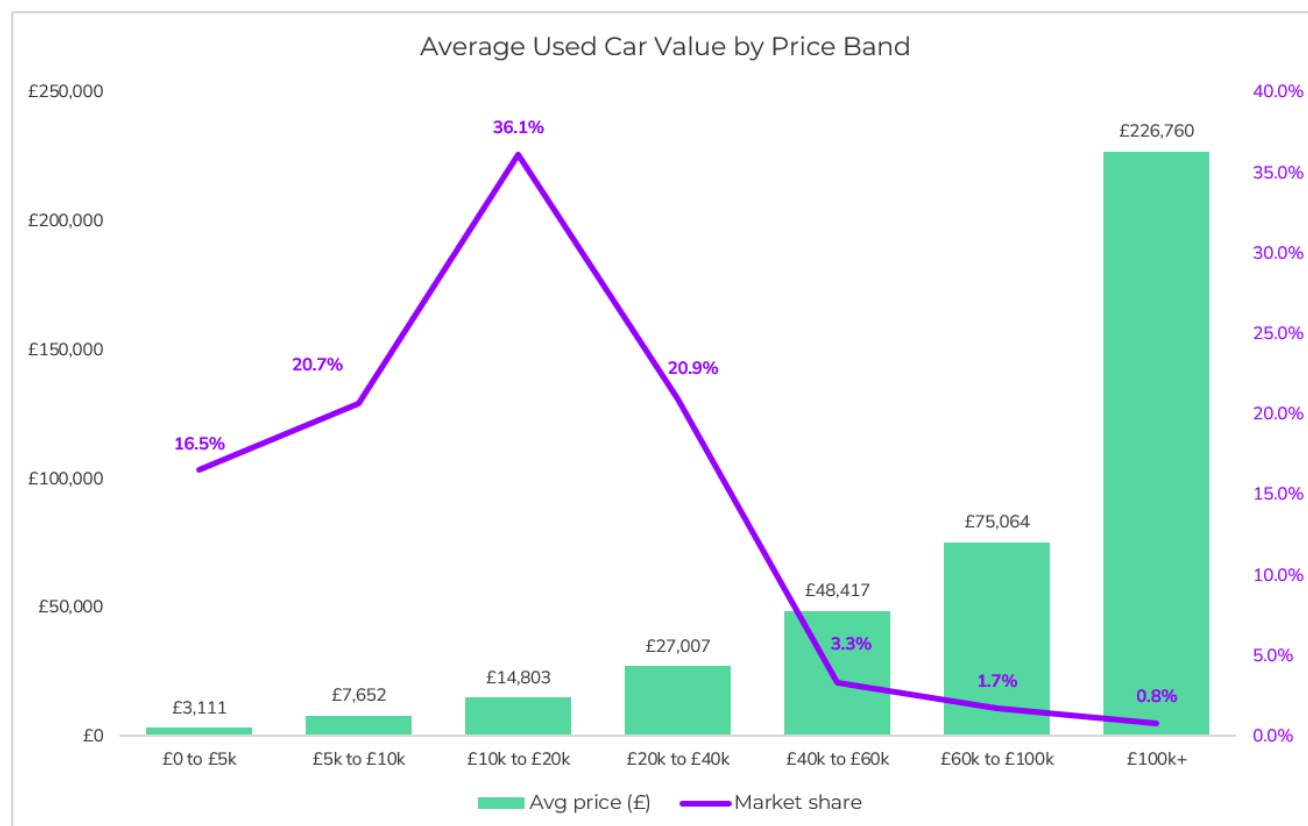
Analysing the market by fuel type is key as the ZEV mandate pushes EV adoption and during July there were some interesting nuances. From a market share perspective, the biggest change for the month was for petrol cars which saw an increase of 0.9 percentage points taking it to 57.63% of whole market sales which is higher than it has been for some months. This is interesting given the drive to sell more EVs and EV share dropped by 0.3% to 7.18%.

Looking at average sale prices, the biggest change was a drop of 11.4% for petrol parallel plug-in hybrids and represented a drop of £3,361 taking the average sale price down to £26,030. This figure is second only to the diesel plug-in hybrids although they take just 0.06% of whole market sales in comparison to 3.19% for the petrol variants.

Only two fuel types saw an increase in average sale price, those being plug-in petrol series cars and diesel/electric hybrids which rose by 8.4% and 11.8% respectively although both have a total market share of less than 0.04% of total sales.

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

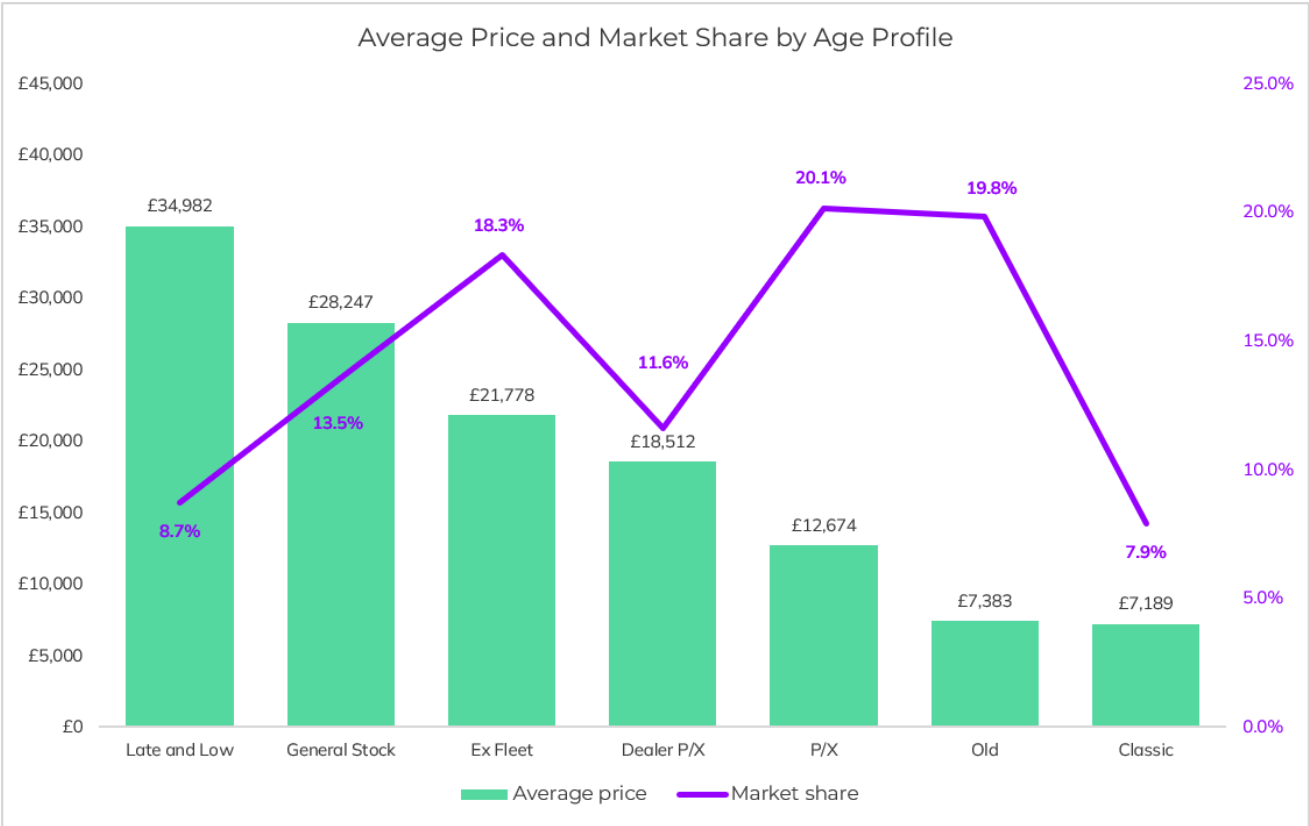
Another broadly stable month when using this lens on the market, shows the overall average price for advertised cars shifted upwards by 1.6% to £57,545. Bear in mind this figure is high because this is whole market data and incorporates high value luxury cars in excess of £100,000. In fact, it was this price band that showed the largest movement with a 3% increase in average price to £226,760 which was £6,642.

It is worth highlighting that between £5,000 and £59,999 by cohort there was a minimal drop in the average listed price of no more than 0.3 of a percentage point. Between £0k and £5k there was a 0.06 percentage point or £2 increase and between £60,000 and £99,999 there was a 0.05 percentage point or £36 uplift.

Looking at the market share, the largest movement was an increase of 0.4 of a percentage point for £0 to £4,999 and -0.15% for the £40,000 to £59,999 banding.

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.



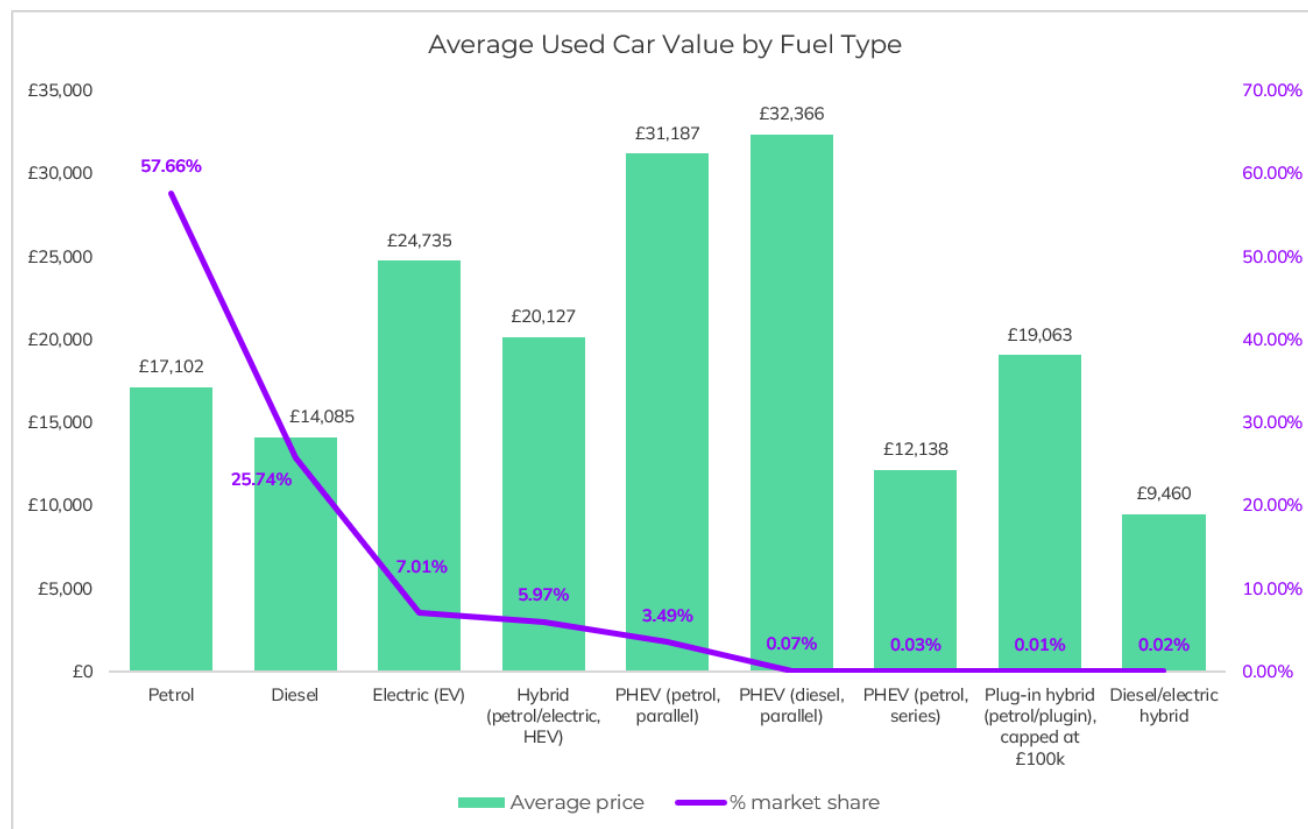
Data Powered by Brego Insight

Reviewing the market by age profile can be very revealing and this month there have been a number of interesting changes. When compared to June there was an increase of 2.1 % in the total volume of adverts, but the biggest change by age profile came for the General Stock sector that saw a 6.8% decrease in the volume of adverts implying that this is where the real sales activity took place although it could also be translated into a shortage of used car stock meaning less vehicles on sale.

Looking at the average advert price there was a 0.5% increase month on month taking the figure to £18,681. On an age profile basis, the biggest increase in price was for the Classic profile which recorded a 1.9% or £136 increase, although the largest pound note increase was £306 for the Dealer P/X profile.

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

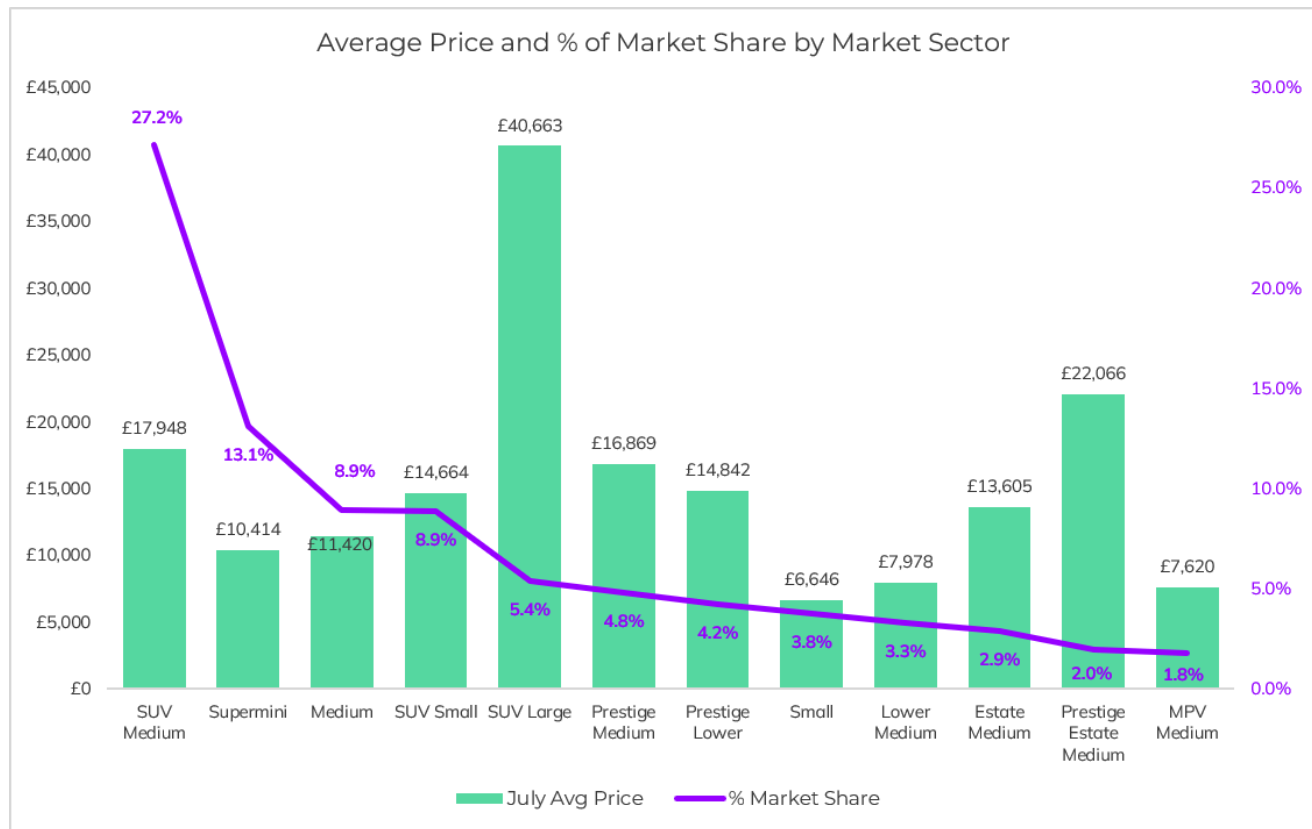
The July fuel type data reveals another stable month in market share terms with movements only ranging between a rise of 0.35 of a percentage point for petrol cars to a drop of 0.32 of a percentage point for diesel cars. Petrol remains the largest fuel type claiming 57.66% of the whole market.

The most significant change in the average price from a pound note perspective fell to the petrol parallel PHEV propulsion type with a drop of £421 or 1.3% although in percentage terms the largest shift was a drop of 2.9% for Diesel Hybrids although this propulsion type takes just 0.02% of the market share.

Of note is that there was a change in the average mileage in July which dropped by 1.9% to 48,587. The average mileage tends to be more stable than this month on month, so this is perhaps something to watch going forward. The largest drop was 12% for the Plug in Hybrids although this propulsion type takes just 0.02% of market share so the drop of 1.1% for EVs has had a greater influence.

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 12 largest market sectors.



Data Powered by Brego Insight

This is always an interesting view of the market and in July the top twelve sectors covered 86.1% of the whole market, which is a small 0.15 percentage point increase over June. As with the previous month there was one change in the top twelve with the MPV Medium sector re-entering in twelfth spot at the expense of the Prestige Large sector.

Looking in more detail, the average price across the top twelve sectors decreased by 1% to £15,395 and the biggest change was a drop of 1.9% for the Prestige Lower sector which takes 4.3% of total market share. As such it is fair to say that the 1.5% drop for the SUV Medium sector was the primary driver given that this sector represents 27.2% of all sales. There were only two sectors in the top twelve that showed an increase in average price, those being Lower Medium and Prestige Medium Estate at +0.5% and +0.1% respectively.

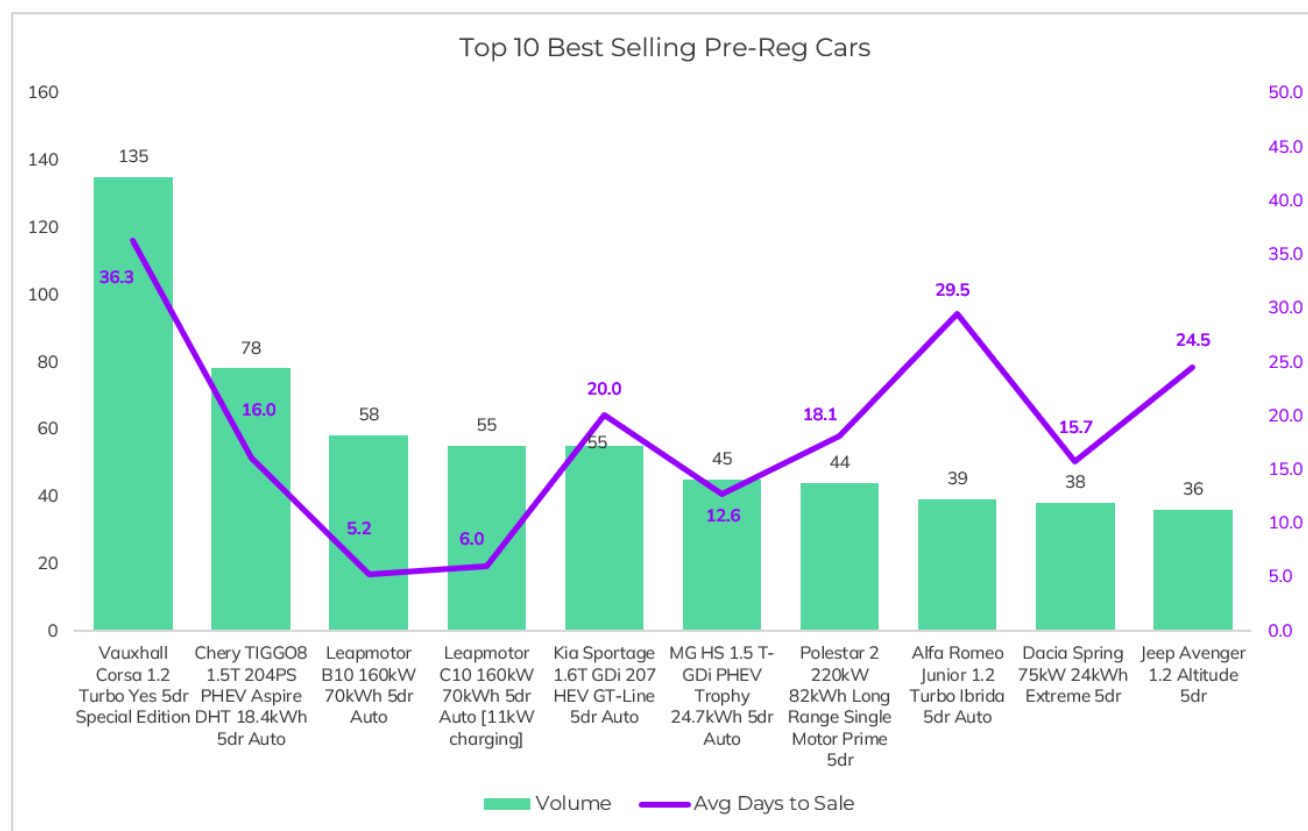
For context, the Best-Selling Cars in the Prestige Lower Car sector for the month were: -

Rank	Derivative	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	BMW 118i [136] M Sport 5dr Step	618	3.7%	£20,075	31.1
2	BMW 120 M Sport 5dr Step Auto	394	2.3%	£28,543	34.5
3	BMW M135i xDrive 5dr Step Auto	387	2.3%	£24,732	35.4
4	BMW Gran Coupé 218i [136] M Sport	311	1.8%	£20,454	32.2
5	Audi A3 30 TFSI S Line 5dr S Tronic	215	1.3%	£19,711	23.9

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.



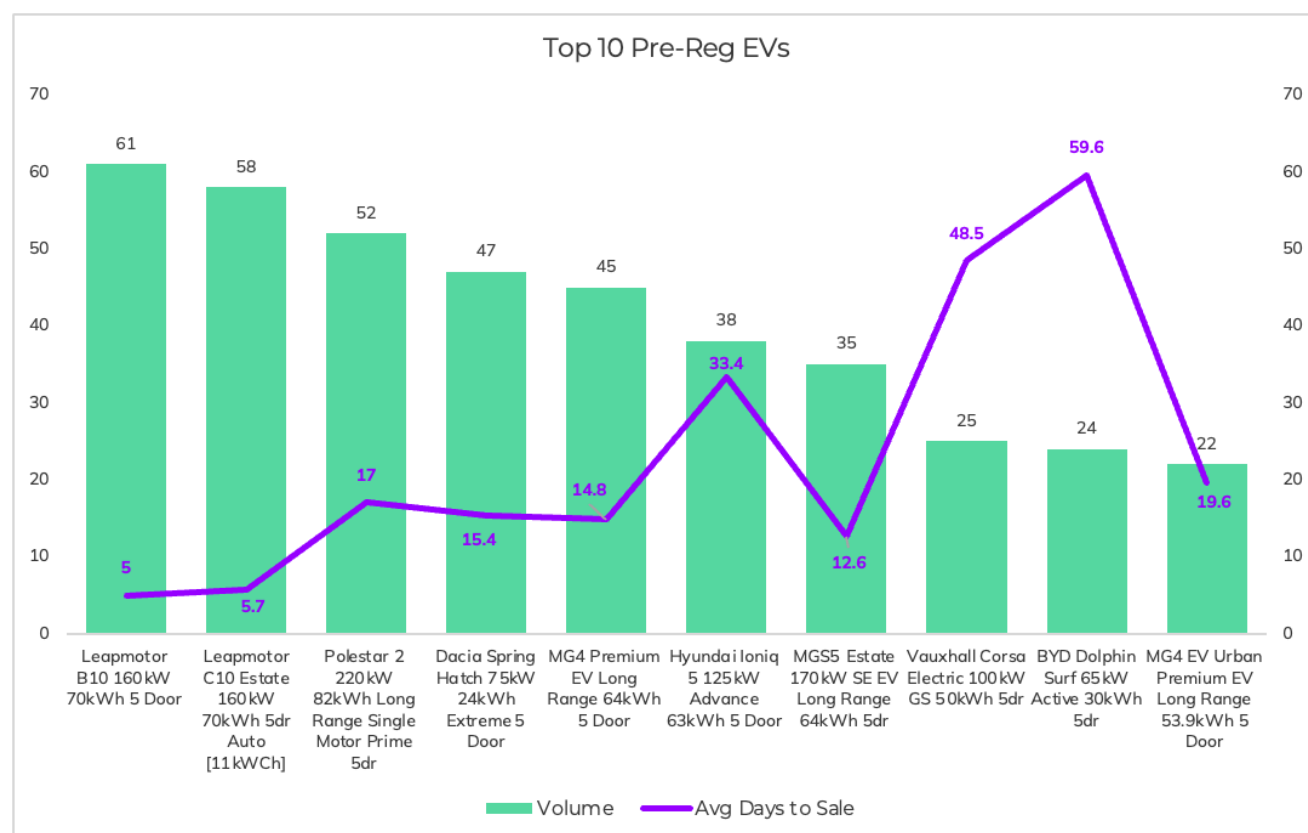
Data Powered by Brego Insight

In July, the volume of the Top 10 Pre-Registered cars increased by 17.5% off the back of a 5.9% decline in June. This signified a consolidation of pre-reg activity, and it was also interesting to see that the Top 10 list had eight new entrants leaving just the Vauxhall Corsa retaining its top spot and the MG HS moving from seventh spot to sixth spot. There were four pure fossil fuel cars, four electric cars and two PHEVs.

The average sale price increased by 29.7% to £24,845 and this was largely due to the introduction of the EVs into the Top 10 which averaged £26,125 and was lower than it could have been due to the lower priced Dacia. The average sale price for fossil fuel cars was £23,073 and for the PHEVs it was £25,832. Average days to sale rested at 18.4 which was 4.3 days faster than the Top 10 in June.

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

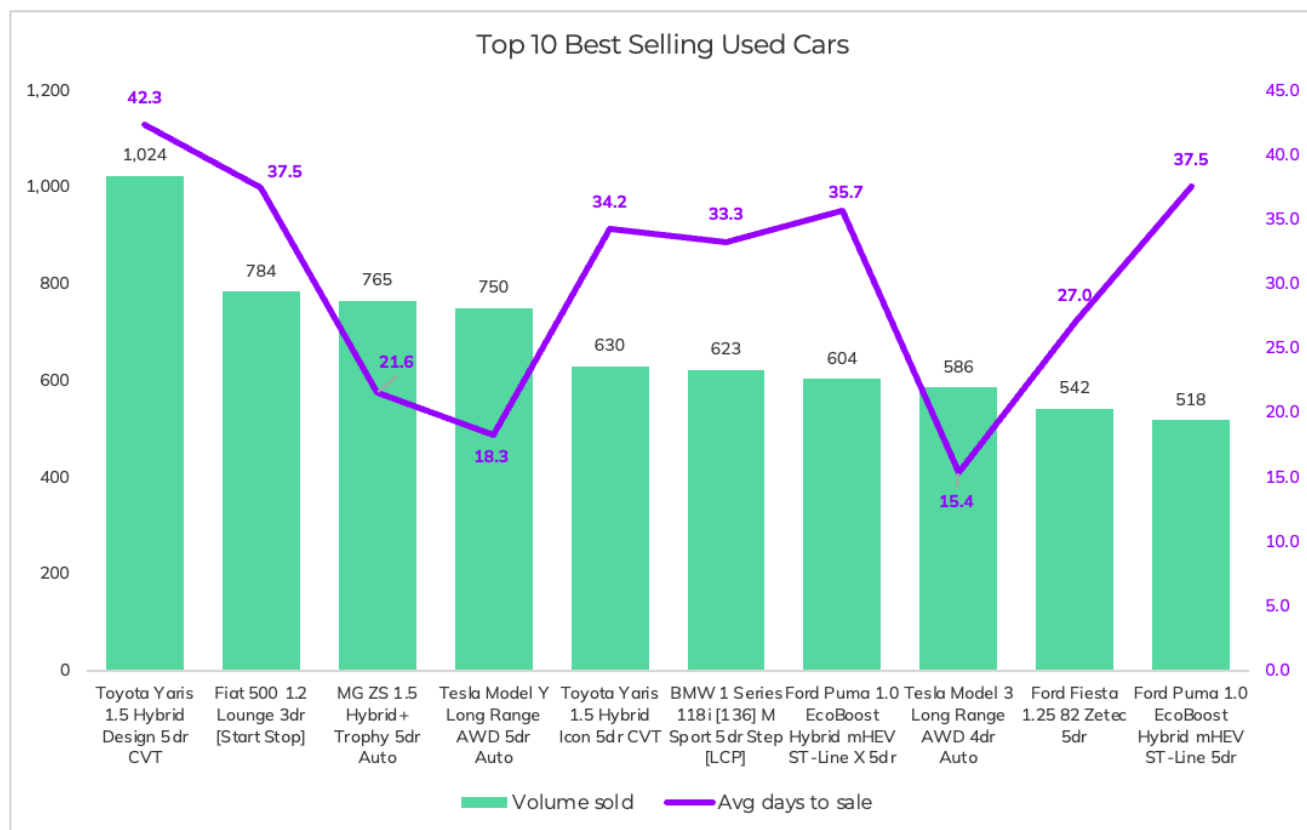
This chart looks purely at pre-registered EVs, and the list shows that there were three new models in the Top 10 in the form of the Leapmotor C10 in second spot, the Polestar 2 in third

place and the Vauxhall Corsa in eighth. Overall volumes increased by 84% when compared to June which is a fairly significant increase.

The Average Sale Price increased by 6.2% to £22,363 and this was partly due to the entry of the Leapmotor C10 and Polestar 2 which had an average sale price of £31,998 and £31,554 respectively. In addition, the Average Days to Sale slowed to 23.2 which was a 6.4 day increase and was heavily influenced by the BYD, Vauxhall and Hyundai models.

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 July was largely similar to June but with one new entry in the form of the Ford Puma in tenth spot that replaced the Tesla Model Y RWD.

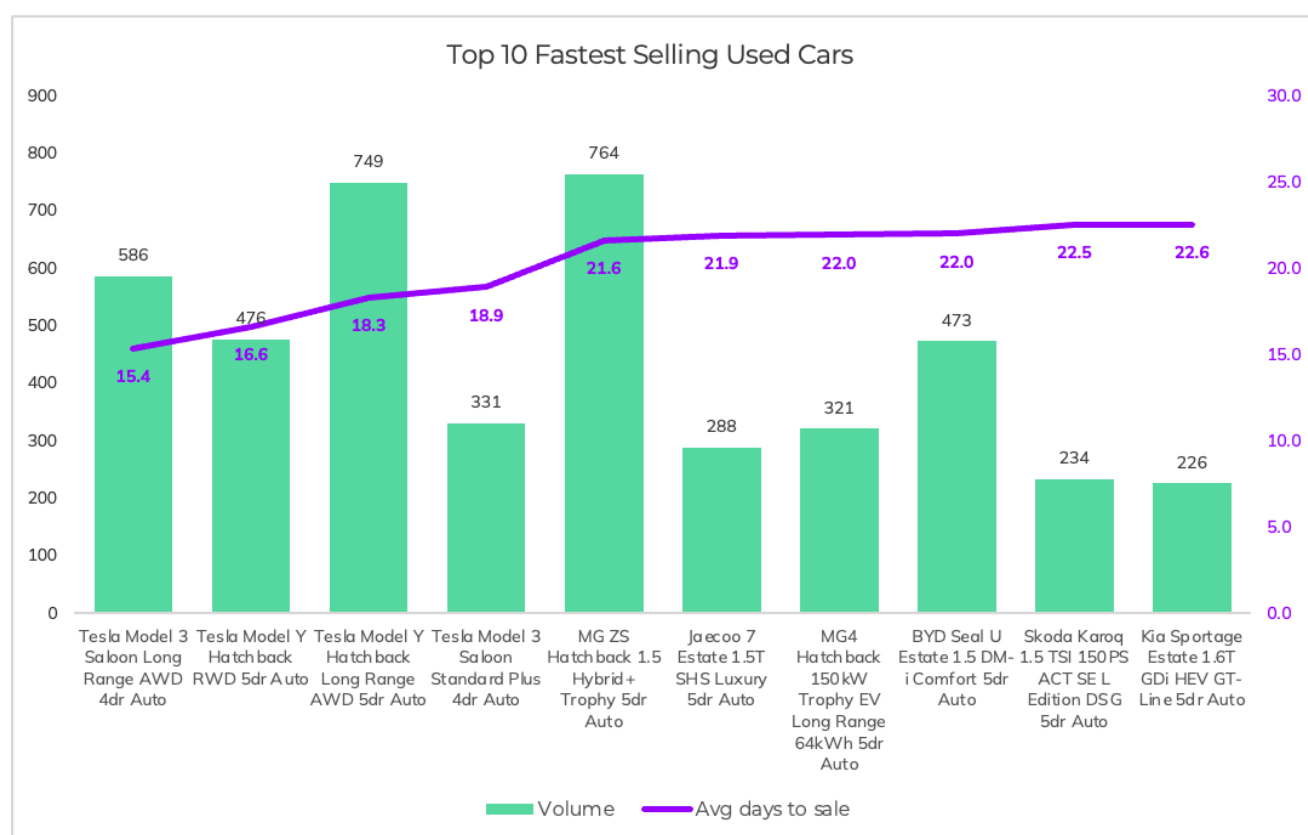
The data showed some marked nuances starting with an increase of 6.1% in the volume sold which could signify either better deals on offer or improved stock availability for these models. The average sale price dropped by 6.1% to £15,011 and this was partly due to the removal of

the Tesla Model Y RWD from the list, which had a £23,328 average sale price in June, and was replaced by the Ford Puma with a £13,364 average sale price in July.

The average days to sale were almost the same at 30.3 days showing just a 0.1 day improvement and the market share of all sales at 1.7% was just 0.04 of a percentage point larger than June.

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. For July, the list saw four new entries in the form of Tesla Model Y Long Range, the Jaecoo 7, the BYD Seal and the Skoda Karoq.

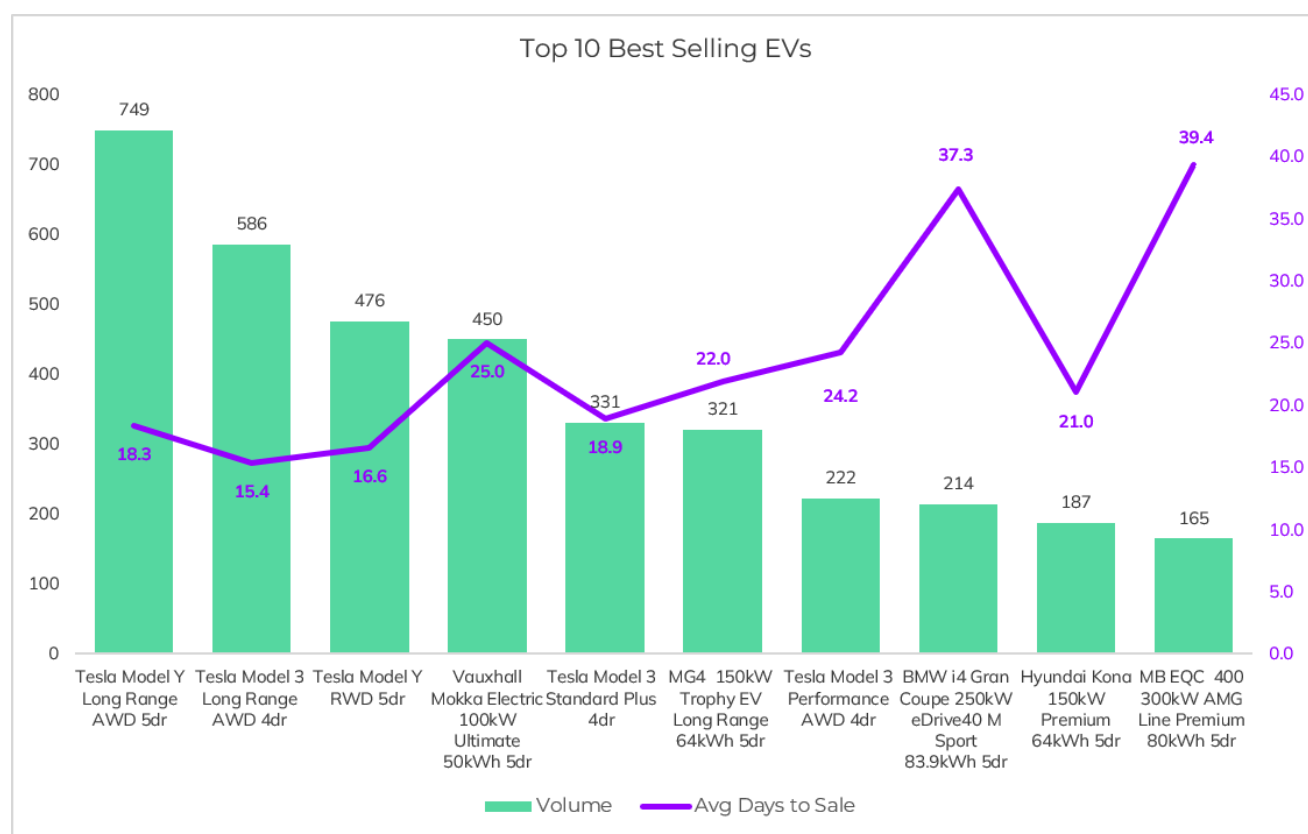
At a high level, the volume of sales increased by 10.7% which drove a minimal 0.06 of a percentage point increase in total market share. In addition, the average sale price increased by a notable 14.7% taking it to £21,360 when compared with the June figure. This was specifically

influenced by the entry of the BYD Seal, Jaecoo 7 and the Tesla Model Y Long Range to the Top 10.

The Average Days to Sale ranged between 15.4 days for the Tesla Model 3 at the top of the list and 22.6 days for the Kia Sportage in tenth place.

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

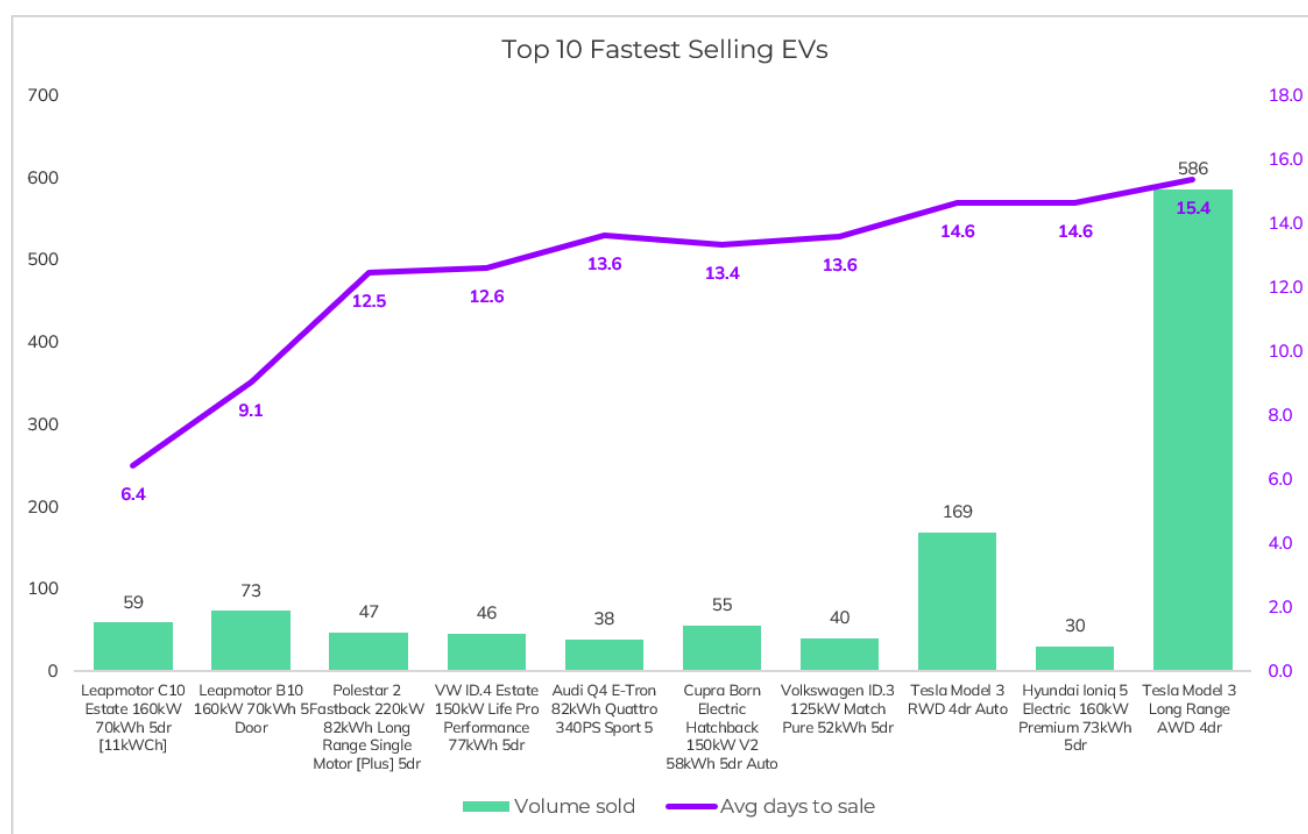
The July data shows that there was just one new entry into the Top 10 with the Mercedes EQC taking tenth spot having knocked out the Peugeot 2008 that was in tenth place in June. Tesla continued to dominate the Top 10 Best Selling EV list in July with five cars spread over the Model 3 and Y ranges.

In volume terms the Top 10 sales were very stable with a small 0.5% drop. In addition, the Top 10 took a 13% share of the total number of used EV sales for the month which was just 0.06 of a percentage point higher than June.

The Average Sale Price increased by 7% and this was due to the entry of the Mercedes EQC with a sale price of £25,787. This was £13,009 more than the Peugeot it replaced and the second highest of the other cars in the Top 10 list. It is interesting to note that the Mercedes was the slowest selling car at 39.4 days and along with the BMW i4 at 37.3 days to sale kept the average days to sale at 23.8. Removing those two cars would have brought the average down to 20 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 Brego Insight

The data for the Top 10 Fastest Selling EVs uses a base of thirty sales to avoid rare outliers distorting the results. For July, the list saw eight new entries with only the Audi Q4 e-tron Quattro Sport and the Tesla Model 3 staying in the list albeit in different positions.

Overall, the Average Sale Price was £21,874 and that was 13.1% lower than in June. From a Market Share % the Top 10 took 4% of the whole EV market and that was 2.5 percentage points higher than the previous month. In volume terms the Top 10 sales were 156.3% higher than June.

The Average Days to sale ranged from 6.4 for the first placed Leapmotor C10 to 15.4 for the tenth placed Tesla Model 3. Overall, the Average Days to Sale increased by 2.2 days to 12.6.

Summary

July was a more consistent month than June which was positive for the sector overall with footfall and enquiries improving for many dealers and groups nationwide. That is not to say that it was easy to close customers, and stock condition needed to be high to ensure there were limited reasons for consumers not to commit to buy. This meant an uplift in preparation costs and for some older cars a longer lead time from purchase to being on sale. Ultimately margins were squeezed a little tighter which is not what the dealers needed.

However, the upside of the extra effort in used car preparation was that sales increased by 8.4% across the whole market and this not only generated profit on the metal but also generated more finance and insurance opportunities to help support lower margins on the cars themselves. With the increase in sales there was also an uplift of 2.1% in the number of cars advertised for sale which suggests that either stock availability improved or that dealers were prepared to increase their stock holding. Better conversion rates at the auctions would suggest the latter.

The average days to sale for the whole market dropped by 1.8% to 38.3 highlighting that demand was strong although this was not the case for certain models and fuel types. 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.