



Brego
Driven by Data

Car Market Insight

March 2026

The contents of this document are private and confidential and are for the intended recipient only. If this is not you, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this document.

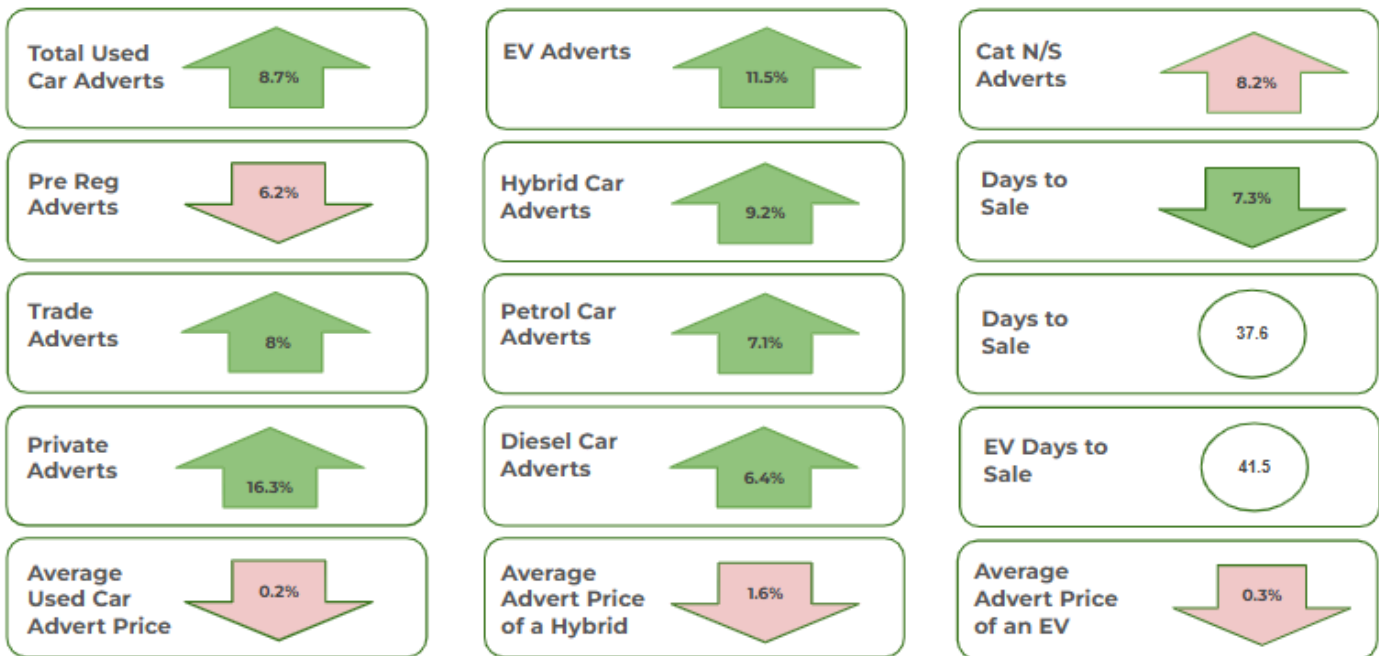
This page does not need to be printed. The information displayed here is displayed elsewhere in the document - please try not to print this page.

March Monthly Car Market Insight

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

Key Used Car Market Indicators

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



Data Powered by Brego Insight

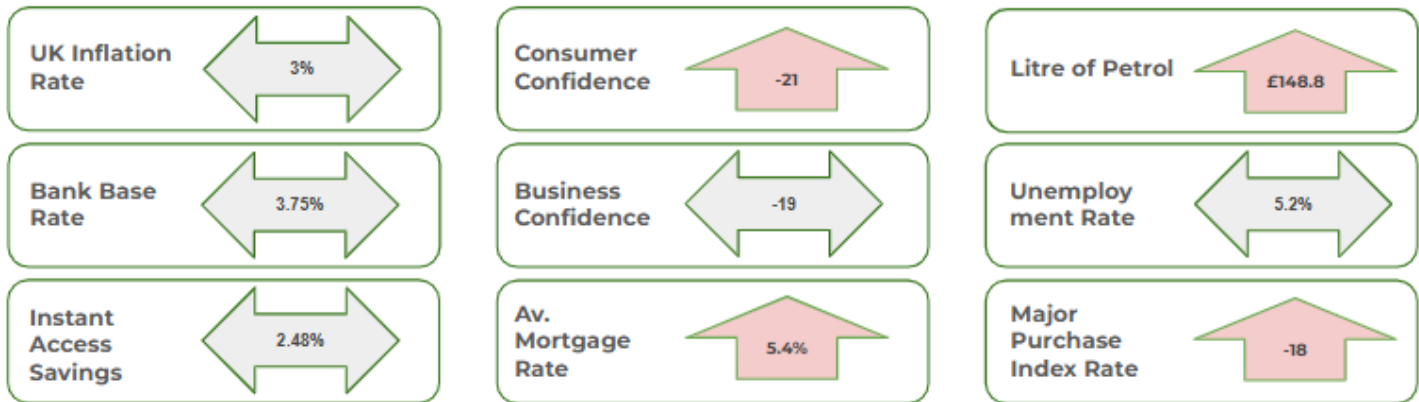
The KPIs for March depict a really good marketplace to be honest with plenty of good news across the board. This is interesting as this is not always the case for used car sales in March due to the launch of the new registration plate and the focus this brings on new car deliveries, often taking staff away from used car sales. With a 6.6% increase in new car sales many dealers had to admit they were pretty stretched.

Used car sales for the month actually increased by 14.1% over the February figure and that is a big increase. This uplift has been combined with a notable surge in the number of cars listed for sale, specifically from private vendors which increased by 16.3%, which was a bit of a surprise. However, given the increase in new car sales, the volume of part exchanges was greater than normal and these have obviously been turned into used stock quickly by the prep teams.

Of note is that the average price of used car advert dropped by 0.2% overall, and this suggests that either more older stock came to the market or more newer cars were sold. This could tie in with the 6.2% drop in pre-registered cars listed for sale although this may well increase in the April data given

there was significant tactical activity in the new car market over the final days of March. The average days to sale also dropped by 7.3% to 37.6 and a gap between whole market and EV days to sale has reopened which is interesting given the boost in the interest in used EVs experienced as fuel costs spiral.

Key UK Economic Indicators



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

On the face of it the March economic KPI's paint a picture of a broadly stable economy, although this is likely to be the calm before the storm in the April data. One cannot ignore the significant global impact of the actions of the USA and Israel in recent weeks. For the UK, the markets have reacted swiftly and negatively and the immediate increases in fuel and energy costs not to mention lending costs have been seen by many as overtly reactive and an element of profiteering has been clear.

What we do know is that the consumer has been hit with increased costs and these increases look set to continue. It would be remarkable if the inflation rate does not jump when the next announcement is due on April 22nd. In addition, the bank base rate may also follow with a slight increase on April 30th. Mortgage rates are set to go higher and consumer and business confidence will likely be hit further too. All this points to a squeeze on disposable income in the coming months and that is not what the country needs.

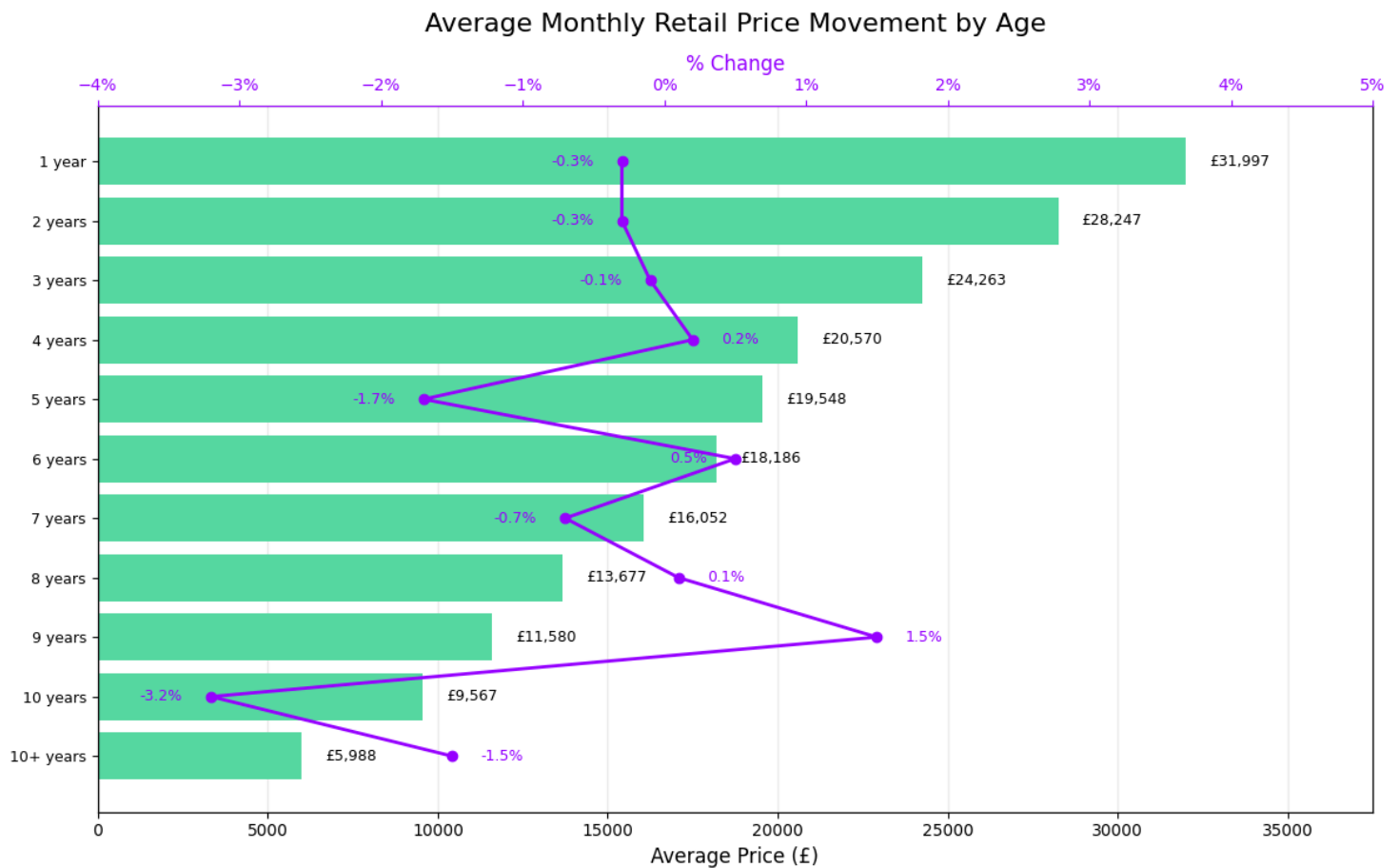
To be honest this is not a comfortable position for the Government either but in their defence they could not have seen this coming and whatever one may think of how the government have performed prior to the current circumstances, the Prime Minister has been slow in response and support for the UK and the voters. This reluctance to assist and the slow response to the American demands for help could be considered a tactical move, but it is difficult to see how that is helping move towards a solution that frustratingly for the Americans is taking a lot longer to achieve than expected.

We also know that the American President is aware of the damage it is having on his own reputation and the American economy overall and with mid term elections only months away,

there is a vital need for the American economy to stabilise and for the cost of living in America to fall before the elections in November.

Average Monthly Retail Price Movement by Age - Sold

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



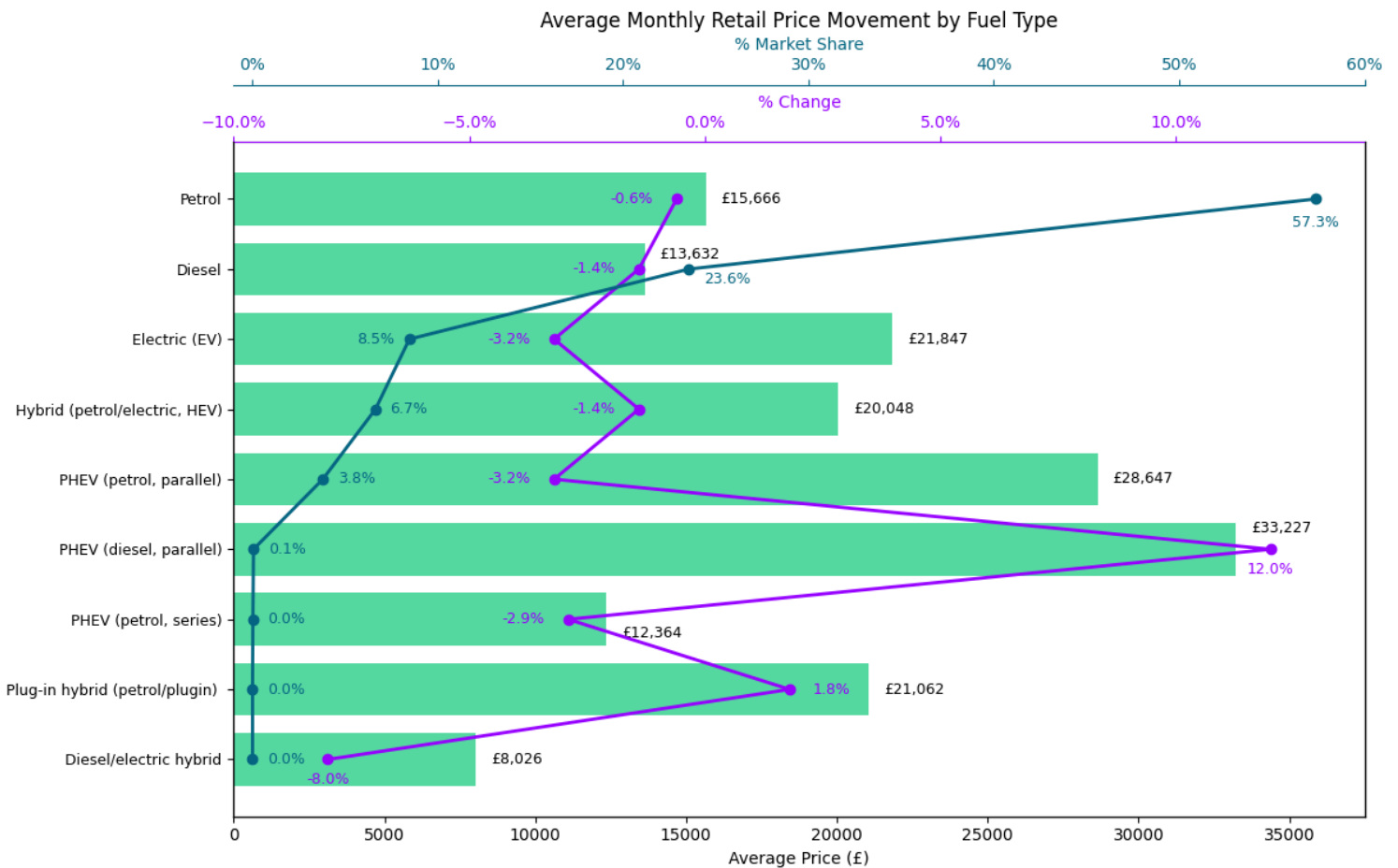
Data Powered by Brego Insight

This chart is important because it quantifies the monthly change in the market experienced during the month of March. As expected the average price shown by the green bars declines as the vehicle ages, something that is not always true for other asset types for which Brego provides insight.

In this data the key points of interest are the increase in the average retail pricing for 9 year old cars which is notably higher than for other age groups. This suggests that more cheaper 9 year old cars were sold. Equally the 3.2% downward move for 10 year old models gives a converse view. Either way it gives context to the overall downward month retail price movement of -0.5%.

Average Monthly Retail Price Movement by Fuel Type - Sold

The chart below gives a breakdown of the Average Monthly Retail Price movements by fuel type. The average 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.



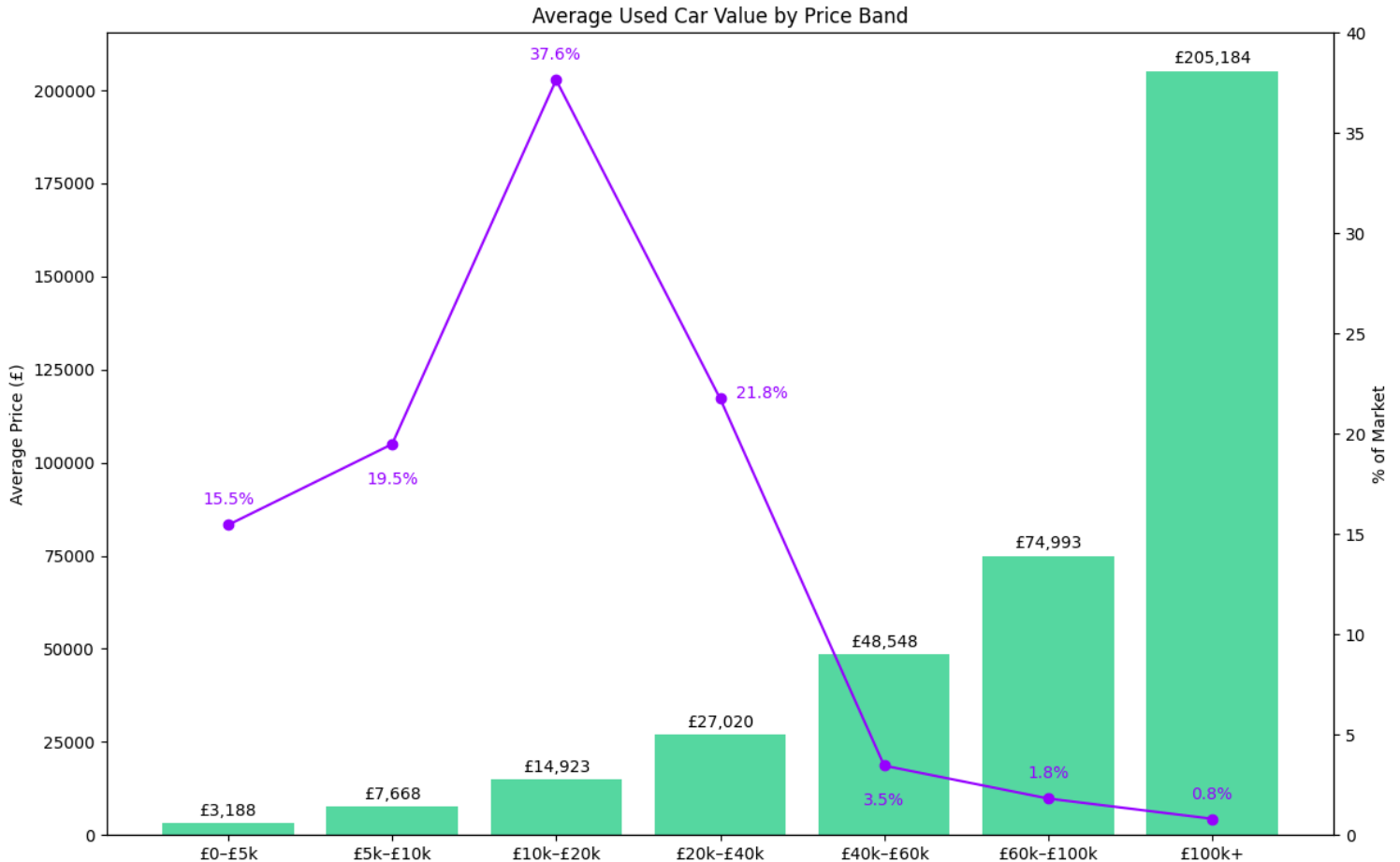
Data Powered by Brego Insight

This chart helps demonstrate the key changes in the retail pricing by fuel type whilst also quantifying the % market share of all the fuel types. This is key in understanding which shifts are worthy of specific focus and which are purely oddities within a small market such as the 12% increase in retail pricing for PHEV (diesel,parallel) that affected just 0.1% of the whole market.

Looking at the top 5 fuel types that make up 99.4% of the whole market, there was a decline of 2% in the retail pricing and this was driven primarily by the EV and Hybrid data. These are data points to watch as it implies that there was market activity perhaps outside the normal scope relating to either supply or demand. Given the current increases in fuel costs, activity for this part of the market needs to be studied closely and Brego customers with access to the Brego Insight tool have the ability to conduct their own deep dive into these anomalies.

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

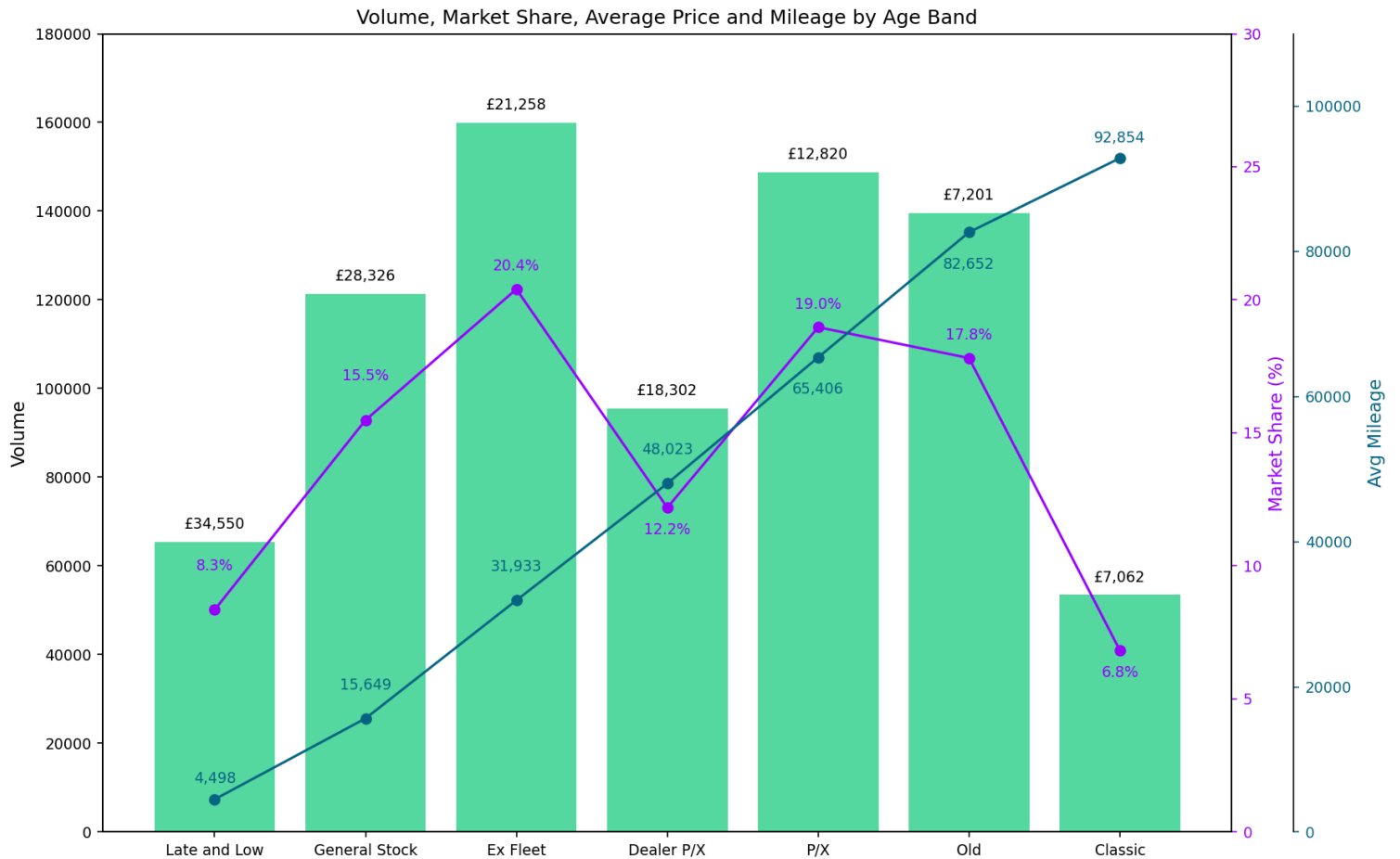
This chart will always look fairly similar month on month due to the nature of the UK market in recent years, although the influx of new Chinese brands is likely to influence some bigger changes in the next 12 to 24 months.

At a high level the data shows that during March the volume of cars listed by price band has increased by 6.1% after outliers and high value models are redacted. Overall there was a 0.5% reduction in the average price when compared to February although the average mileage barely changed at all.

The largest change in market share month on month was seen in the £10k to £20k bracket where there was an uplift of 0.5% in market share confirming this was the largest area of growth. The biggest drop in advert volumes came from the £20k to £40k price bracket.

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.



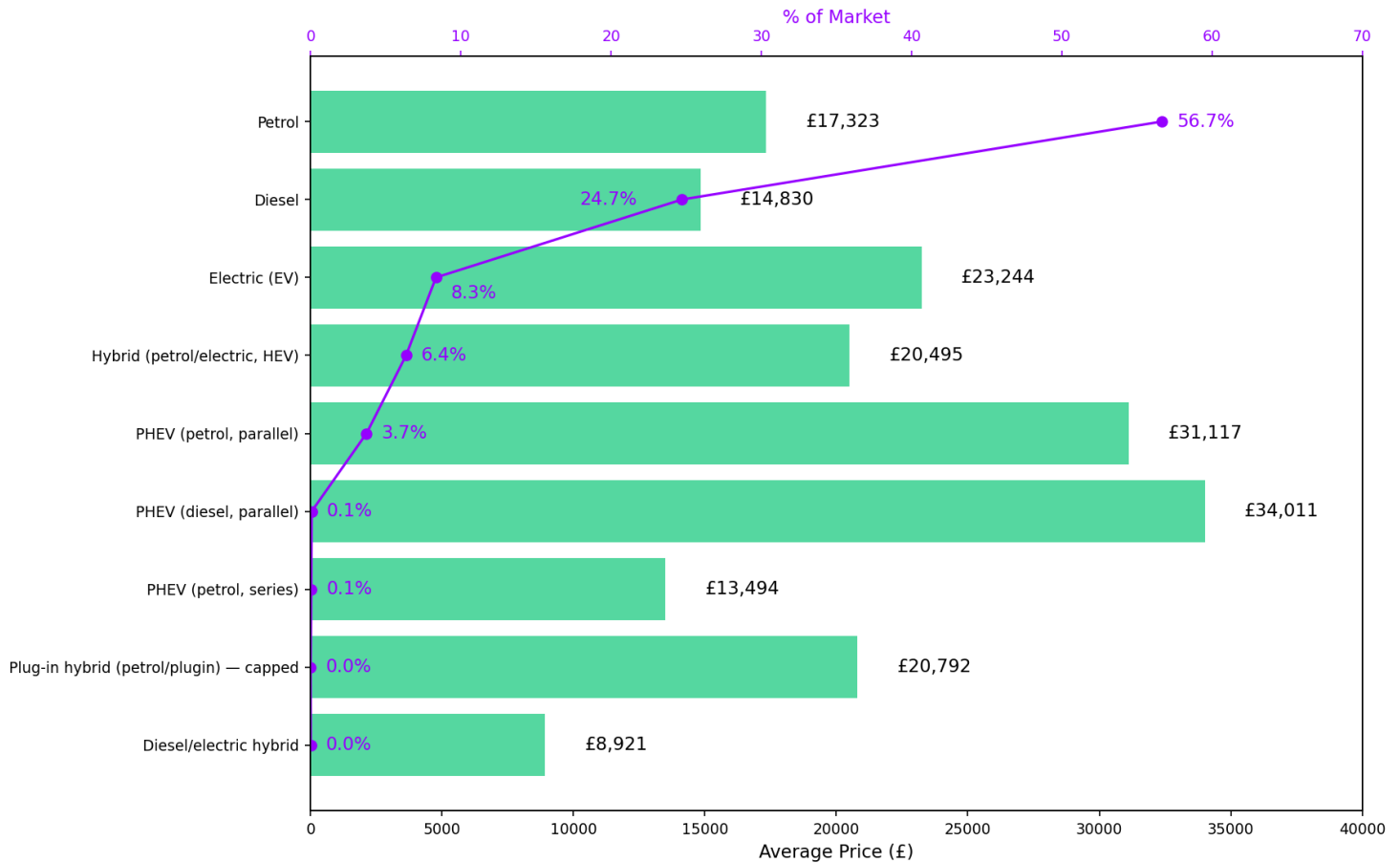
Data Powered by Brego Insight

Looking at the data by market sector, there have been some subtle changes this month that have changed the shape of the market slightly. Most notable has been the overall increase of 7.8% in the volume of adverts in the market once outliers have been redacted. The overall average price has increased by 1.2% and this excludes high end slow selling supercar models for fairness. The average mileage has dropped by 1.7% to 48,716.

Looking in more detail, it is apparent that the number of Late and Low cars in the market has dropped as has the average mileage suggesting greater sales activity. This is supported by the drop in the volume of Pre-Registered cars on sale. The largest pound note movement by sector is also for the Late and Low sector at £590 although in percentage terms the drop of £391 for Classic cars represents a 5.35% drop.

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.



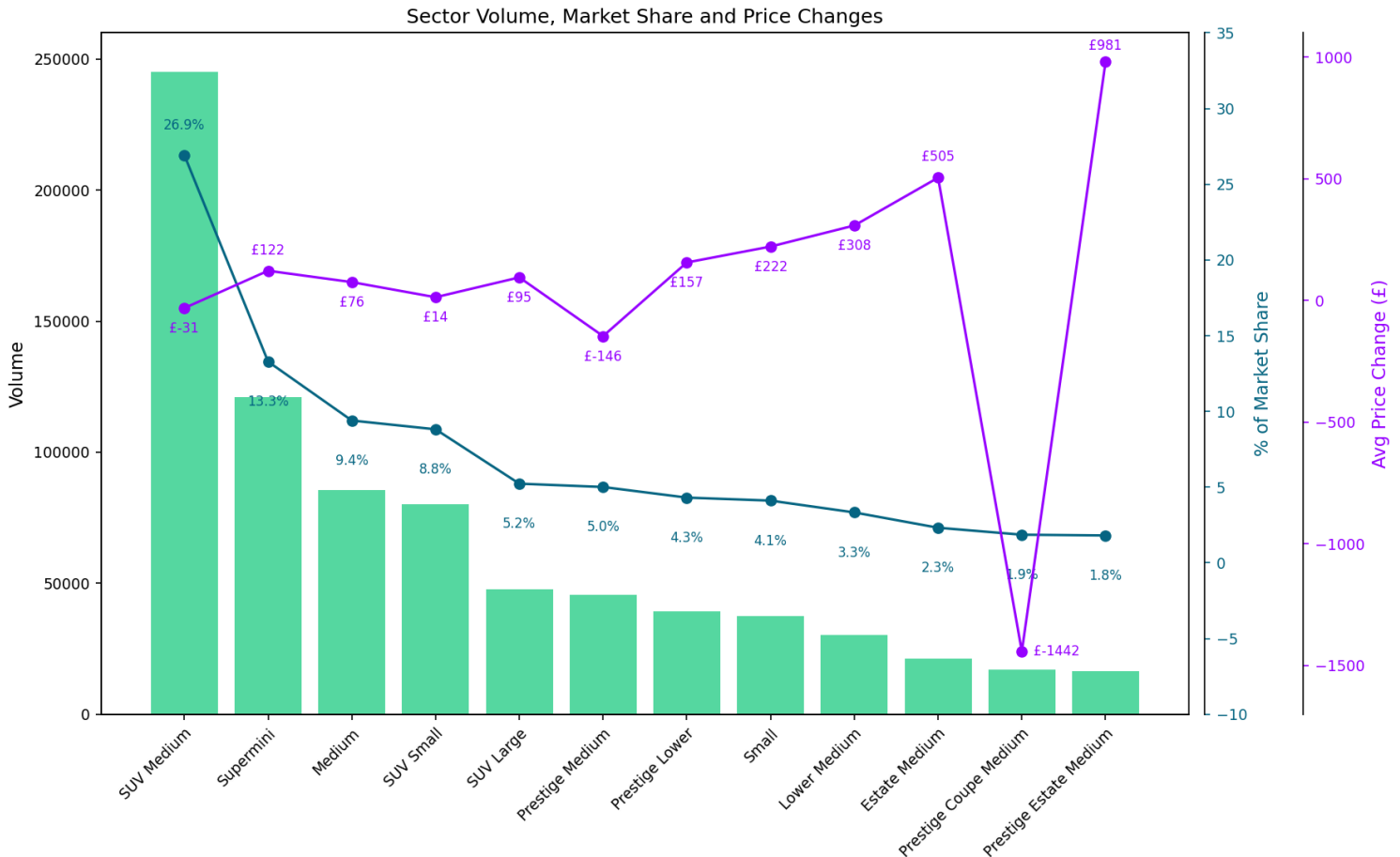
Data Powered by Brego Insight

The data for adverts listed by fuel type has seen a few significant changes in March when compared to February most notably the jump of 11.5% in the number of EV adverts truly signalling the increase in volumes of the new fuel type as new car sales increase albeit at a lower rate than required to meet the Government ZEV mandate. There was also a 9.2% increase in the number of used hybrids on sale. However, the largest increase was 87.9% for Plug-in Hybrids (capped at cars up to £100k) although this sector represents just 0.01% of the whole market.

In average asking price terms the overall change was a decrease of 0.2%. However, the biggest change was an increase of 8.3% for PHEV (diesel,parallel) although this fuel type represents just 0.08% of the whole market. Looking at those sectors with more than a 1% share and the biggest move was an increase of 1.2% for the slowly disappearing Diesel sector. The biggest drop in average price was for Petrol cars at -1.1%.

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 purple line shows the month on month change in the Average Price by sector and the blue 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 March the top 12 sectors covered 86.4% of the whole market down 0.4 of a percentage point on February. Overall volume of cars increased by 4.9%. The largest change in market sector volume was for the leading SUV Medium cars which saw a drop of 0.4 percentage points off the back of a similar drop in February suggesting increased sales or a decrease in availability of used car stock. The biggest increase in volume was for Superminis which increased by 0.27 of a percentage point.

From an average price perspective the biggest change in pound note terms impacted the Prestige Medium Coupe market once again with a drop of £1442 off the back of £318 the previous month. It continues to be the most volatile sector in pricing terms. The next biggest move was for the Prestige Estate Medium sector that represented 1.8% of total market share and recorded an increase of £981 whilst also increasing market share by 0.06 of a percentage point.

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.

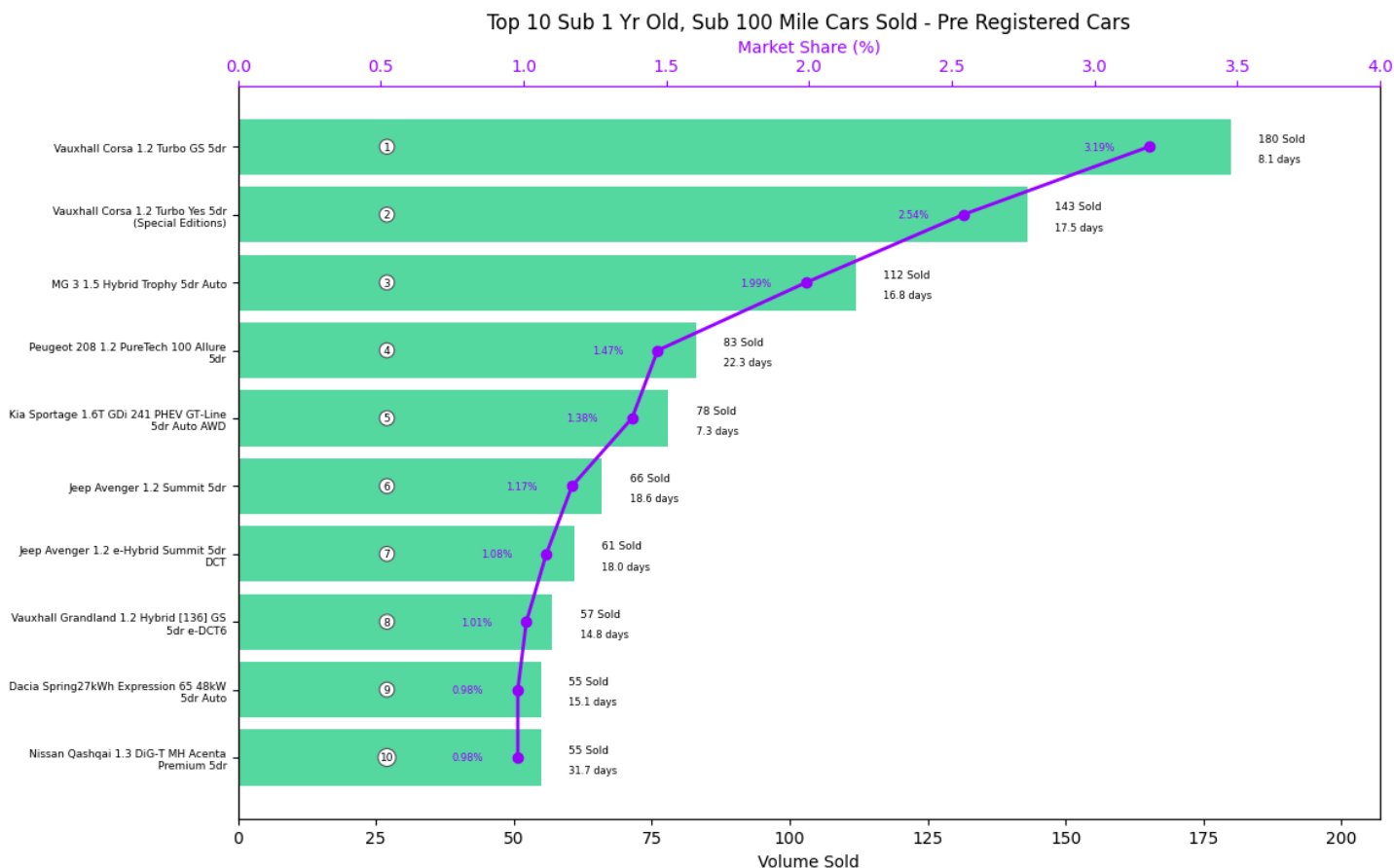
For context the Best Selling Cars in the Prestige Estate Medium sector for the month were:-

Rank	Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	BMW 3 Series Touring	1,704	24.2%	£21,628	40.4
2	Audi A4 Avant	1,341	19.0%	£16,917	37.1
3	Mercedes-Benz C-Class Estate	901	12.8%	£16,037	43.1
4	Volvo V60	680	9.7%	£18,147	45
5	Mercedes-Benz CLA Shooting Brake	608	8.6%	£20,514	40.1

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

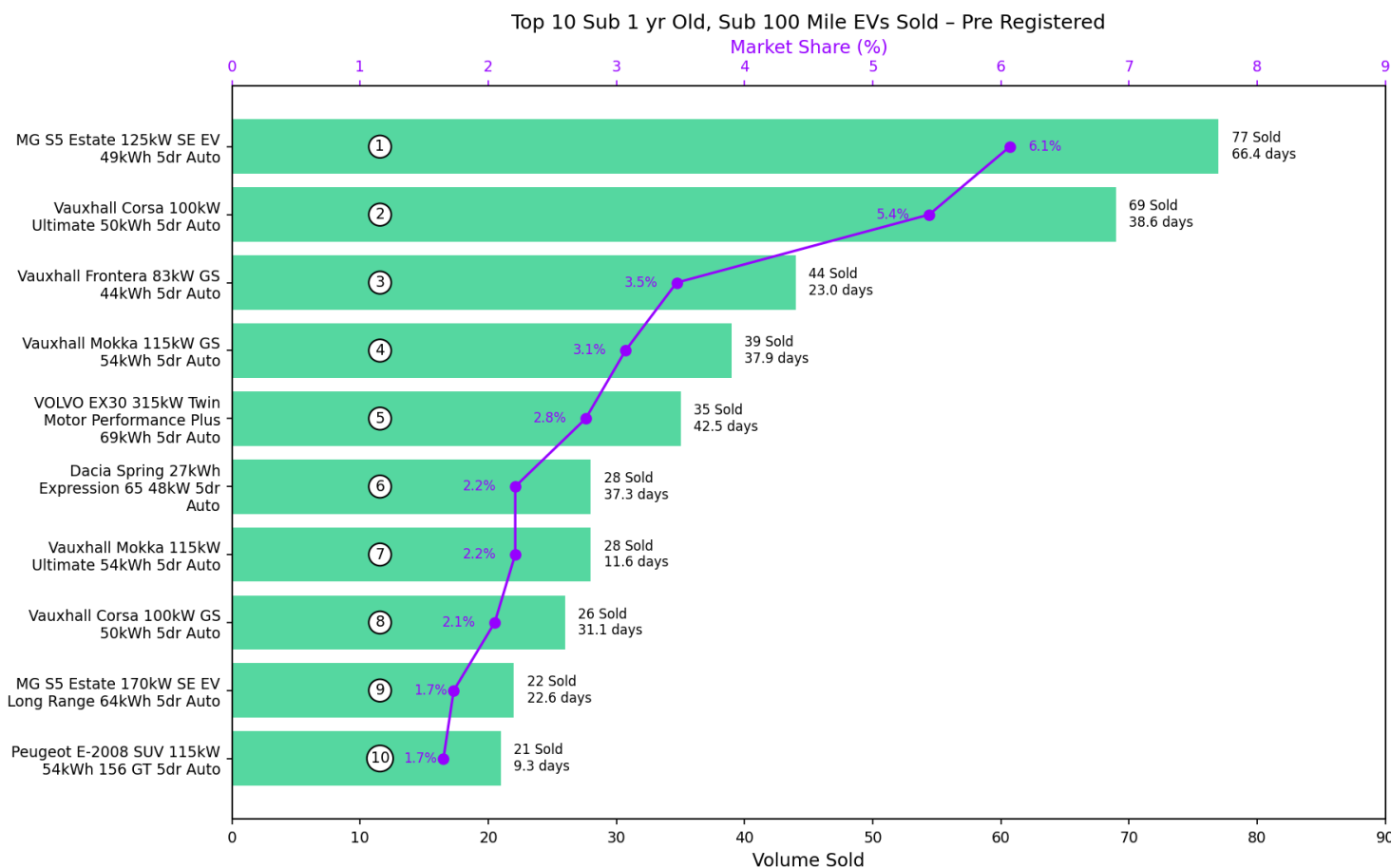
The volume of pre-registered cars sold in March increased by 9.7% overall although for the Top 10 the volume was just 0.1% higher than in February which suggests there was a wider range of cars pre-registered before the end of the new plate month.

Overall it is worth noting that 7 of the top 10 pre-registered cars sold were from the Stellantis Group which is three more than last month. The other three models were all MG's. The average sale price was 3.4% higher at £20,148 with the most expensive model being the eighth place Vauxhall Grandland at £26,952.

The total market share for the Top 10 dropped by 0.7% to 14.5% and the average days to sale increased by almost a day to 31.9.

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:-



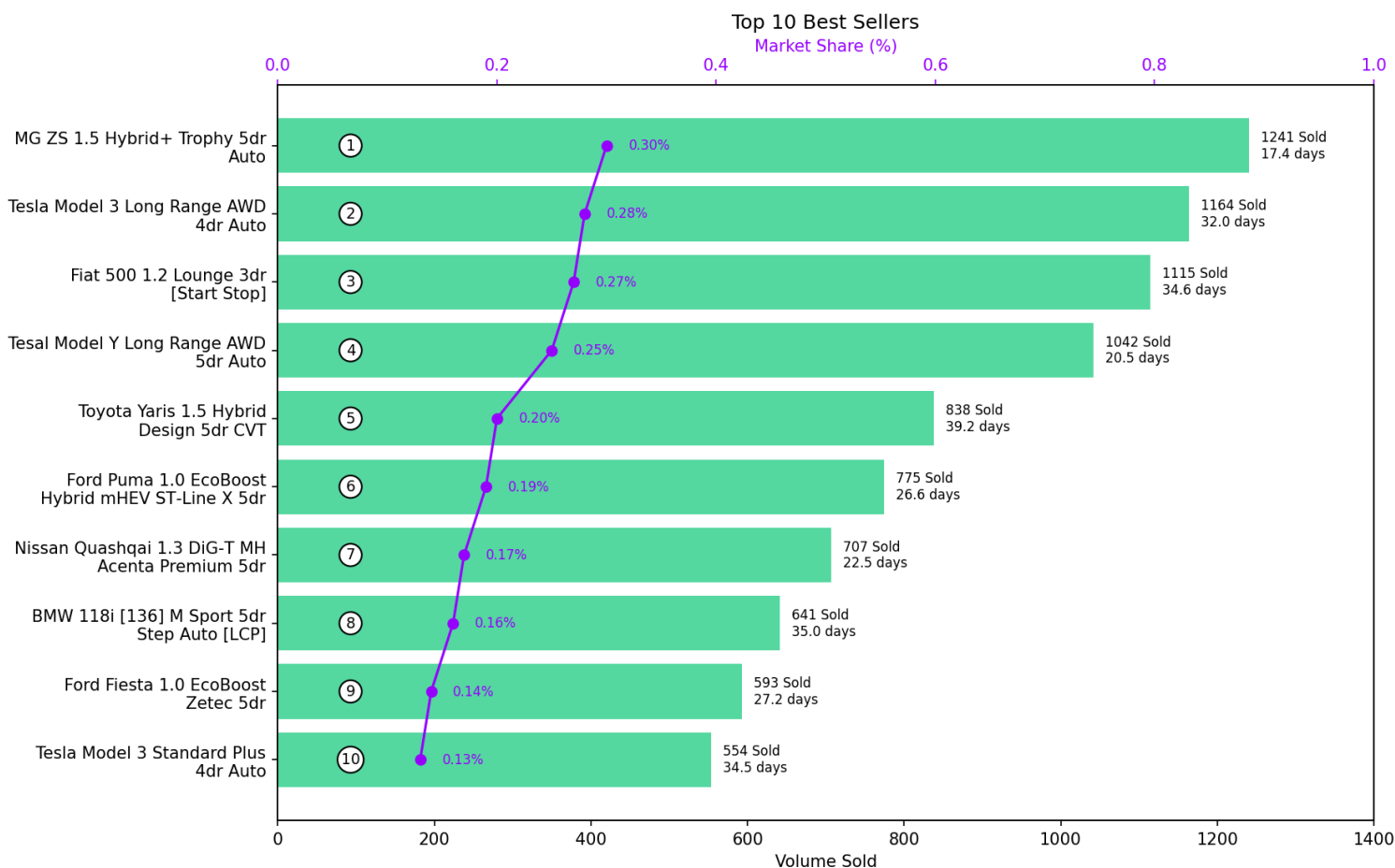
Data Powered by Brego Insight

The March data reveals that the volume of the Top 10 pre-registered EVs increased by 39.4% which on the face of it sounds alarmingly high. Although this does signal a marked shift, the actual volume increase was 110 units overall. The average sale price dropped by 4.6% to £20,057 largely due to the number of Vauxhall Corsa's and the Dacia Spring that have made the Top 10 for this month. The days to sale improved significantly dropping by 8.2 days to a figure of 32 days whilst the market share for the Top 10 increased by 1.6 percentage points to 30.7%.

This month Stellantis held six of the Top 10 spots up from four in February and a majority share as also found in the previous Top 10 Best Selling Pre Registered cars chart. It seems that Stellantis is still overproducing cars and setting some perhaps over optimistic dealer targets.

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 Brego Insight

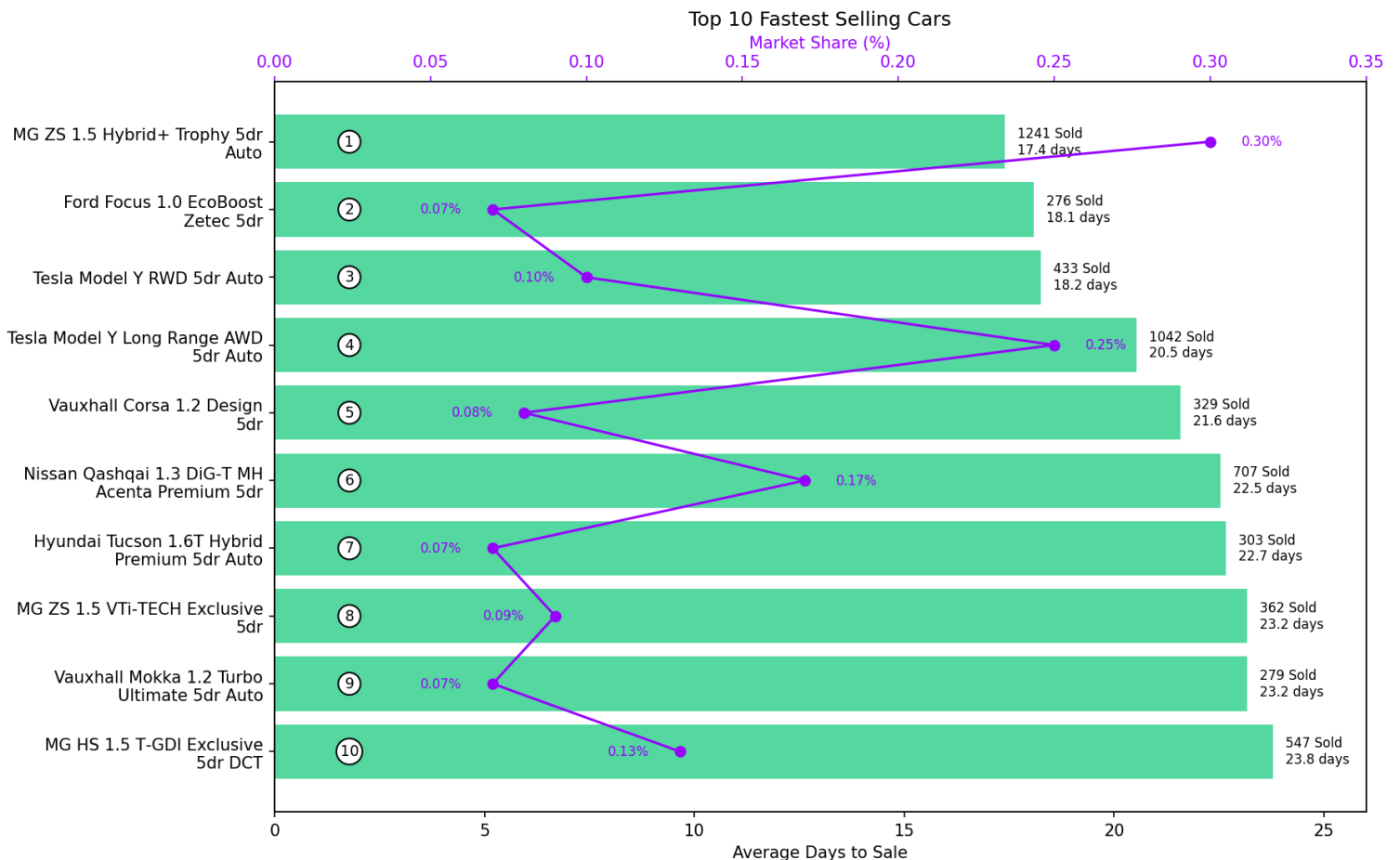
The March Top 10 Best Sellers were almost exactly the same as in February, albeit in a different order. There were two new entries in the form of the Ford Fiesta 1.0 EcoBoost Zetec 5 dr and the Tesla Model 3 Standard Plus which took ninth and tenth spot.

Looking at the high level detail, the volume sold of the Top 10 increased by a notable 23.9% when compared to February although total market share increased by just 0.2 of a percentage point to 2.1%. From an average price perspective this fell by 6.8% to £15,092.

The biggest individual change in the data came in the form of a 5.2% increase in the average price for the seventh placed Nissan Qashqai, highlighting that newer and more expensive variants had been sold during the month.

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:-

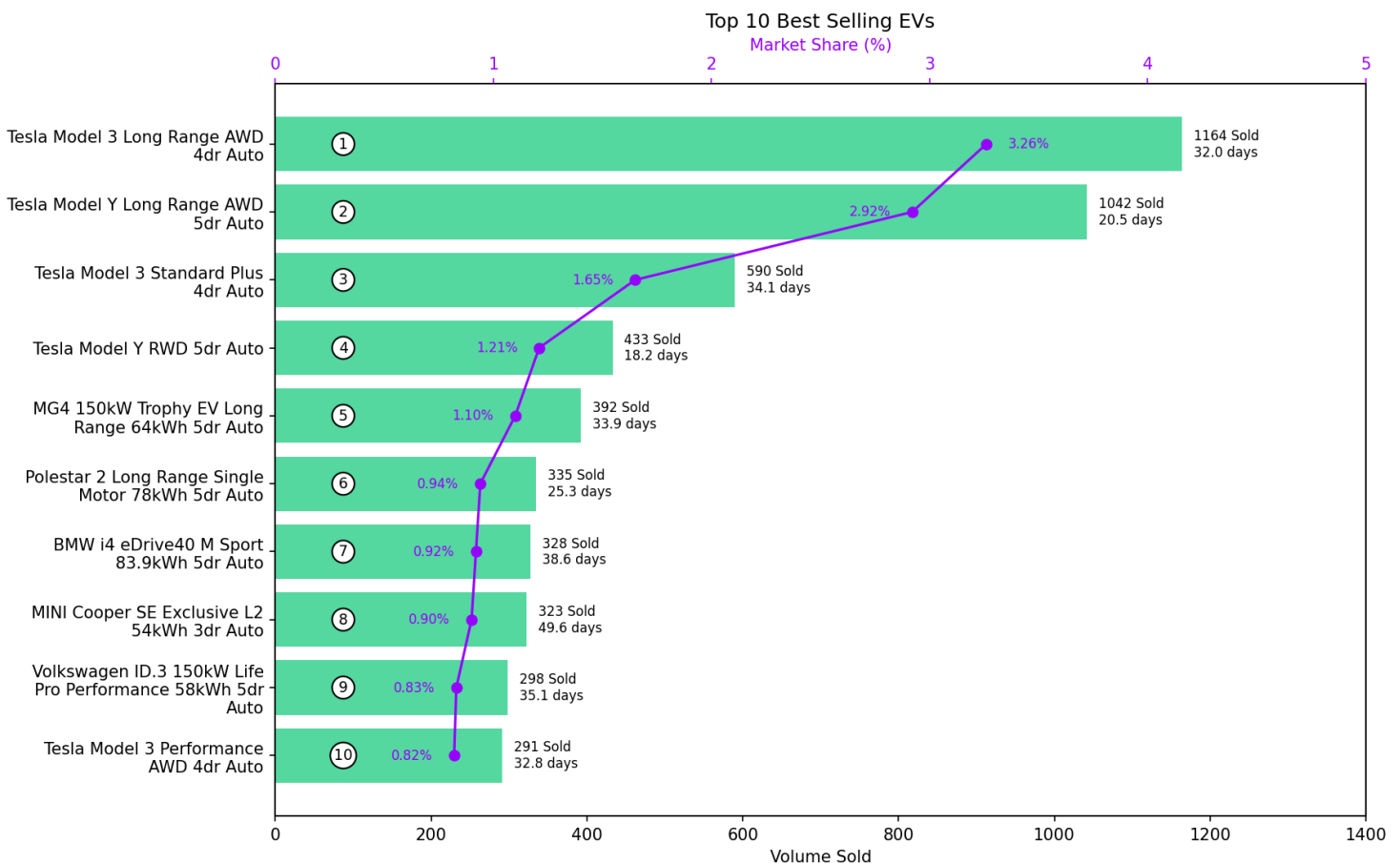


A very different set of data for March that reveals 9 of the Top 10 Fastest selling cars were new entries to the list. The common car was the MG ZS 1.5 Hybrid+ Trophy that rose to be the fastest selling car from fourth spot in February.

An increase in the speed of sale for more mainstream cars has meant that the volume of the Top 10 list has increased by 325% to 5,519 cars and the average sale price has also jumped by 35% to £16,087. In addition the overall average days to sale increased by 3.3 to 21.1 days whilst the share of the overall market increased by 0.8 of a percentage point to 1.3%. Further analysis of the data is recommended and is likely to highlight that the average age of the cars in the list has dropped. Customers with access to the Brego Insight tool will be able to do this themselves.

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:-



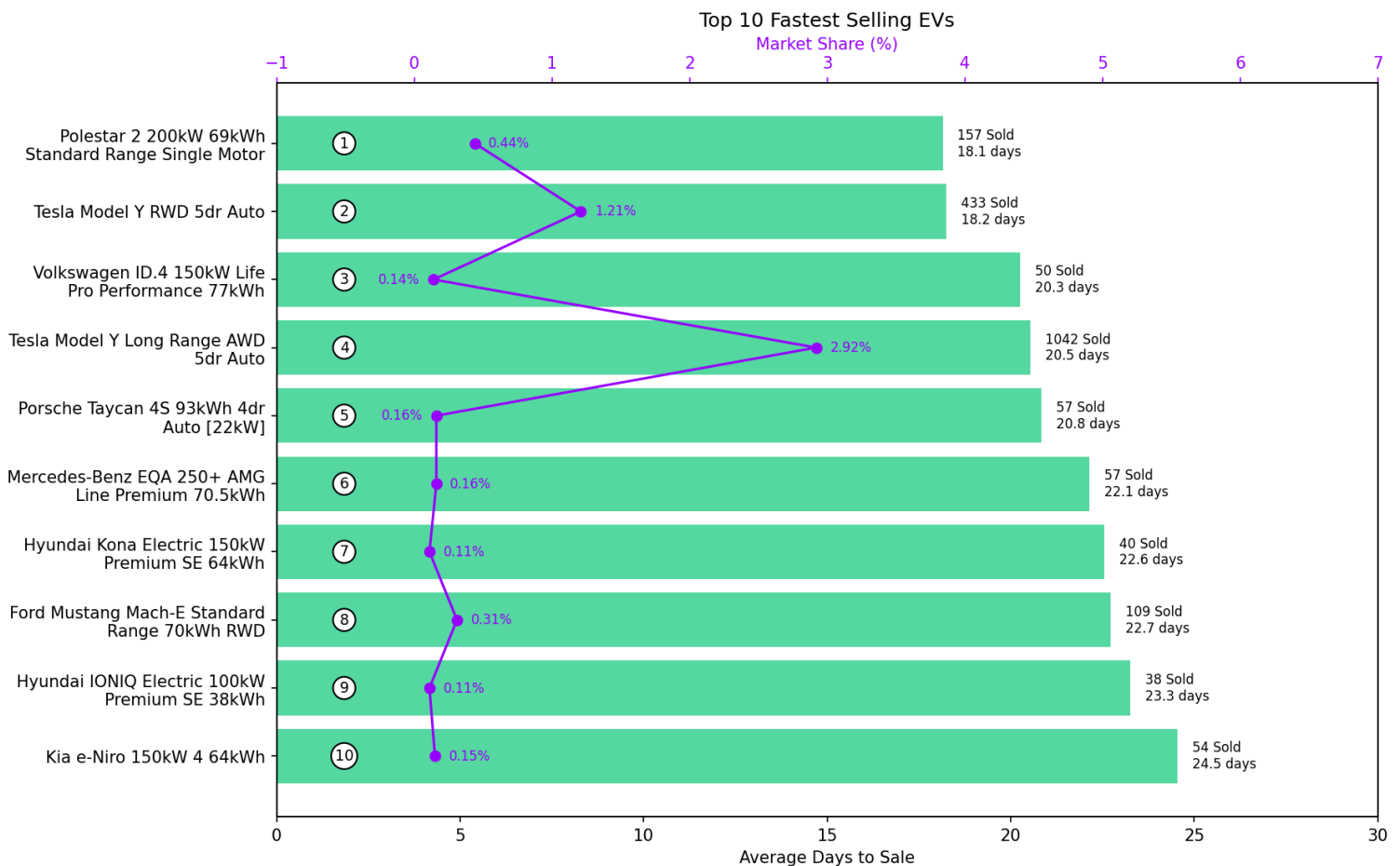
Data Powered by Brego Insight

For the third month running Tesla took five of the Top 10 Best Selling EV spots with the top 3 exactly the same derivatives as in February. There are four new entries in the form of the Polestar 2, the BMW i4, Mini Cooper SE and the VW ID.3.

The volume of the Top 10 sold increased by 39.7% to 5,196 and the average sale price increased by a minimal 0.1%. The market share was also very consistent at 14.6% reflecting a drop of 0.3 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

The data in the Top 10 Fastest EVs list is almost completely different to the February data. Only the VW ID.4 and Kia e-Niro remain in the list, albeit in different positions but with very similar data points. The largest volume seller in the Top 10 was the Tesla Model Y Long Range which recorded 1042 sales during the month and along with the the Tesla Model Y at 433 sales helped

boost the total volume sold in the Top 10 to 2037 units, an increase of 358% over the previous month. The average sale price jumped by 10.2% to £21,379 and the average days to sale improved by 6.8 days to 21.3.

The Porsche Taycan posted the highest average sale price at £50,660 and the car with the biggest market share was the Tesla Model Y Long Range at 2.9% of the total 5.7% share of all sales. It is interesting to note that the market share for ranks 5 to 10 are broadly similar.

Summary

The March automotive retail sector outperformed other retail sectors in the UK despite a somewhat unstable economic outlook that is currently heavily influenced by the global geopolitical chaos driven by the war in the Middle East. The 14.1% increase in used car sales and the 8.7% jump in used car advert volumes both indicate that dealers had a good month and this was echoed in the new car market with new car registrations improving by 6.6%. Of specific importance was the significant jump in registrations of Chinese models and specifically BYD who had a 3.98% share of the market and the Chery Group who took 5.9%. This kind of performance will see significant volumes of used Chinese cars coming to the market from 12 months time at the latest.

It is also important to note that Consumer interest in EVs has been boosted by the increase in the cost of petrol and diesel as a result of the war and the closure of the Strait of Hormuz, and this is evident in both enquiry levels and sales. April could be a difficult time for the UK economy and increases in inflation, the bank base rate, the cost of borrowing for finance and mortgages coupled with energy as a whole will put further pressure on consumer confidence and spending. It must be a “proceed with caution” message for the month of April and the cessation of the war is imperative for economic and humanitarian reasons

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.