Monthly Market Intelligence

The latest insight from the UK's largest new and used car platform.

JULY 2026

Autotrader

Electrification drives new market growth and used market resilience.

New car registrations

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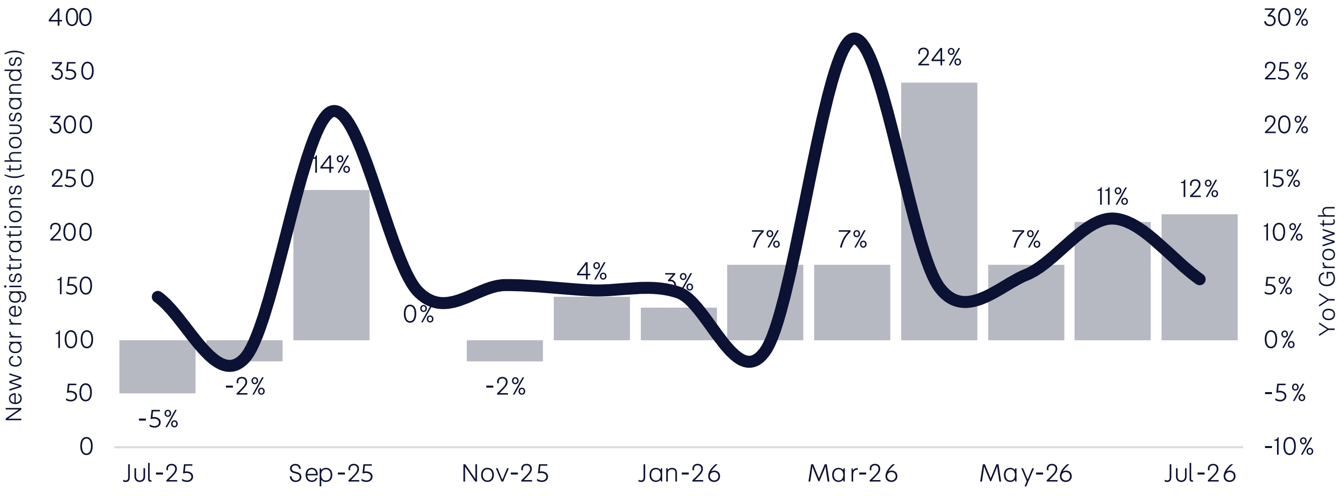
New car registrations rose 11.7% in July, delivering the best July performance since 2020 and an eighth consecutive month of growth. Electrified models drove the market, with PHEVs up 34%, hybrids up 12%, and EVs surging 45% to a record July volume (28% market share). EV growth was aided by a softer YoY comparison, with purchases last July delayed by ECG eligibility confirmation. All sales channels grew, with the private market maintaining positive momentum, up 13% YoY.

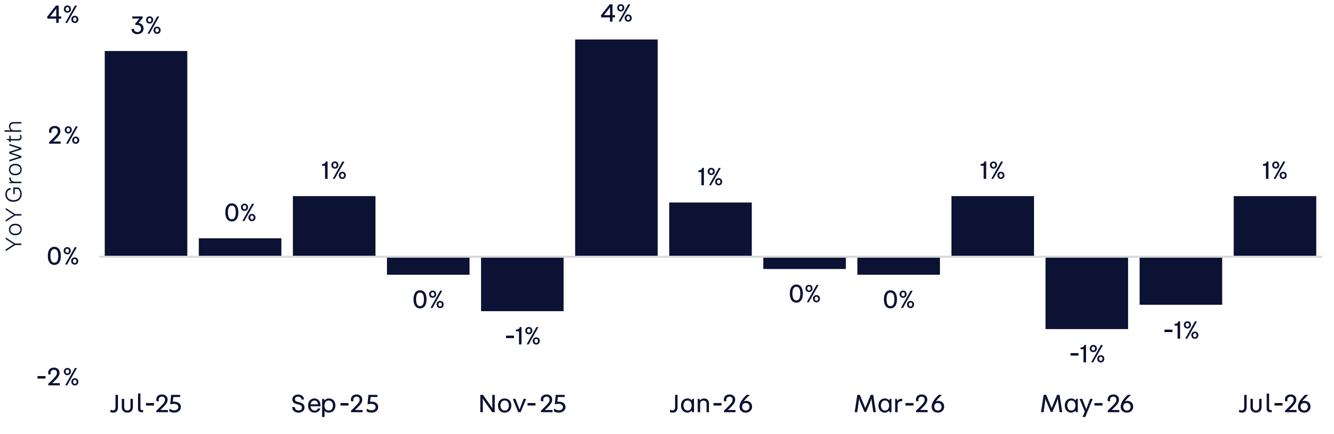
156,571
New car reg. (SMMT)

+11.7%
(vs. July 2025)



Used car sales (Year-on-year)

Used car transactions grew by 1%* YoY in July, led by 30% full/mild hybrid growth, while tighter stock availability limited EV growth to 24%. Franchise retailers outperformed, with alternative fuel cars driving a 3% increase in transactions and making up two in five sales. Independents, however, fell 1% as diesel (-12%) and petrol (-1%) declines outweighed gains from alternative fuel types, which remain scarce in the older used market.



*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

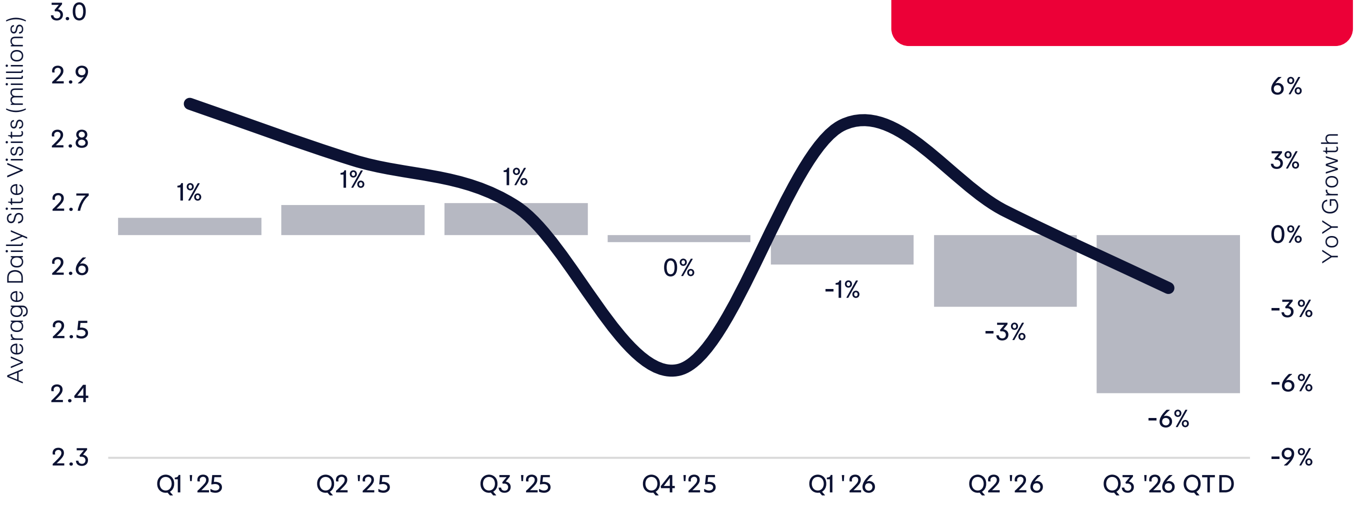
Autotrader audience

Site visits softened in July with a combination of successive heatwaves and the World Cup temporarily diverting consumer attention. Traffic fell a combined 14% across England's fixtures, including a 22% drop during the quarter-final. Despite these disruptions, daily visits remained resilient against strong benchmarks, while GfK's Consumer Confidence Index rebounded six points to -17, signalling improving sentiment.

-6%
(QTD 2026 vs. QTD 2025)

Autotrader site visits

Average daily site visits, year-on-year



New car activity

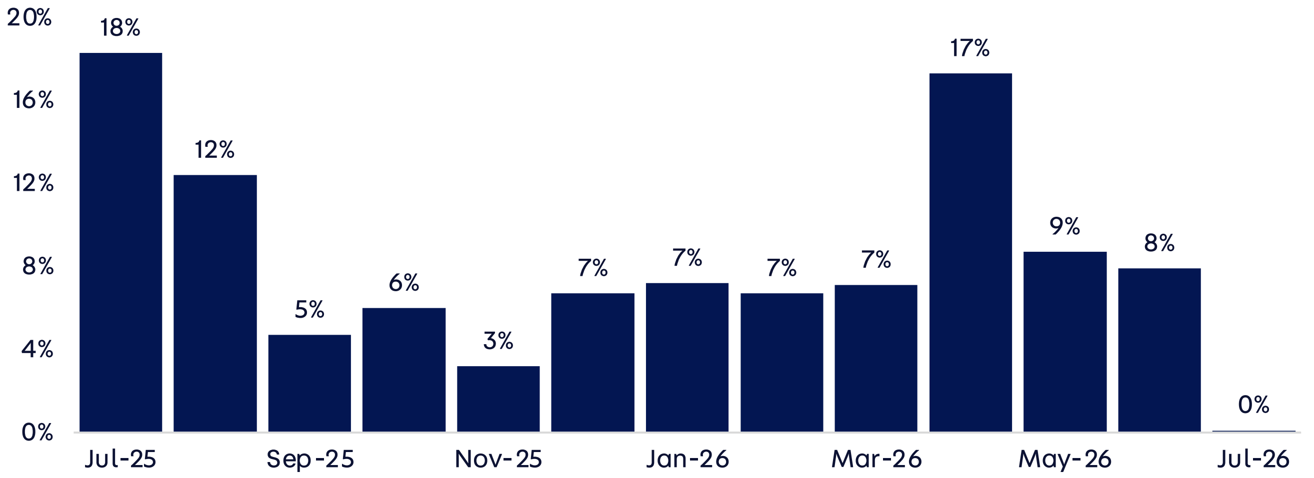
New car demand remained solid, with site traffic holding steady despite disruptions. EVs remained the most in-demand fuel type, and combined with plug-in hybrids accounted for half of all new car enquiries. MG stood out, capturing 1 in 5 EV and PHEV enquiries, driven by the MGS9. Discounts remained elevated across the market, averaging 10.3%, with electric and petrol models averaging a higher 11.3%.

+0%
New car visits (vs. July 2025)
-5.2% MoM

29%
EV lead share
+2.7ppts MoM

Autotrader new car visits*

Year-on-year



[1]Source: Autotrader Consumer Survey Data (n=1104)

Used market health

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The used car market is stable, with demand softening slightly amid lighter platform traffic with supply flat YoY. As buyers shift towards alternative fuel types, diesel (-20%) and petrol (-9%) demand continues to decline. EVs are the fastest selling used cars at 25 days, followed by PHEVs at 29 days, compared with the market average of 31 days. ICE cars slowed in July, with petrol at 30 days and diesel at 36 days.

	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
vs. July 25	-7%	+1%	-7%

The Market Health metric shows the ratio of supply vs. demand compared to the previous year*

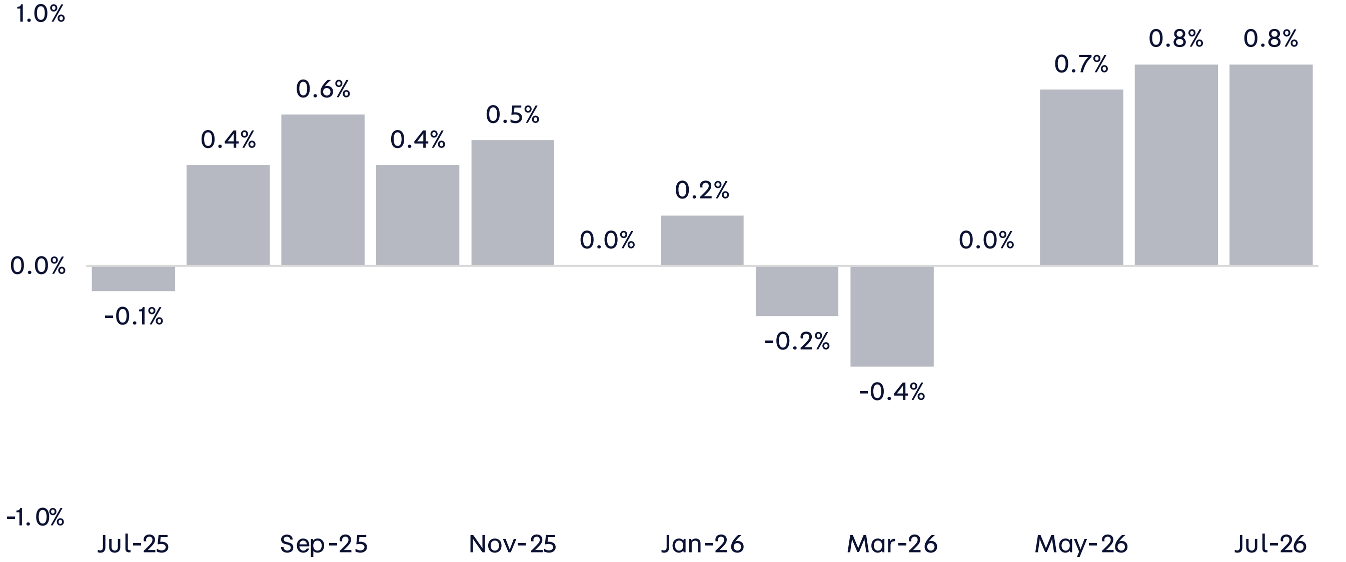
	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
Jul 26	-7%	1%	-7%
Jun 26	-6%	0%	-7%
May 26	-5%	-7%	2%
Apr 26	-1%	-8%	7%
Mar 26	-4%	-3%	-0%
Feb 26	0%	1%	-1%
Jan 26	-1%	-1%	0%
Dec 25	-2%	-1%	-1%
Nov 25	-2%	2%	-3%
Oct 25	-3%	2%	-5%
Sep 25	-5%	1%	-6%
Aug 25	-2%	0%	-2%
Jul 25	2%	1%	1%

Used car retail price growth

Used car prices rose 0.8% in July, marking a third month of consecutive growth driven by cars aged three years and older. The 10-15-year-old cohort led the market once again, up 7.0%, supported by strong gains in full/mild hybrids (+11.1%) and petrol (+8.4%). EVs and PHEVs also increased for a second consecutive month, signalling improving stability. EV growth was led by 3-5-year-olds, where values strengthened +10.2% , while 1-3-year-old EVs returned to positive growth for the first time.

Year-on-year used car retail price growth

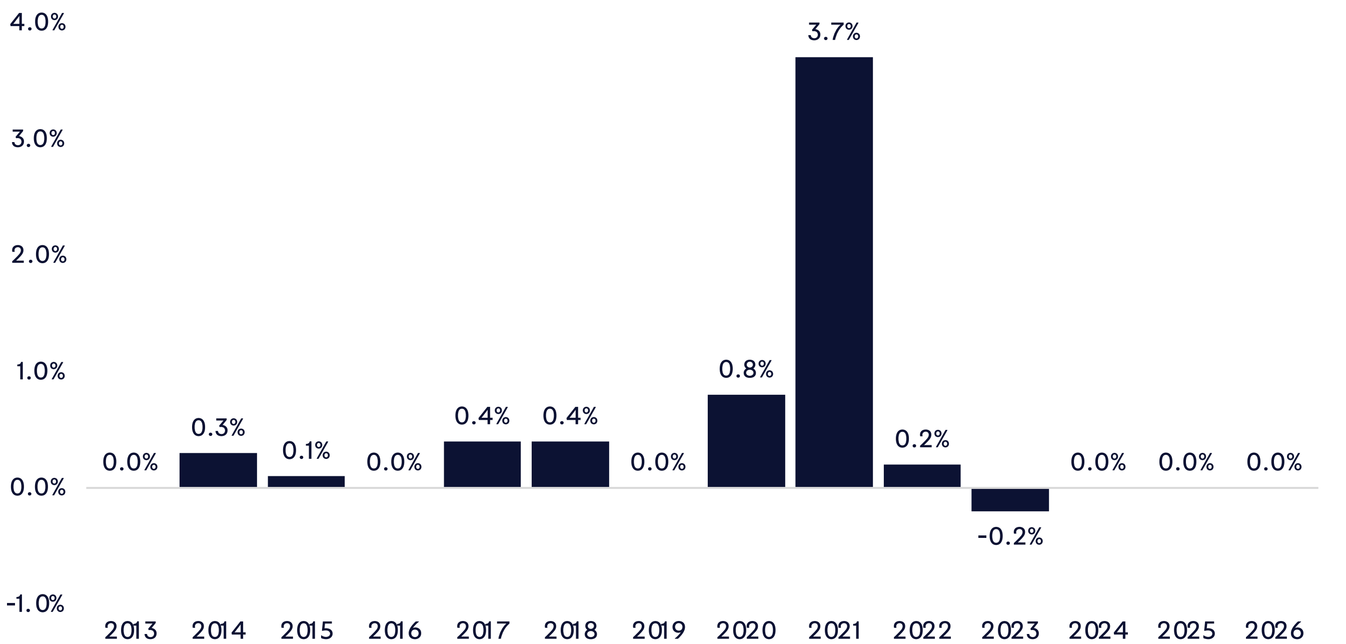
Like-for-like basis



On a month-on-month basis, used car prices were broadly unchanged in July, matching seasonal norms. Performance diverged by fuel type, with EVs recording the strongest monthly growth at +2.0%, contrasting with both diesel and PHEVs, which softened by -1.2% MoM. By age, 3-5-year-old cars continue to outperform the wider market with a +0.6% MoM rise, while 5-10-year-old cars saw prices soften by -0.4% MoM.

Month-on-month used car retail price growth: July

Like-for-like basis



Retail price observations. Year on year like-for-like pricing. Removes the impact of stock mix shift to reflect true value adjustments

Demand, supply, market health & price movement

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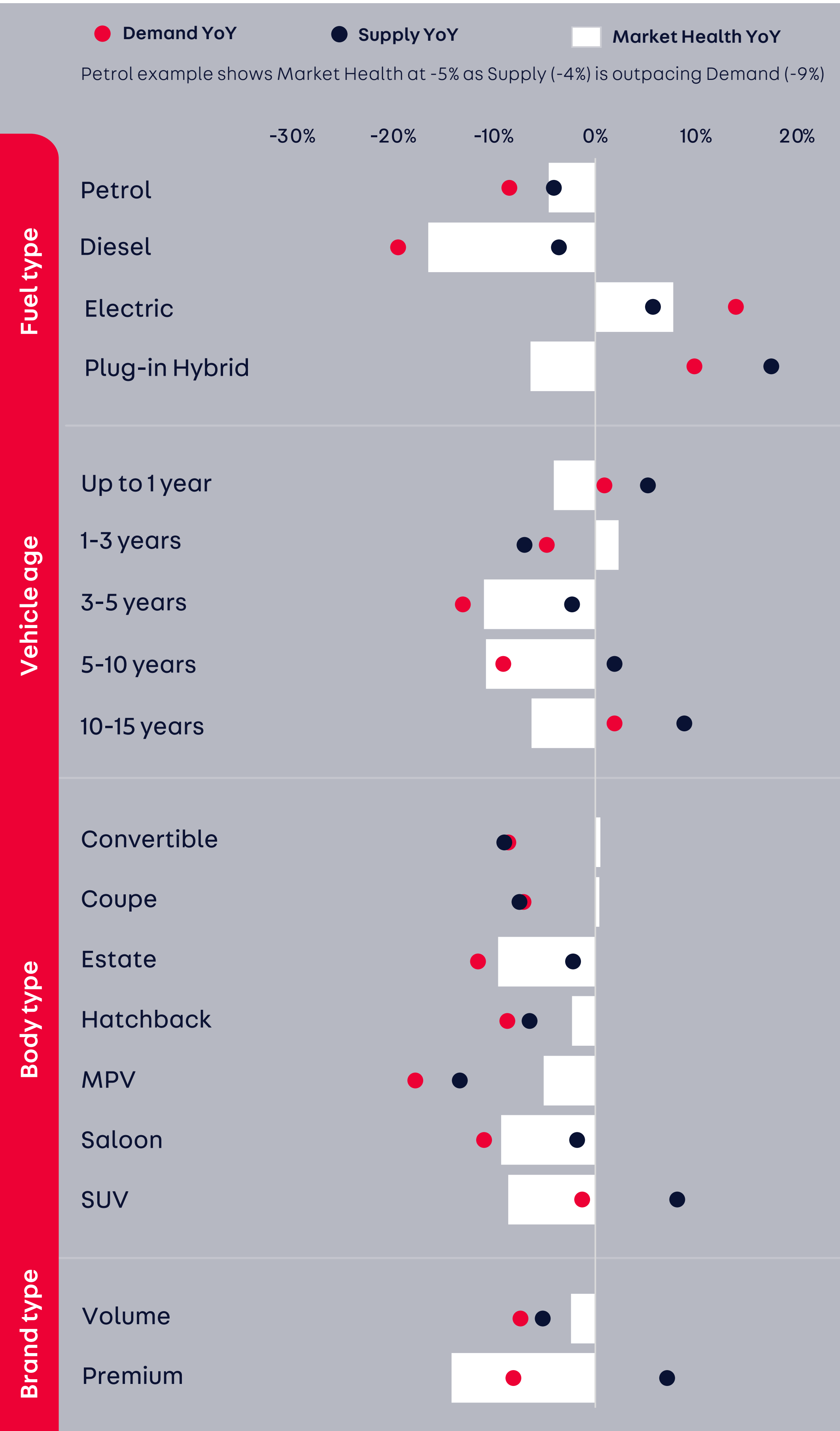
(YoY growth)

Charts show Market Health (blue bar), Demand (red) and Supply (white), with pricing movements.
The monthly movement of retail prices is illustrated by blue/red arrows.



Retail Price Movement YoY

	Jun-26 Retail Price		Jul-26 Retail Price
Petrol	+0.8%	▲	+1.0%
Diesel	+2.3%	▼	+1.4%
Electric	+1.6%	▲	+3.3%
Plug-in Hybrid	+1.9%	▼	+0.9%
Up to 1 year	-1.8%	▼	-2.0%
1-3 years	-1.0%	▲	-0.3%
3-5 years	+1.2%	▲	+1.4%
5-10 years	+1.6%	▼	+1.2%
10-15 years	+7.8%	▼	+7.0%
Convertible	+3.7%	▲	+4.4%
Coupe	+2.0%	▼	+1.2%
Estate	+4.9%	▼	+4.6%
Hatchback	+1.8%	▲	+1.9%
MPV	+3.5%	▲	+4.3%
Saloon	+4.2%	▼	+3.6%
SUV	-0.8%	▼	-0.8%
Volume	-1.4%	▲	-1.3%
Premium	-0.3%	▲	+0.3%

In focus this month

The three-way pull on 3-5-year-old premium demand.

The premium affordability challenge

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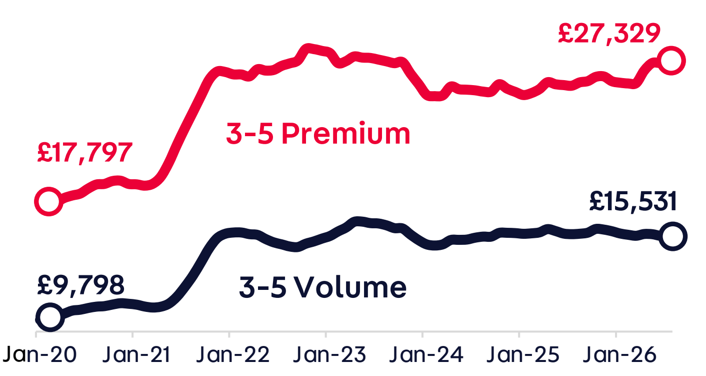
Back in 2020, a 3-5-year-old premium car cost almost £10,000 less than it does today. In the face of these higher prices buyers face a range of choices - for those with a flat budget, volume brands are the way to stay within the 3-5-year-old age band. For those with a bigger budget, increasingly affordable new cars, with modern technology and attractive finance offers, are an alternative. At the same time, the maturing EV market is broadening choice, with demand for 3-5-year-old EVs climbing sharply in response to high fuel costs.

+£9,532

change in price of 3-5 premium cars since Jan 2020

Average used 3-5-year-old car prices. Autotrader



The younger volume advantage

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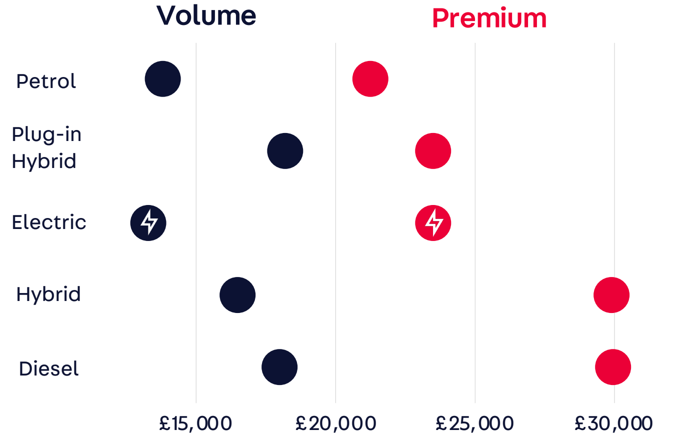
Volume brands are outpacing premium within the 3-5-year-old segment by offering crucial affordability. Unable to stretch to a premium model, buyers with unchanged budgets are switching to volume cars within a £14,000 to £18,000 budget. This shift has reduced enquiries for 3-5-year-old premium models YoY, causing them to slow to an average of 30 days to sell while volume models now sell a day faster at 27 days - expanding the sales speed gap from one day to three.

48%

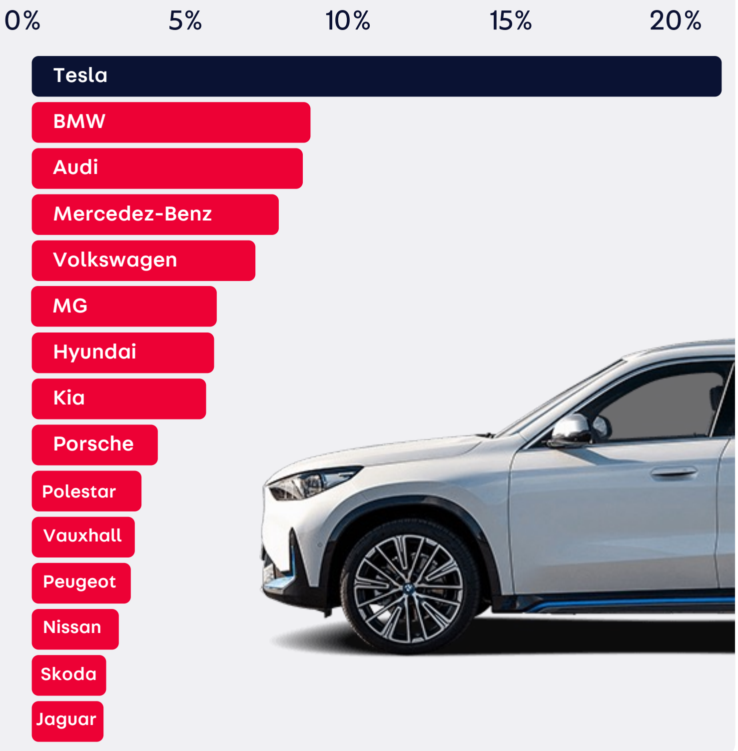
of 3-5 enquiries are for premium cars. July 2026 -5.7ppts YoY

Median 3-5-year-old used car prices. July 2026. Autotrader



The electric pivot

Share of 3-5-year-old EV enquiries by brand (Top 15). Year-to-date. Autotrader.



Buyers in the 3-5-year-old car market have greater choice than before as the EV market matures. Combined with escalating fuel prices, EV demand has risen 30% YTD. Consequently, traditional fuel demand is eroding, with petrol demand down 14% YTD and diesel 39% YTD, despite ICE cars maintaining a 58% share of supply.

This downturn heavily impacts premium German brands, with July ICE enquiries dropping for Mercedes (-43%), BMW (-43%), and Audi (-24%). While surging EV interest hasn't replaced this lost premium volume in 3-5, early mover Tesla is capitalising on the shift, capturing roughly one in five electric enquiries.

Price gap to new cars narrows

For traditional 3-5-year-old premium buyers willing to stretch their budgets, the new car market is becoming an increasingly compelling alternative. Manufacturers are pushing hard, with average discounts of 10.3% and attractive finance packages, new cars are an increasingly viable option.

Chinese brands, focused on providing premium features and technology at prices well below established premium rivals, offer a strong alternative and are growing fast, especially in the £300-£400pm sweet spot.

JAECOO 7
New Hybrid

£29,599*

* Average price

BMW X1
3-5 Hybrid

£28,446*

* Average price

88%

new cars are bought with finance. Rolling 12 month. FLA

44%

of new car finance leads are for £300 to £400 monthly payments. Autotrader

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