Monthly Market Intelligence

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

AUGUST 2026

Autotrader

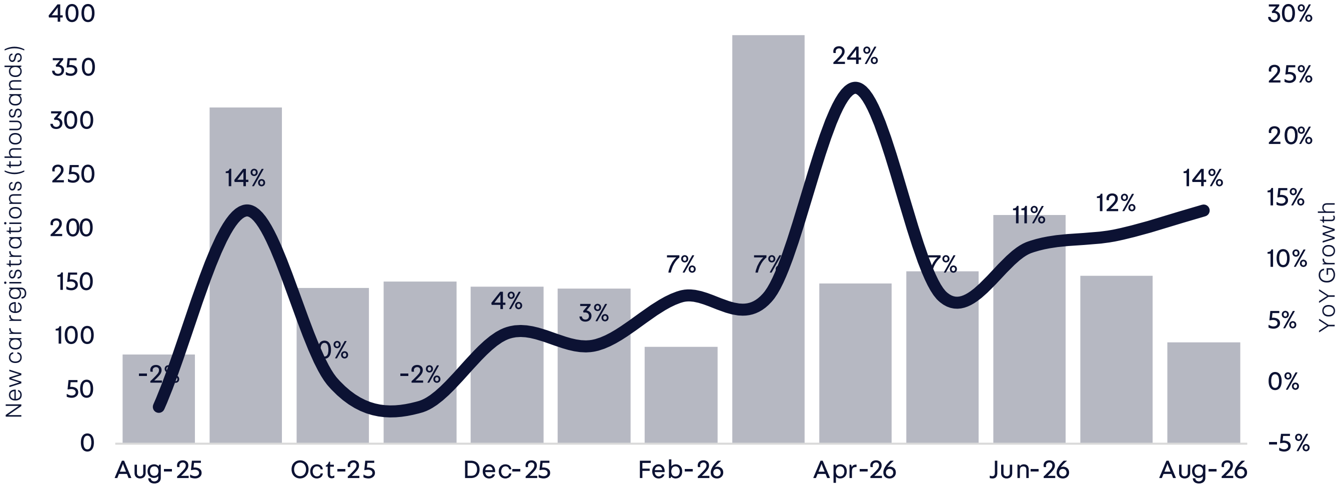
Consumer confidence strengthens as electrification supports market resilience.

New car registrations

New car registrations rose 14% in August, typically a low-volume month as buyers defer purchases ahead of September's plate change. Within the ninth consecutive month of market growth, electrified cars continued to take the spotlight, with PHEVs up 40% YoY and EVs up 28% - electric share reached 30% in August. On a YTD basis, EV share now sits at 26%. Growth was recorded across all sales channels, led by a strong 19% increase in private registrations.

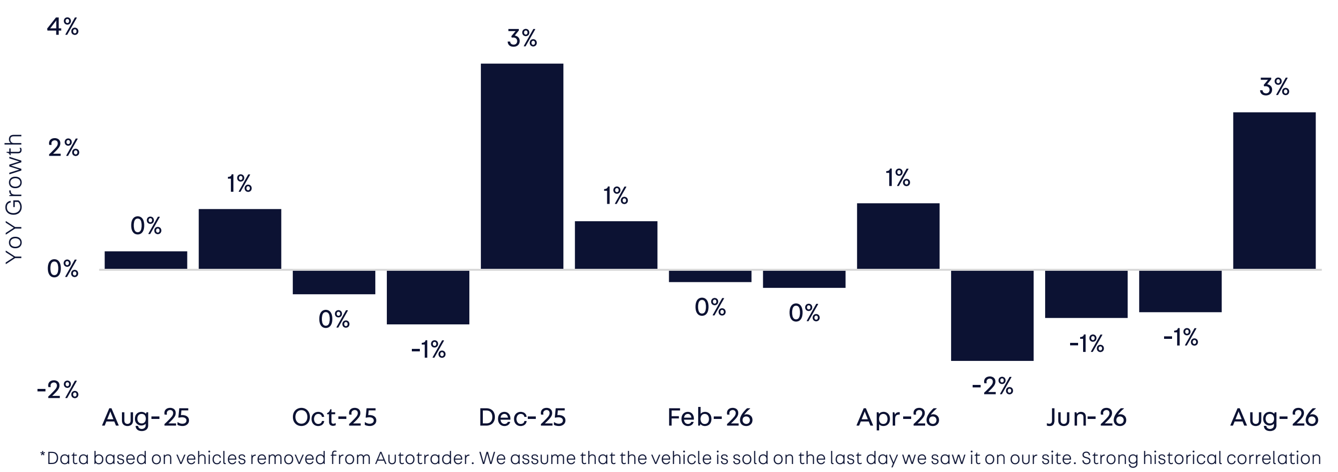
94,236
New car reg. (SMMT)

+13.7%
(vs. August 2025)



Used car sales (Year-on-year)

Used car transactions* grew 3% year-on-year in August, as growth in full/mild hybrids and plug-in cars offset the steady contraction diesel and petrol sales. This electrified shift supported franchise retailers in securing a 5% increase-their sixth consecutive month of growth. Independents also returned to growth, rising 1% YoY, despite higher exposure to the declining diesel segment, which represents 30% of their total sales mix.



*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.

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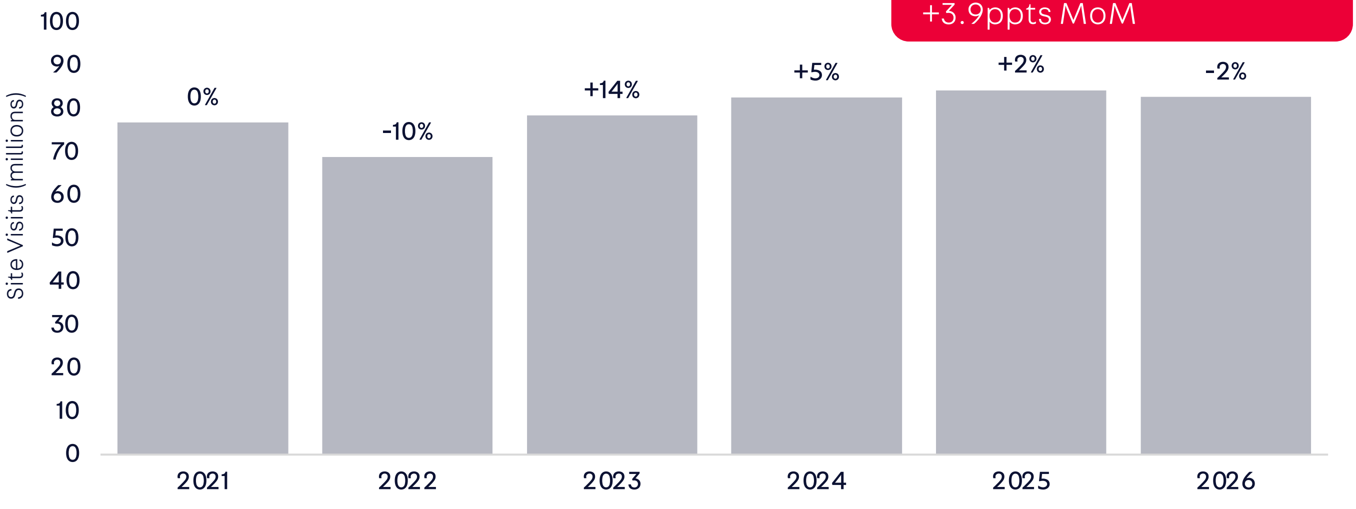
Site visits eased 2% in August but remain highly resilient against a strong historic benchmark. Underlying consumer sentiment is also strengthening, with GfK's consumer confidence rising three points to -14 (a two-year high), and the Major Purchase Index up five points to -7 (the highest since December 2021). With 70% of consumers on Autotrader planning to buy a car within the next six months[1], buying appetite remains strong heading into autumn.

82.7m
Site visits
+3.9ppts MoM

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



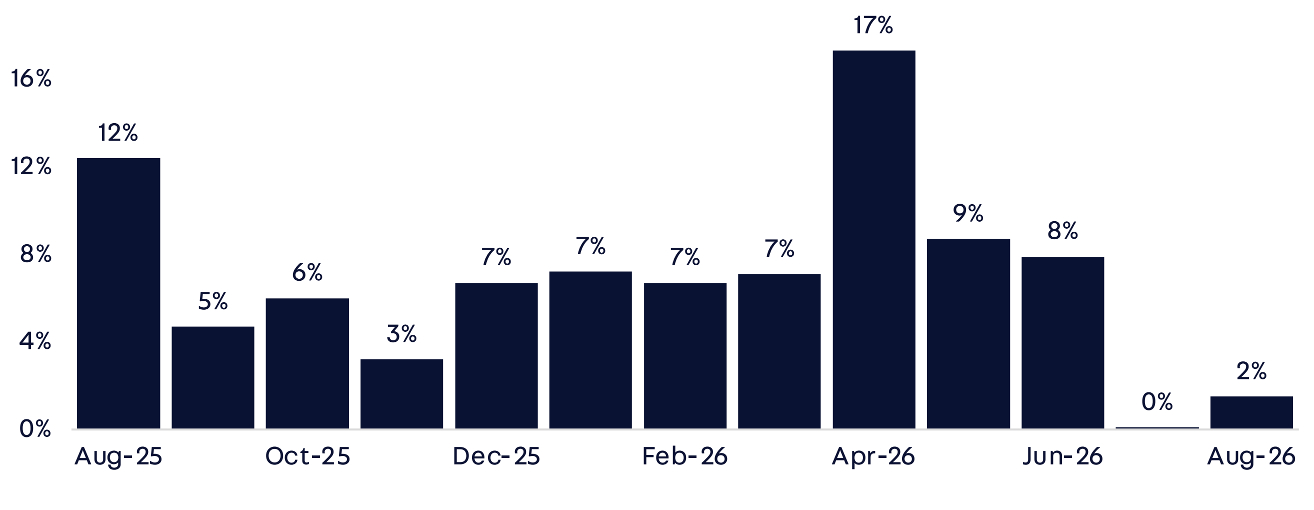
New car activity

New car visits built steadily ahead of the September plate change, rising 5% MoM and 2% YoY, following strong 12% growth last year. Manufacturers continued to lean heavily on discounting to stimulate private demand, with discounts remaining elevated at 10.5%. EV and petrol models were the drivers, with petrol edging ahead by 0.2ppts. EVs set a new benchmark at record 30% monthly share of new car enquiries, while PHEVs held firm at 18%.

+2%
New car visits (vs. Aug 2025)
+5.1% MoM

30%
EV lead share
+1.3ppts MoM

Autotrader new car visits*
Year-on-year



[1]Source: Autotrader Consumer Survey Data (n=1244)

Used market health

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Stable supply and slightly softer demand kept the used car market steady, but the fuel types divide is widening. Electrified demand continues to climb, while diesel fell 18% and petrol fell 7%. Petrol's drop aligns with its supply decline, but diesel demand is falling faster than supply. Although overall market pace matched last year's 30-day average, electrified cars are turning faster, led by EVs at 27 days, while diesel took three days longer to sell.

	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
vs. August 25	-5%	+1%	-5%

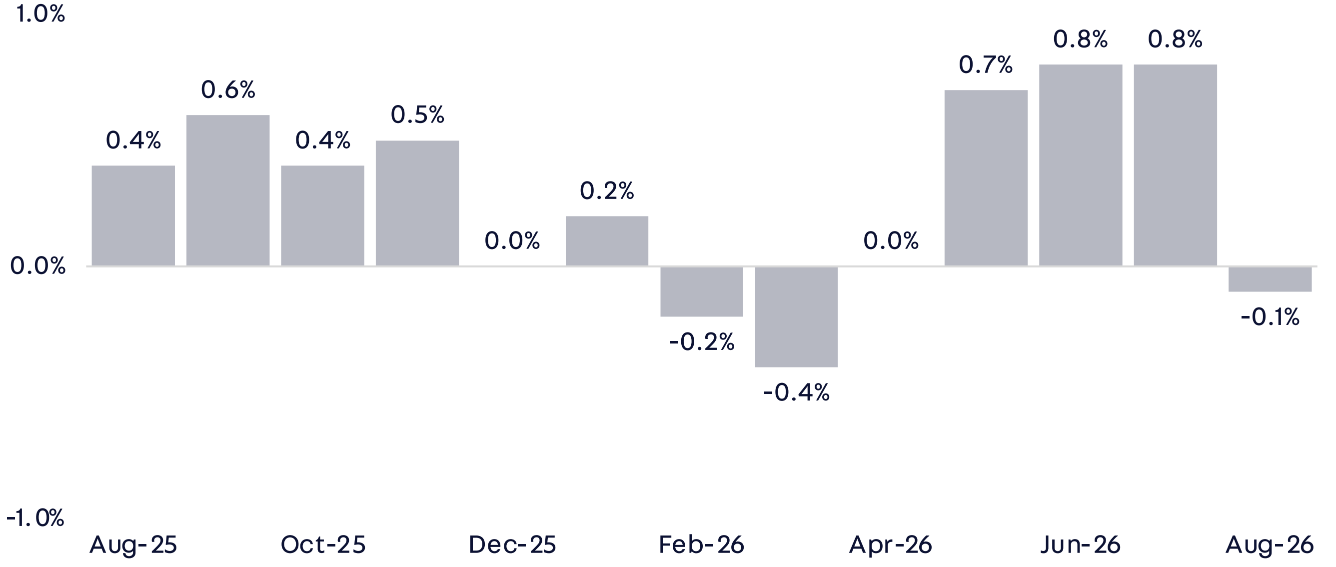
The Market Health metric shows the ratio of supply vs. demand compared to the previous year*

	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
Aug 26	-5%	1%	-5%
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%

Used car retail prices remained level year-on-year, marking nearly 18 months of sustained retail pricing stability despite emerging downward pressure on trade prices. Preserving this stability will remain important for retailers as the market continues to demonstrate underlying strength. Meanwhile, EV prices continued their recovery, rising 3.8% for a fourth consecutive month of growth. Growth was seen across all age cohorts, led by 3-5-year-old EVs at 9.4%.

Year-on-year used car retail price growth

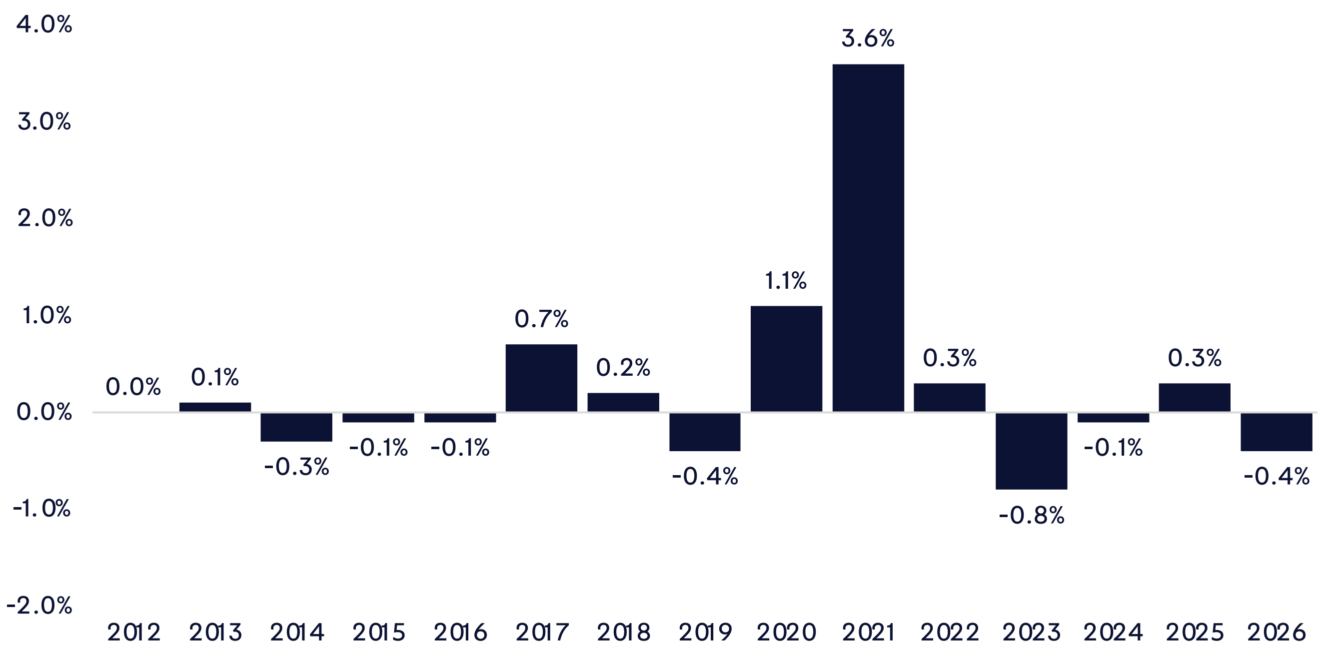
Like-for-like basis



On a month-on-month basis, used car prices dipped -0.4%, a more pronounced fall than typically seen at this time of year. While age cohort performance aligned with the wider market, fuel types diverged. EVs defied the contraction to rise +0.5% MoM, continuing their steady recovery, whereas diesel (-0.7%) and plug-in hybrids (-1.4%) recorded steeper negative movements than the market average.

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

Like-for-like basis

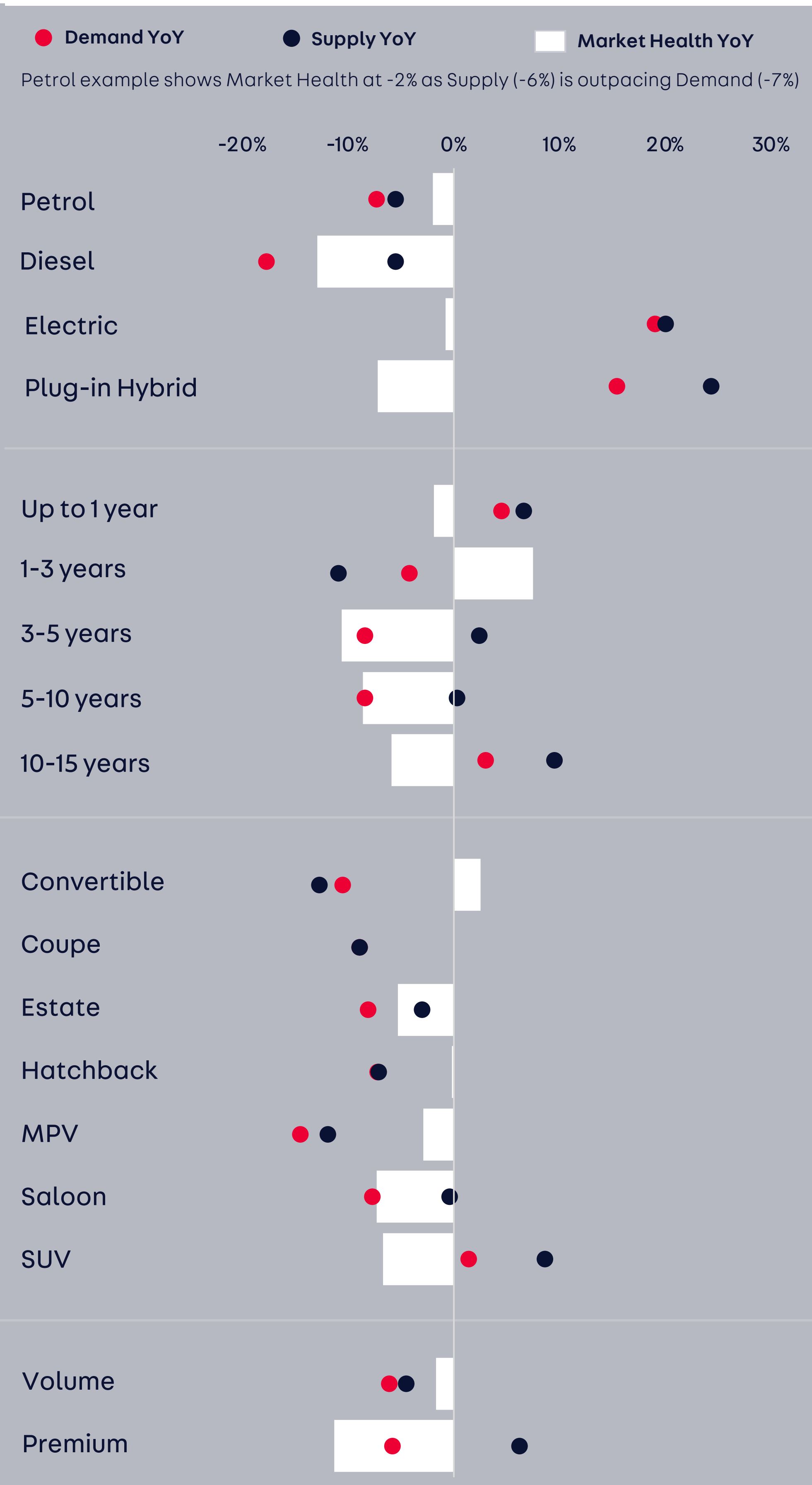


Retail price observations. Year on year like-for-like pricing. Removes the impact of stock mix shift to reflect true value adjustments

Demand, supply, market health & price movement

(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

		Jul-26 Retail Price		Aug-26 Retail Price
Fuel type	Petrol	+1.0%	▼	+0.4%
	Diesel	+1.4%	▼	+0.0%
	Electric	+3.3%	▲	+3.8%
	Plug-in Hybrid	+0.9%	▼	-1.2%
Vehicle age	Up to 1 year	-2.0%	▼	-2.0%
	1-3 years	-0.3%	▼	-1.8%
	3-5 years	+1.4%	▼	+0.2%
	5-10 years	+1.2%	▼	+0.5%
	10-15 years	+7.0%	▼	+6.9%
Body type	Convertible	+4.4%	▲	+4.6%
	Coupe	+1.2%	▼	+0.0%
	Estate	+4.6%	▼	+2.4%
	Hatchback	+1.9%	▼	+1.7%
	MPV	+4.3%	▼	+3.5%
	Saloon	+3.6%	▼	+1.7%
	SUV	-0.8%	▼	-1.6%
Brand type	Volume	-1.6%	▲	-1.4%
	Premium	-1.1%	▲	-0.3%

In focus this month

Electric Van Market: Practicalities remain a barrier to adoption.

Diesel dominance and the ZEV gap

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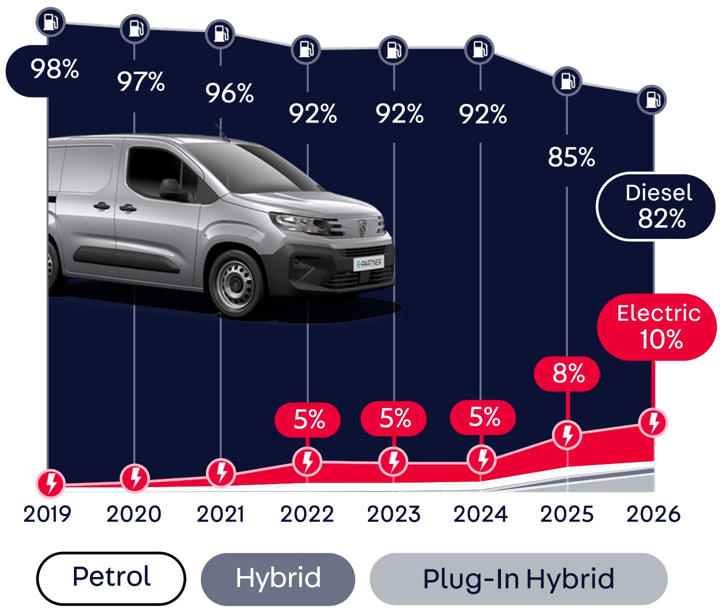
Diesel still commands 82% of new LCV registrations YTD, highlighting the scale of the challenge facing the sector as zero-emission targets tighten. Electric van adoption lags at just 10%, falling short of this year's 24% ZEV mandate, which rises to 34% next year.

With fleet registrations accounting for 78% of the market, business and commercial buying decisions will play a critical role in determining the pace of the zero-emission transition.

New LCV registrations share by fuel type. Year-to-date. SMMT.



EV savings hinge on charging

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Average discounts of 31% have brought EV vans below the upfront cost of diesel, while rising fuel prices are making the financial case for electric even stronger. But the scale of the saving depends heavily on access to affordable charging. Mostly depot charging delivers savings of £1,684, but frequent use of public rapid chargers cuts this to just £436.

Access to home or depot charging is critical to feeling the benefits of electric vans, making adoption attractive only to those with suitable infrastructure.

£436

50% depot / 50% rapid charging

£1,684

80% depot / 20% rapid charging

£2,516

100% depot

Savings based on 20,000 miles a year. Diesel: £1.80/litre at 35 mpg.Charging rates (8,000 kWh annual energy): Depot 27p/kWh, Public rapid charging 79p/kWh

Range limits add costly downtime

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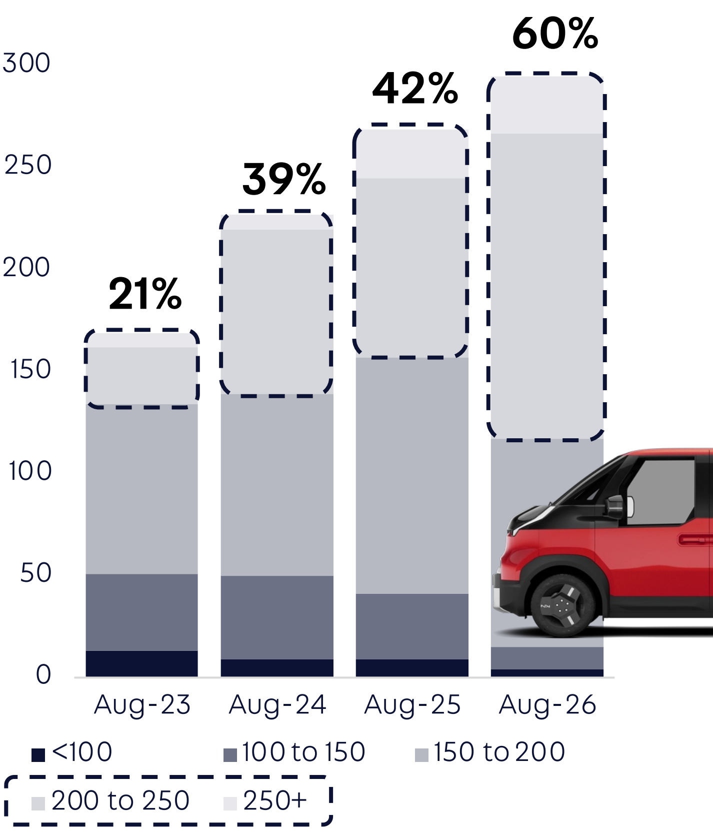
EV vans still face limitations around range and choice. More electric vans are coming to market, but choice remains heavily skewed towards panel vans, making up three in four EV options versus half of diesel vans. Body type choice in electric vans remains narrow.

Range capability is improving as technology evolves, but issues persist – 4 in 10 electric vans have a range of under 200 miles. A 300-mile operating week would require an electric van to stop and recharge, whereas a diesel completes the task without refuelling. For businesses, this additional downtime comes at a cost.

As manufacturers bring more models and body types to market, the electric offering must be capable of meeting a wider range of operator needs.

Number of new van derivatives by battery range. Autotrader.



Used vans trail cars in electrification

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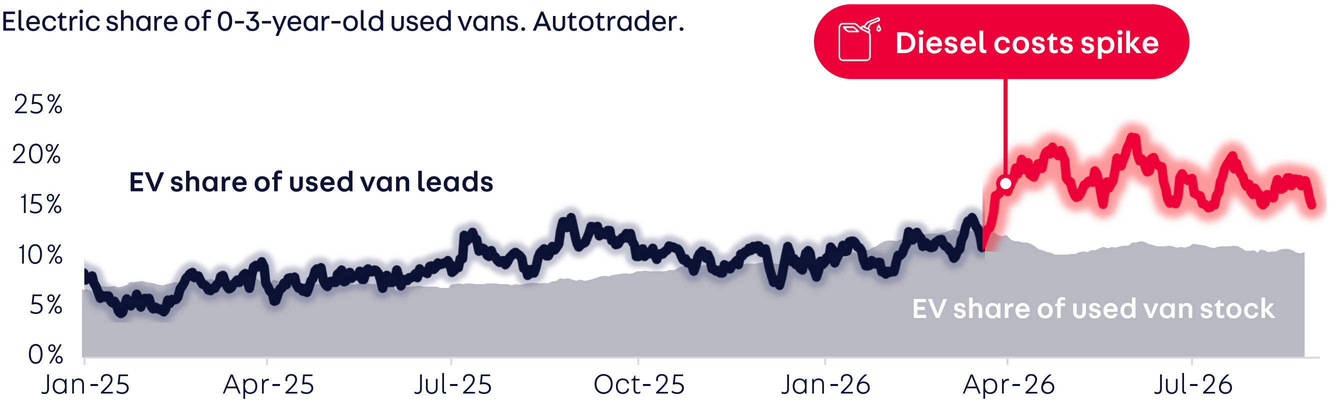
The used van market is where the car market was three years ago in its electric transition, with EVs accounting for 11% of under-3-year-old stock. As tradespeople typically rely on older used vans, it will take time for sufficient electric stock to filter through to this market and users covering shorter journeys, where range limitations are less of a concern.

Rising diesel costs are also strengthening interest in electric vans, but the limited availability of used EV stock could constrain growth. Where electric stock is available, demand is strong, with the electric Ford Transit Custom selling in just 29 days versus 42 days for its diesel equivalent.

Electric share of 0-3-year-old used vans. Autotrader.



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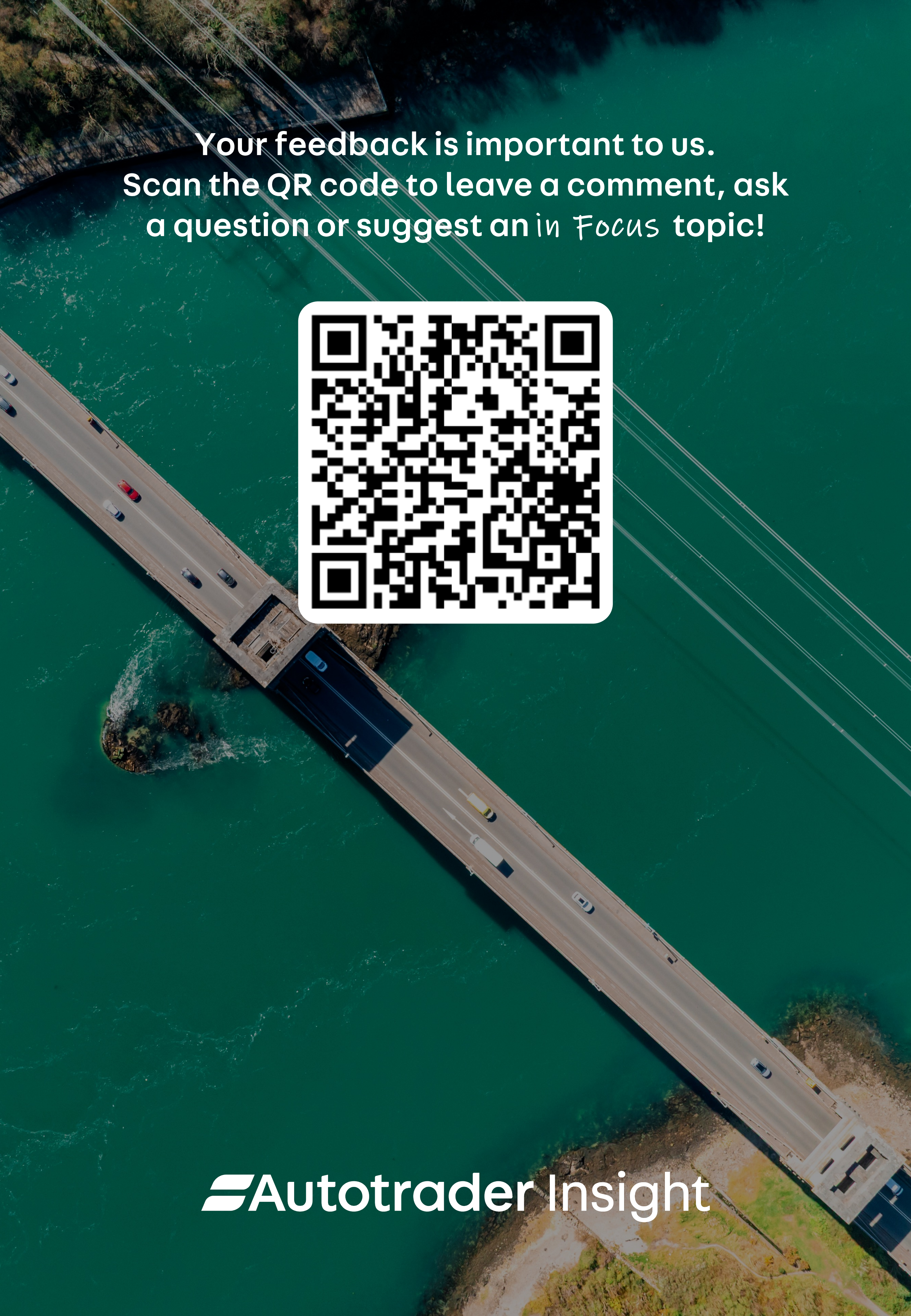

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