

# Monthly Market Intelligence

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

APRIL 2026

 Autotrader

# Resilient car market amid global uncertainty and Middle East tensions.

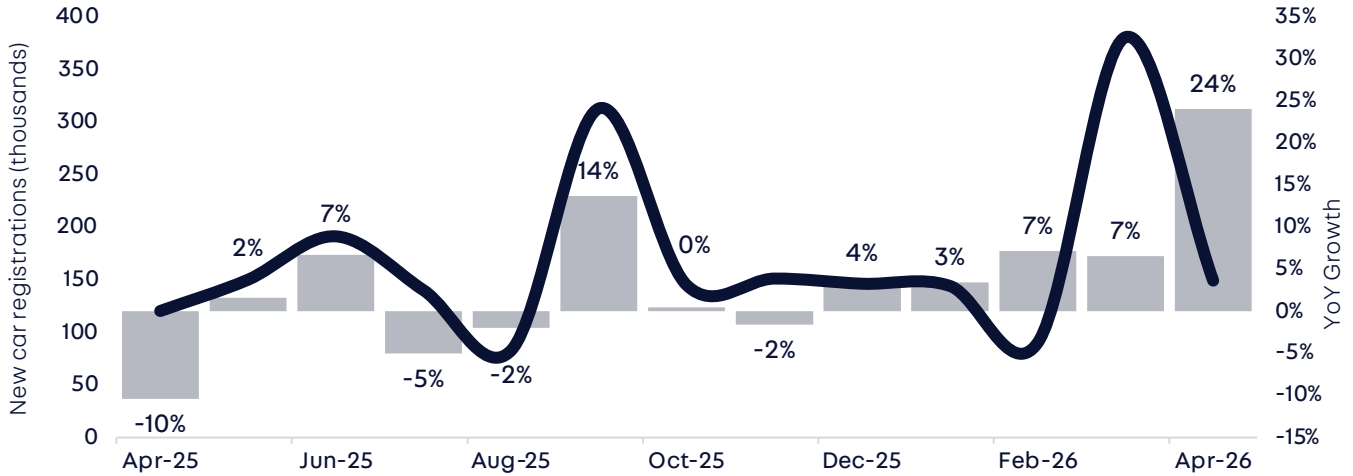
## New car registrations



April's new car registrations rose 24% YoY, rebounding from a weaker, tax-affected month in 2025. EVs had a strong month, increasing 59% YoY and surpassing the milestone of 2 million total electric car registrations. PHEVs were the only other fuel type to see similarly strong growth, up 46%. Together, they continued to gain share in April, with EVs at 26% and PHEVs at 14%, although EVs remain at 23% YTD – still below the 33% target. Growth was recorded across all sectors, led by fleet up 27%, followed by private buyers at 20%.

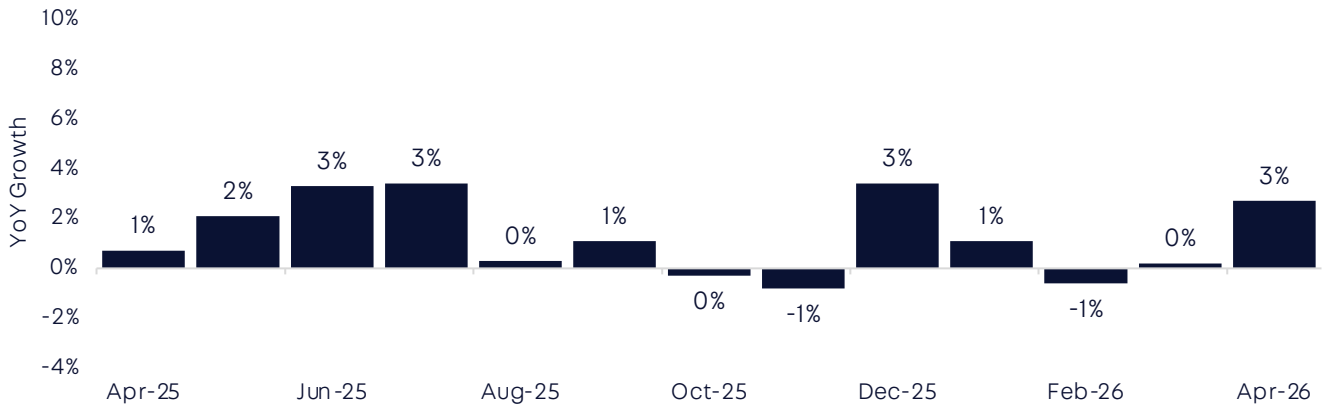
**149,247**  
New car reg. (SMMT)

**+24.0%**  
(vs. April 2025)



## Used car sales (Year-on-year)

April used car transactions rose 3% YoY based on stock removed from Autotrader\*. Electric drove standout growth, with sales doubling compared to last year and accounting for more than one in ten transactions, building further on the previous month's record share. Franchise retailers saw a 4% rise, supported by stronger electric supply, while Independents recorded a 1% increase.



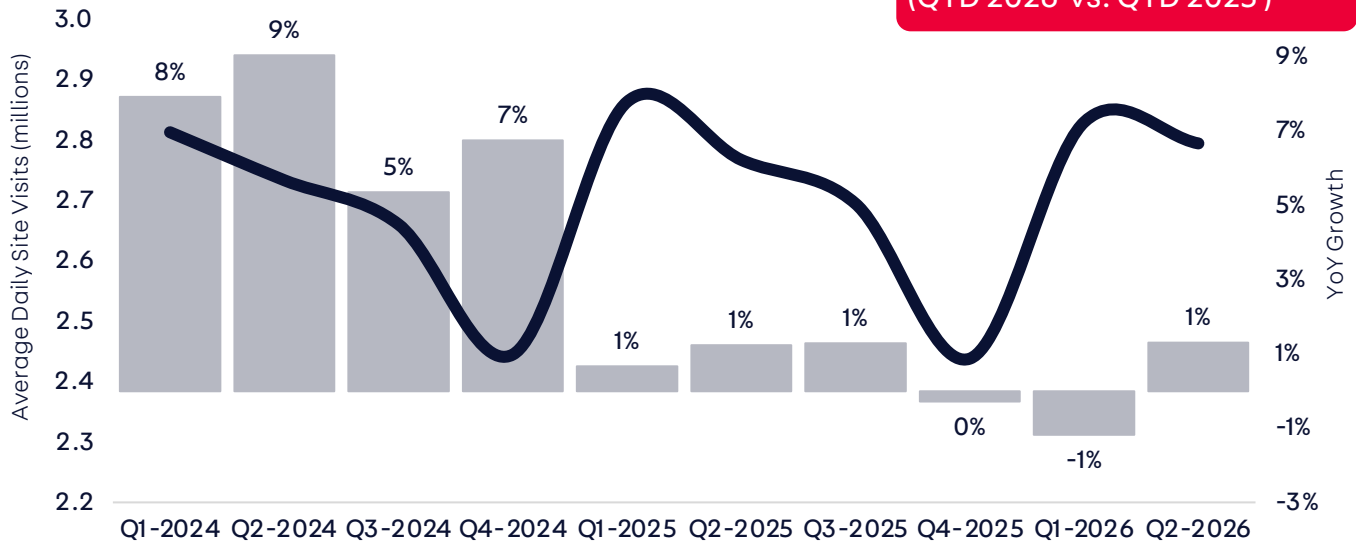
\*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

Site visits to Autotrader increased by 1% YoY and continue to track above 2024 levels, demonstrating resilience against a strong historical base. While ongoing external disruptions are weighing on consumer confidence, with GfK reporting a 4-point drop in April, car buying intent remains firm, with 3 in 4 consumers on Autotrader planning to purchase in the next six months<sup>1</sup>.

**Autotrader site visits**

Average daily site visits, year-on-year

**+1%**  
(QTD 2026 vs. QTD 2025)



**New car activity**

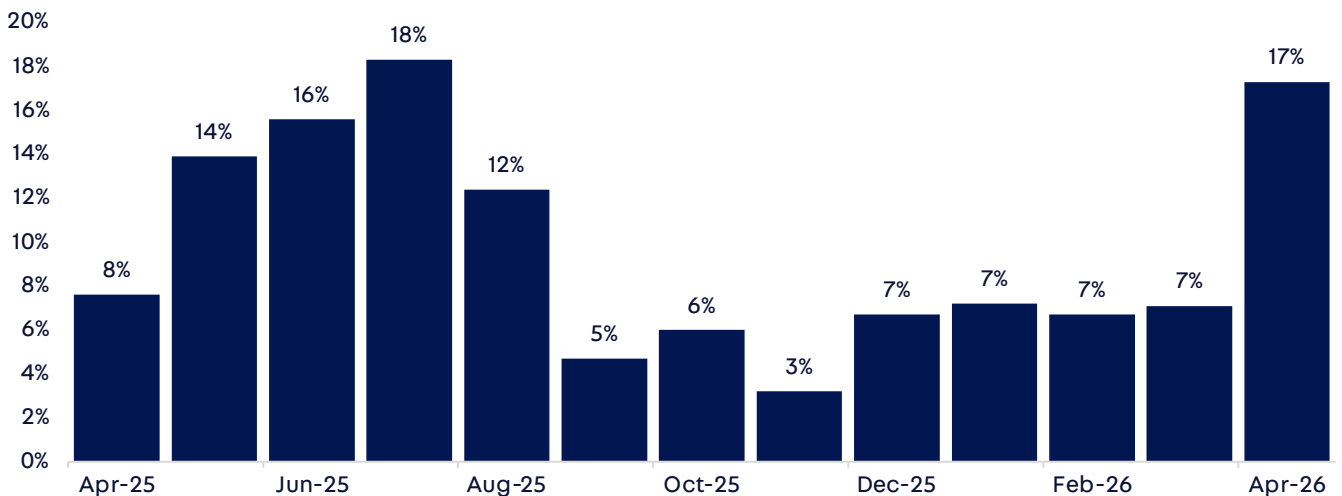
A strong month for new car retail demand, up 17% YoY, with supply sustaining momentum from a robust first quarter. EVs set a new high, capturing 29% of new enquiries, supported by rising fuel prices. PHEVs also achieved a record 18% share, largely driven by Chinese brands, which now account for 69% of the fuel type. Discounts remain elevated at 9.9%, just below last month's 10.9% peak, helping to sustain private demand.

**+17%**  
New car visits (vs. Apr 2025)  
-12% MoM

**29%**  
EV lead share  
+4.8ppts MoM

**Autotrader new car visits\***

Year-on-year



\*Please note some previous months have been revised to reflect updated data and ensure accuracy

<sup>1</sup>Source: Autotrader Consumer Survey Data (n=1104)

The market remains resilient, with demand holding firm as supply tightens but remains above 2024 levels. This reflects some normalisation from promotional activity, strong EV demand absorbing available stock and Covid supply gap filtering through into 5-10-year-olds. Overall, the market pace remains steady, with cars selling every 27 days on average, while EV strength is driving a three-day improvement on last year to 28 days.



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

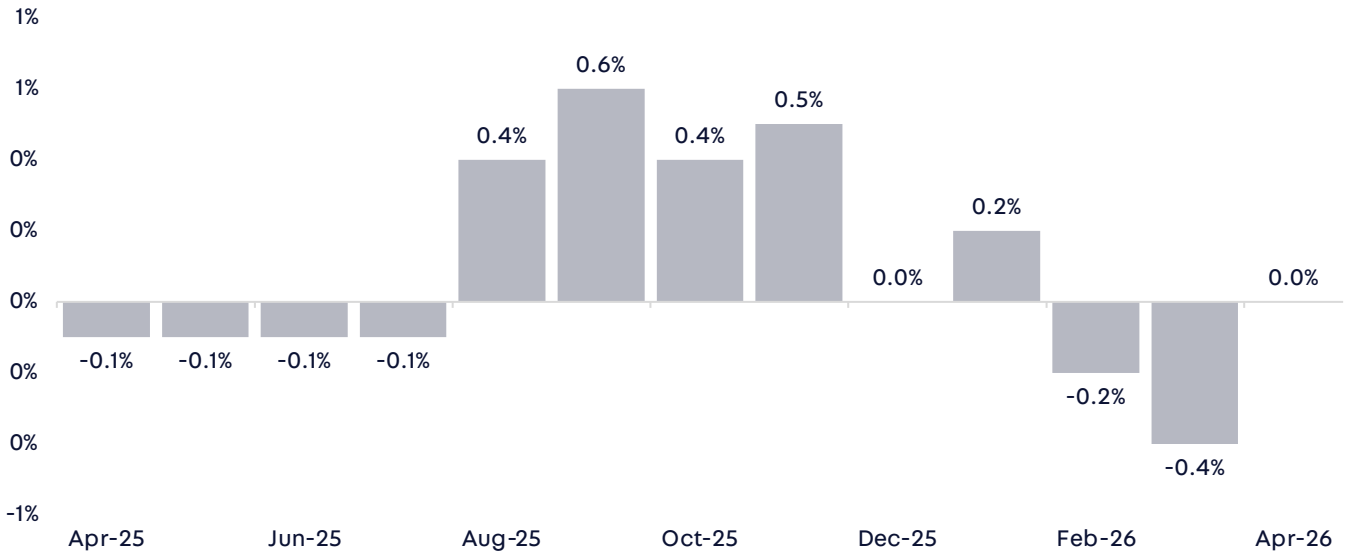


\*Please note last month has been revised to reflect updated data due to an incomplete reporting period

Pricing stability extends to April, marking a full year of largely flat movements. Older cars continue to strengthen, with 10-15-years-olds up +8% amid sustained strong demand. Meanwhile, younger cars are moving in the right direction, with prices easing as market dynamics improve following earlier supply increases. EVs have entered a fourth consecutive month of price softening, with growing demand absorbing supply.

## Year-on-year used car retail price growth

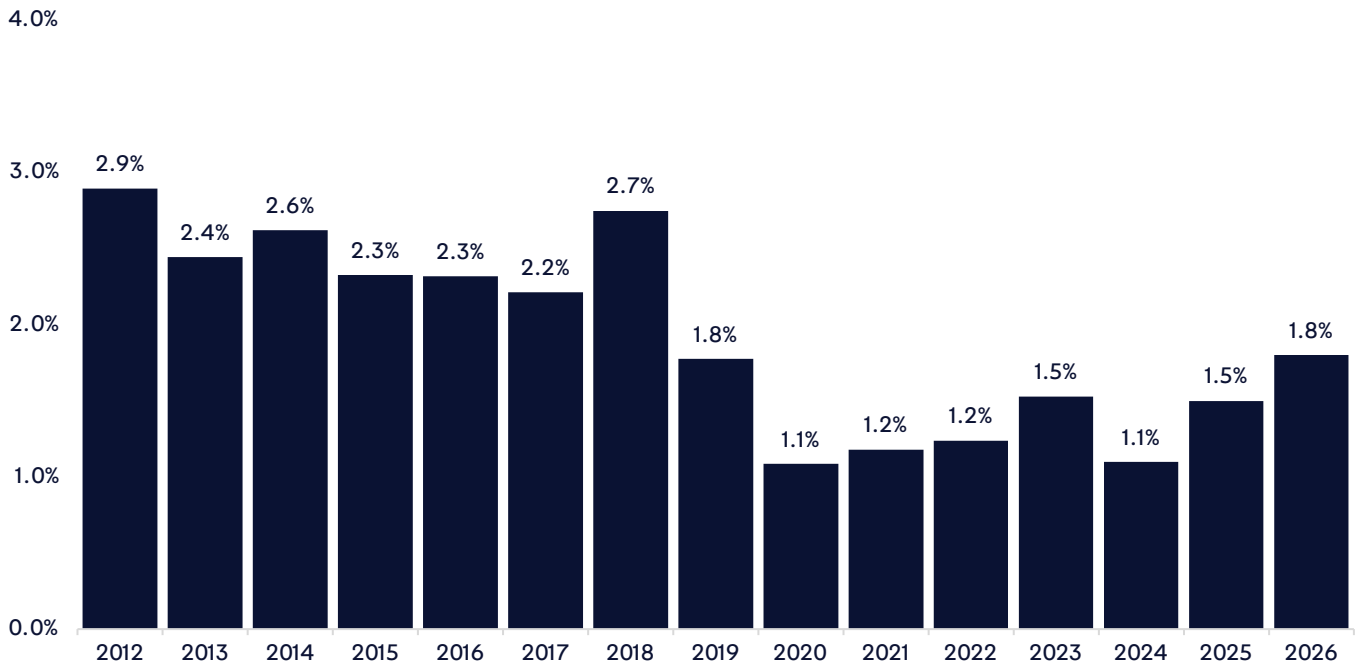
Like-for-like basis



Used car retail prices increased by +1.8% month-on-month, consistent with seasonal norms. Encouragingly, growth was consistent across all fuel types and age cohorts, highlighting the resilience of demand across the market. EVs stood out as the strongest performing segment, rising by +3% and outperforming the broader market, supported by sustained demand momentum.

## Month-on-month used car retail price growth: April

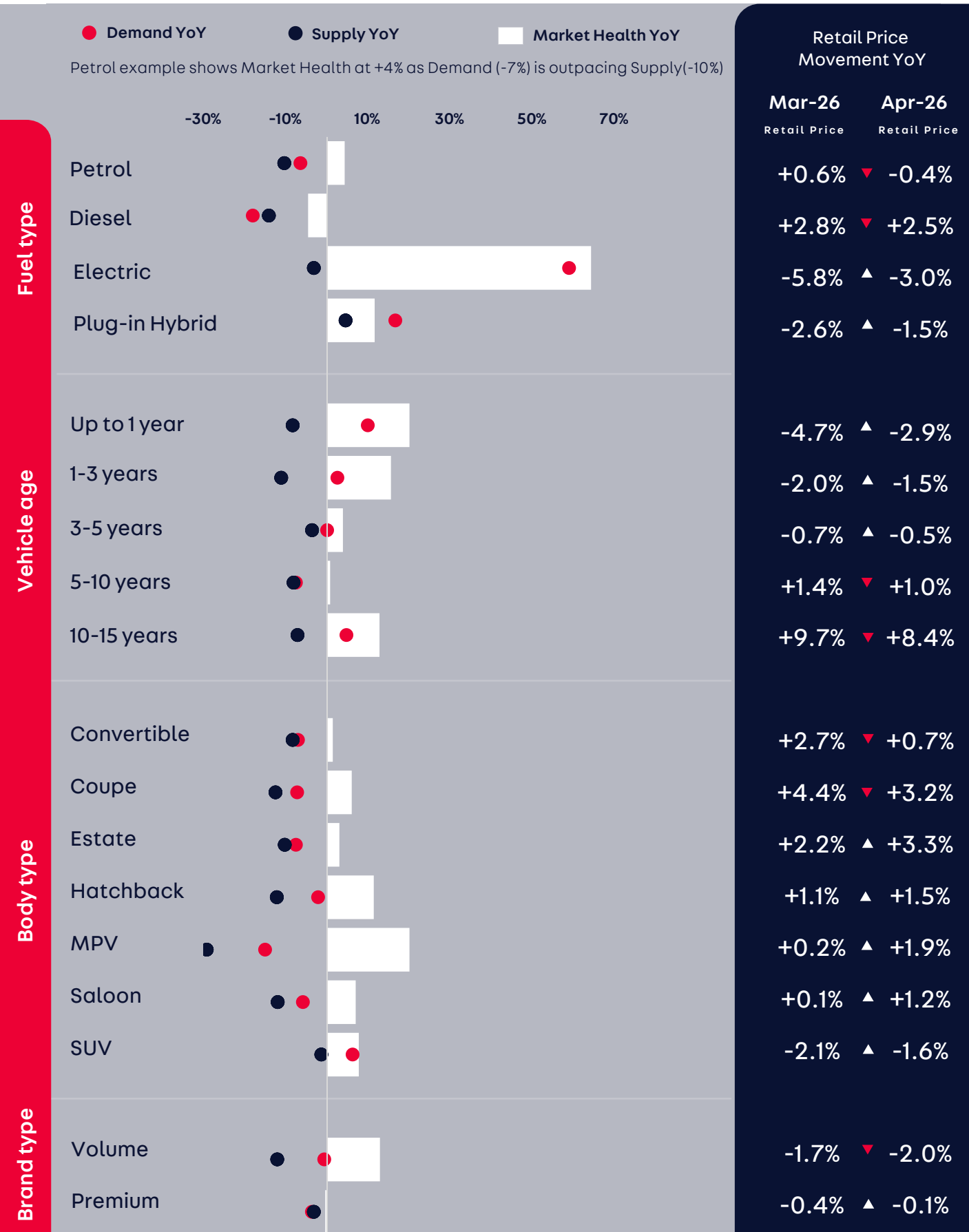
Like-for-like basis



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

(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.



In focus this month

# When ICE was on top: The 10-15-year-old segment.

The demand core



**+5%**

Demand  
Year-to-date

**30**

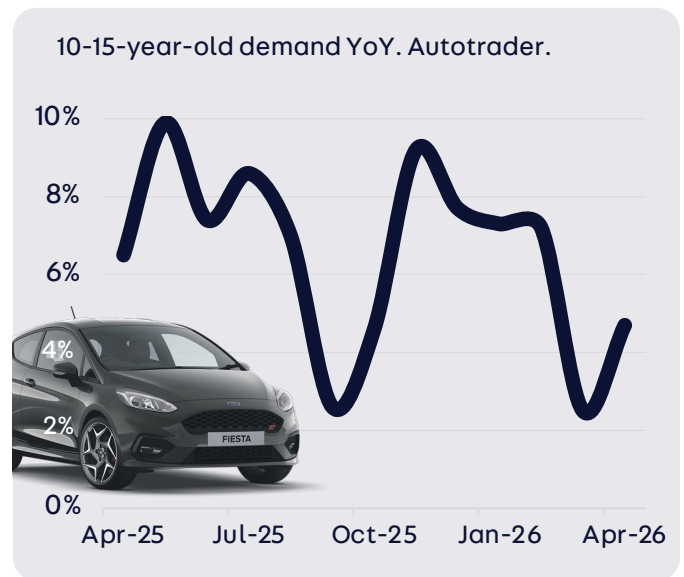
Days to sell  
Year-to-date

**+9%**

Pricing  
Year-to-date

Demand for cars aged 10 to 15 years remains remarkably resilient. Prices have grown 9% year-to-date, with these vehicles selling faster than in previous years.

As the final group defined by familiar petrol and diesel engines, they continue to be a cornerstone of the market. This familiarity has secured their position as the second most in-demand age group today.

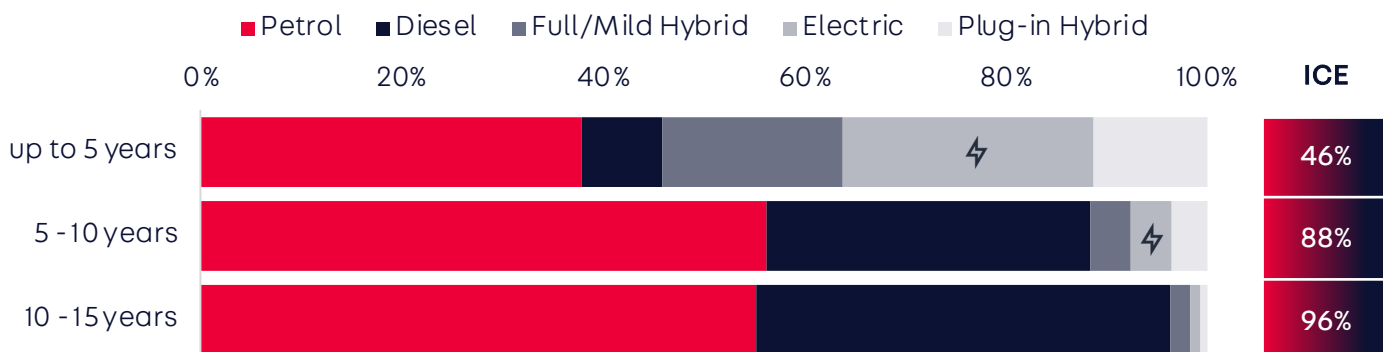


Last stronghold of the ICE age



As electrification and alternatives accelerate, ICE is losing ground among younger cars, now accounting for 45% of consumer interest in cars under 5. In contrast, the 10-15-year-old market remains firmly rooted in traditional technology, with 96% of interest in petrol or diesel cars.

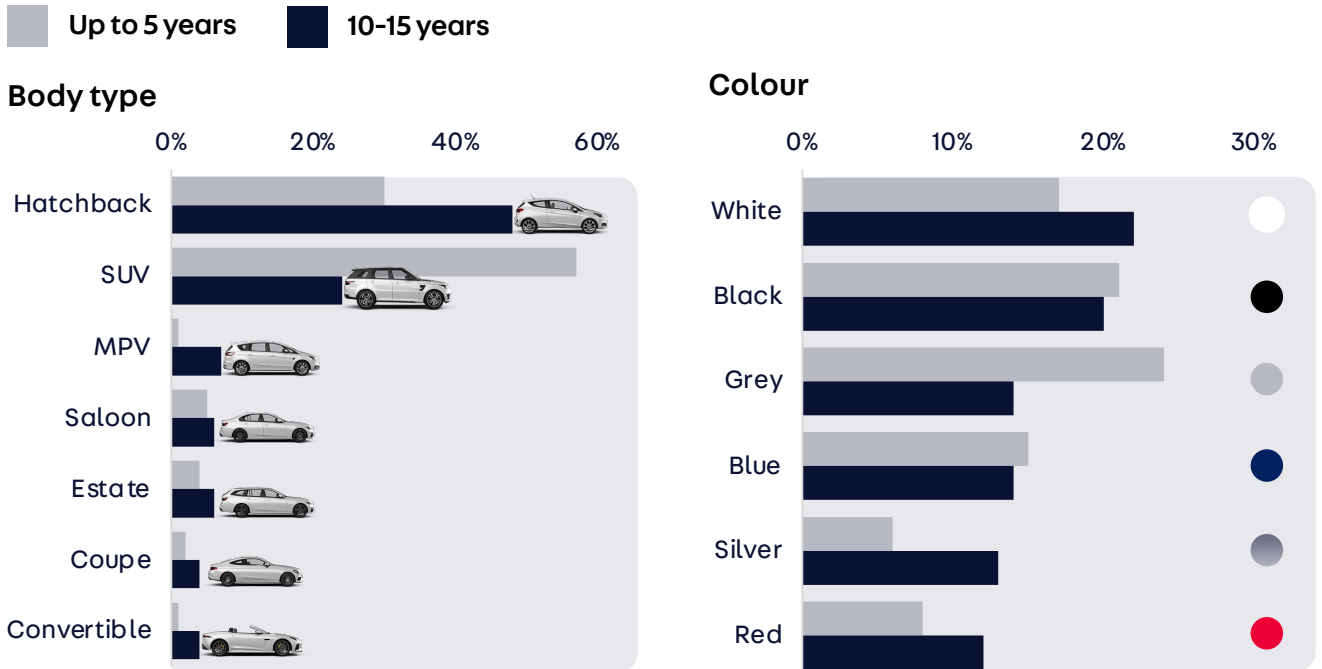
Most viewed fuel types by age cohorts. Apr 2026 Autotrader.



## Where familiar automotive styles live on

For many buyers, 10-15-year-old cars represent a more familiar and traditional automotive landscape, standing in contrast to the increasingly SUV-led and standardised profile of newer cars. This variety in both body style and colour composition underpins the strength of demand, pricing growth and speed of sale for older cars.

Distinct ads body type and colour mix by age cohorts. Apr 2026 Autotrader.



## Nostalgic models

Cars in the 10-15-year-old bracket carry a strong sense of nostalgia, shaped by a time when family hatchbacks and household names dominated the roads and were deeply connected to everyday life and first driving experiences.

After decades of relative uniformity, the market is now undergoing rapid change. As electrification and SUV growth reshape newer segments, it is only a matter of time before older cohorts follow. The 10-15-year-old segment is where we find familiar makes, models and designs that will be gradually replaced by different choices of brands and technology.

Top 5 most enquired upon models. Apr 2026 Autotrader.



### Up to 5 years

### 10-15 years

1	Tesla Model 3		2.5%	Volkswagen Golf		3.5%
2	Volkswagen Golf		2.2%	Ford Focus		3.1%
3	Tesla Model Y		2.1%	Ford Fiesta		3.0%
4	Nissan Qashqai		1.4%	Vauxhall Corsa		3.0%
5	Mercedes-Benz CLA		1.3%	Volkswagen Polo		2.8%

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 Autotrader Insight