Light Commercial Vehicle
Quarterly Market Intelligence

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

Q2 2026

Autotrader

New LCV registrations saw strong growth in Q2 whilst used van sales remain down.

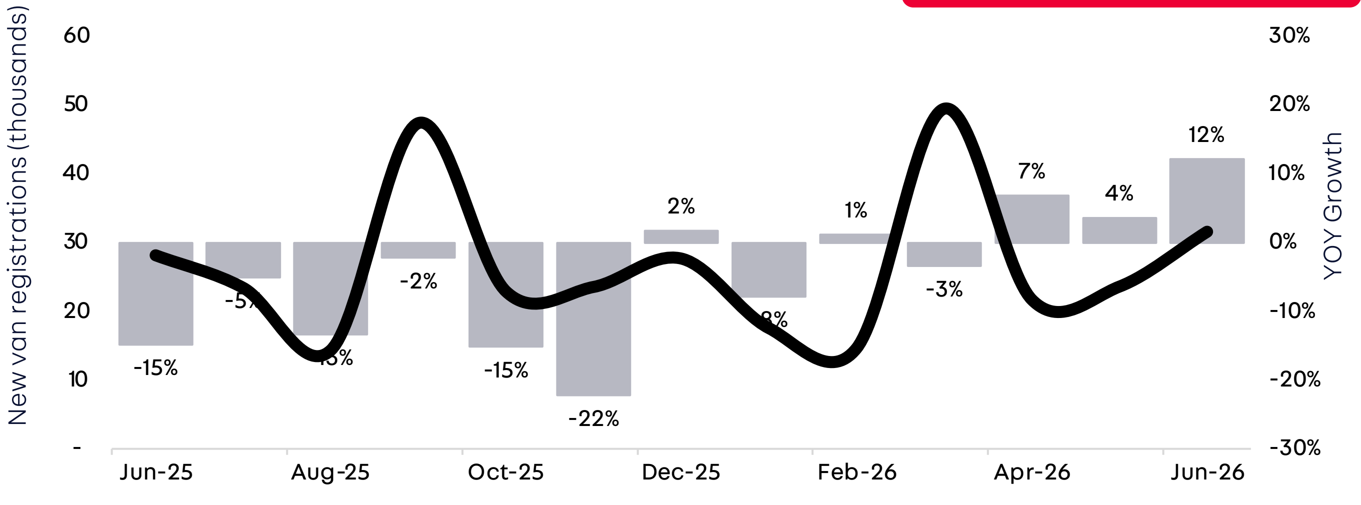
New LCV registrations

Autotrader

June (up 12%) saw the third consecutive month of Year-on-year growth in Q2. The quarter grew 7.9% in Q2 and was up 1.7% in H1. New registrations fell in June by 19% for small <=2.0T vans year-on-year, whilst larger vans saw growth, up 62% for 2.0-2.5T, and 13% for 2.5-3.5T. We saw growth in 4x4s, up 21%, but following last years changes to Benefit-in-kind tax allowances for double cabs we continue to see decline in the once popular Pick-ups. They fell again by 58% in June year-on-year, now only making up just a small fraction of the total registrations for June.

31,602
New LCV reg. (SMMT)

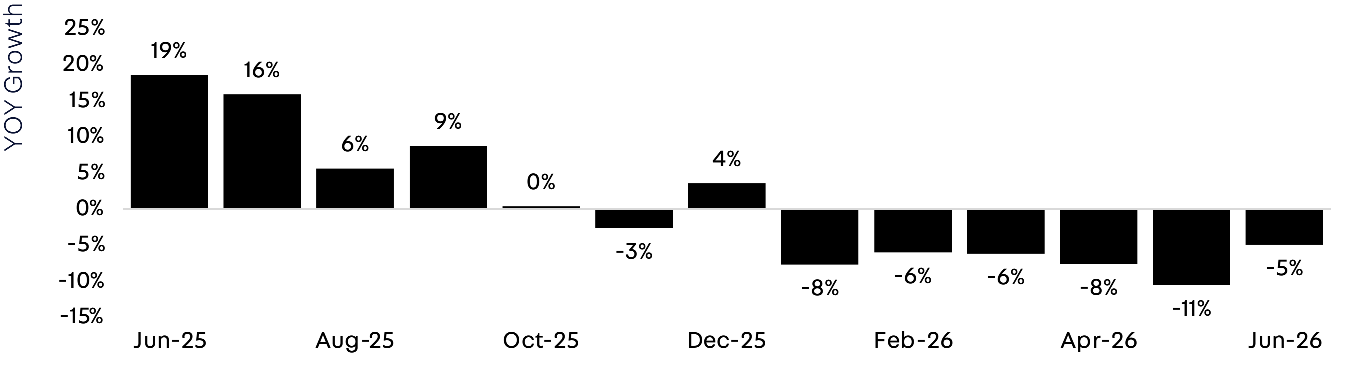
+12%
(VS. Jun 2026)



Used LCV sales (Year-on-year)*

Continuing the trend seen in Q1, last quarter saw further year-on-year decline, falling 8% in Q2. Though Franchises saw a smaller decline than Independents, back 1% vs 7% respectively in June, both saw fewer sales across the quarter vs last year - Franchises fell 3% and Independents 9%. Electric sales saw growth across Q2 up 114% year-on-year for the quarter whilst diesel fell 12%.
Plug in hybrids maintained its popularity growing each month in H1, growing 155% in Q2 vs last year.

-5%
(VS. Jun 2026)

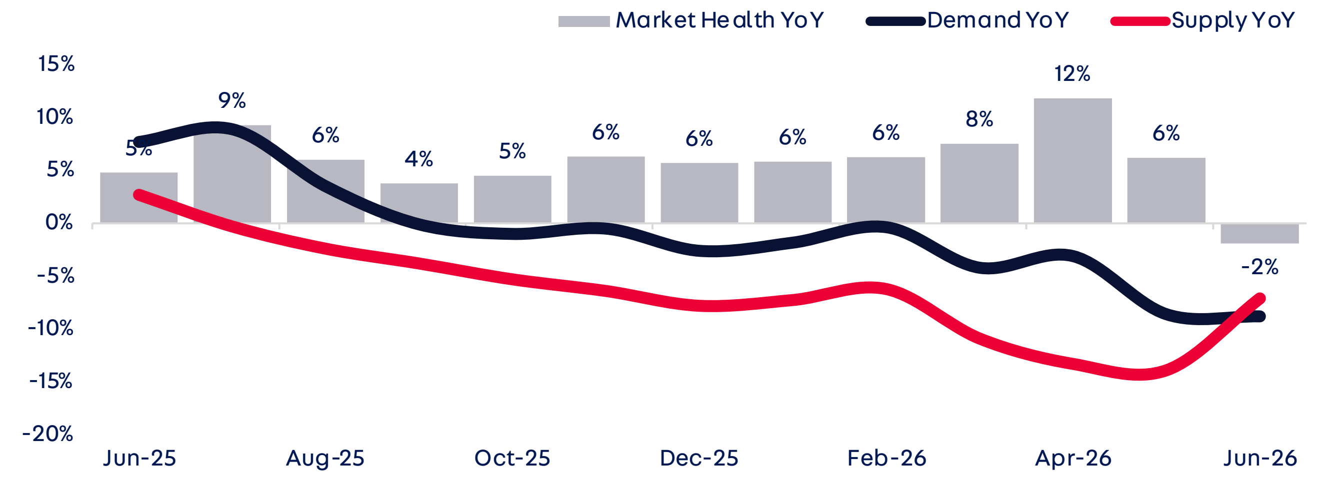


* Data based on vans removed from Autotrader. We assume that the van is sold on the last day we saw it on our site. Strong historical correlation to DVLA used LCV transactions. Includes electric vans weighing up to 4.25t.

Used LCV market health

Following Q1's positivity both April and May saw growth in market health as demand outweighed supply, June bucked the trend as supply took a slight uptick vs last year. Growth in supply in June looked to be led by an increase in electric van stock which grew 32%. Demand also grew however, by 44% vs last year offering a strong 9% market health. Supply fell for younger used vans, the largest reduction seen in 3-5-year-olds which were back 17%, driving demand back 22%. Though nearly new and 1-3-year-old vans saw supply decline, their market health remain positive by 16% and 4% respectively.

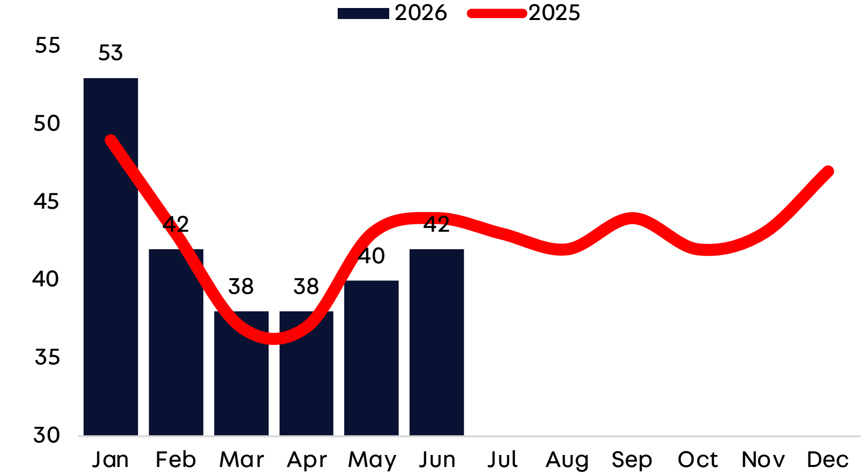
Demand	Supply	Market Health
-9% (Year-on-year)	**-7%** (Year-on-year)	**-2%** (Year-on-year)



Used LCV speed of sale

With exception of April which was slower by one day, the rest of Q2 saw speed of sale improve vs the same period last year. Diesel sold two days faster in June year-on-year, electric outperformed however on the back of a strong demand, selling faster by four days. As demand dropped for 3-5-year-old vans, their speed of sale slowed by one day. Where demand grew for nearly new vans, we saw speed increase by 11 days to 43 in June vs last year.

42 days
In June 2026
2 days faster YOY



Fastest selling:

MERCEDES-BENZ eSPRINTER
Panel Van

MAXUS T90EV
Pickup

CITROEN BERLINGO
Combivan

Following the first quarter of the year, Q2 has continued the positive trend of increasing year-on-year pricing movements, up 3% on average across the quarter . Pricing was up across the whole of H1, by 2% on average vs H1 of 2025. Pricing movements improved the most across older aged vans, particularly 10-15-year-olds which grew 17% in June despite growth in year-on-year supply (5%). Younger used vans were back however, 2% for nearly new vans. Whilst demand and speed of sale grew for used electric their pricing movements decreased in June vs June last year by 6%, averaging a retail price of £23,219, however diesel grew 4% with their average retail price showing at £21,999.

£22,214

Average price (June 26)

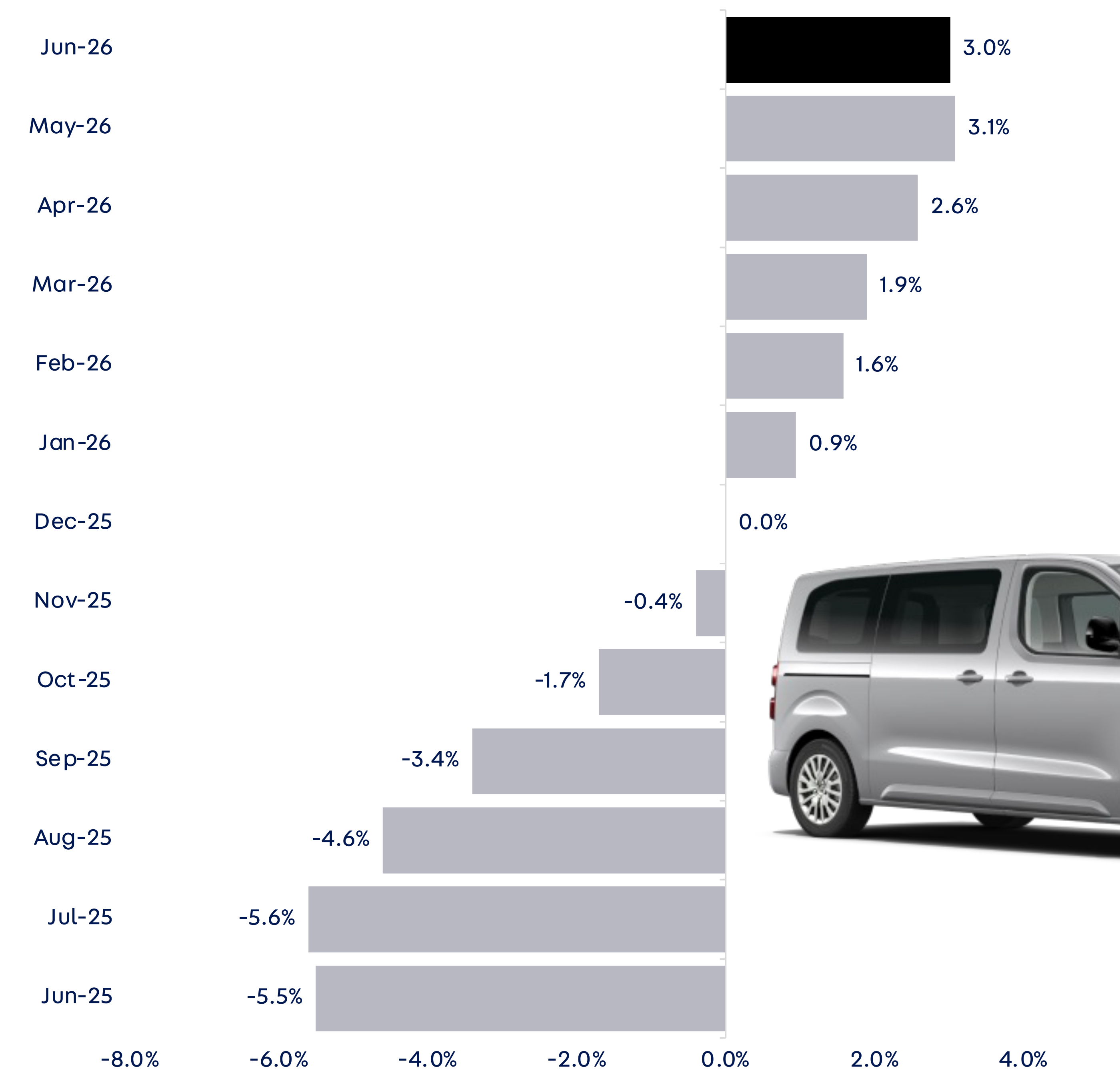
+3.0%

Price change YOY

Like-for-like price growth. Excludes VAT and private adverts .

Used LCV price growth

Year-on-year



Demand, supply, market health & price movement

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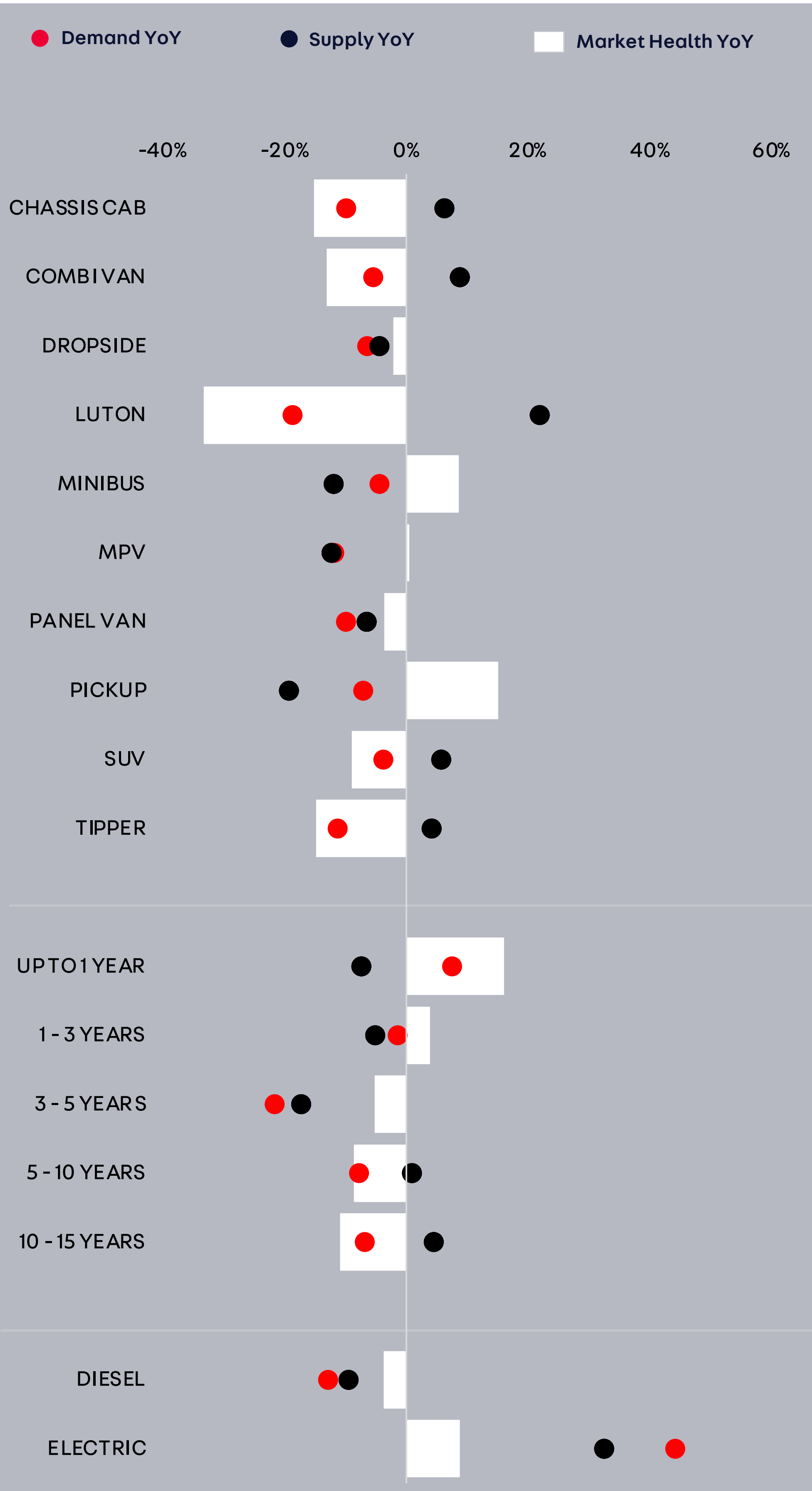
(YoY growth)

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



		Avg. Retail Price	year-on-year	
Body type	CHASSIS CAB	£21,991	10%	▲
	COMBI VAN	£25,908	5%	▲
	DROPSIDE	£19,351	5%	▲
	LUTON	£23,255	9%	▲
	MINIBUS	£25,263	-4%	▼
	MPV	£18,940	5%	▲
	PANEL VAN	£19,588	3%	▲
	PICKUP	£24,000	1%	▲
	SUV	£48,072	2%	▲
	TIPPER	£23,916	12%	▲
Vehicle age	UP TO 1 YEAR	£35,408	-2%	▼
	1 - 3 YEARS	£28,148	-1%	▼
	3 - 5 YEARS	£20,167	7%	▲
	5 - 10 YEARS	£15,994	7%	▲
	10 - 15 YEARS	£13,862	17%	▲
Fuel type	DIESEL	£21,999	4%	▲
	ELECTRIC	£23,219	-6%	▼

Used electric LCVs

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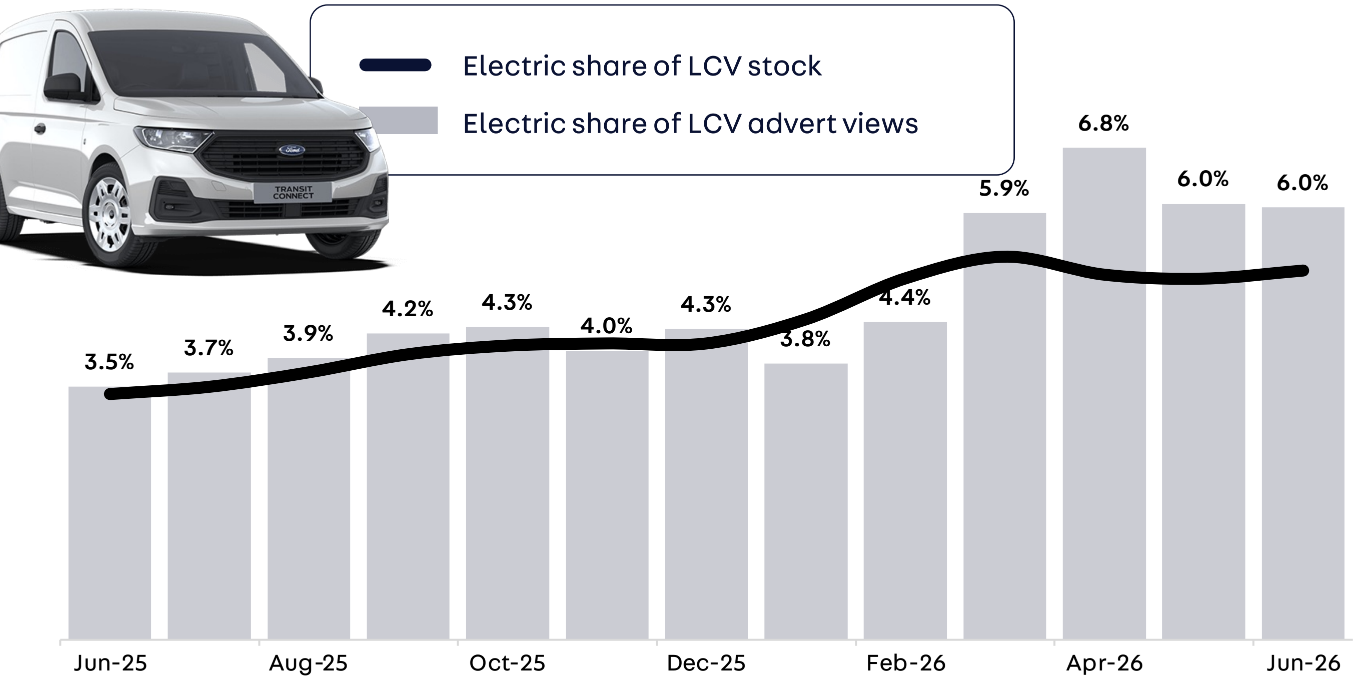
Q2 saw the used electric share of advert views for used vans peaking at 6.8% in April following what was the largest share of stock in March. Though dropping slightly vs March's 5.3% stock share, Q2 remained strong averaging 5.1% . The electric market shows positivity as share of advert views over indexes relative to stock. EV engagement has improved in Q2 prompted by heightened diesel costs at the pump but also as supply and demand metrics grow leading to a faster speed of sale in June at 39 days. Though diesel saw speed of sale also increase by 2 days year-on-year it was slower than electric at 42 days to sell. The fastest selling used electric van in June was the Mercedes-Benz eSprinter which sold in 21 days.

Electric share of the used LCV market on Autotrader



Used LCVS days to sell by fuel type

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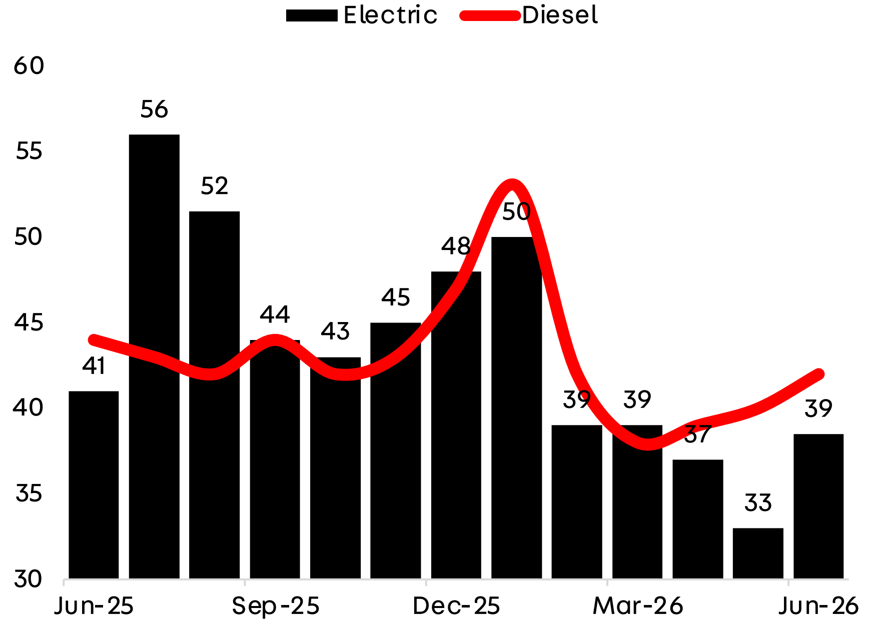

39 days
In June 2026
2 days faster year-on -year

42 days
In June 2026
2 days faster year-on -year

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