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Car Market Insight

May 2026

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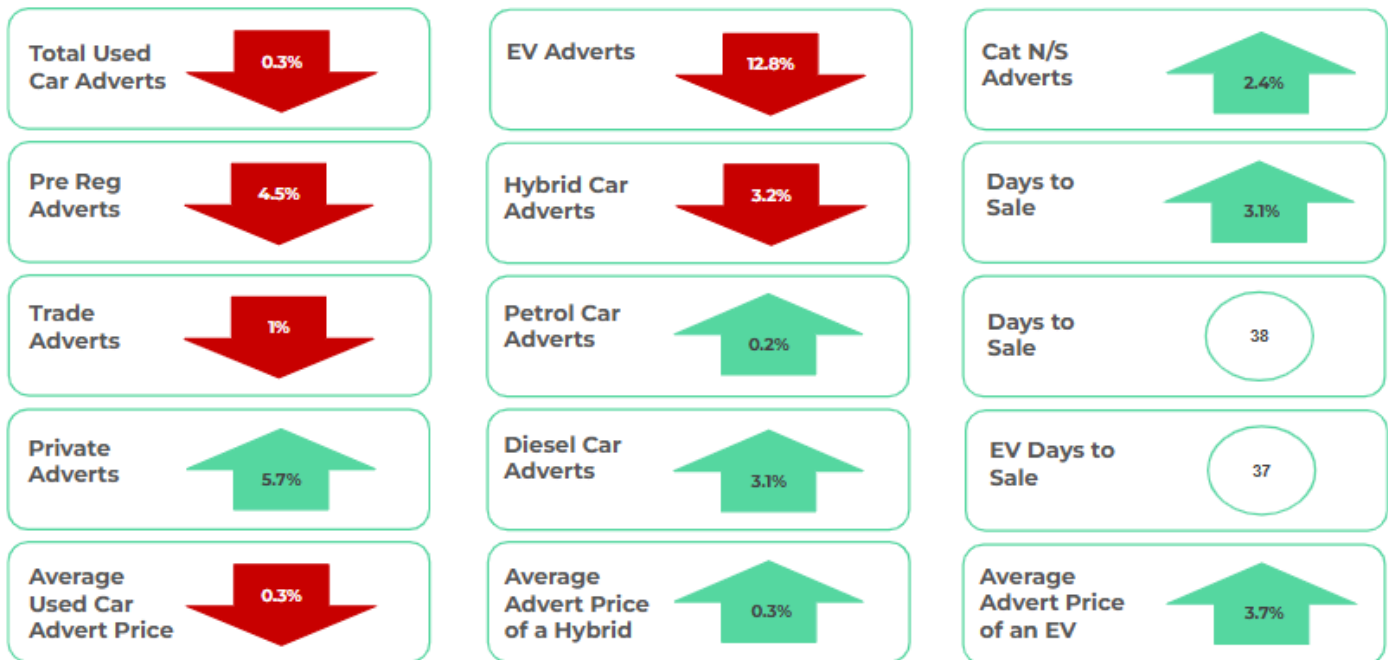
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May Monthly Car Market Insight

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



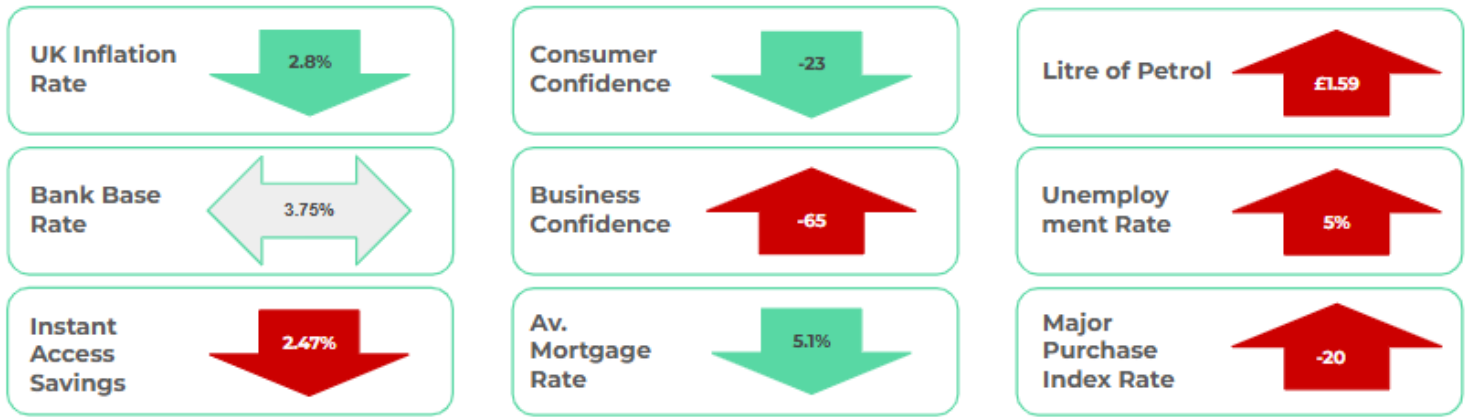
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May proved to be a more stable month in some ways with used car sales up by just 0.2% suggesting that the Auto Retail sector has found its level for the time being, albeit at a slower pace than dealers would like. One must remember that although the month-on-month sales figures were remarkably similar, the year-on-year data for the month showed sales were up by 8.9% and advert volumes were up by 7%. However, the average sale price was 4.1% lower and the average advertised price was 3.3% lower. This shows that year on year the market is stronger although the data suggests that there are not only more cheaper cars in the market, but some retail consumers are spending less money although this appears to be offset by high end activity.

The KPIs also make it clear that there has been less Pre-Registration activity with lower advert volumes over the course of the month. This is probably an anomaly as anecdotal feedback from dealers highlights this is still an issue. Looking at advert types and the data indicates lower volumes for EVs and Hybrids which supports greater consumer interest in the up-and-coming

propulsion types as fuel costs remain at an elevated level. Exploring the details is key for a true market view.

Key UK Economic Indicators



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

The May economic KPIs show a contradictory view of the economy. On the positive side the inflation rate remained at 2.8% where common sense suggested this should have risen given the marked increase in the cost of living. This increase was driven by transport costs which rose from 4.5% to 6.8% and consists of motor fuel, aviation fuel and VED increases amongst other things. However, this was offset by lower inflation for food and non-alcoholic drinks with a figure of 2.2%. However, it is almost a certainty that this will change on June 17th when the next inflation rates are announced.

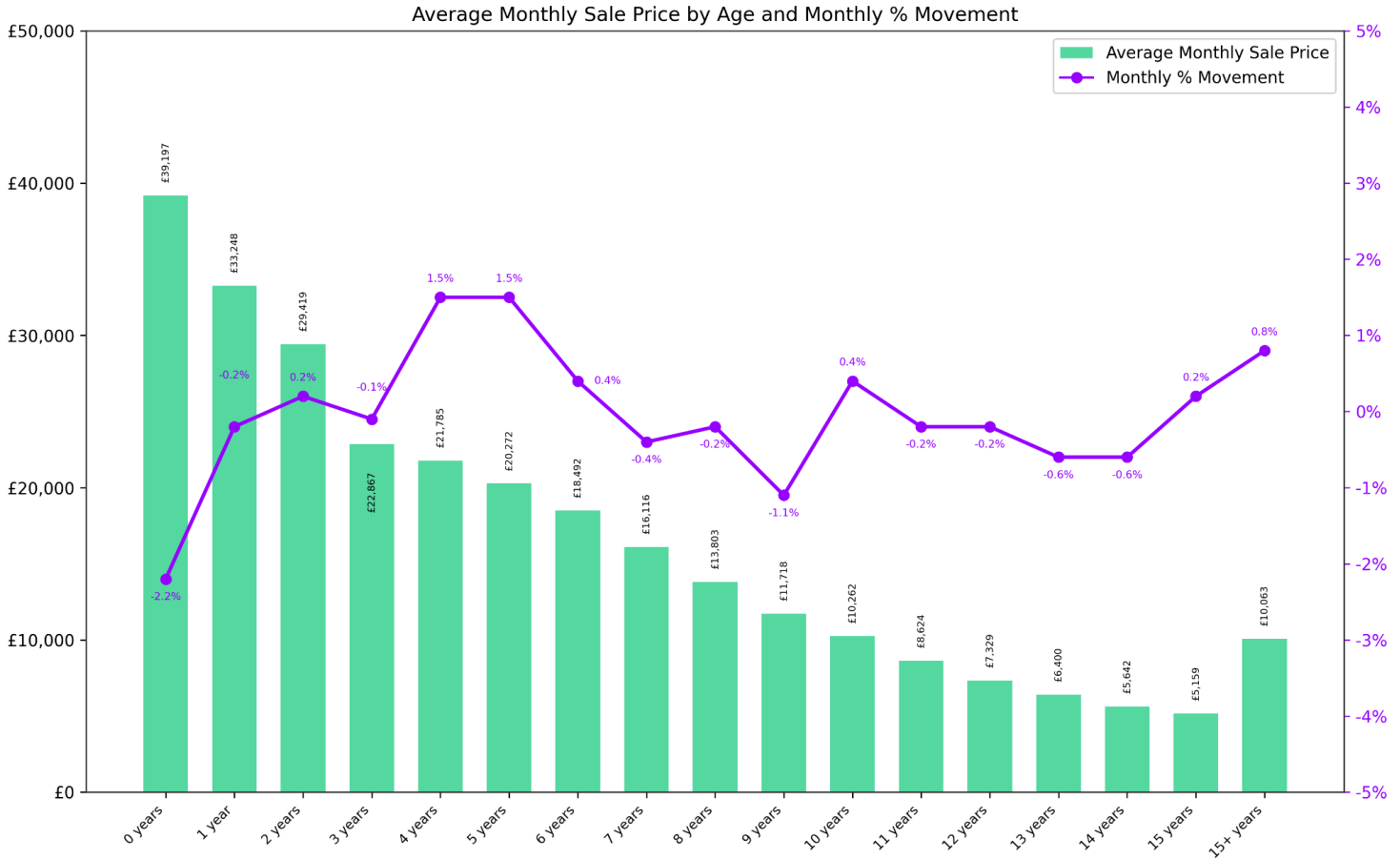
A further positive was that the Bank Base Rate remained at 3.75%. Many had feared that this would rise and predictions were for a jump up to 4%. With the generally stable conditions in the Middle East, the fear of a rate increase has subsided somewhat, and the next rate decision will be announced on June 18th.

However, Business Confidence remained low as UK companies battled with increased costs and reduced order books. Unemployment increased and is set to go further in the coming months. In addition, the savings rates continued to fall, and the housing market remained stagnant despite a minimal drop in the mortgage rates. The major purchase index also declined further, and the cost of fuel edged up a little further which came as a surprise to many as the cost of a barrel of oil dipped slightly.

Finally, despite all these things the Consumer Confidence rate improved to -23. This is interesting and there is evidence that consumers are still spending money across the whole economy. Of note was the fact that whilst footfall and enquiries in the Automotive sector were changeable, demand was clearly still there but driven by promotional finance and discounting of both new and used cars.

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 May. 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

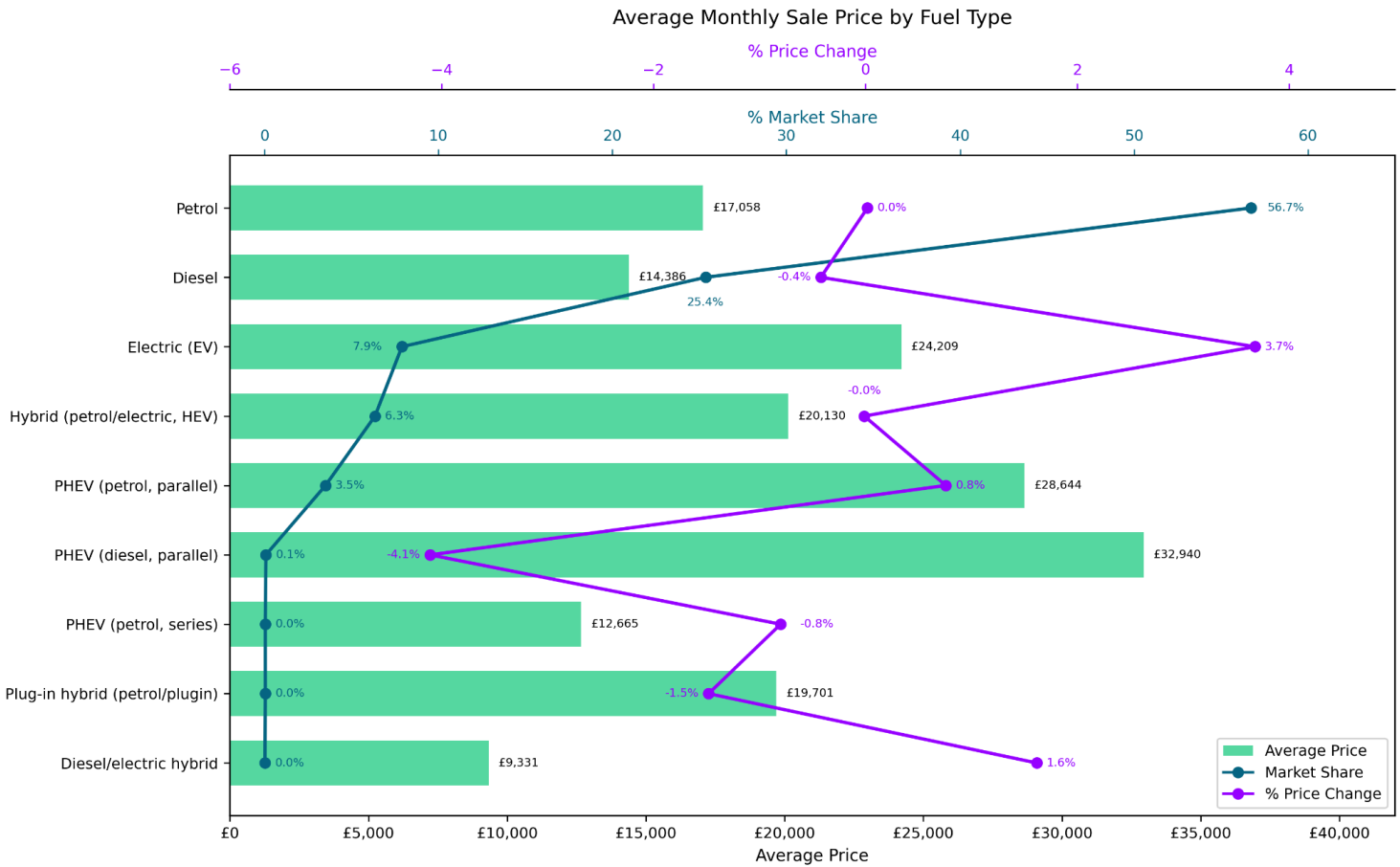
This chart is important because it quantifies the monthly change in the market experienced during the month of May. As expected, the average price shown by the green bars declines as the vehicles age, with an uplift for 15+ year old cars that will include some higher priced classic cars. This is something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

Overall, the average sale price across the market remained largely stable, although the detail shows some interesting pockets of change by age. Most notable was the drop in average sale price for sub one year old cars which dropped by £888 or 2.2% highlighting that cheaper cars were in greater demand. There was also an increase in the average sale price of four and five year old cars.

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.



Data Powered by Brego Insight

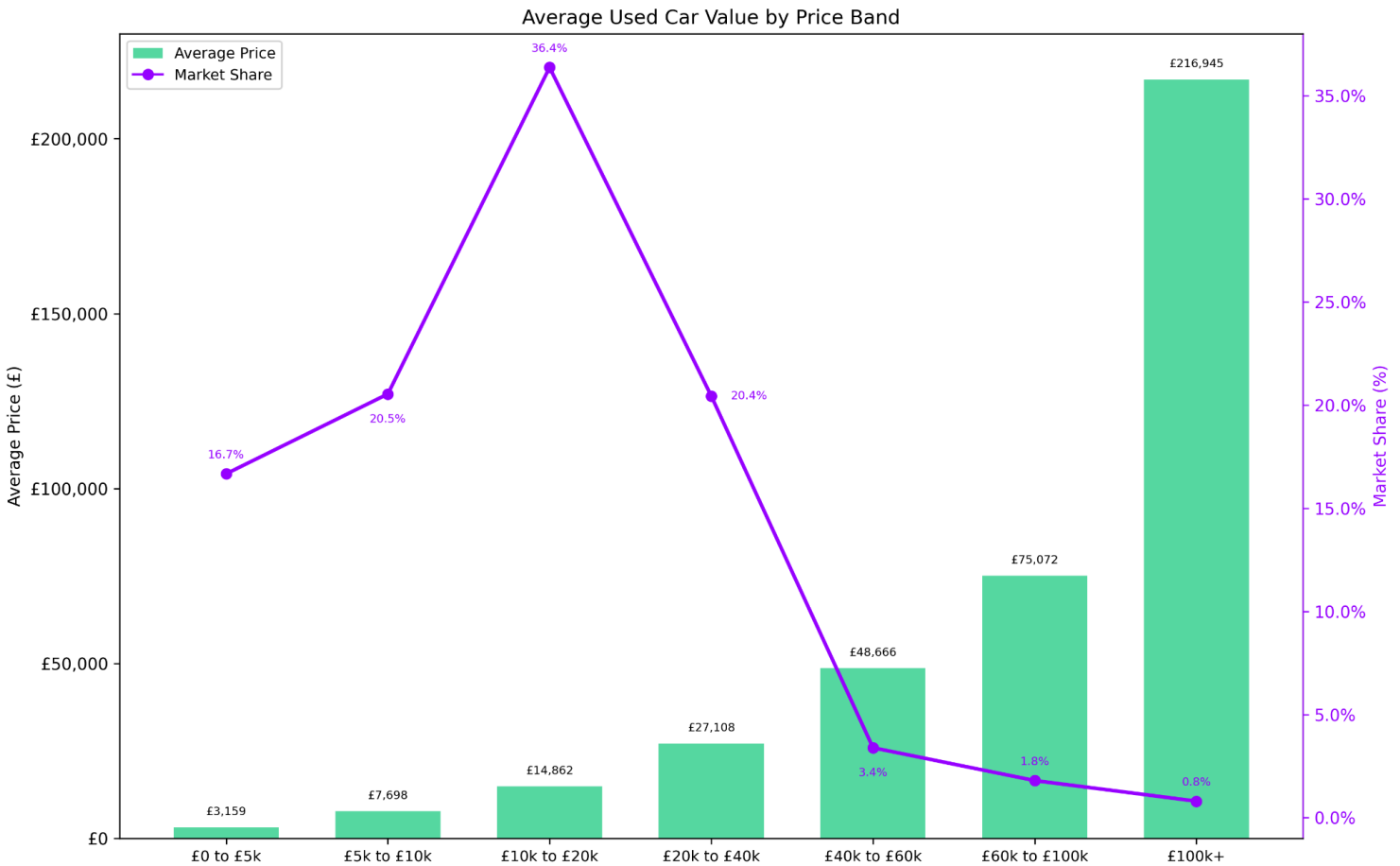
Reviewing the market by fuel type is important at the moment as the Auto sector continues to migrate away from fossil fuel cars. May showed an interesting shift in the number of adverts for diesel cars with an increase of 0.9 percentage points over April suggesting that either there were more cars available or that sales slowed. Conversely the volume of EV adverts dropped by 0.9 percentage points and given we know there are more EVs coming to market this reflects greater demand and higher sales.

From an average price perspective, the biggest change was for diesel PHEVs which saw a drop in the average price of 4.1% to £32,940 and although this propulsion type holds 0.7% of the total market share it is somewhat surprising. Of the key fuel types EVs showed an increase of 3.7% to

£24,209 and this highlights that it was cheaper EVs that sold in greater numbers or that more higher priced cars came to the market.

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

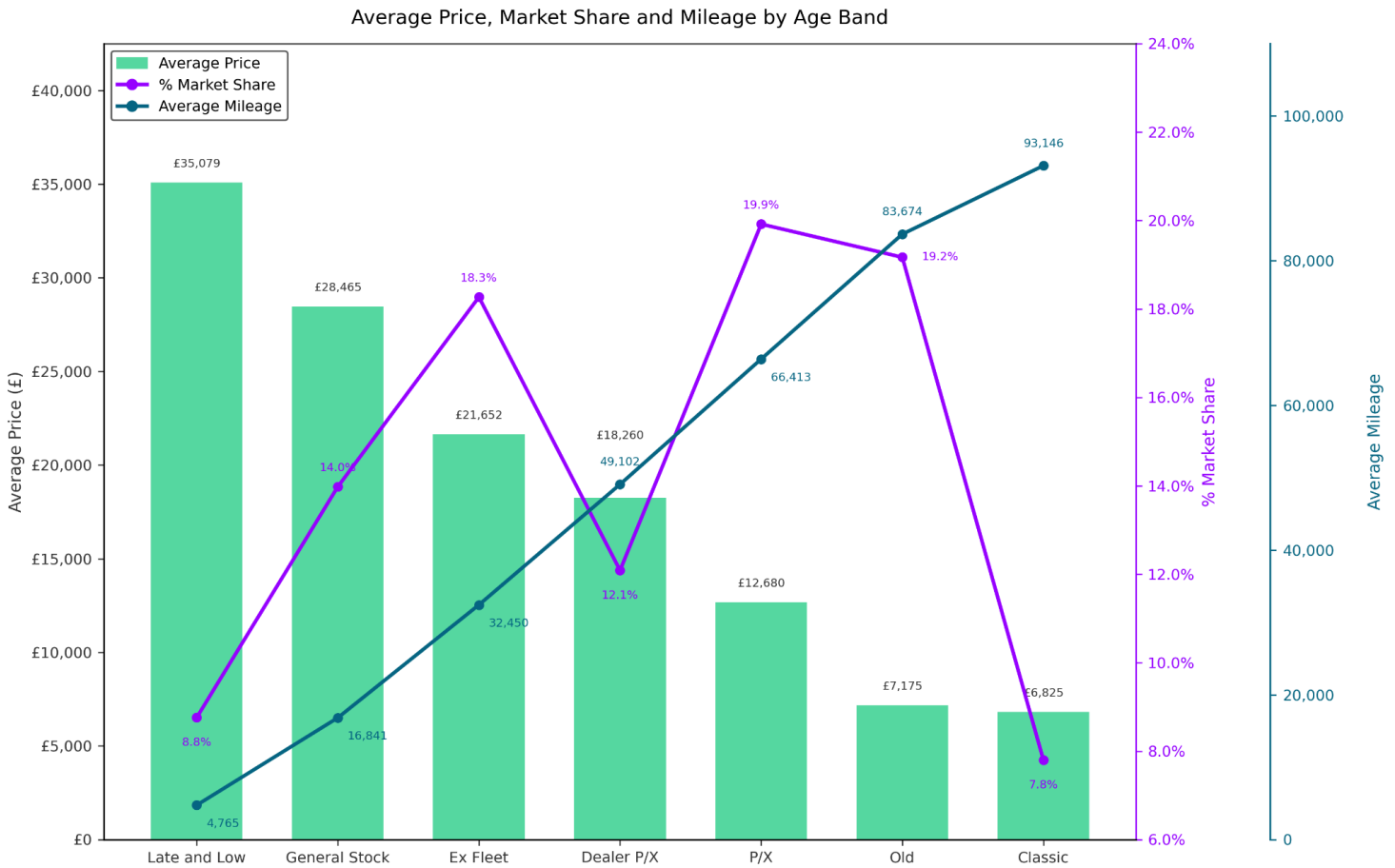
This month's data highlights a couple of important changes to the shape of the market with an increase in the number of cheaper cars advertised for sale. This has primarily affected the sub £5k and the £5k to £10k price bands both of which saw a 0.7 percentage point increase. This was at the expense of the £10k to £20k and £20k to £40k price bands that both experienced a 0.6 percentage point decrease.

Broadly speaking the average price in most price bands increased slightly with the biggest increase coming for the £100k+ price band. This suggests that more high-end specialist and performance cars came to market, which given the current economic situation should not be a surprise. This warrants further investigation to establish whether there are any specific trends

and could be seen as mildly worrying for lenders and dealers that service this end of the Auto sector.

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

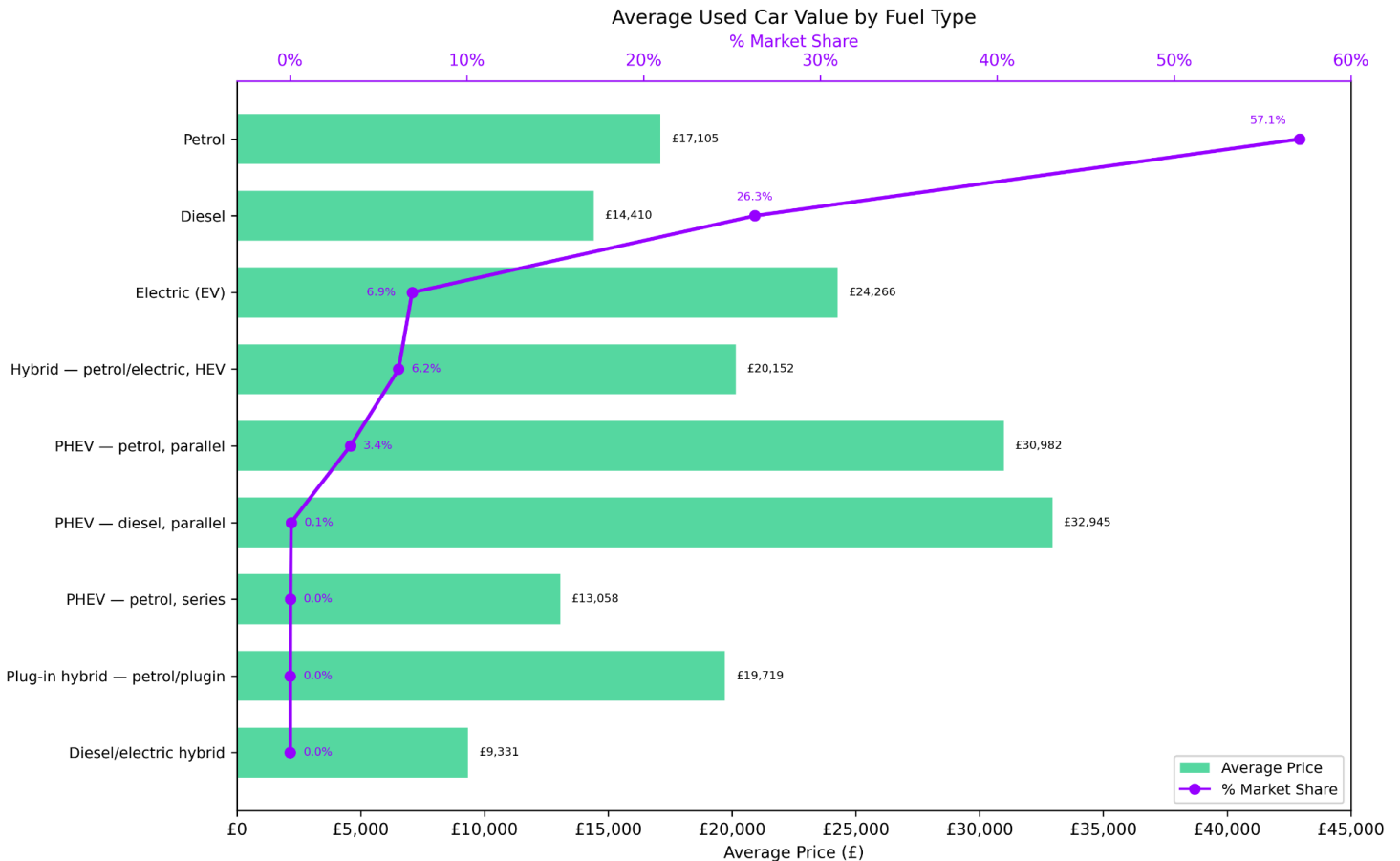
Whilst we have already established there may be an issue with adverts and demand for cheaper priced cars, using this lens on the data confirms that the volume of seven year and over cars in the market has increased. When compared with April General Part Exchange and Classic Cars saw an increase of 0.5 percentage points each and Old Cars 0.8 of a percentage point. It is also worth noting that the average advert price remained with 0.5% of the pricing in April for all but Classic Cars which dropped by 1.8%.

This could imply that sales have either slowed a little or consideration must be given to the fact that there may have been an increase in the number of cars coming to the market. This is likely to

be off the back of the impressive new car registrations over the past few weeks which have generated an uplift in part exchanges and as such temporarily exceeded consumer demand.

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 to the right of the bar and the purple line showing the % of Market Share.



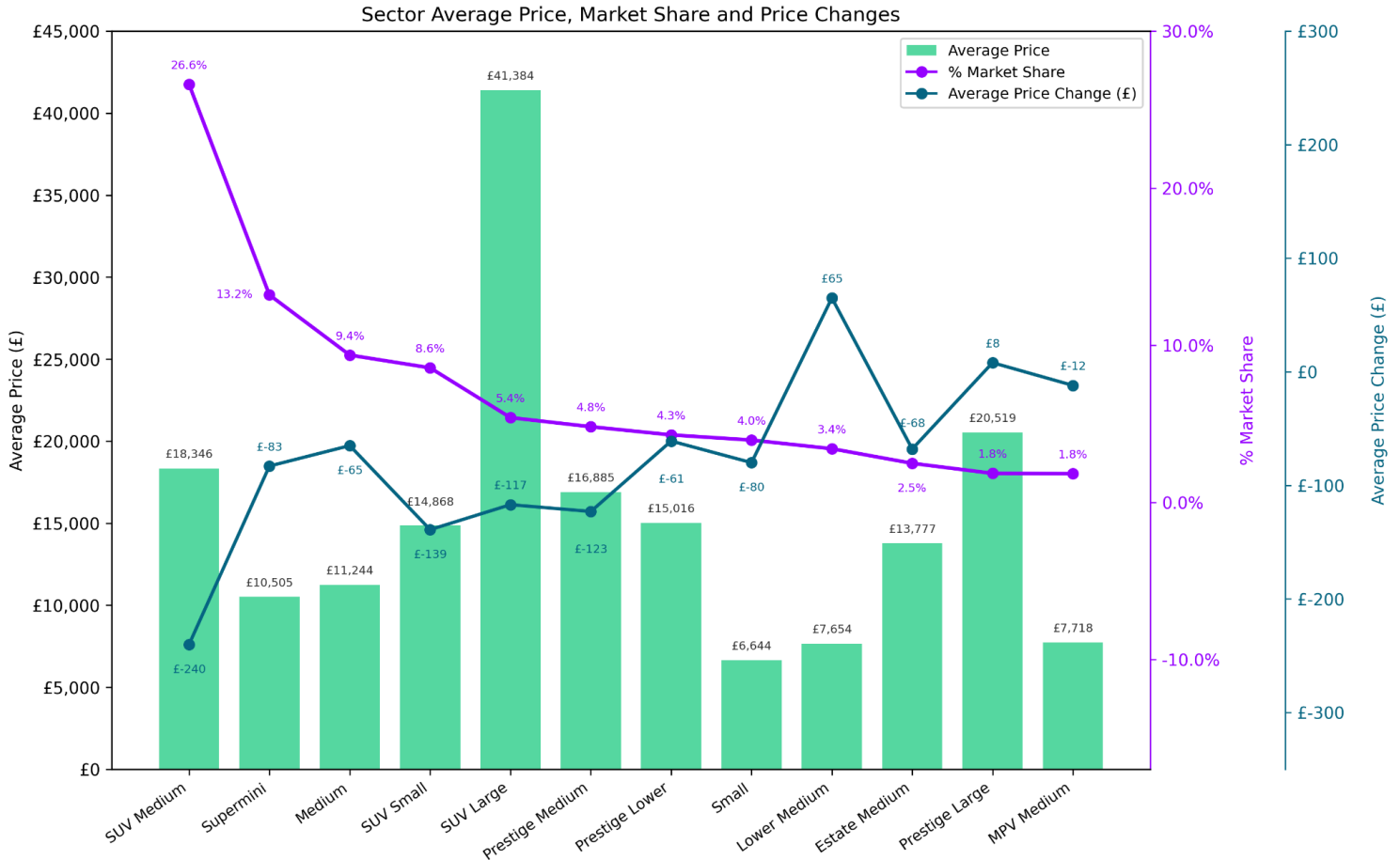
Data Powered by Brego Insight

For the second month running this data shows a marked change in the volume of EVs on sale with a drop of 12.7% month on month and has resulted in a 0.9% drop in the market share. It has been widely reported that used car buyers have shifted their attention to EVs due to the significant increase in the cost of petrol and diesel and this data validates the anecdotally based press coverage. The question is whether this will be sustained or whether it is a short-term reaction to offset running costs and balance the overall increase in the cost of living.

Our data would suggest the latter based on the fact that in May the EV percentage of total used car sales dipped to 7.8% from 9.6% in April. It is worth noting that this is still an increase on the January and February figures of 6.2% and 6.8% respectively before jumping to 8.7% in March. Therefore, there is a chance it is a temporary blip, but it is certainly something to watch going forward.

Used Car Performance by Market Sector

This is a fairly detailed chart and shows the Average Price 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.



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This is always an interesting view of the market and in May the top 12 sectors covered 85.7% of the whole market, down 0.3 of a percentage point on April. This is the third month in a row this has declined at this rate and highlights that consumers are buying more cars outside of the Top 12 sectors. The entry of Prestige Large and MPV Medium at the expense of the Prestige Estate Medium and the Prestige Coupe Medium sectors highlights this.

From an average price perspective, the biggest change in pound note terms impacted the SUV Medium sector with a decrease of £240. However, in percentage terms Small cars showed a decrease of 3% reversing the increase of 2.5% in April. In market share terms the biggest changes were for SUV Large which showed a 0.1% increase at the expense of Prestige Medium that experienced a 0.1% decrease.

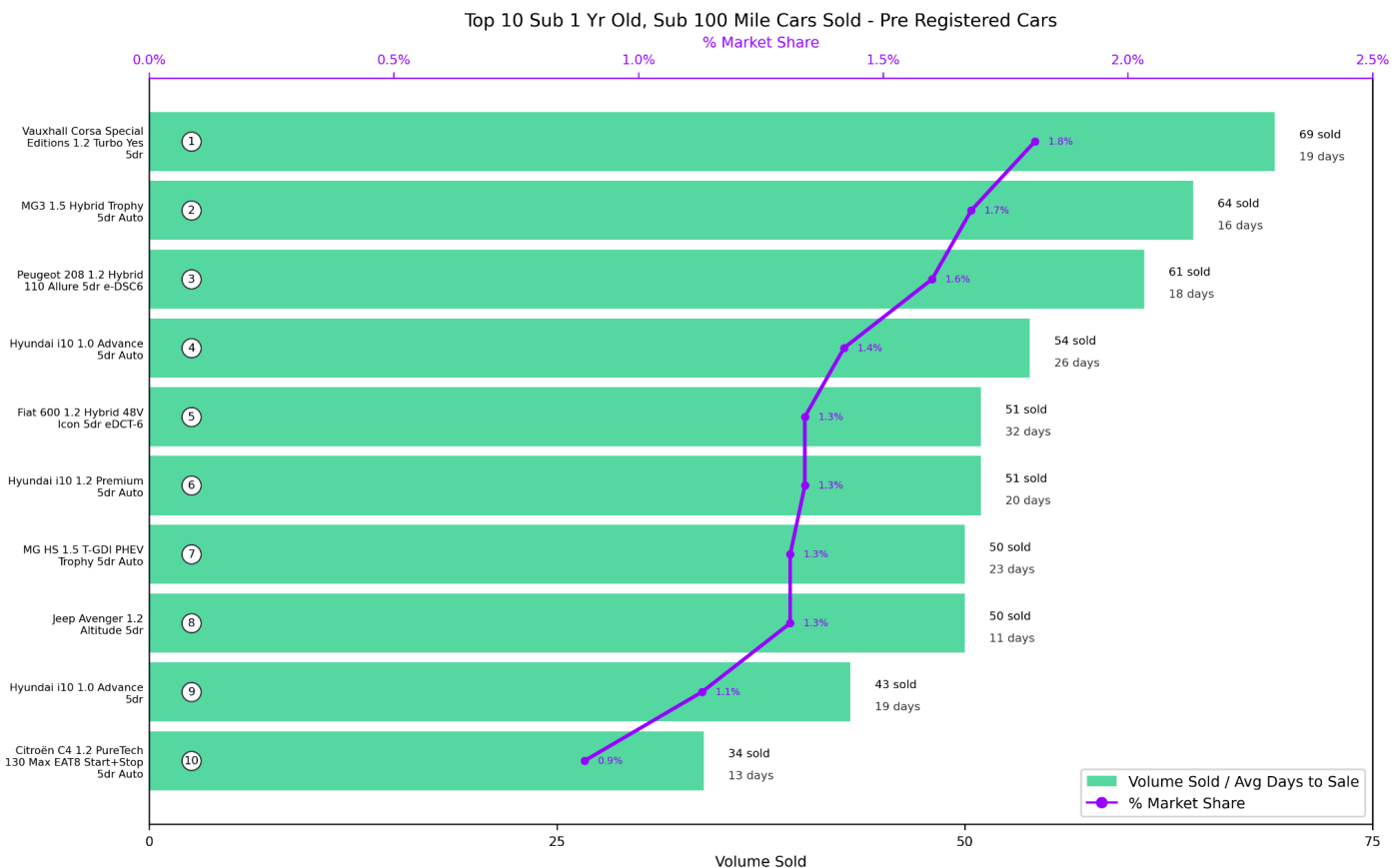
For context, the Best-Selling Cars in the Small Car sector for the month were: -

Rank	Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	Fiat 500 Hatchback	2,739	15.9%	£4,866	28.3
2	Hyundai i10 Hatchback	2,328	13.5%	£9,037	29
3	Kia Picanto Hatchback	1,712	9.9%	£8,811	31.4
4	Toyota Aygo Hatchback	1,580	9.2%	£6,643	28.7
5	Toyota Aygo X Hatchback	1,087	6.3%	£13,463	38.7

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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 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

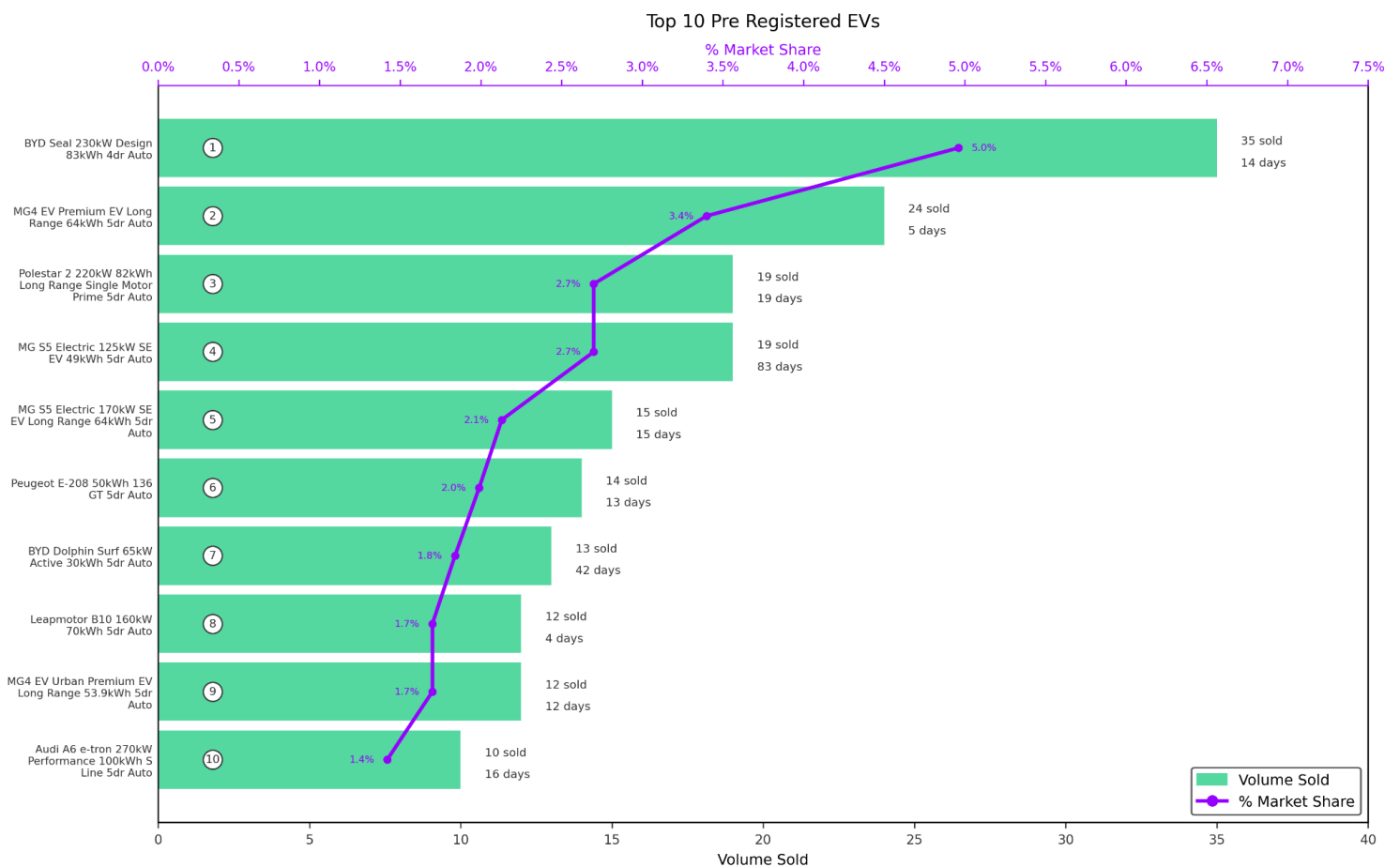
In May the volume of the Top 10 Pre-Registered cars dropped by 19.3% off the back of a 24.9% decline in April. This is combined with an overall market drop of 4.5% and highlights that

Pre-Registration has slowed although this is almost certainly a blip as recent trends show this to be increasing and a necessary evil to enable dealers to meet ambitious new car sales targets.

Of the Top 10 there were six cars carried over from the previous month with the Vauxhall Corsa Yes remaining at the top of the table. The new entrants were the MG3 Hybrid, Peugeot 208 Hybrid, the Jeep Avenger, and the Citroen C4. These replaced the Vauxhall Corsa Design, the MG3 petrol SE and HS and the Volvo EX 30. The latter has been one of the most Pre-Registered cars in the market for some months, so this is good news for the brand.

Top 10 Best Selling 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

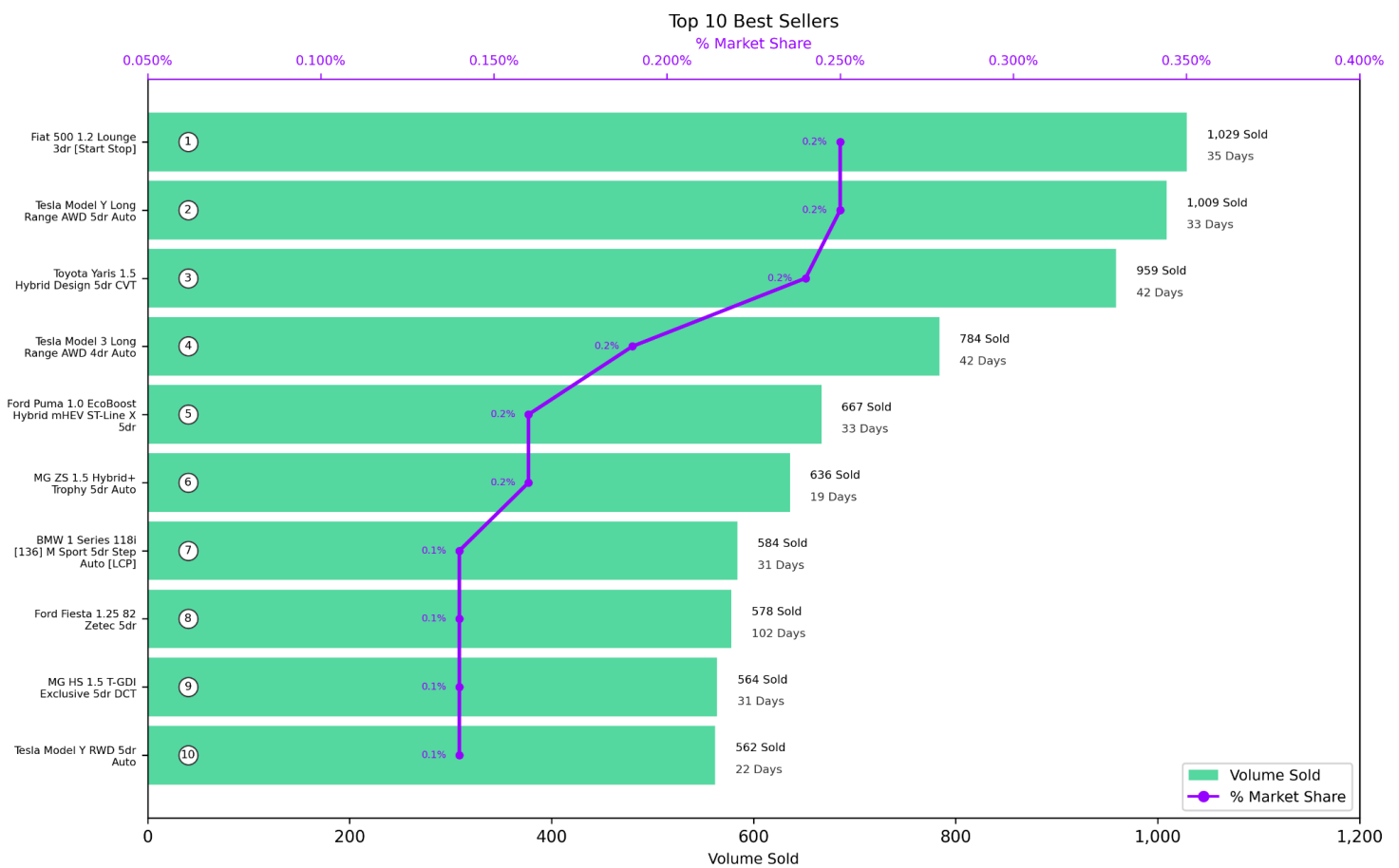
The volume of Pre-Registered EVs dropped by a significant 42.5% month on month clearly indicating that fossil fuel cars were more difficult to sell. The cars in the Top 10 also changed significantly with only the MG S5, Peugeot E-208 and the Leapmotor carrying over from April. The good news is that there is just one Stellantis Group car in the top 10 this month. However, it

is interesting to note that there are two BYD models in the list which is rare. There are also four MG models in the list and a surprise entry in the form of the Audi A6 e-Tron.

The Average Price of the Top 10 has increased by 12.8% to £25,871 which is largely due to the entry of the Audi whilst the Average Days to Sale dropped by 6.3 to 22.4 days. This has been skewed by the significant 82.3 days to sale for the MG S5 which seems to be struggling to find buyers.

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

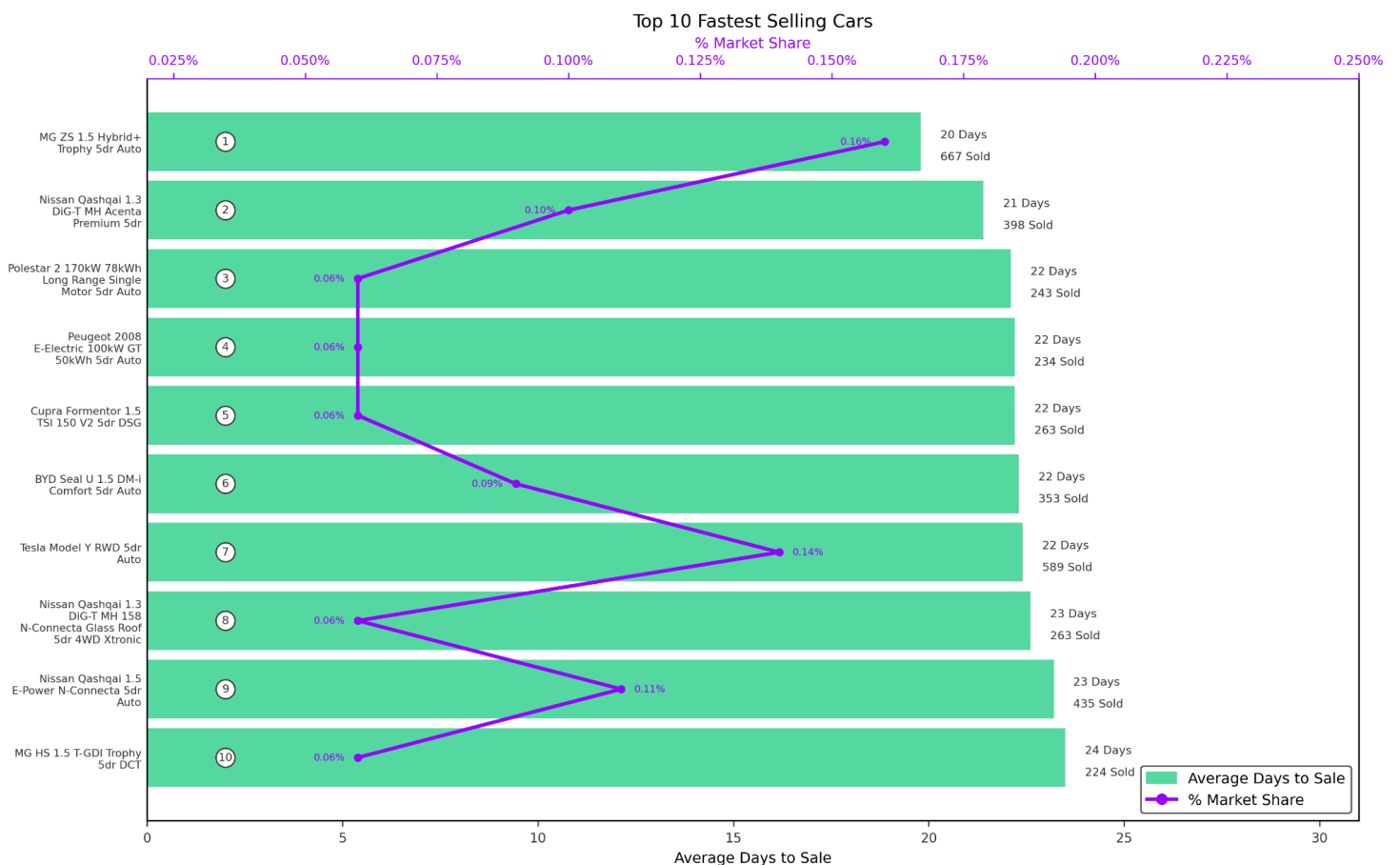
The May Top 10 Best Sellers were largely similar to April although there were two new additions. In 8th spot the Ford Fiesta joined the list and the Tesla Model Y RWD took 10th spot at the expense of the Tesla Model 3 Standard Plus and the Ford Fiesta 1.0 EcoBoost Zetec.

In total the Top 10 took a 1.8% share of the whole market sales volume which was down 0.3 of a percentage point on the April figure. As highlighted earlier in the report buyers seem to be looking at a wider selection of cars these days. The Average Sale Price increased by 5.1% month on month and the most expensive car in the list was the Tesla Model Y Long Range at £24,492 followed by the Tesla Model Y RWD at £22,492.

Of note was the fact that the Average Days to Sale increased by 8.7 days to 39.1 which was a bit of a surprise although it is clear that this has been skewed by the 102 day average for the 8th place Ford Fiesta. If you exclude that car it drops to 32 which whilst quicker than the whole market is still 1.7 days longer than in April.

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: -



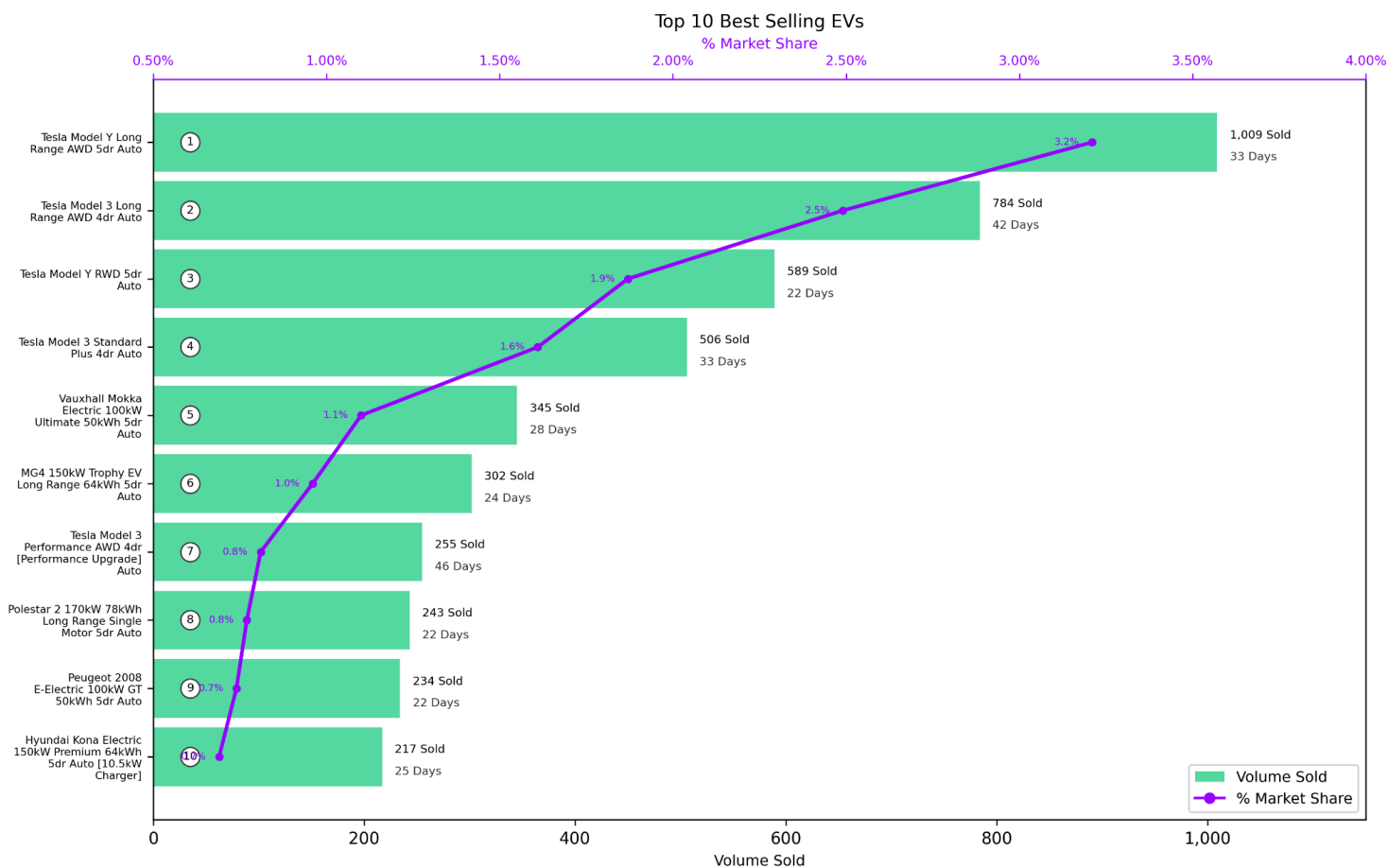
Data Powered by Brego Insight

Looking at the Top 10 Fastest Selling cars there is a very different selection of derivatives when compared to April. Only the Tesla Model Y RWD, the Nissan Qashqai E-Power and the MG HS have carried over leaving seven fresh cars in the list.

These Top 10 Fastest Sellers took 0.9% of the total used car sales volume in May which was 0.1 of a percentage point less than in April. In addition, the total volume of cars in the list was 10.8% lower than in April. The Average Sale Price was £18,933 which was 16.1% higher than the previous month largely due to the BYD Seal in 6th spot which had the highest Average Price at £26,476.

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

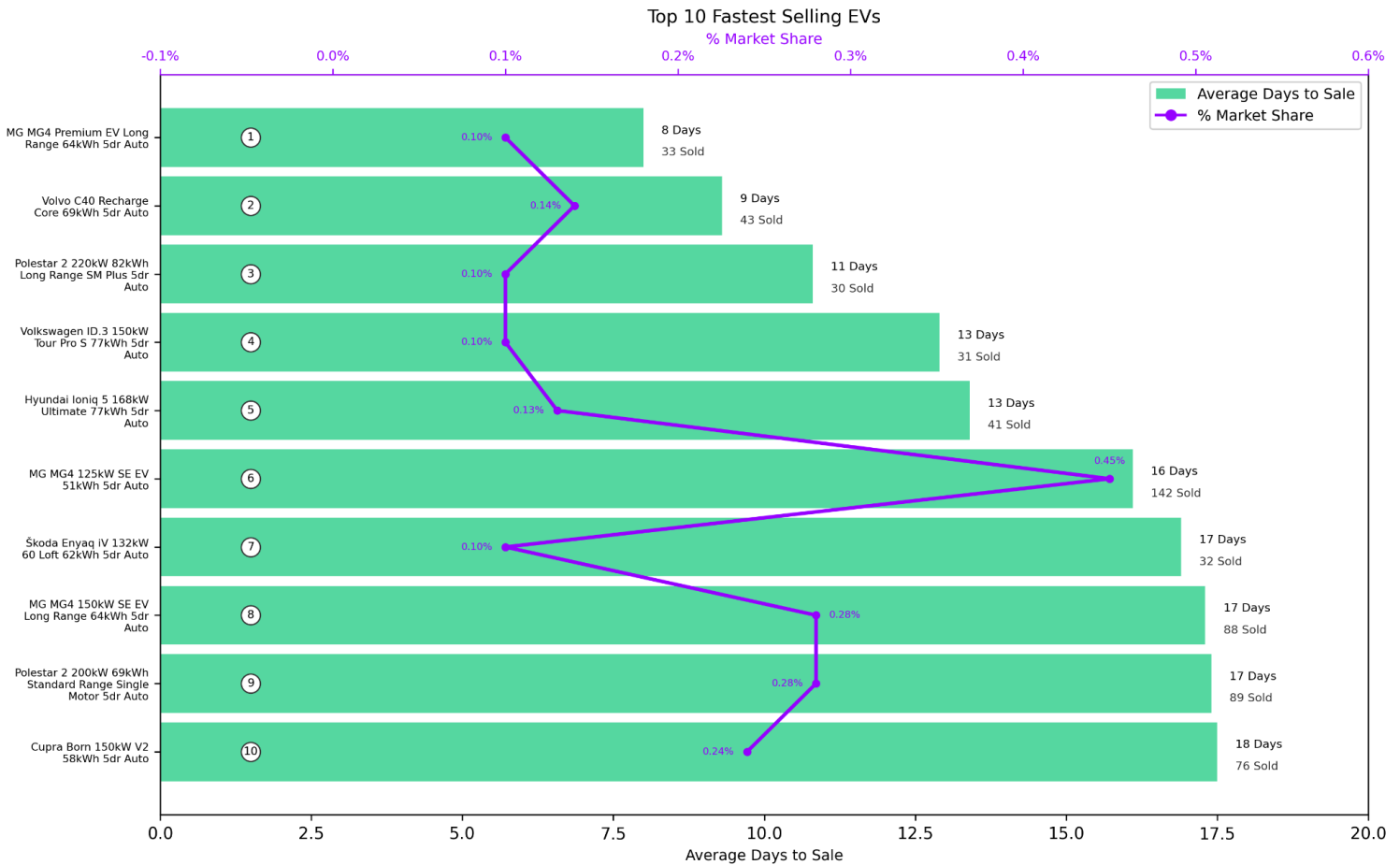
Tesla continues to dominate the Top 10 Best Selling EV list with five cars spread over the Model 3 and Y ranges. The May data has three new entries with a Polestar 2, Peugeot 2008 and a

Hyundai Kona taking 8th, 9th and 10th spot at the expense of a Mini Cooper, BMWi4 and an Audi Q4 that all made the list in April

In volume terms the Top 10 sales dropped by 19.7% and took a 14.2% share of the total used EV sales for the month. The average sale price also dropped by 11.1% to £17,314 and this was due to the BMW i4 dropping out of the list which had an average sale price of just over £31,000 in April. The Average Days to Sale improved by 1.4 days to 29.8 which is some way below the average of 37 for the month for all EVs.

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. The data is based on a minimum of 30 sales per derivative: -



Data Powered by Brego Insight

The Top 10 Fastest Sellers have all changed for May except for the Polestar 2 which dropped one place to 9th. The fastest selling was the MG 4 Premium Long Range at just 8 days to sale, and it also commanded the highest Average Sale Price at £21,861. The less luxurious SE version in 6th

place had the lowest Average Sale Price at £11,835. Of note is the fact that MG had three models in the Top 10 in May.

Overall, the Average Sale Price was £17,590 and that was 12% lower than in April. These ten cars also took 1.9% of the total used EV sales in May which was 0.2 of a percentage point more than the previous month. From an Average Days to Sale perspective this reduced to 14 days for May which was 2.9 days quicker than April.

Summary

May proved to be an interesting month for both the Auto Sector and the economy. The resilience of used car sales remains intact, and one has to say that it is refreshing to find an industry where when faced with lower footfall and reduced online enquiries the dealers just dig deep and get on with the job.

The econometric position was split with some negative KPIs but also the key Inflation Rate and Bank Base rate seems to have garnered improved consumer confidence and helped used car buyers to be brave and make some big purchasing decisions. The global economy appeared to settle a little too and despite the war in the Middle East and a shaky ceasefire, combined with the prolonged closure of the Strait of Hormuz a sense of normality returned.

One point of specific interest is what will happen with demand for used EVs. The report highlights that in May the % of EV sales in relation to the whole market dropped. This could be a blip but it's certainly a metric to watch in the coming months. Can the momentum be retained or will EV sales stagnate slightly?

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.