Brego
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Car Market Insight

June 2026

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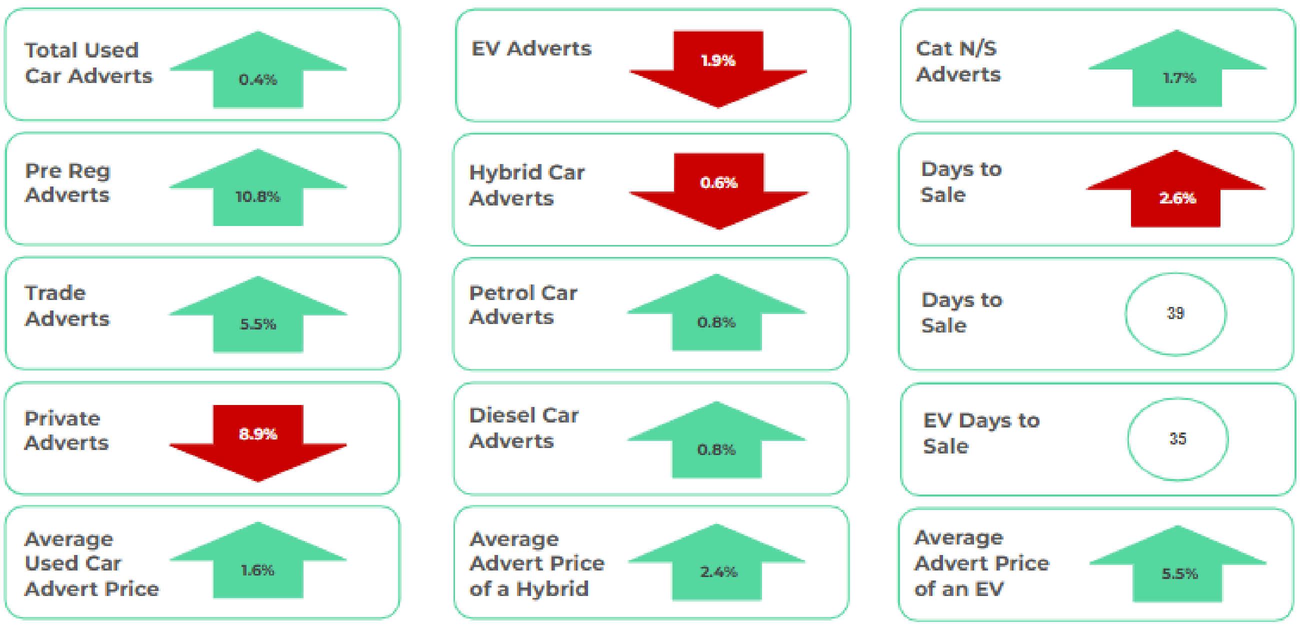
June Monthly Car Market Insight

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



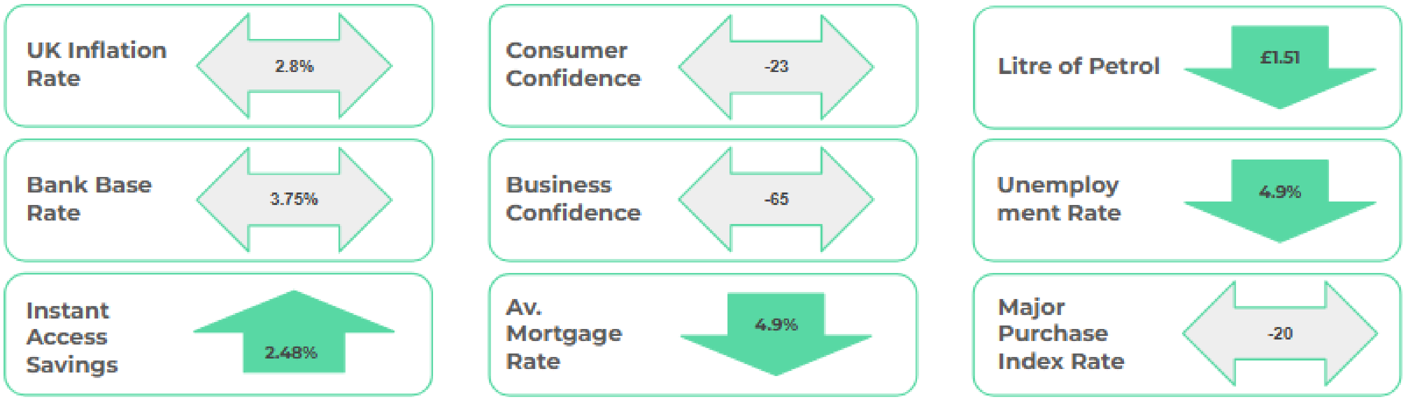
Data Powered by Brego Insight

June proved to be a difficult month across the Auto Sector and was almost a month of two halves with the first two weeks proving to be very difficult across the board. There were glimpses of activity at the older, cheaper end of the market at the beginning of the month before demand grew stronger in the second half, but only for newer cars. That said, by the end of the month sales had actually increased by 6.6% over May but it was a hard-earned increase.

Whilst the number of adverts increased by a nominal 0.4%, pre-reg volumes increased by 10.8% which highlighted that dealers were being pushed by the OEMs to meet the half year targets and therefore earn the all-important volume bonuses. Wholesale activity was patchy for almost all vehicle types although retail demand for EVs and Hybrids was reasonably good and that helped the auctions and remarketing companies satisfy vendor pressures.

The average days to sale for the whole market actually increased by a day reflecting the slower start to the month whereas EV days to sale dropped by two days to 35.

Key UK Economic Indicators



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

The KPIs for June actually show a pretty stable period for the economy which will come as a surprise to many that have been watching what has happened both globally and in the UK. The problems in the Middle East appear to have eased somewhat and this is due to the less aggressive approach taken by the United States bolstered by the signing of a Memorandum of Understanding to end the war brokered by Pakistan on June 17th. This resulted in the immediate cessation of aggression and the reopening of the Strait of Hormuz.

In the UK, Andy Burnham won the Makerfield by-election on June 18th paving the way for a leadership challenge. This was followed by the resignation of the Prime Minister on June 22nd, and his subsequent claims of immense success during his leadership specifically relating to the UK economy and Foreign Policy. The country remained in a state of mild disarray for the rest of the month.

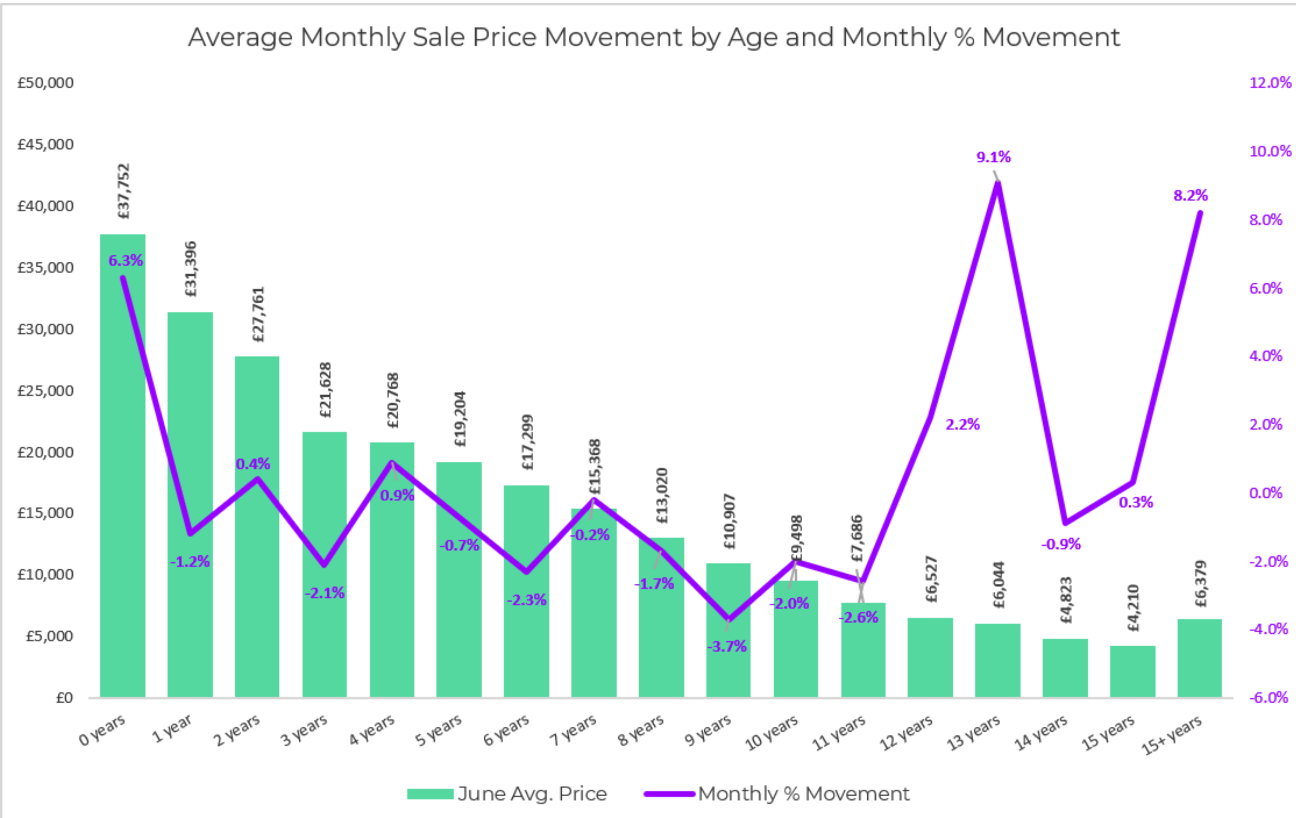
However, the KPIs show that the inflation rate remained at 2.8% despite some heavy increases in transport costs, thankfully being offset by housing and household services amongst other things. There is still an expectation for this to rise in July due in part to the lift in the energy price cap from July 1st. The Bank Base Rate also remained static at 3.75% after a unanimous vote by the MPC and revised forecasts expect this to remain at 3.75% until later in the year with no further drops forecast until mid 2027.

As a result, Consumer Confidence remained steady at -23 and the Business Confidence rate is still at -65 due to its quarterly publication. Forecasts suggest they will both improve in July which is welcome news.

There was also a positive and unexpected fall in the unemployment rate to 4.9% and also in the cost of a litre of unleaded fuel which dropped to £1.51 after the Strait of Hormuz reopened and oil supplies started to get back on track. A drop in the two-year Mortgage Rate, albeit small, and an increase in the Instant Access savings rate rounded off what looked on the face of it to be a stable month for the UK economy although many questions remain as to what will happen in the coming weeks.

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 June. 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

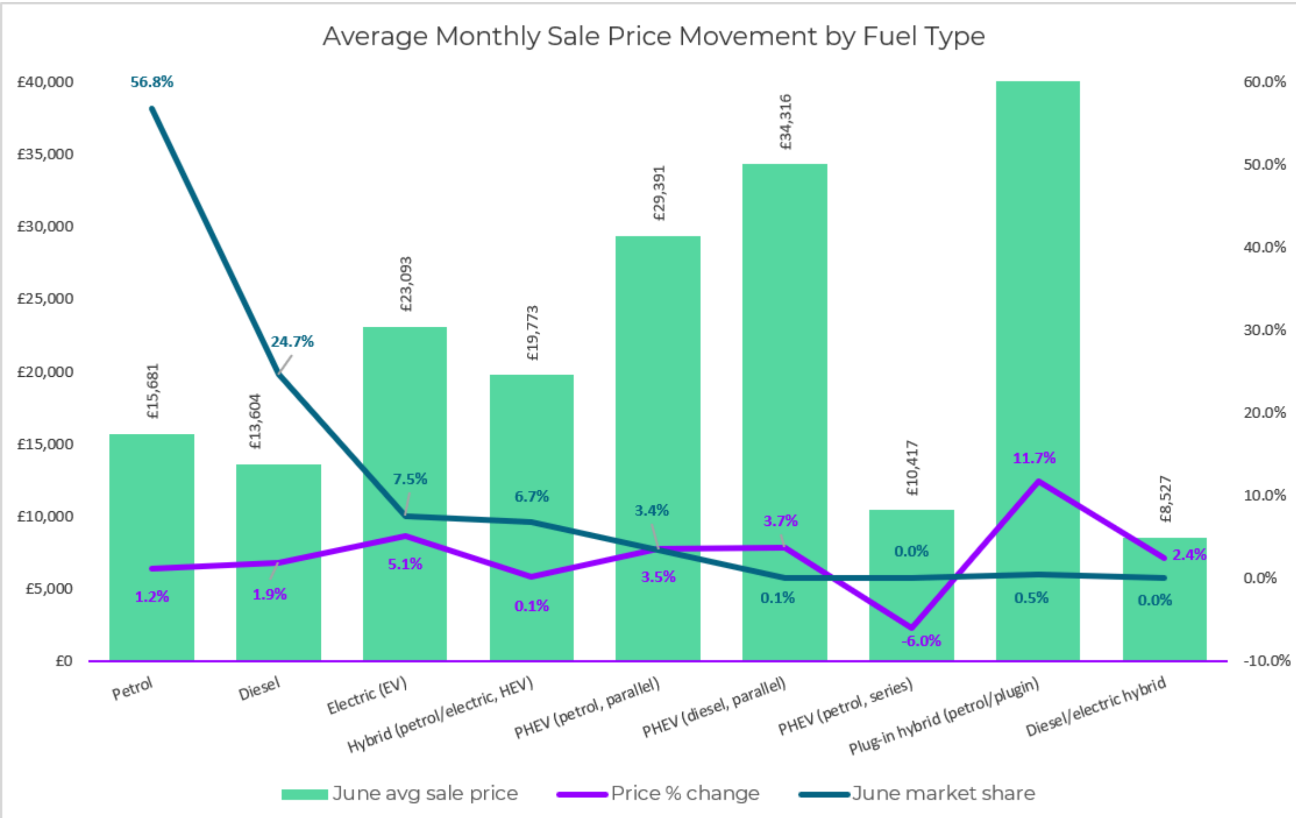
This chart is important because it quantifies the monthly change in the market experienced during the month of June. As expected, the average price shown by the green bars declines as the vehicles age, with an uplift for 15+ year old cars that will include some higher priced classic cars. This is something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

Overall, the Average Sale Price increased by 1.6% across the market, but it was influenced by under one year old, 13-year-old and over 15-year-old cars. The remainder of the Sale Pricing was fairly stable with variances of between +2.2% for 12-year-old cars and -3.7% for 9-year-old cars. Of note is that the older end of the market showed less stability overall with very varied sale prices combined with dealer feedback expressing concerns that the older end of the market had been noticeably quiet at the beginning of the month.

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.

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.



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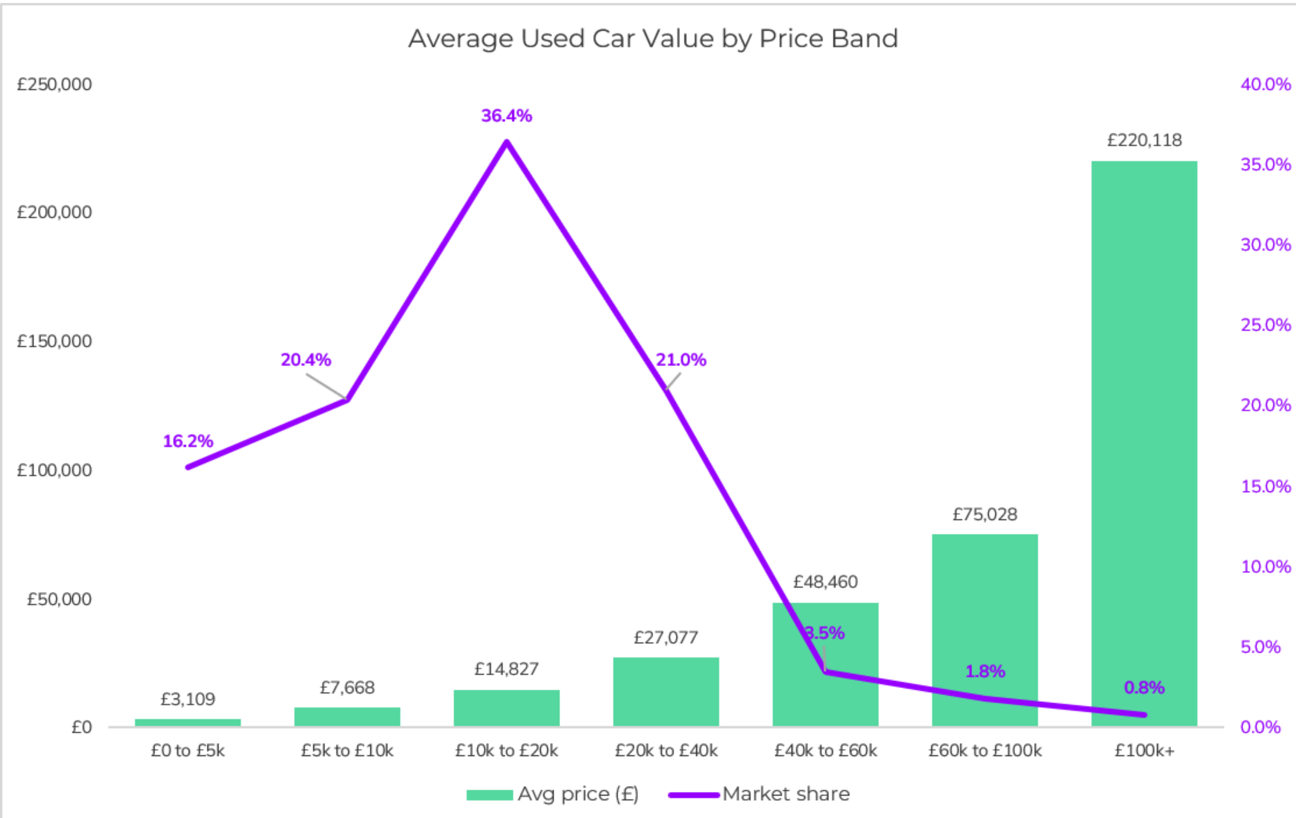
Reviewing the market by fuel type is important at the moment as the Auto sector continues to migrate away from fossil fuel cars. From a sales perspective the biggest change in the Average Sale Price was for Plug In Hybrids with an 11.7% increase although they hold just 0.5% of the market. Of more significance was the move for EVs which showed a 5.1% increase in Average Sale Price although overall sales dropped by 7.5% which was unexpected. This drop may be a reduction in interest as a result of the fall in the cost of fuel following the ceasefire agreement in the Middle East.

The biggest change in the market share by fuel type was a 0.4 percentage point drop for petrol powered cars and a 0.5 percentage point drop for EVs. For the second month running diesel cars recorded an increase in sales and a market share uplift of 0.4 percentage points, which was the same as Hybrid cars.

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.



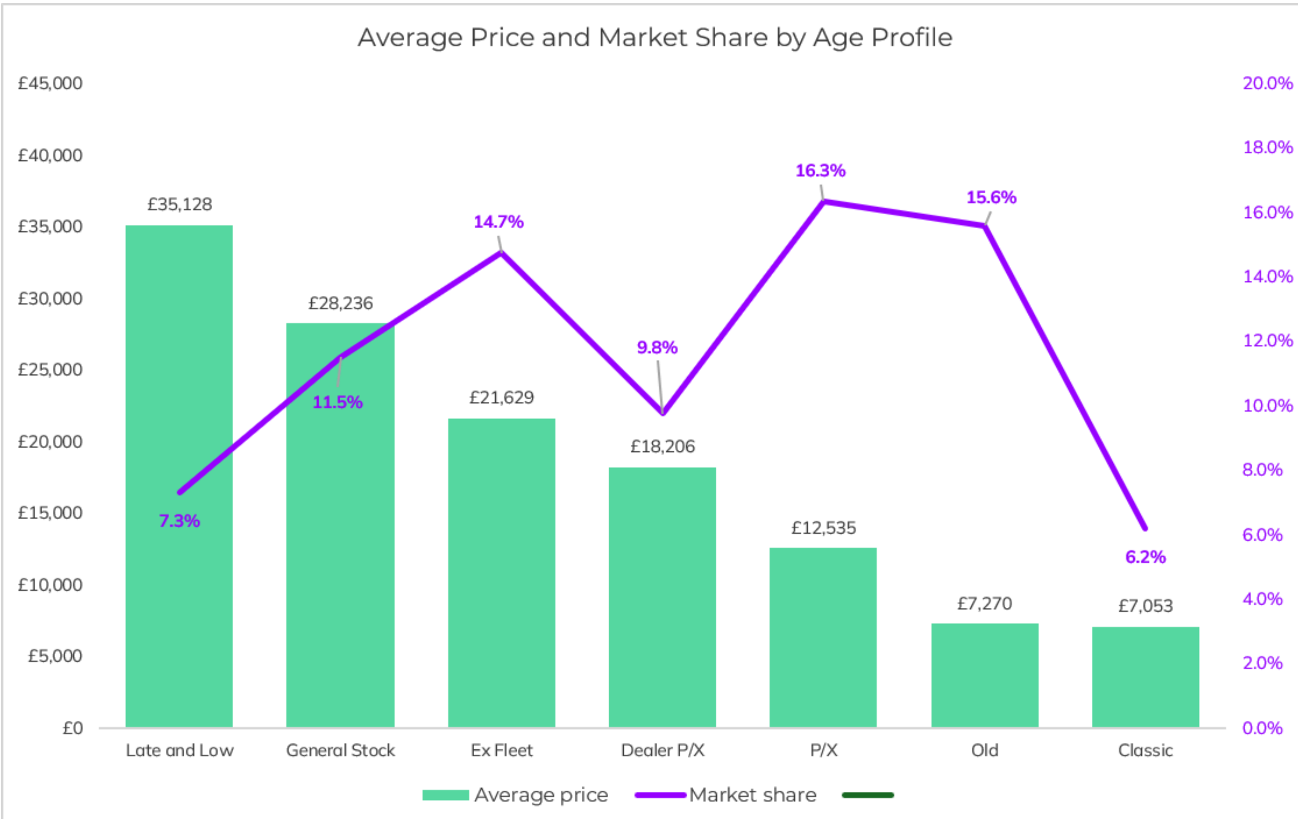
Data Powered by Brego Insight

June's data was remarkably stable using this lens on the market, although there were a couple of significant changes in that the cheaper end of the market showed a drop in Average Advert Price. For cars up to £5,000 there was a decline of 1.6% to £3,109 and for cars between £5000 and £10,000 there was a fall of 0.4% to £7,668. This reflects the activity experienced in the nine-year-old and over market. The biggest change in Average Price was for cars over £100k where there was a 1.5% increase taking the price to £220,118.

Looking at the % of market share and once again the market appeared to be stable with minimal movements of between a 0.5 percentage point increase for the £20k to £40k price band which was at the expense of the up to £5k band which lost 0.5 of a percentage point. The largest market share was held by cars with an Average Price of between £10k and £20k and the smallest share was for cars over £100k which took 0.8%.

Market Analysis by Age Profile

The chart below gives a breakdown of the Average Used Car Price by market 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

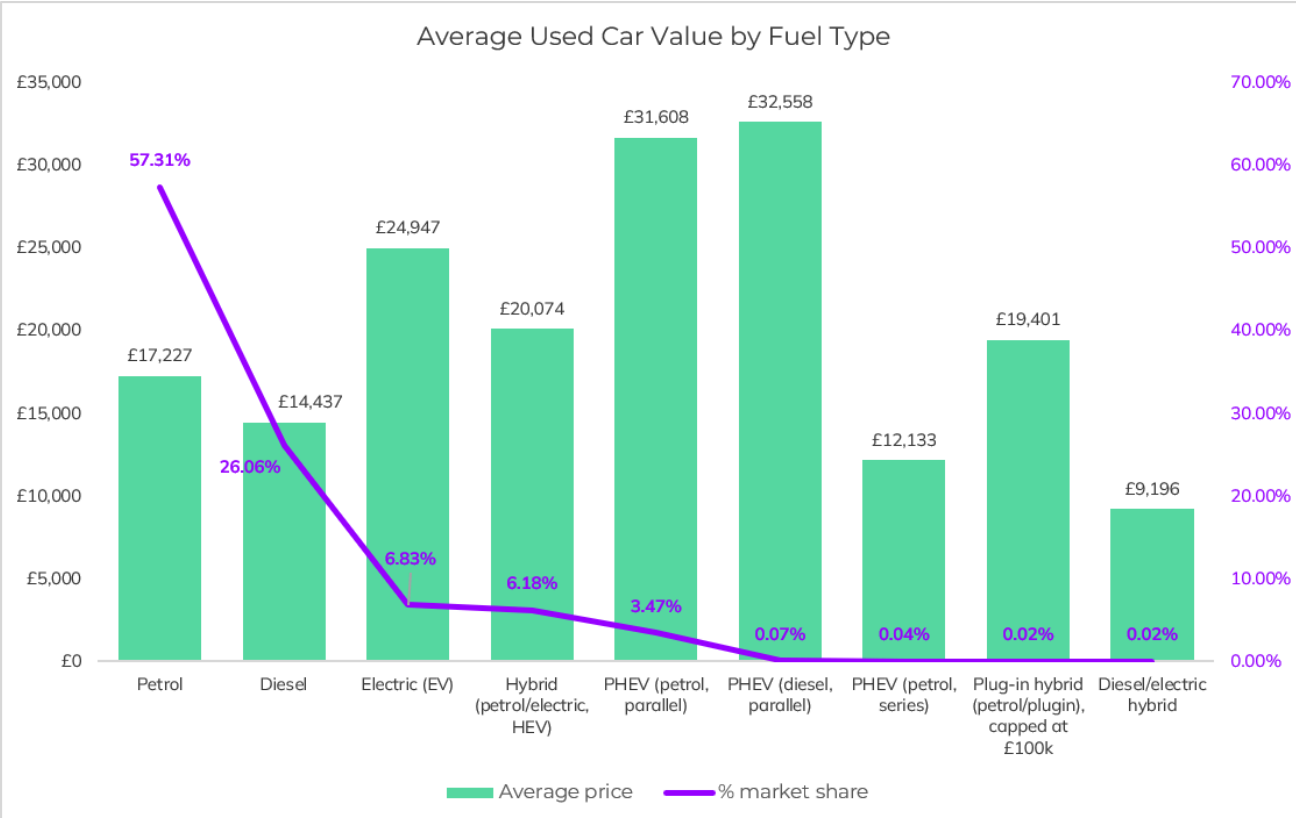
This data is very interesting when compared to May as it shows some important changes in the market. Firstly, the Average Price has decreased by a mere 0.1% overall using this lens and data set. The price movement for all but the Old and Classic car segments ranged between a decrease of 1.1% and an increase of 0.1%.

However, as identified earlier, pricing for older cars has increased both in retail advert and sales terms. This implies that there are more higher priced older cars coming to the market or indeed that there has been a bit of a run on sales of cheaper older cars. This is worthy of further investigation, but at a high-level, Old cars increased by 1.3% and Classic cars by 3.3%.

The market share data has also shifted, with the biggest month on month change going to Old cars which saw a decrease of 3.6 percentage points to 15.6% of the total market. This also implies there was a higher level of sales.

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 June fuel type data shows a bit more of a stable month when compared to May and this insight focuses on the key fuel types on sale in the market. The month-on-month Volume change was a drop of 2.8% whilst the overall Average Price dropped by just 0.2%. There was also a minimal 0.8% change in the Average Mileage.

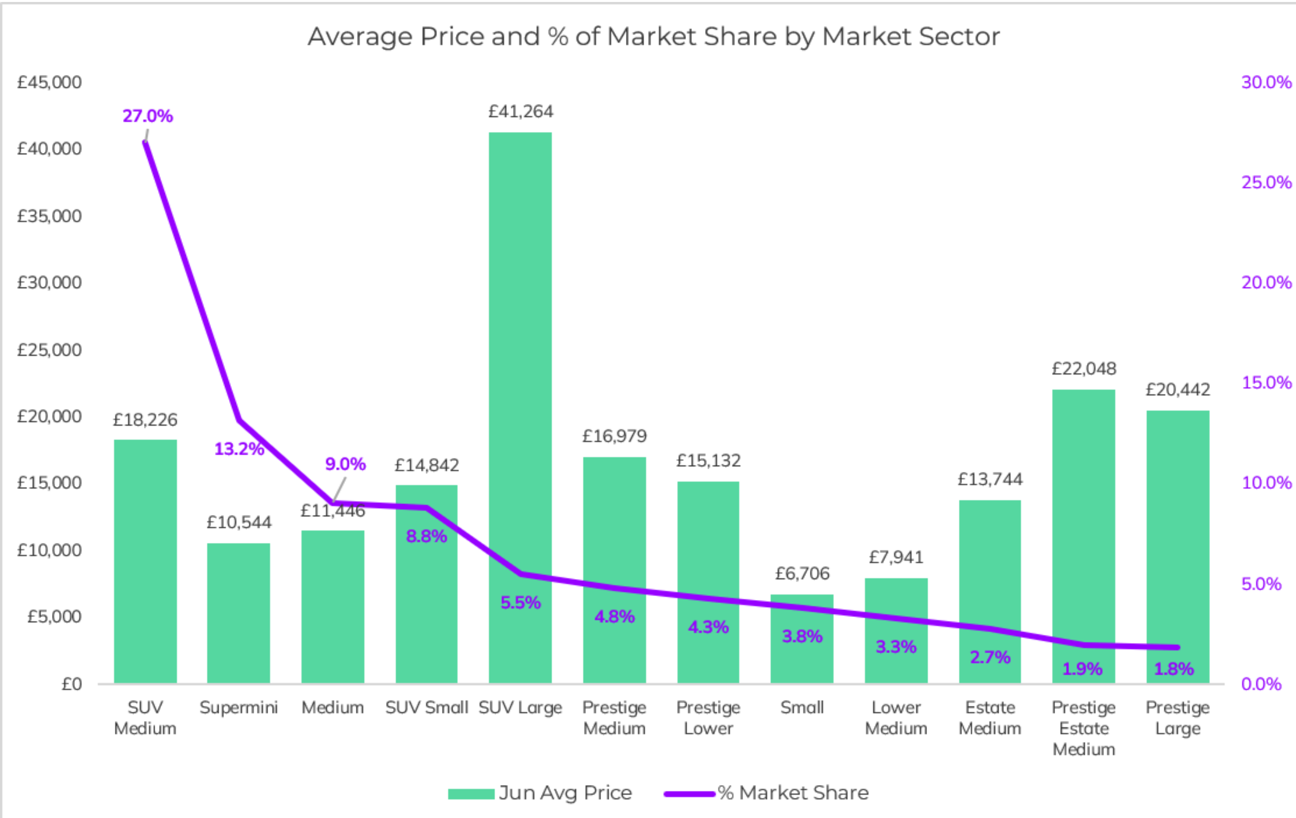
The largest change in Average Price was a drop of 7.1% for Petrol PHEVs which also ties in with a 4.4% increase in Average Mileage and a 2.3% increase in Volume in the market. It is worth noting that this fuel type accounts for just 0.04% of market share.

EVs recorded a 2.8% increase in Average Price as more high-end models came to the market although the Average Mileage for EVs also dropped by 3.2% which may go some way to explain the shift in price.

The largest change in the % of Market Share went to Petrol cars which increased by 0.2 of a percentage point to 57.3%, perhaps signalling lower sales levels.

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.



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This is always an interesting view of the market and in June the top 12 sectors covered 86% of the whole market, up 0.3 of a percentage point on the May figure. There was one change in the Top 12 with Prestige Estate Medium re-entering at the expense of the MPV Medium sector.

From an Average Price perspective, the biggest change in pound note terms impacted the Lower Medium sector with an increase of £287. This was also the largest change in percentage terms with an uplift of 3.7%. In market share terms the biggest change was for the MPV Medium sector which showed a 0.4% percentage point increase largely due to a 0.3 percentage point decrease for Medium cars.

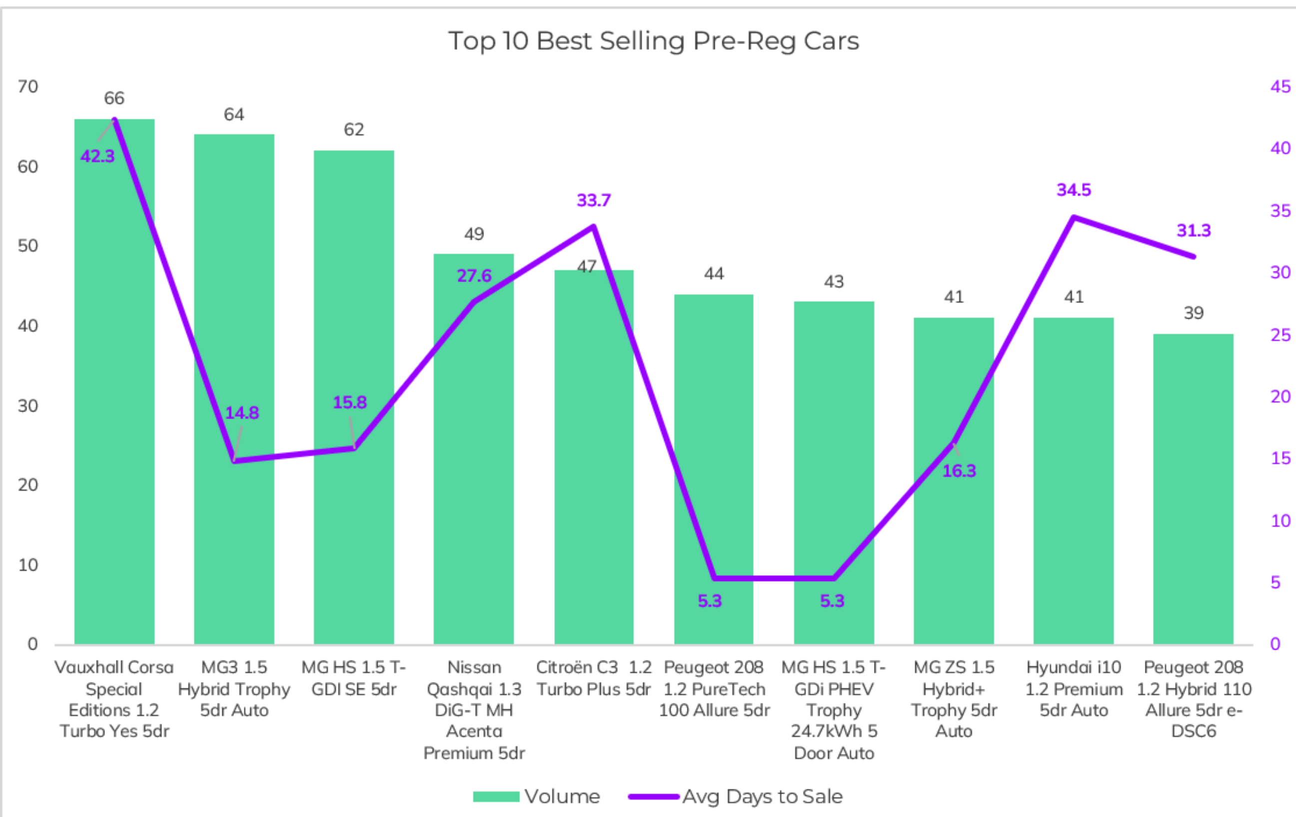
For context, the Best-Selling Cars in the Lower Medium Car sector for the month were: -

Rank	Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	Volkswagen Golf	7,941	21.9%	£14,387	33.9
2	Ford Focus	6,127	16.9%	£7,825	32.7
3	Vauxhall Astra	3,021	8.3%	£5,711	29.9
4	Honda Civic	1,712	4.7%	£9,391	31.7
5	SEAT Leon	1,341	3.7%	£9,483	32.4

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 shown by the purple line.



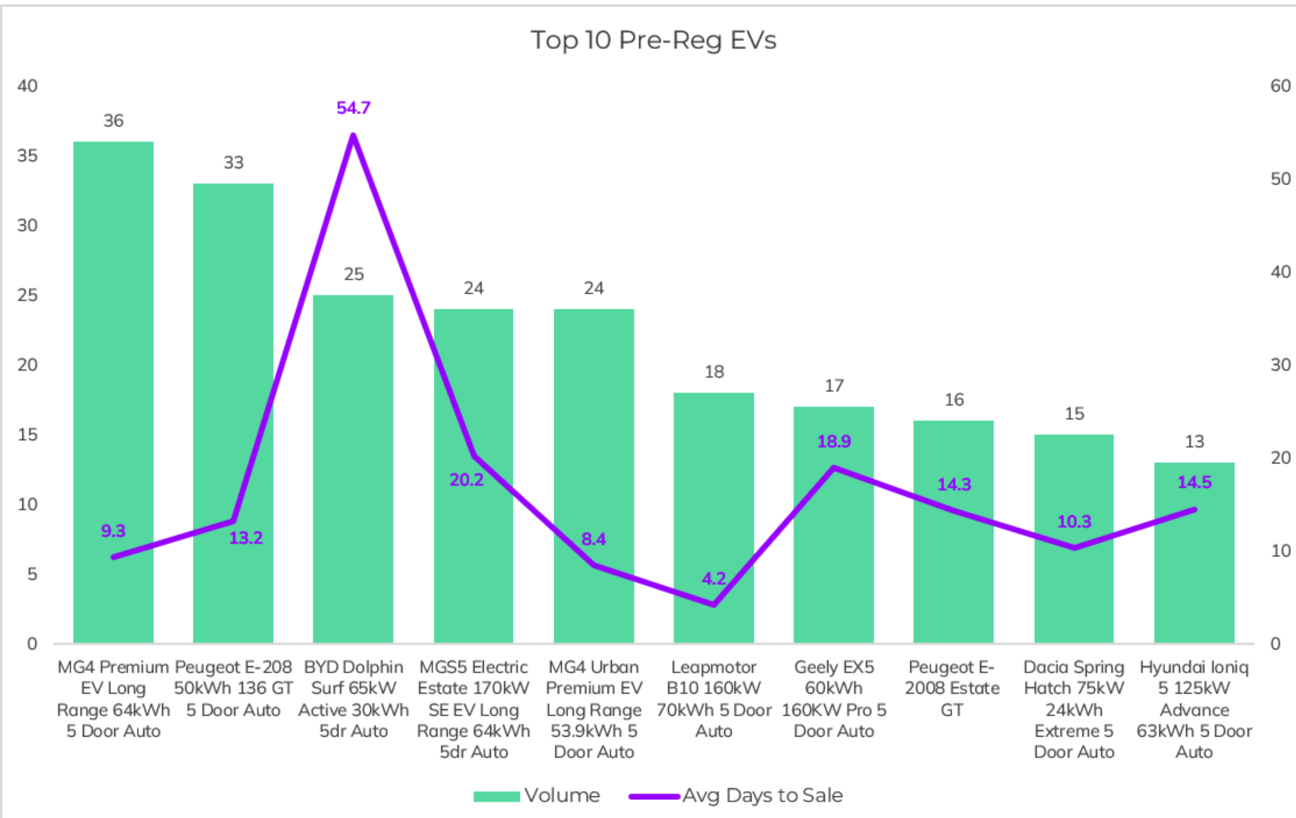
Data Powered by Brego Insight

In June, the volume of the Top 10 Pre-Registered cars dropped by 5.9% off the back of a 19.3% decline in May. However, the full Pre-Reg market increased by 10.8% and this shows that dealers registered a wider variety of cars to meet half year bonus targets.

Of the Top 10, four cars were carried over from May, and there were new entrants in the form of the MG HS, Nissan Qashqai, Citroen C3, Peugeot 208, MG ZS, and the Hyundai i10. Overall, the Average Sale Price dropped 1.3% to £19,157 whilst the Average Days to Sale increased by 2.7 to 22.7. The Vauxhall Corsa was the slowest seller in this list taking 42.3 days to sell and this is reflective of the fact that this model has been the highest selling pre-reg car every month so far in 2026.

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 is shown by the purple line: -



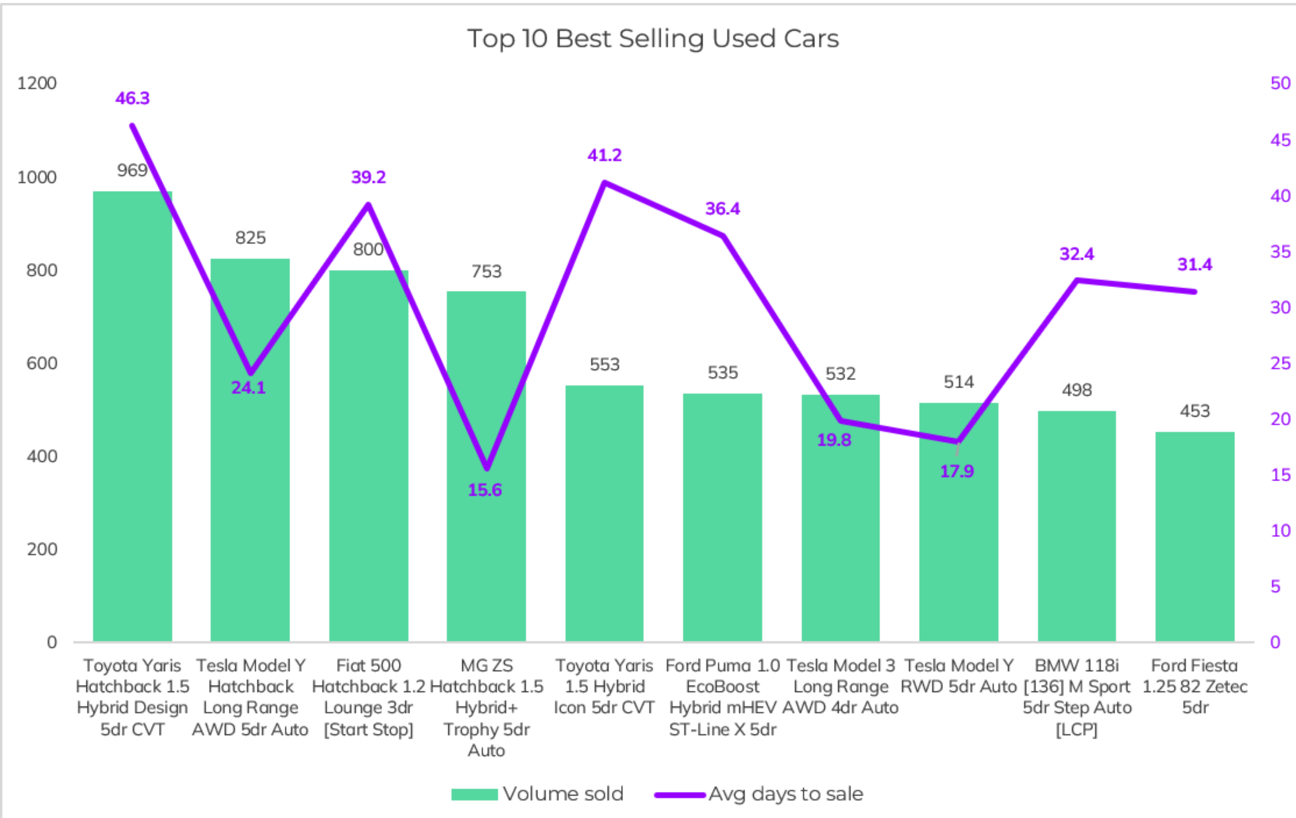
Data Powered by Brego Insight

In June, the volume of Pre-Registered EVs increased by 27.7% off the back of a 42.5% decline in May. Six of the Top 10 remained the same month on month and there were new entries from Geely, Peugeot with the E 2008, Dacia, and Hyundai.

Overall, the Average Sale Price dropped by a marked 17.3% to £21,604 and this was partly due to the entry of the low-priced Dacia at £13,137 and the removal of the Audi A6 e-tron which had an Average Sale Price of £46,125 in May. In addition, the Average Days to Sale improved to 16.8 which was a 5.6 day drop.

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 is shown by the purple line.



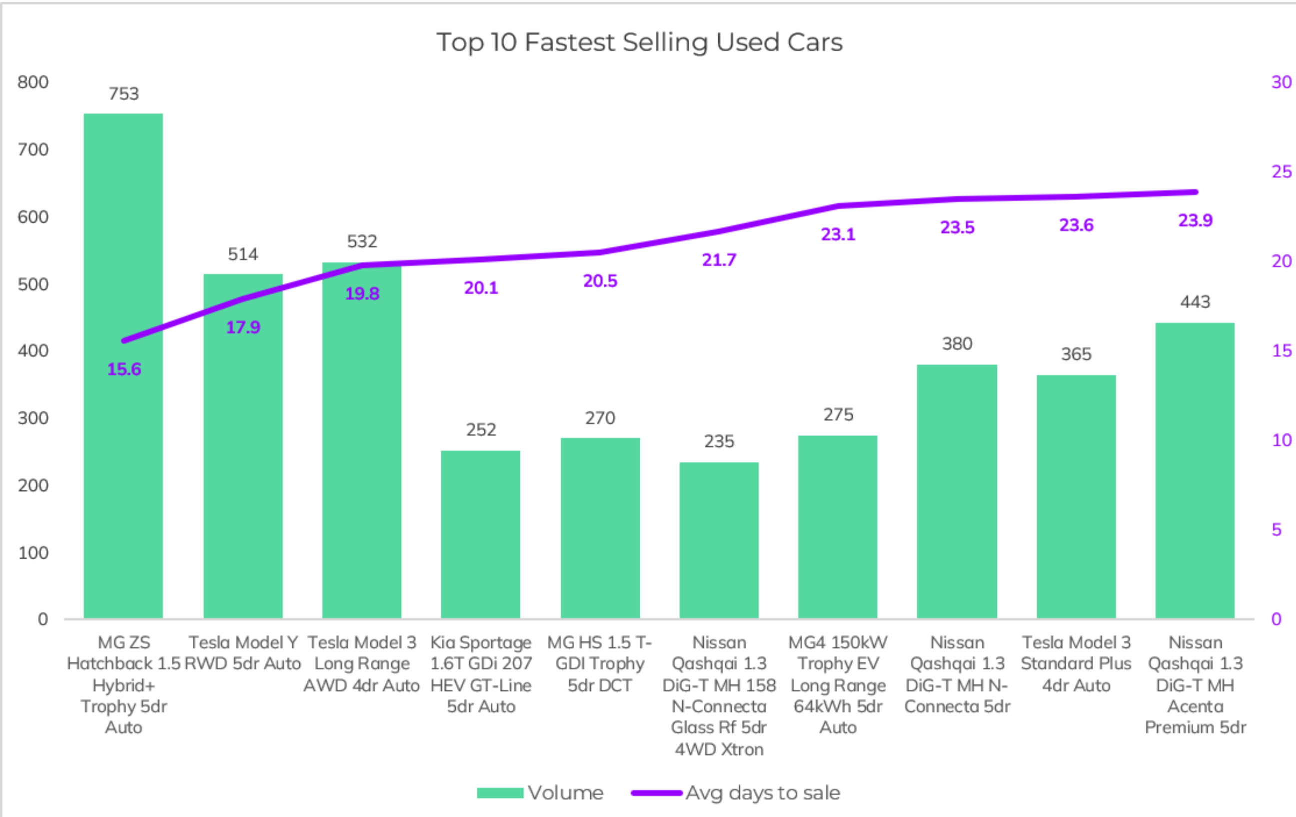
Data Powered by Brego Insight

The Top 10 Best Sellers in June were exactly the same as in May and uncharacteristically they were also in the same order. However, there were some changes in the high-level data that show a shift in the market as a whole. There was a 12.8% drop in total sales for the Top 10 which is at odds with the whole market movement of an increase of 6.6%. This highlights that consumers were tempted into alternative makes and models.

In addition, the whole market share for the Top 10 has dropped by 0.1% of a percent point to 1.7% overall whilst the Average Days to Sale dropped by 8.6 to 30.4. This was specifically influenced by the quick sales rate of the MG ZS which took just 15.6 days to sell.

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.



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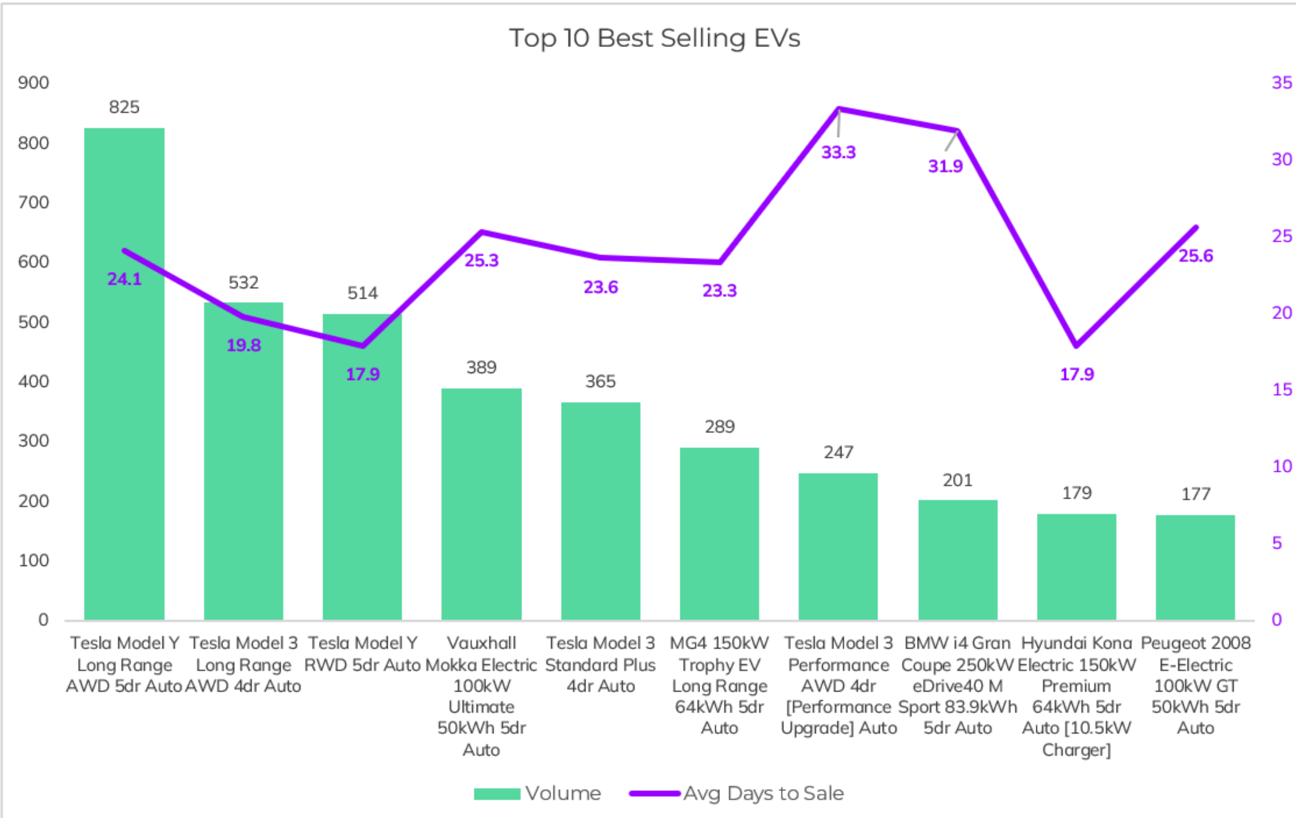
The data for the Top 10 Fastest Selling used cars uses a base of 200 sales to avoid rare outliers distorting the results. For June, the list saw six new entries in the form of Tesla Model 3 Long Range and Standard Plus, the Kia Sportage, two Nissan Qashqai models and the MG4.

At a high level, the volume of sales increased by 9.5% pushing the % of Market Share for the Top 10 up by 0.2 of a percentage point to just over 1%. However, the Average Sale Price dropped and experienced a 1.6% fall taking it to £18,621 when compared with May. This was specifically influenced by the BYD Seal that was in sixth spot in May with an Average Price of £26,476 falling out of the Top 10 for June.

The Average Days to Sale ranged between an impressive 15.6 days for the MG to 23.9 for the Qashqai Acenta Premium. The former improved by 4.2 days month on month which is quite a change.

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.



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Tesla continued to dominate the Top 10 Best Selling EV list in June with four cars spread over the Model 3 and Y ranges. There was just one new entry to the list in the form of the BMW i4 Gran Coupe at the expense of the Polestar 2 that was in eighth position in May.

In volume terms the Top 10 sales declined by 17.1% month on month which is interesting given the 19.7% fall in May. In addition, the Top 10 took a 12.9% share of the total number of used EV sales for the month which was 1.4 percentage points lower than May. It will be remarkably interesting to see if this becomes a trend as we see more varied and differently priced EV models come to the used car market.

The Average Sale Price increased by a marked 9.9% and this was due to the entry of the BMW i4 Gran Coupe with a high sale price of £32,677. This was £15,529 more than the Polestar it replaced and the highest of any of the other cars in the Top 10 list.

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 30 sales to avoid rare outliers distorting the results. For June, the list saw nine new entries in the form of the BMW X1, four Audi e-trons, the Nissan Ariya, a Tesla Model 3, a Mercedes EQB, and the Mercedes EQA.

Overall, the Average Sale Price was £25,178 and that was 43.1% higher than in May. From a Market Share % the Top 10 took 1.5% of the whole EV market and that was 0.42% percentage points lower than the previous month again highlighting that consumers are seeking variety from what is on offer in the whole market as EV choice widens. In volume terms the Top 10 sales were 26.3% lower than in May.

The Average Days to sale ranged from 7.1 for the first placed BMW X1 to 13.8 for the tenth placed Hyundai Ioniq, which incidentally was the only car that made the jump from the May Top 10 list to June. Overall, the Average Days to Sale dropped 3.6 days to 10.3.

Summary

June was a better month for the UK Auto sector when compared with May with sales improving by 6.6% overall. That is not to say it was an easy month by any means, and the market started slowly with activity at the lower priced older end of the market before picking up notably in the final two weeks. Online enquiries were lower and footfall at the dealers built during the course of the month. There was also evidence of price realignment for the older end of the market as the month passed. This proved essential to keep sales flowing.

If one considered just the Econometric KPIs shown earlier in the report, it would be easy to think that everything was rosy. There are lots of green arrows and horizontal hold arrows in the chart and the fact that inflation, the Bank Base rate and consumer confidence all remained stable could easily have masked the more geopolitical backdrop. There is little doubt that inflation will rise in July and there will be a change of leadership for the currently governing labour government. Little is known of Andy Burnham's real policies, and it will be crucial that these prove to be robust and sustainable but only time will tell. As it seems likely there will be no other candidates to challenge him this feels almost ominously pre-planned.

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.