

Light Commercial Vehicle Quarterly Market Intelligence

The latest insight from the UK's largest new and used
light commercial vehicle (LCV) platform



New LCV registrations were back 3.6% in Q1 vs last year as Pick-up volumes reduce following tax changes.

New LCV registrations



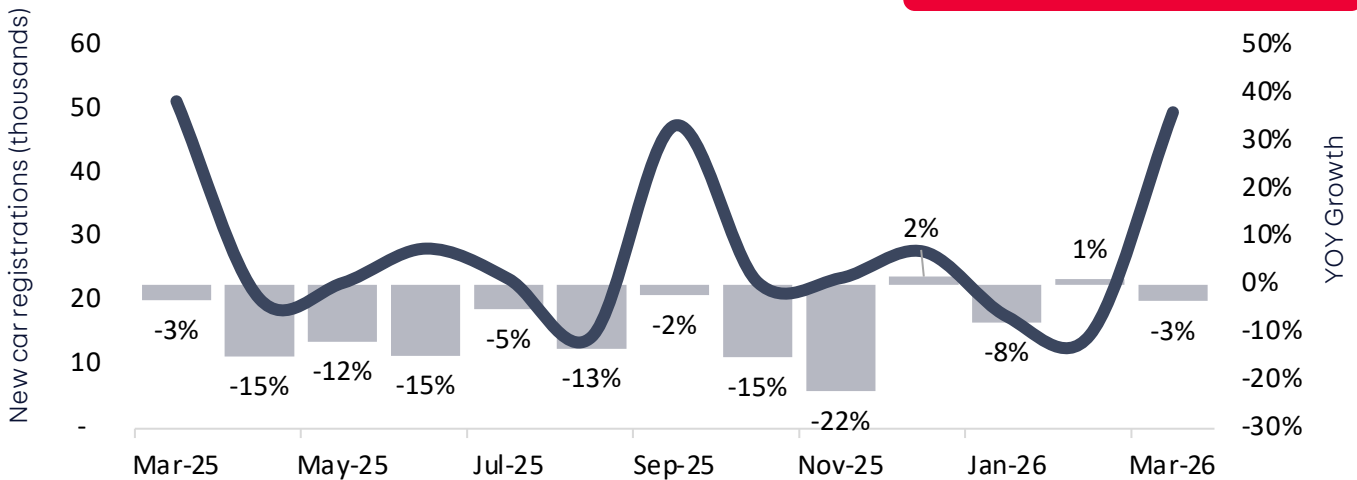
Whilst up in February, registrations fell again in March, back by 3.4% year-on-year and back 3.6% across Q1. New LCV registrations fell by 1,716 registrations, predominantly led by a reduction in sales of pick-ups, back 54% year-on-year following last year's changes to Benefit-in-kind tax allowances for double cab Pick-ups. Sales of BEV LCVs were up in Q1 by 2.8% year-on-year however had a weaker plate change month falling by 15.7%. At 8.1% Market share YTD BEV registrations currently sit behind the current 24% ZEV target.

49,505

New LCV reg. (SMMT)

-3%

(VS. Mar 2025)

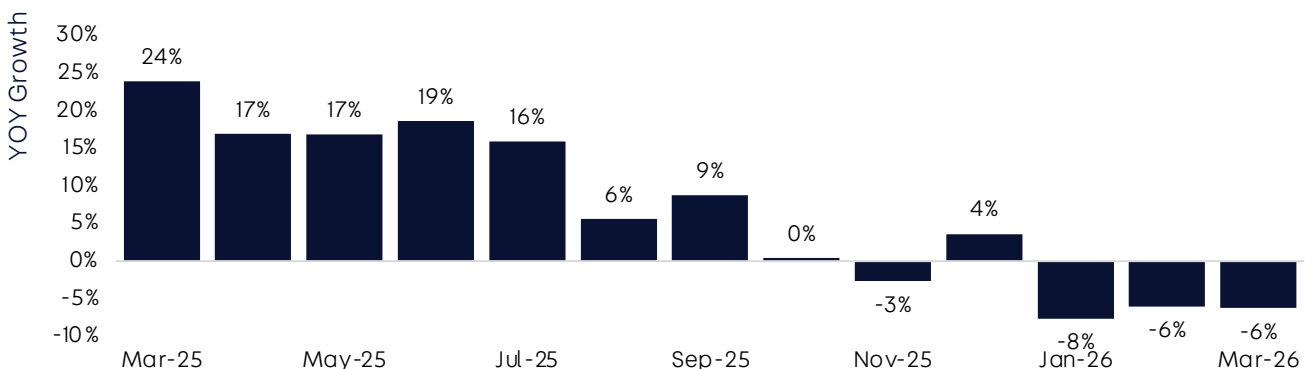


Used LCV sales (Year-on-year)*

2026 used car sales have also started the year negatively, back 6% year-on-year in March, led by a reduction in diesel sales which were back 10% year-on-year. Franchise retailer sales were stronger through Q1 than independent sales, however both segments fell back compared to 2025. In March Franchise were back 1.1% whilst independents fell by 8.2%. Though diesel sales struggled, BEV went from strength to strength, growing 94% in March year-on-year.

-6%

(VS. Mar 2025)



* Data based on vans removed from Autotrader. We assume that the van is sold on the last day we saw it on our site. Strong historical correlation to DVLA used LCV transactions. Includes electric vans weighing up to 4.25t.

Q1 saw the 10th consecutive month of positive market health in March as demand metrics remain higher than supply year-on-year. Supply fell 11% in March vs the same period last year particularly across 3- to 5-year-old vans, affected by factory closures during the pandemic, which were back 18%. Demand is currently strongest in younger vans, up 13% in 1- to 3-year-old vans where supply is strongest (+8%) in March year-on-year. Market health is strongest for electric vans in March with a strong demand 72% outweighing a similarly strong supply of 44%.

Demand

-4%

(Year-on-year)

Supply

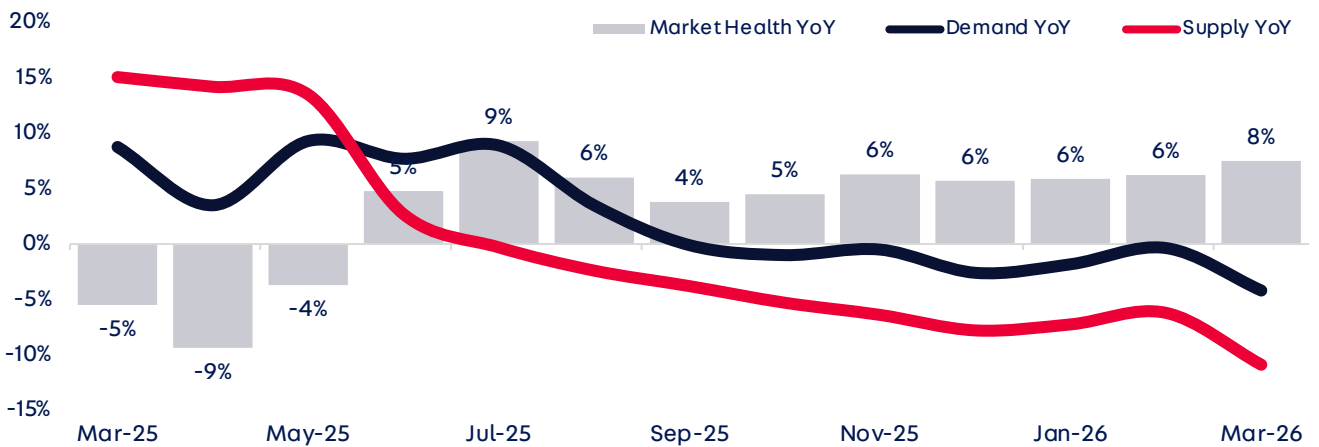
-11%

(Year-on-year)

Market Health

+8%

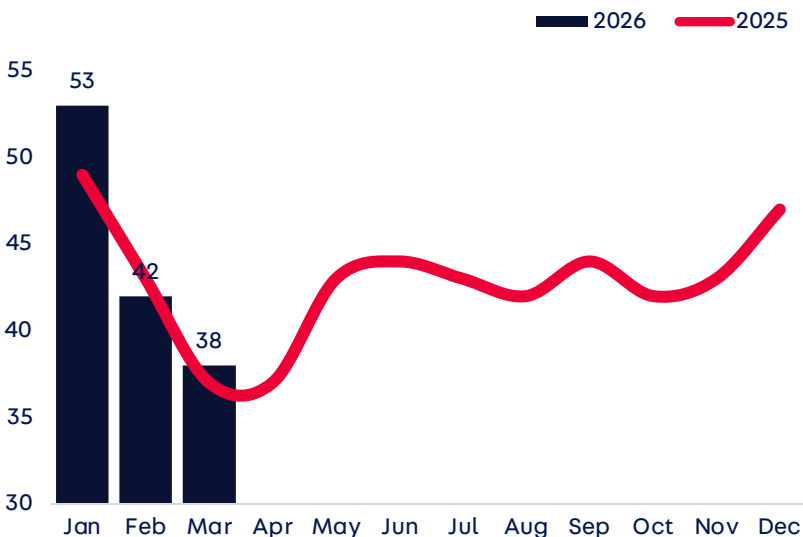
(Year-on-year)



Used LCV speed of sale

Speed of sale for LCVs improved through Q1 overcoming the seasonal end of year slow down and selling 15 days faster in March than January. March sold 1-day slower year-on-year as 1- to 3-year-old vans, in stronger supply sold 2 days slower. Pick-ups sold 5 days slower in March compared to last year, though Chassis and Panel vans were faster by 2 and 4 days, respectively.

38 days
In March 2026
1-day slower YOY



Fastest selling:

VAUXHALL VIVARO ELECTRIC
Panel Van

FIAT FULLBACK
Pickup

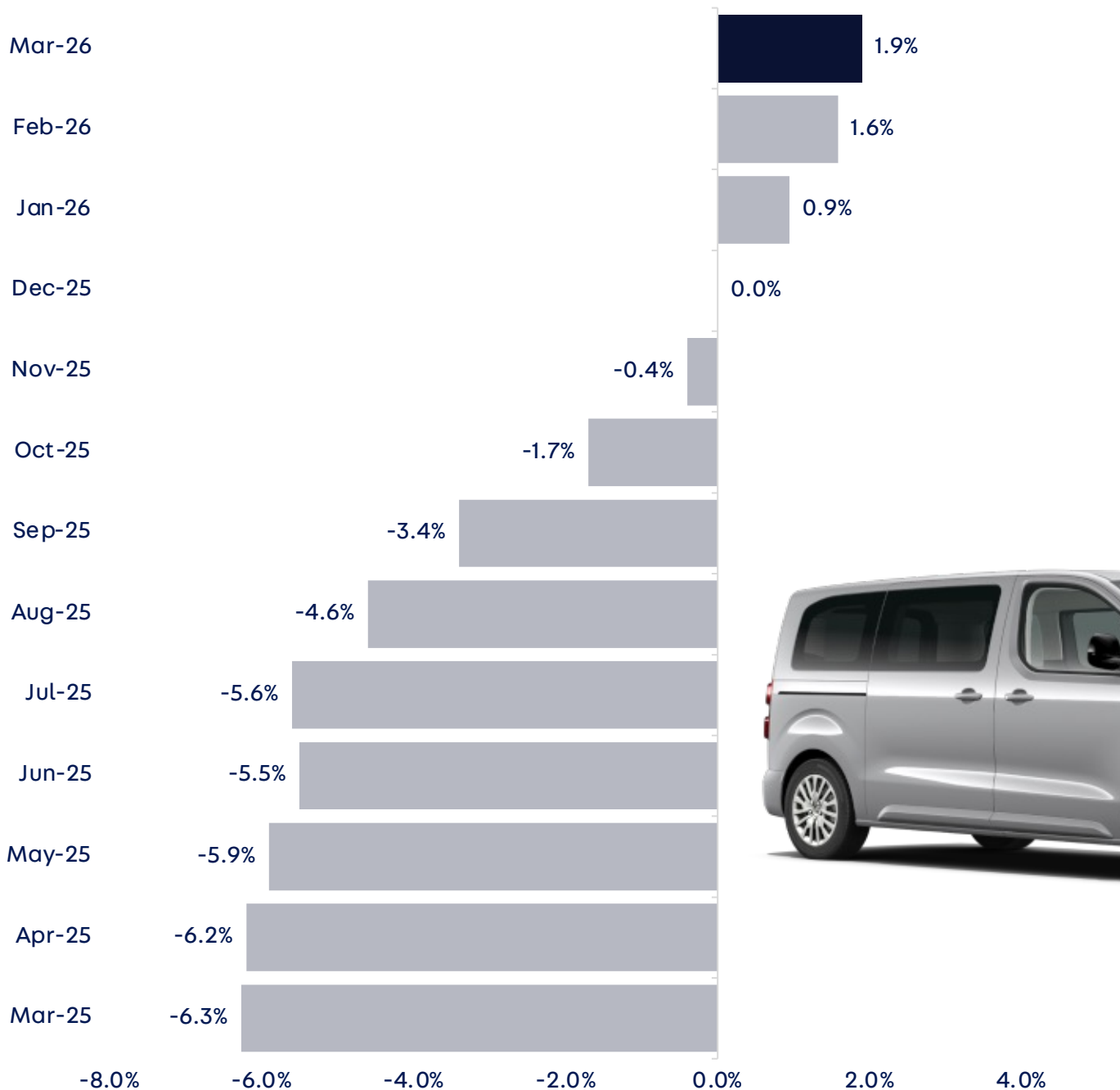
FORD RANGER
Combivan

For the first time since November 24, after 24 months of reducing like for like pricing and a flat month in December, Q1 displayed increasing pricing movements , up 1.5% on average across Q1. Pricing was up 1.9% in March vs last year, led in part by diesel which grew 2% and across older aged vans where supply was weaker, 10- to 15-year-old vans were up 15% and 15 years + were up 12%. Younger vans, under 1 year old LCVs were still back 3% as were Pick-ups, back 2% year-on-year. Despite negative market health metrics Chassis cabs were up 7%. Unlike diesel, electric LCVs were back 9% in March, averaging £23,090 on Autotrader.

£22,086
Average price (March 26)

+1.9%
Price change YOY
Like-for-like price growth. Excludes VAT and private adverts .

Used LCV price growth Year-on-year



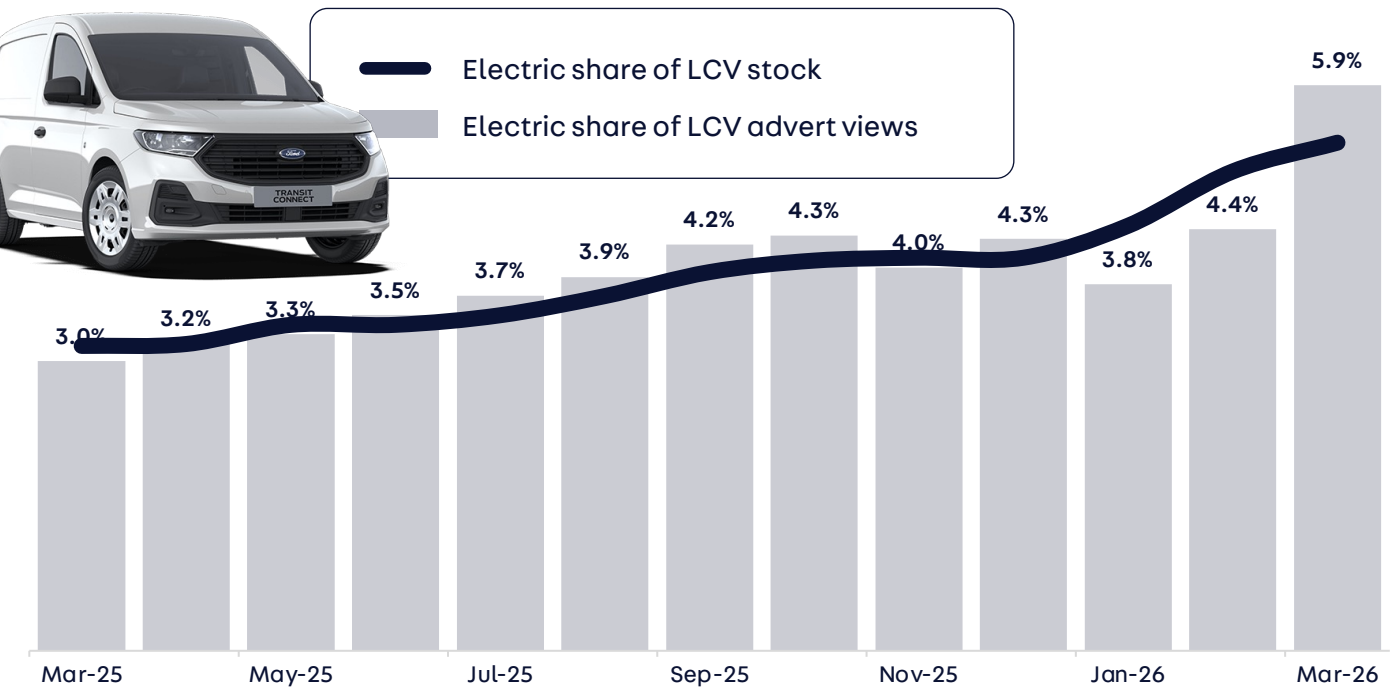
(YoY growth)

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.

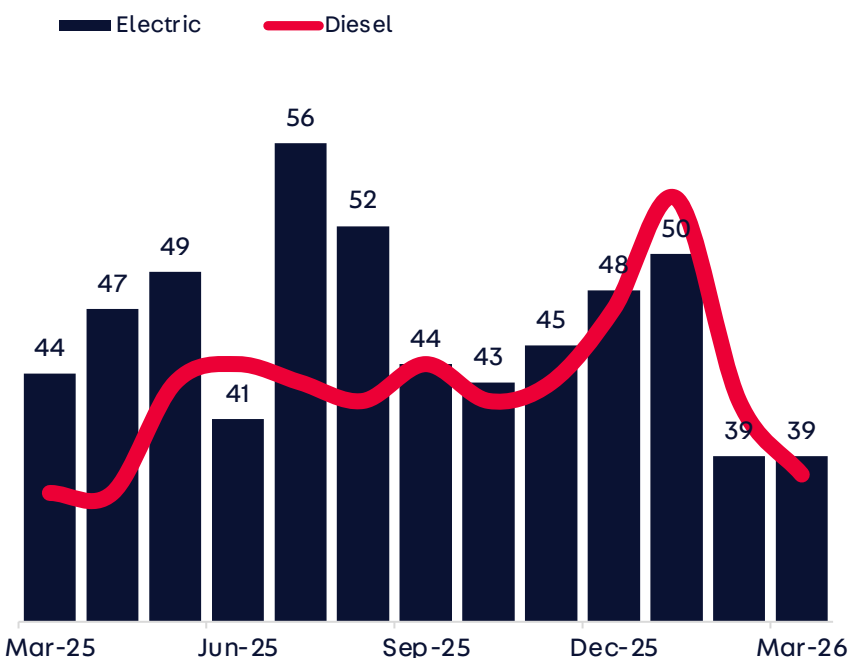


March 26 saw the highest share of used van stock and advert views on our platform at 5.3% and 5.9%, respectively. As choice and supply has grown so too has the demand for that fuel type, Market health and demand metrics are positive for EV year-on-year seeing ad view share grow 2.9PP in March vs the same period last year. Days to sell for used electric vans was flat month-on-month in March but was 5 days faster than March last year. Diesel too, saw a faster speed of sale through Q1 however was 1-day slower year-on-year. The fastest selling electric van in March was the Vauxhall Vivaro Electric.

Electric share of the used LCV market on Autotrader



Used LCVS days to sell by fuel type



39 days
 In March 2026
 5 days faster year-on-year

38 days
 In March 2026
 1 day slower YOY

*Data based on vans removed from Autotrader