

Monthly Market Intelligence

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

OCTOBER 2026

Autotrader

Used car resilience holds with cars selling quickly as new car recovery continues.

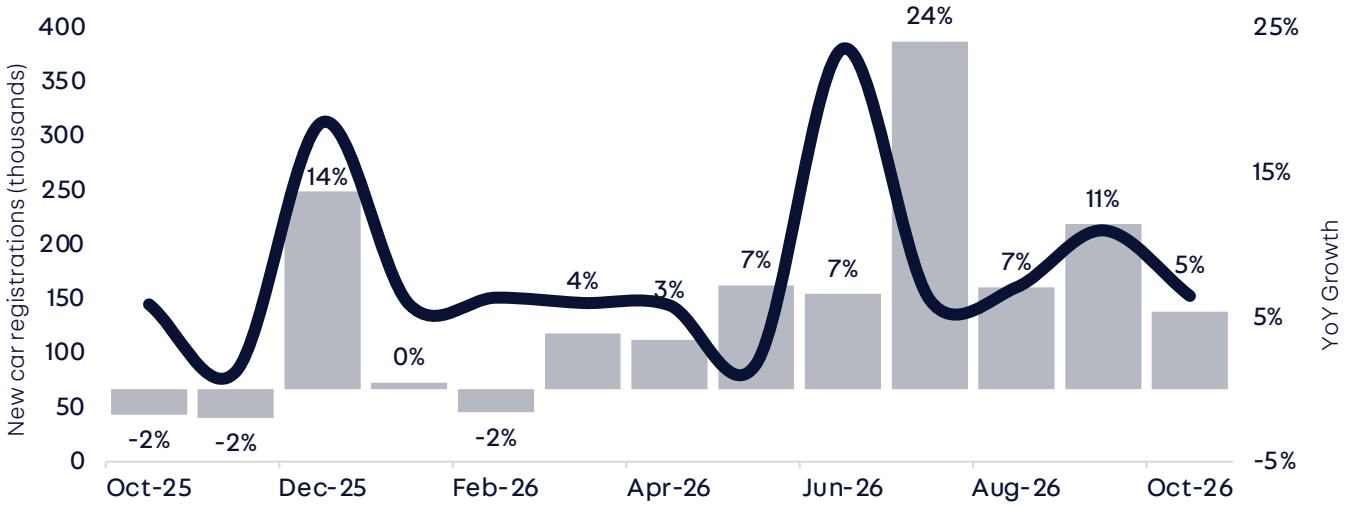
New car registrations

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The new car market saw its eleventh consecutive month of growth, up 5% in October. Plug-in cars continued to drive market expansion, taking a combined 47% share as EVs and PHEVs rose 33% and 30% respectively. EV share hit a year-high 32% as manufacturers pushed towards year-end ZEV mandate targets, continuing the pattern seen over the past two years. Gains were recorded across all sales channels, with fleet registrations rising 5% ahead of private demand at 4%.

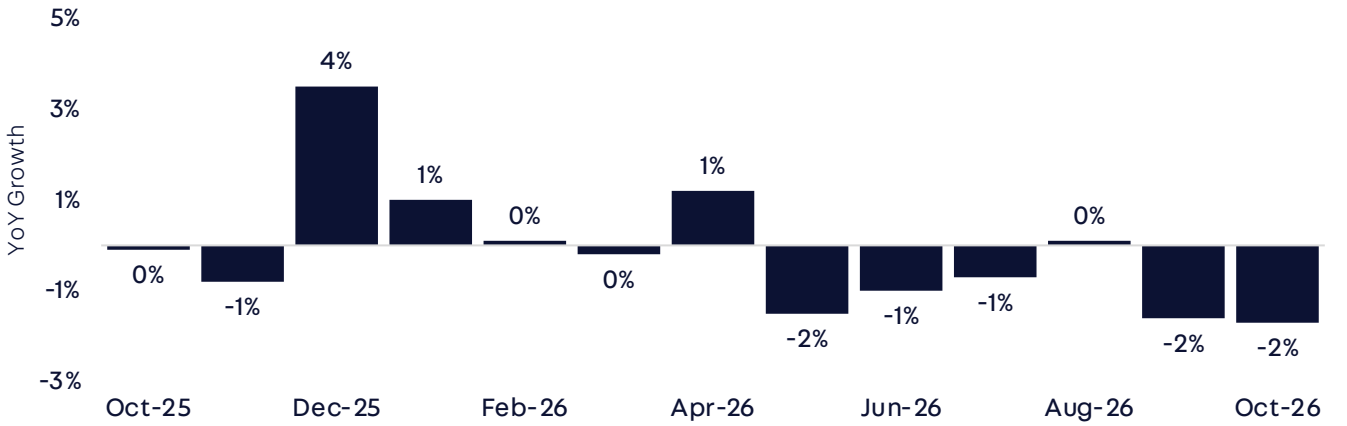
152,730
New car reg. (SMMT)

+5.4%
(vs. October 2025)



Used car sales (Year-on-year)

Used car transactions* fell 2% in October, leaving YTD sales level. EV sales accelerated, rising 56% to reach one in ten transactions. Conversely, ICE declined 12%, with diesel falling 24% compared with 7% for petrol. This is reflected in retailer performance, with independents, where diesel accounts for a third of stock, seeing transactions down 4% YoY. Franchise retailers, with 10% diesel and a more diverse fuel mix, maintained stable volumes.



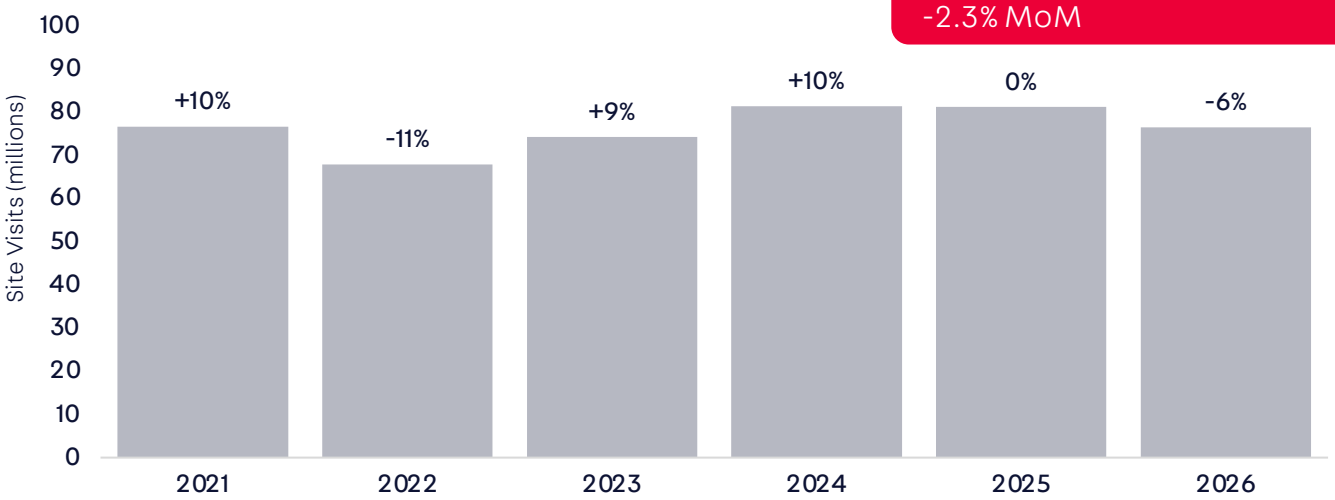
*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

Autotrader audience

Following broadly level year-on-year performance in September, site visits dipped 6% in October, bringing activity back in line with more typical levels after two record years. Separately, GfK consumer confidence fell sharply, down 11 points to -24, returning to levels seen earlier in the year. Despite this weaker sentiment, car-buying appetite remains resilient, with three quarters of consumers on the platform still planning to buy within the next six months[1].

76.3m
Site visits
-2.3% MoM

Autotrader site visits: October
Site visits, year-on-year



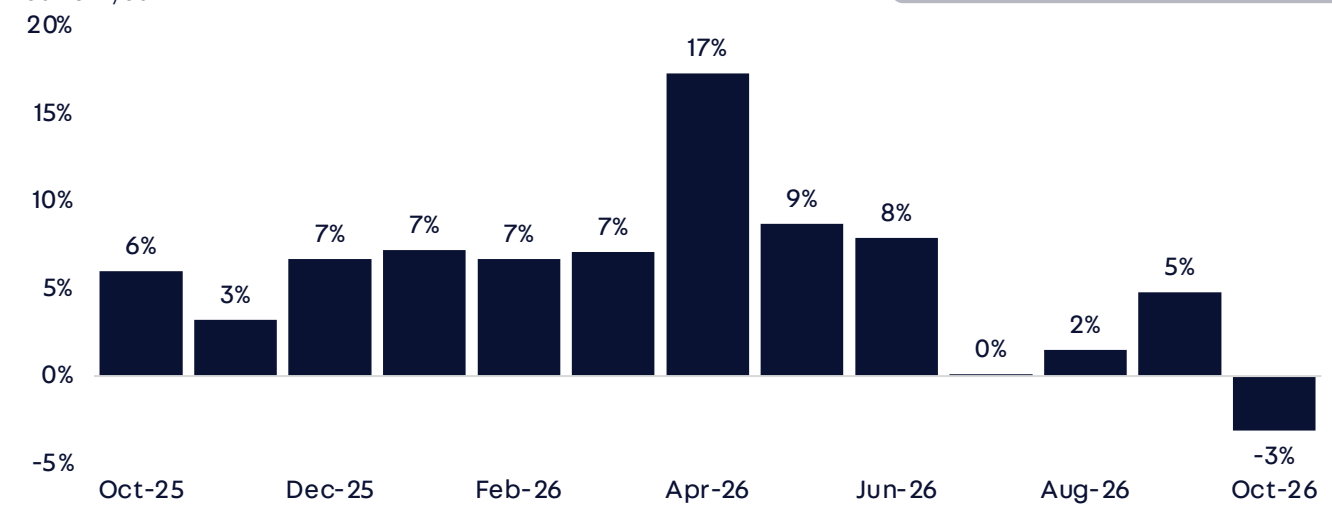
New car activity

New car visits softened 5% MoM post-plate change, with manufacturers continuing to stimulate demand through discounting, despite average discounts easing to 10.2%. Combined electric and plug-in hybrid interest surpassed half of all enquiries, with electric cars alone reaching a record 34% share. Established brands continue to dominate electric enquiries, capturing eight in ten, while Chinese brands lead in PHEVs, accounting for 63%.

-3%
New car visits (vs. Oct 2025)
-5.2% MoM

34%
EV lead share
+4.4ppts MoM

Autotrader new car visits*
Year-on-year



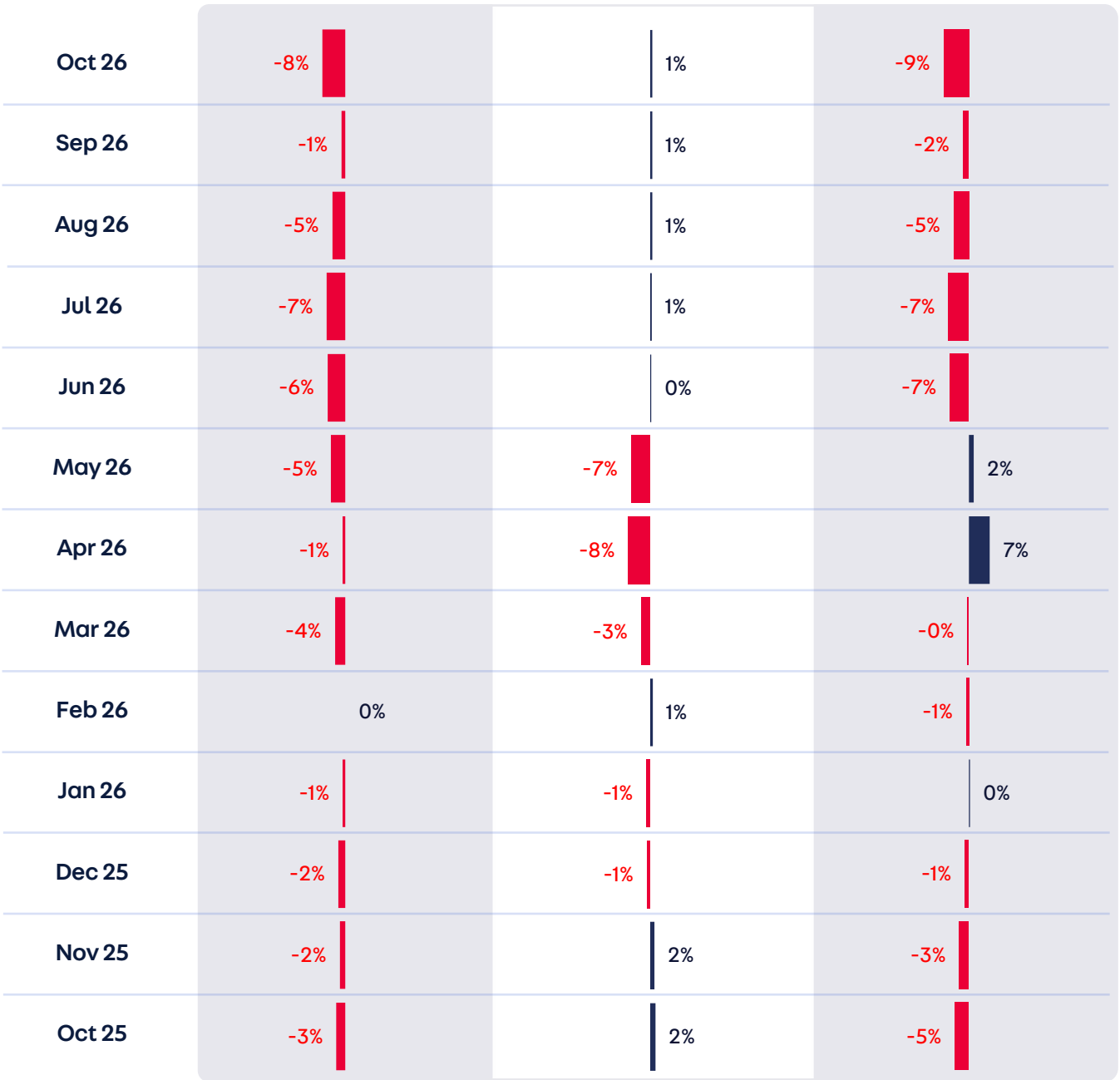
[1]Source: Autotrader Consumer Survey Data (n=788)

Used market health

While demand has softened, the used car market remains resilient, supported by stable supply and steady stock turnover. EV demand rose 38%, outpacing supply, while continued fuel price pressure saw petrol and diesel demand fall 13% and 25%, respectively. Cars are selling as quickly as last year, averaging 29 days, with diesel taking three days longer to sell YoY and petrol one day longer. Other fuel types are turning faster than average.

	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
vs. Oct 25	-8%	+1%	-9%

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

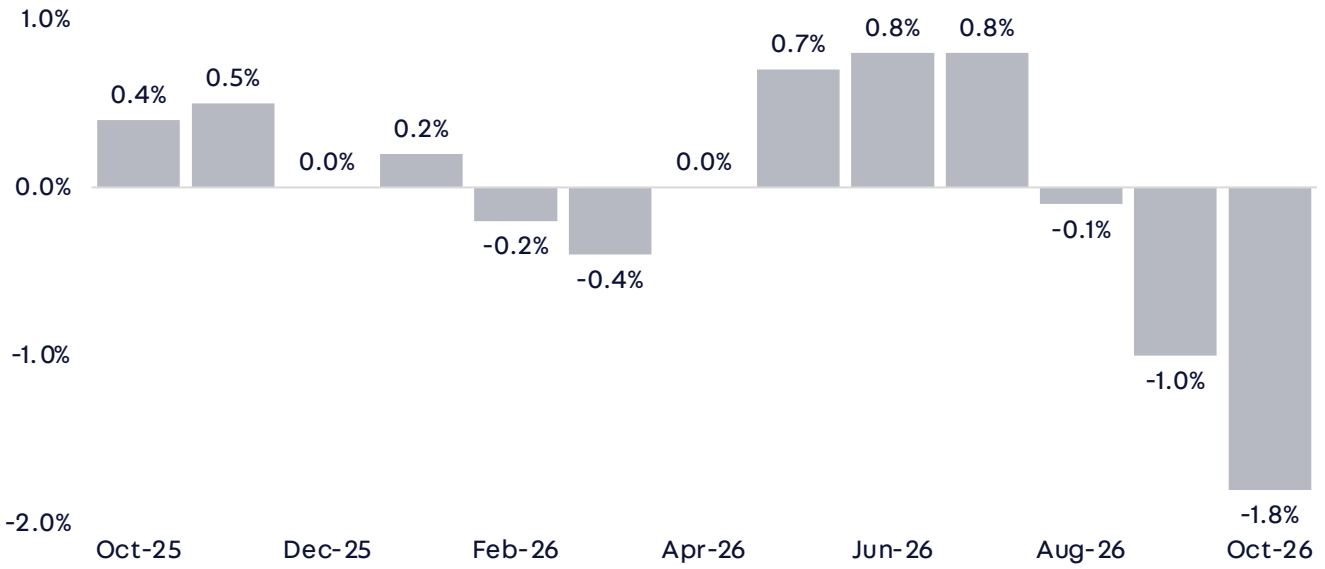


Used car retail price growth

Used car retail prices fell further, down 1.8% year-on-year, continuing to reflect downward pressure from trade values. However, with cars still selling quickly, retailers should remain focused on pricing to market rather than allowing lower prices to dictate retail prices. The trends seen last month continued, with EVs remaining the only fuel type to record positive price growth. Resilience also persisted among older stock, with prices for 10-15-year-old cars rising 4.6% YoY, reflecting demand for affordable ICE stock.

Year-on-year used car retail price growth

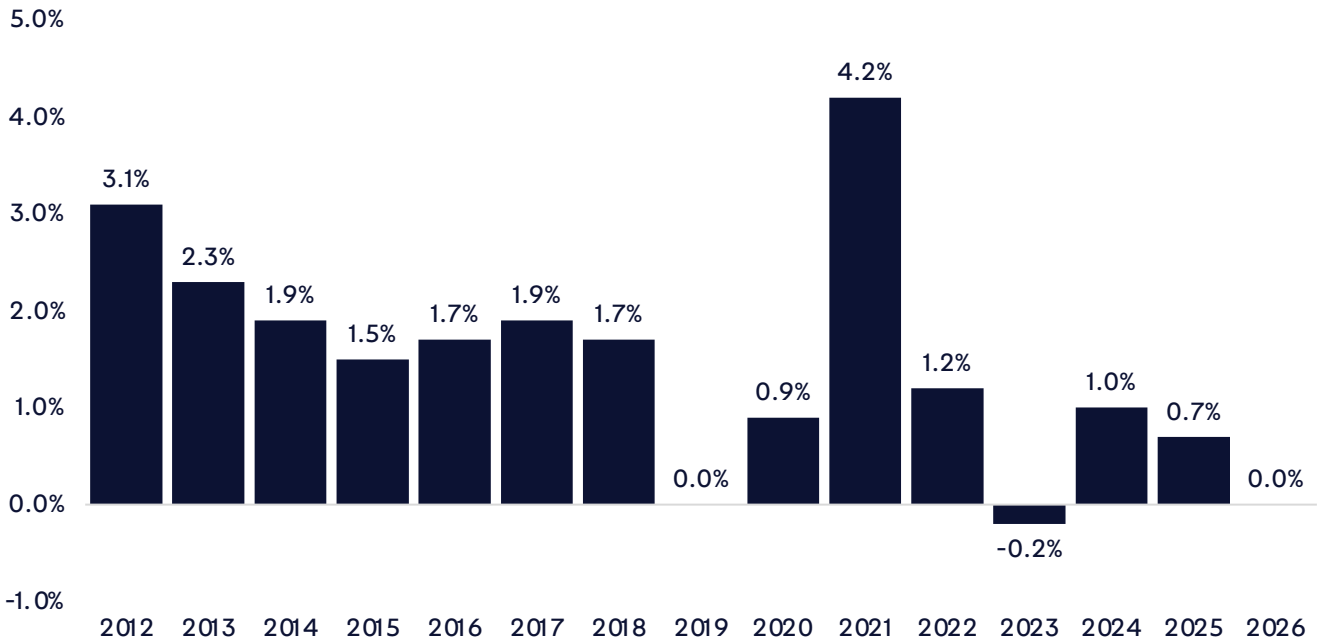
Like-for-like basis



On a month-on-month basis, used car prices held steady, marking a softer seasonal movement than the pre-pandemic average of 1.8%. Electric and 10-15-year-old cars were the strongest performers, up 1.3% and 1.5% respectively, while diesel and select age cohorts also outperformed the market but remained below their historical seasonal trends.

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

Like-for-like basis



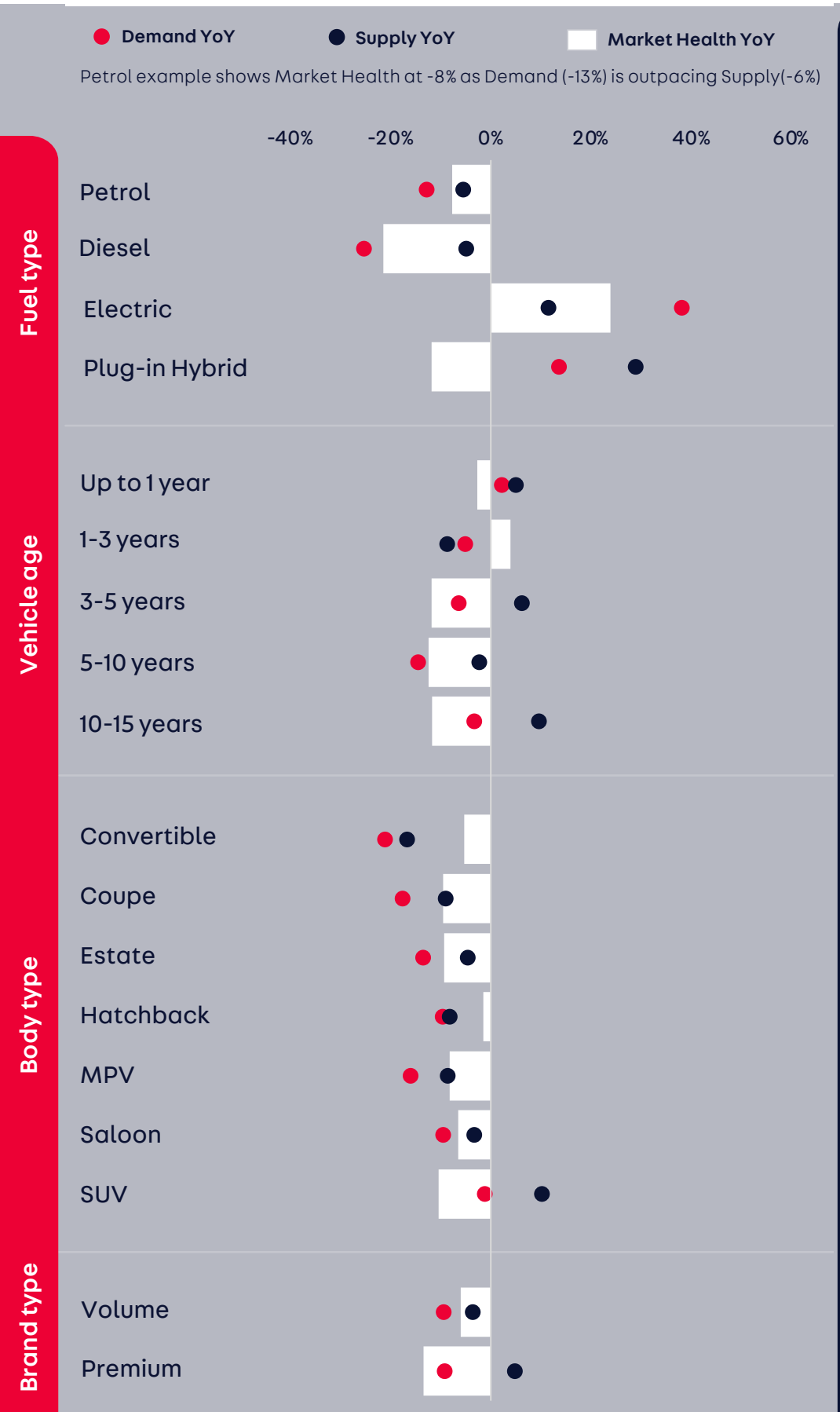
Retail price observations. Year on year like-for-like pricing. Removes the impact of stock mix shift to reflect true value adjustments

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		
	Sep-26 Retail Price		Oct-26 Retail Price
Petrol	-1.0%	▼	-1.9%
Diesel	-0.8%	▼	-1.6%
Electric	+2.8%	▼	+2.8%
Plug-in Hybrid	-0.6%	▼	-1.4%
Up to 1 year	-2.7%	▼	-3.5%
1-3 years	-2.4%	▲	-2.0%
3-5 years	-1.0%	▼	-2.3%
5-10 years	-0.4%	▼	-1.8%
10-15 years	+5.6%	▼	+4.6%
Convertible	+3.4%	▼	+3.2%
Coupe	-1.4%	▼	-1.9%
Estate	+1.5%	▼	+0.1%
Hatchback	+0.9%	▼	+0.6%
MPV	+1.3%	▼	+0.3%
Saloon	+0.4%	▲	+0.6%
SUV	-2.5%	▼	-3.5%
Volume	-2.7%	▲	-2.2%
Premium	-1.7%	▲	-1.6%

In focus this month

Diesel retains its place in the used car market.

The peak and fall of new diesel

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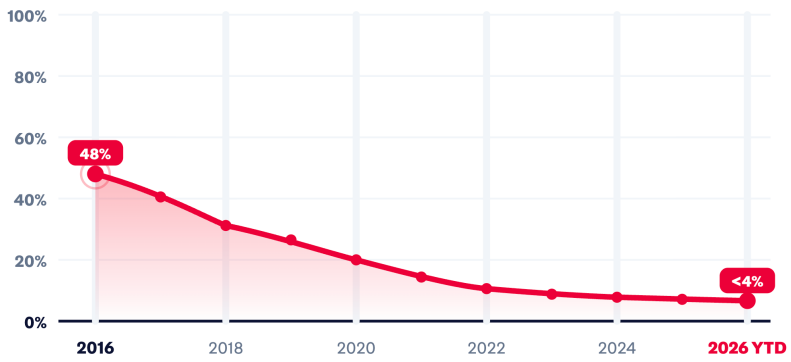
New diesel car registrations peaked in 2016, following years of strong demand supported by policies favouring lower CO_2 emissions, favourable benefit-in-kind (BiK) tax structures for company car drivers and lower overall ownership costs.

69,761
2026 YTD Diesel registrations

1,280,411
2016 Diesel Registrations

However, the "Dieselgate" scandal marked a turning point, with regulatory focus shifting to NO_2 emissions. The introduction of Clean Air Zones, strict Euro 6 emissions standards, and new additional tax charges accelerated diesel's decline.

Diesel new car registrations share. SMMT.



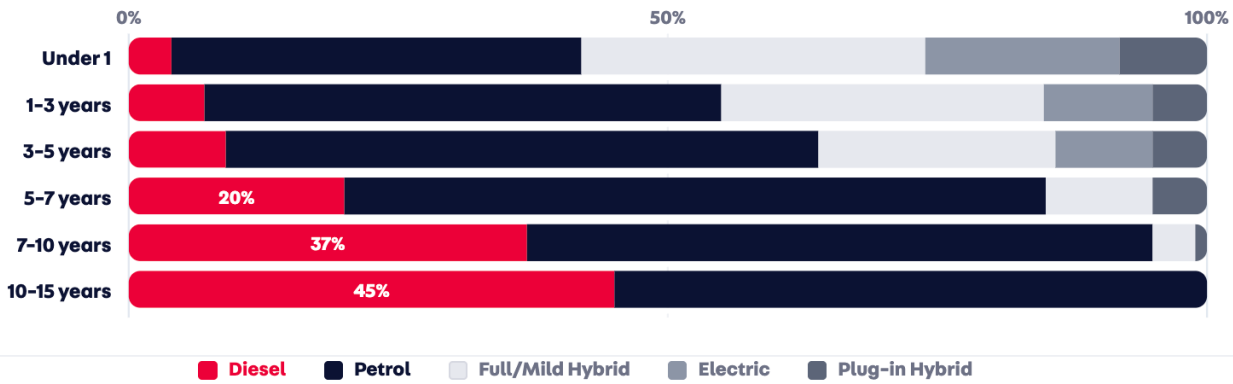
Diesels still have miles left to run

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Diesel demand has softened against a backdrop of higher fuel prices, but diesel stock remains an integral part of the used car market. Crucially, diesel prices continue to follow the wider market rather than experiencing an isolated decline, with older 10-15-year-old models even recording price growth.

With over a third of stock aged seven years and older powered by diesel, and around one in five cars in the parc still expected to be diesel in 2030, these cars will remain a significant part of the market for years to come.

Share of stock by fuel and age. October 2026. Autotrader.

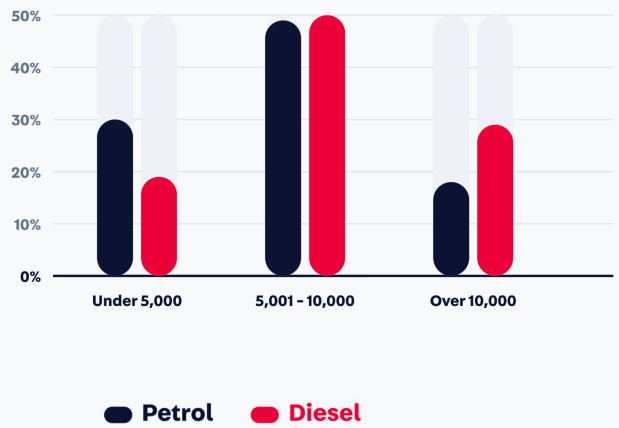


A practical choice for some

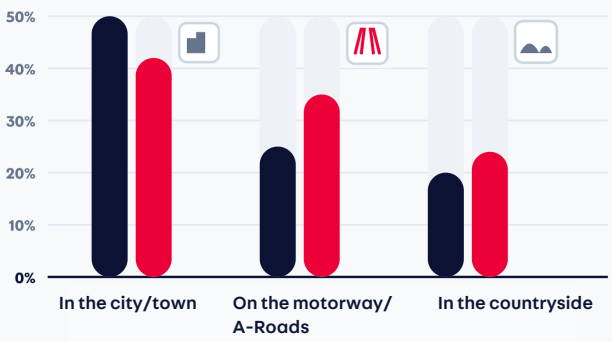
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Diesel continues to be a practical choice for drivers covering longer distances. Almost three in 10 diesel drivers travel more than 10,000 miles a year, almost twice the proportion of petrol drivers. Their greater use of motorways also suits diesel's higher mpg and longer range between fill-ups.

Annual miles driven[1]



Primary driving environment[1]



[1]Drivers choice awards survey 2026. Petrol (n=47,503), Diesel (n=34,394)

Diesel delivers more for your money

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Across different budgets, buyers can access a newer and more economical diesel car than comparable petrol models, with greater choice among premium brands. This presents an alternative for fixed budget consumers prioritising modern styling and newer tech features over lower mileage. While used diesels typically carry higher average mileage across retail stock, their reputation for longevity can help offset concerns around mileage.

ICE model budget comparisons. October 2026. Autotrader.

Volkswagen Golf		
Fuel type	Diesel	Petrol
Registration year	**9-10-years-old (2017)**	11-12-years-old (2015)
Median price	**£9,995**	£9,995
Average mileage	**84,637**	68,217



BMW 1 Series		
Fuel type	Diesel	Petrol
Registration year	**7-8-years-old (2019)**	9-10-years-old (2017)
Median price	**£10,690**	£10,999
Average mileage	**69,921**	62,788



Mercedes C Class		
Fuel type	Diesel	Petrol
Registration year	**7-8-years-old (2019)**	9-10-years-old (2017)
Median price	**£15,499**	£14,995
Average mileage	**67,353**	62,019




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