



Brego
Driven by Data

Car Market Insight

February 2026

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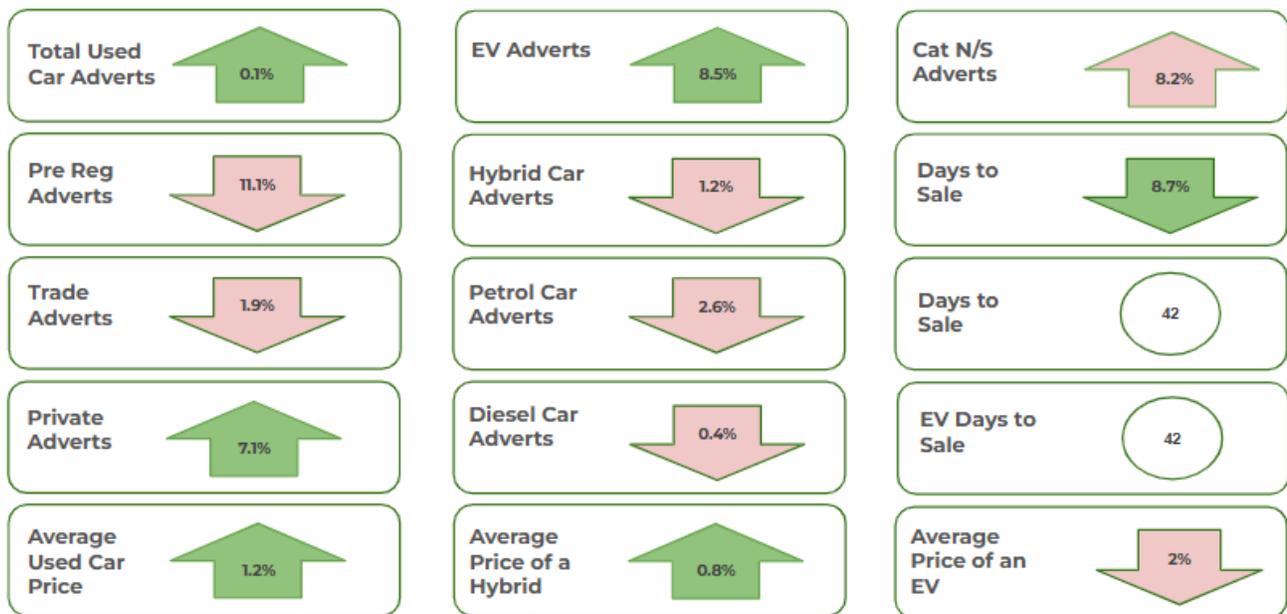
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February Monthly Car Market Insight

The February Monthly Insight report reviews what happened in the UK automotive sector during the month with some comparisons to January 2026, whilst also highlighting key economic indicators that influenced consumer and dealer behaviour.

Key Used Car Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of February when compared with market activity experienced in January:-



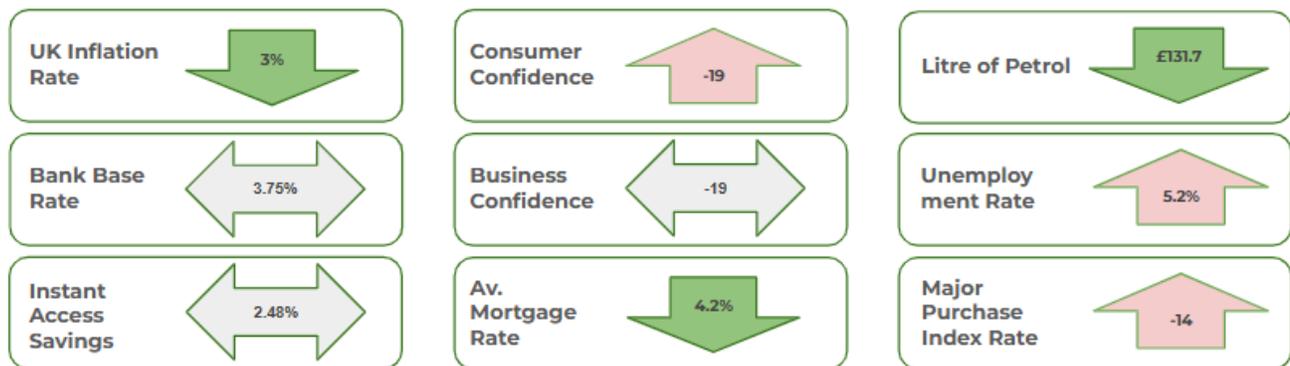
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The February KPIs reveal some interesting shifts in the market as consumers returned to buying mode during the preceding weeks. Total advert listings increased by a nominal 0.1% and the drop in the volume of both trade adverts and specifically pre-reg adverts show that the sales activity has been focussed in the dealer environment, in part at the expense of private sales. Sales for the month increased by a healthy 2.9% which is a welcome uplift, although the success in the used car market was eclipsed by a 7.2% boost in new car registrations, albeit that latter figure is a year on year increase.

Returning to advert listings, there was a notable 8.5% increase in EV adverts whilst all other fuel types experienced drops ranging from 0.4% to 2.6%. This jump in used EV adverts is probably not an indication of slower sales, but just a further reflection of better used EV availability in the market.

As expected the average time to sell a car decreased during the month to 42 days, reflecting a pick up in demand that started at the beginning of the year. It will be interesting to see what happens during March whilst the new car market will be the focus of attention for the franchised dealer, which may result in a slow down for the used car sector.

Key UK Economic Indicators



Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

The economic forecast for February had been varied, but the reality was way more positive than expected as consumers returned to the automotive retail sector with a little more cash in their pockets. The increase in digital activity coupled with improved footfall at the dealers was encouraging and defied the fact that the consumer confidence index increased by 3 points to -19 for the month. There was also more good news as the rate of inflation came down to 3% along with a reduction in the cost of fuel and slightly lower mortgage rates, all of which helped to give a positive feel for the consumer to work with.

This kind of optimism was mildly tempered by an increase in the unemployment rate, although this was widely expected, along with a decline in the major purchase index rate. However, there were clouds on the horizon and the first was the continued harm the government and prime minister were doing to their reputation post the Mandelson and Epstein debacles.

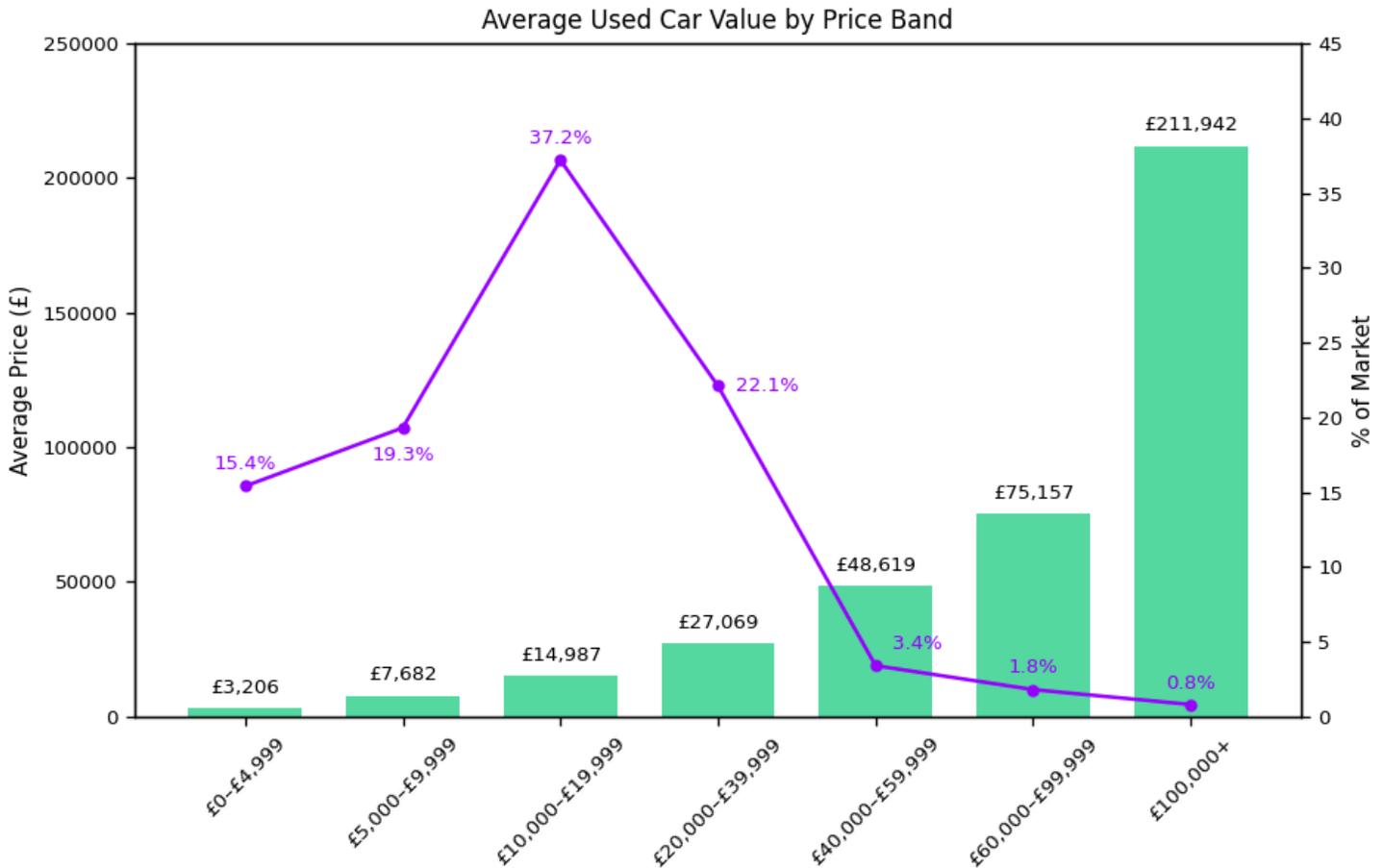
On February 28th matters took an ugly turn when the US and Israel threw the global economy into a potential meltdown by taking military action against Iran. Their actions, which are perhaps illegal, have subsequently resulted in chaos in the Middle East. Whilst the loss of human life and infrastructure damage has been horrific, the wider global impact will not be known for some weeks.

As it stands today, very little oil is coming out of the region which provides around 20% of the worlds oil supply, and the immediate impact on the world economy has seen a 10% increase in the cost of oil, 20% increase in the cost of gas and an expectation of perhaps a 0.6% headline global increase in inflation. The next few months may well see the UK impacted more heavily, and of course this kind of global unrest will probably mean there will be no further decrease in

the inflation rate and it is unlikely that the Bank of England will vote for further base rate reductions for the foreseeable future. For both humanitarian and economic reasons an early cessation of the military action is essential.

Average Used Car Value by Price Band

The chart below gives a breakdown of the Average Used Car Price of advert listings by price band. The Average Price is shown above the bars and the % share of the market for each price range is shown by the purple line.



Data Powered by Brego Insight

This chart will always look fairly similar month on month due to the nature of the UK market in recent years, although the influx of new Chinese brands is likely to influence some bigger changes in the next 12 to 24 months.

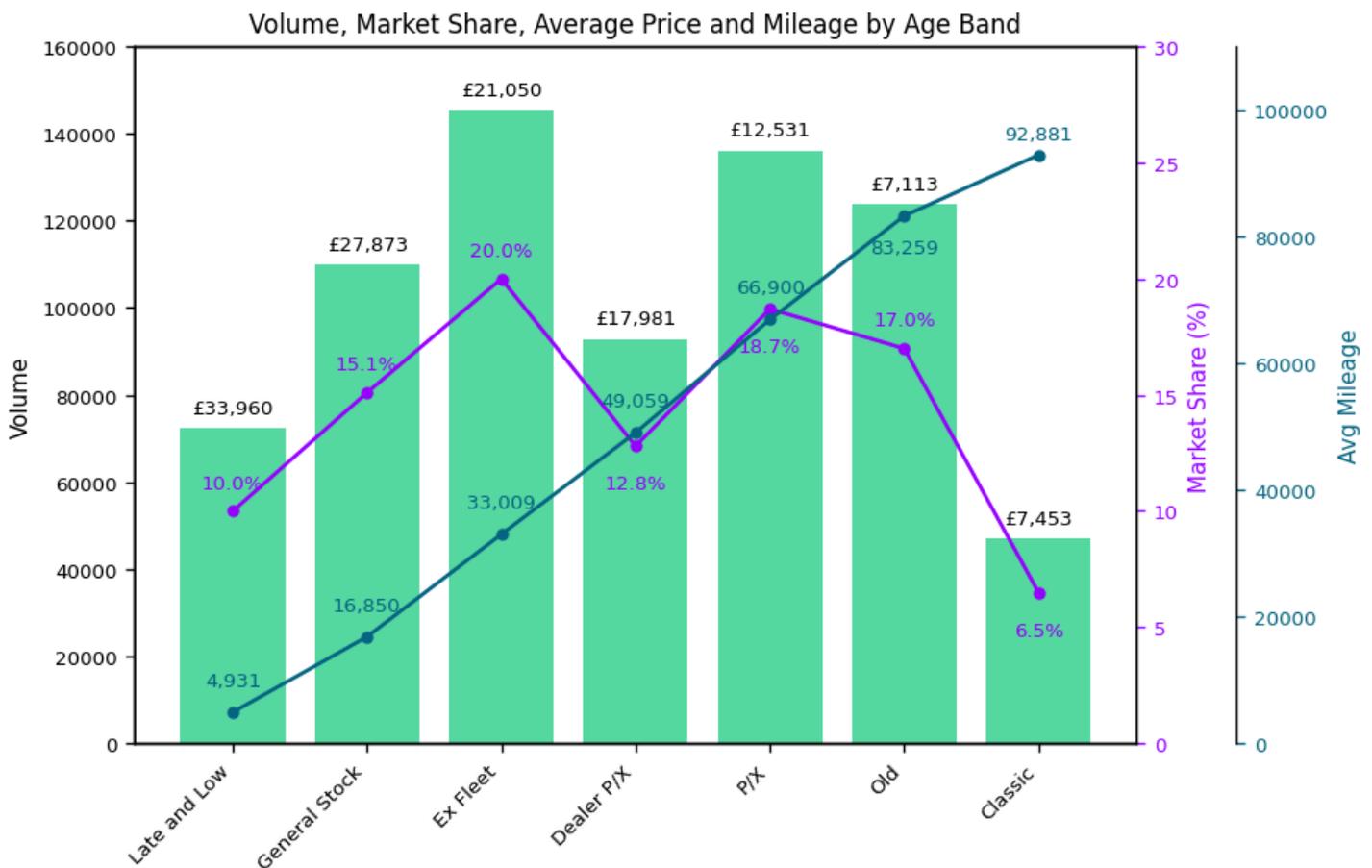
Comparing the February data against the January insight and at a high level the average price has increased by a touch over 1% to £55,523. This may seem quite high but no outliers have been removed and this often means that the average can seem high. In addition the overall average mileage has also increased by almost 1.1% to 39,202.

Looking specifically at the average price change by band and this month shows considerable consistency. In pound note terms the biggest shift has been an uplift of £3,268 for cars over £100,000 which equates to a 1.5% increase. All other price bands experienced an increase in the average price except the £10,000 to £19,999 band which saw a nominal 0.09% decrease of £14.

From a market share perspective, all price bandings remained within one percentage point month on month. It is worth highlighting that the biggest shift in the % of market share was a drop of 0.6 of a percentage point in the £20,000 to £39,999 band.

Market Analysis by Age Profile

This is a detailed chart and looks at the market by Sector combined with the Average Price on top of the bar and the Average Mileage and % of Market Share by the blue and purple lines respectively.



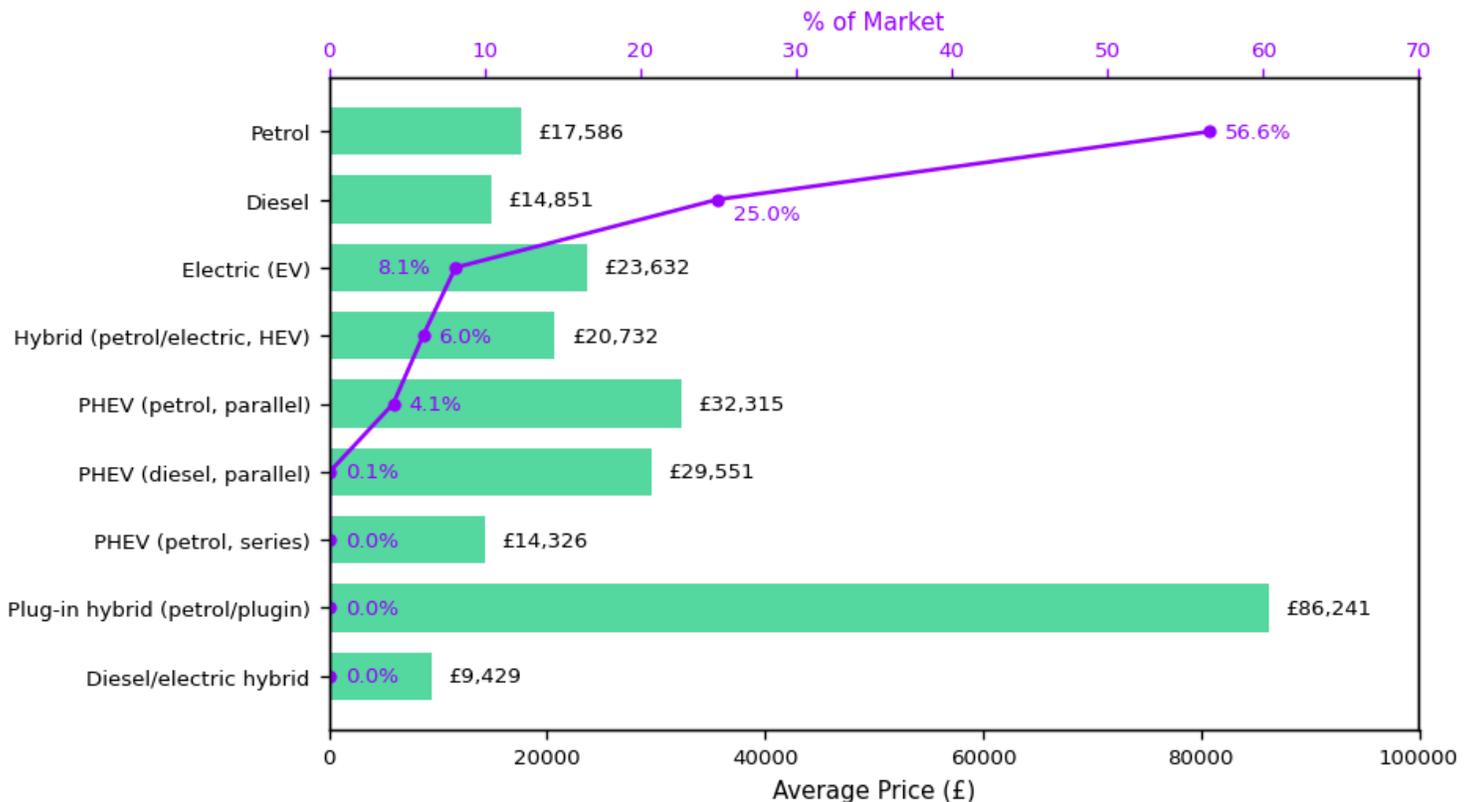
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Reviewing the data at a high level there has been little change since January. The average mileage has increased by a mere 0.29% overall and the biggest change in the % of market share was for the general stock category which contracted by 0.5% of a percentage point.

Looking at the average price by sector the general stock tranche saw an increase of 1.1% or £309 whereas all the other sectors remained within 1%. It is interesting that the biggest shifts this month have affected the general stock sector and this implies that there has been quite a bit of sales activity particularly towards the lower end of the price highlighted by the increase of £309 or 1.1%.

Average Used Car Value by Fuel Type

The data in this chart dissects the market by fuel type with the Average Price to the right of the bar and the purple line showing the % of Market Share.



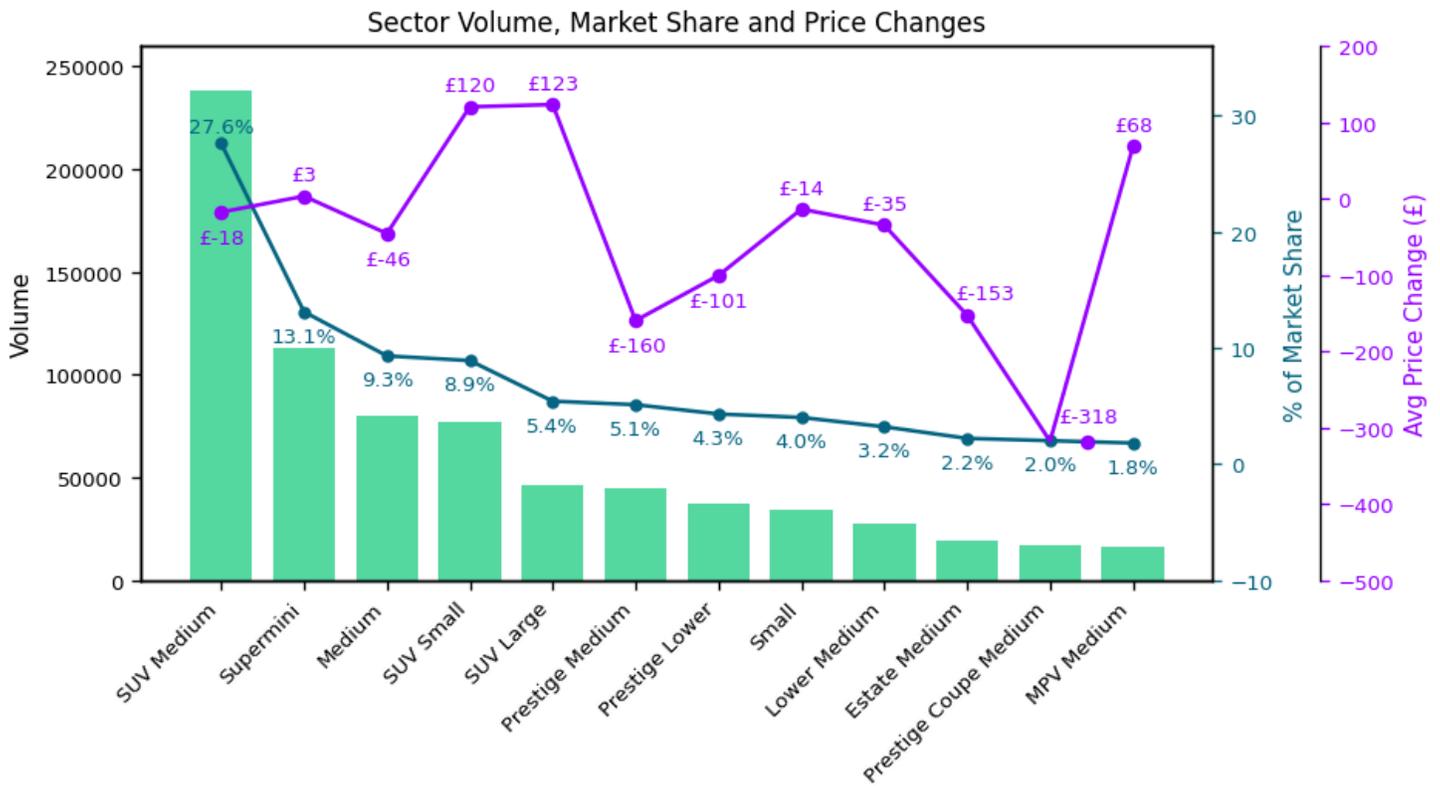
Data Powered by Brego Insight

The market share by fuel type has seen a number of interesting changes during February with the largest change being an increase in EVs on sale. This had been widely anticipated but at a surge of 8.5% this was perhaps greater than expected. The reality is that this should become a trend as new car registrations continue to increase.

From an average price perspective the biggest shift in pound note terms was a decrease of £660 for the diesel PHEVs, albeit with just a 0.06% of market share. Of those fuel types with more than a 1% market share, the biggest change was a drop of £583 or -£1.3% for EVs and this is off the back of a £489 or 2% drop in January. This certainly looks like a trend now and will be due to the volume of older EVs appearing in the used car market.

Used Car Performance by Market Sector

This is a fairly detailed chart and shows the Volume of cars advertised in the market by the bars. The purple line shows the month on month change in the Average Price by sector and the blue line the % of Market Share. This chart covers the 12 largest market sectors.



Data Powered by Brego Insight

When compared with January this data reveals that there was an overall drop of 0.5% in the volume of cars in the twelve largest market sectors meaning they took a total of 86.9% of the market. Looking in more detail the largest change in market share affected the SUV Medium sector which dropped by 0.4% to 26.7%.

From an average price perspective the biggest change in pound note terms impacted the Prestige Medium Coupe market with a drop of £318 and it is worth noting that this has proven to be quite a volatile sector over the past few months. This was followed by a drop of £160 for the Prestige Medium sector. However, in percentage terms the biggest change was for the Estate Medium sector which dropped 1.1% followed by Prestige Medium at -0.9%

This data set warrants further investigation, and those customers with access to the Brego Dealer platform can use the Brego Insight tool to probe the nuances in each sector.

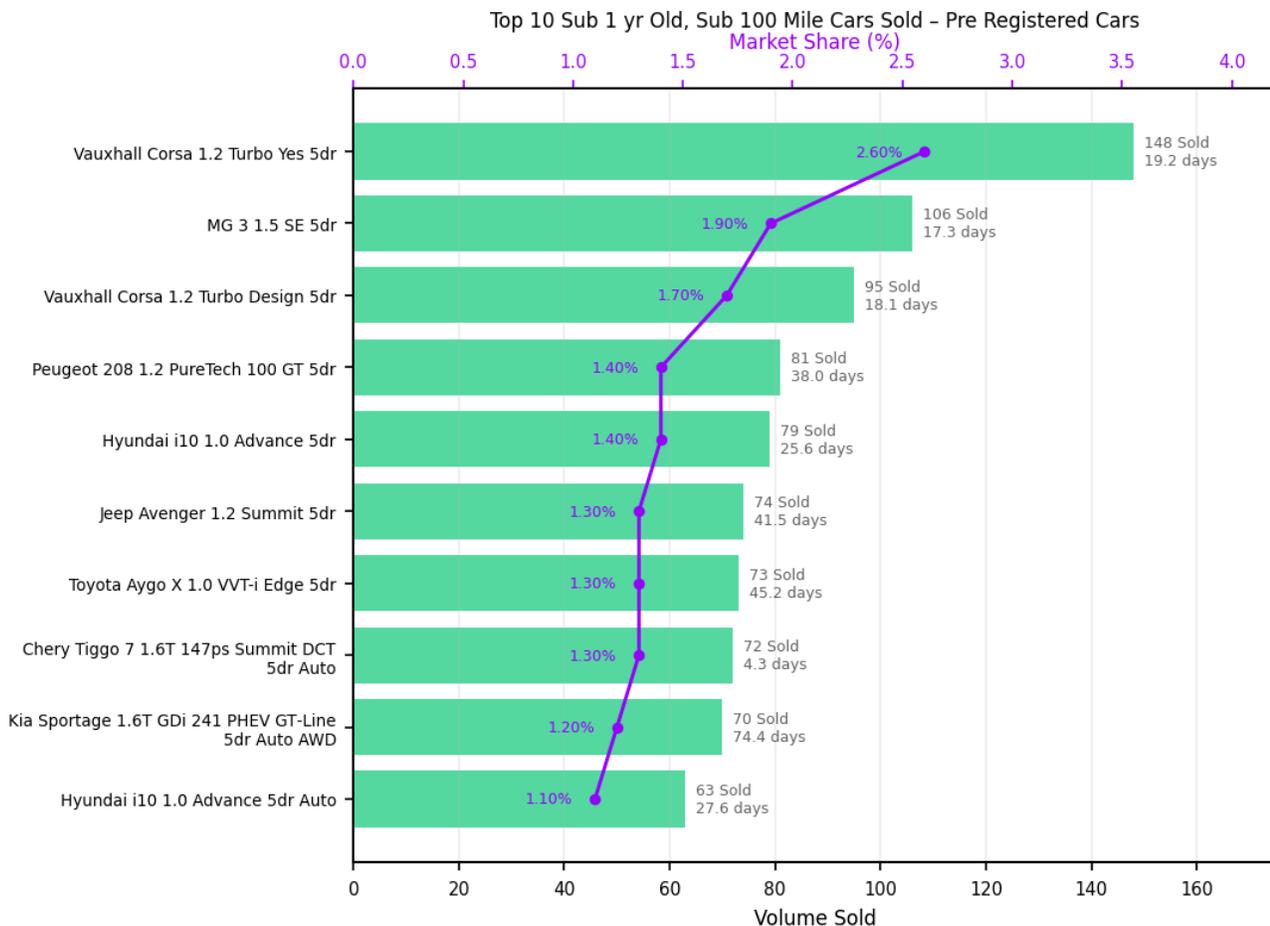
For context the Best Selling Cars in the Prestige Medium sector for the month were:-

Rank	Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
1	BMW 3 Series (Saloon)	3,325	18.00%	16,587	39.7
2	Mercedes-Benz C-Class (Saloon)	1,875	10.20%	14,261	43.6
3	Tesla Model 3 (Saloon)	1,691	9.20%	18,646	29
4	Audi A4 (Saloon)	1,257	6.80%	13,230	40.3
5	Jaguar XE (Saloon)	581	3.20%	9,937	35.5

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Top 10 Pre-Registered Cars

The bars in this chart show the Volume of Cars sold by individual top selling model derivatives with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

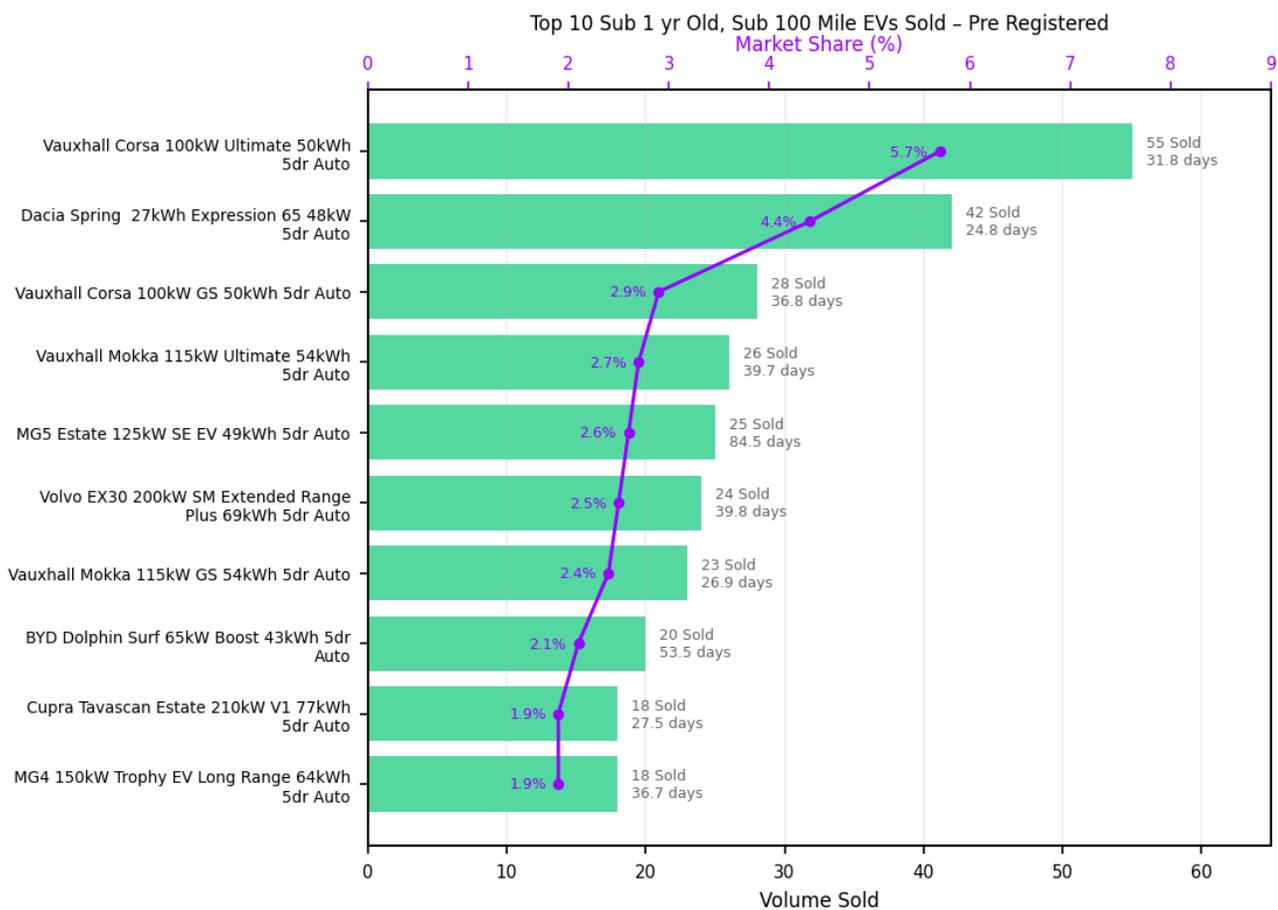
Pre-Reg activity during February showed a marked decline of 11.1% in the whole market and for the Top 10 it dropped by a more pronounced 23.5%. This is a clear indication of a reduction in the need to get cars registered, although this may well increase as we move into March. Of the Top 10, four models came from the struggling Stellantis Group who announced a 22.3 billion Euro loss on February 26th 2026, further highlighting their struggle to produce cost effective and desirable products in an evolving market.

It is worth highlighting that for the Top 10 the average price increased by 5.9% to £19,485 whilst the average days to sale improved by 4 days to 31.1. In addition, the Top 10 took 15.2% of the whole Pre-Reg market in comparison to 15.7% in January.

It also comes as a surprise to see a Chery model in 8th place, perhaps highlighting that Chery are more successful with PHEVs and EVs.

Top 10 Pre-Registered EVs

The bars in this chart show the Volume of EVs sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-

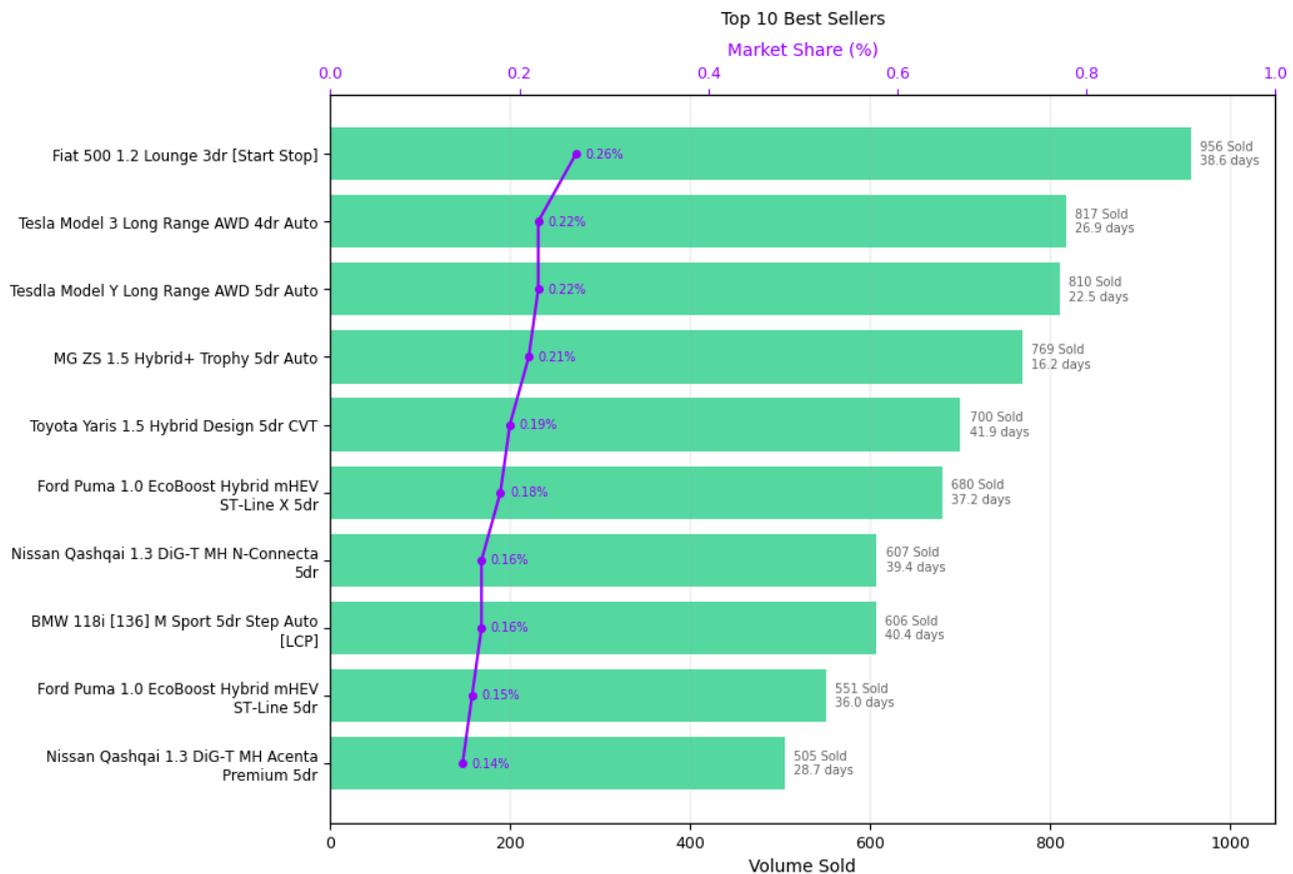


Looking at a high level and the data for February reveals that the volume of Pre-Reg EVs dropped by 26.2% which is higher than both the whole market and Top 10 for the whole market and suggests slightly better demand for EVs. The average sale price for the Top 10 Pre-Reg EVs increased by 3.7% to £21,019 although the average days to sale increased by 8 days to 40.2.

Stellantis held four of the Top 10 spots which is down on the seven it had last month and that must come as a relief for the group. Some may be surprised at the entry of the Dacia Spring in second spot and it will be interesting to see if this is an anomaly or whether this is a requirement to meet production volumes.

Top 10 Best Selling Used Cars

The bars in this chart show the Volume of Cars sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

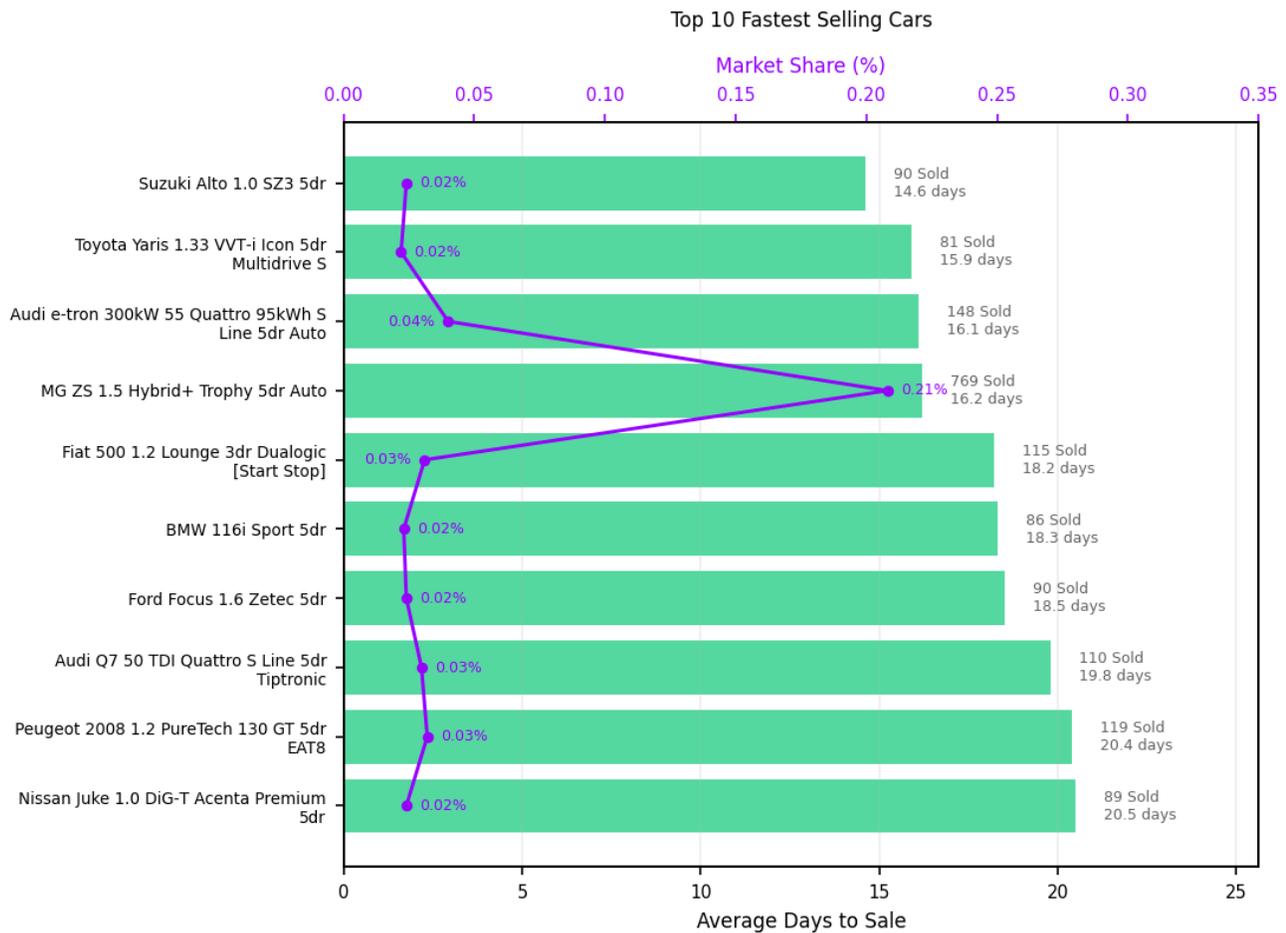
The February Top 10 Best Sellers were almost exactly the same as in January, albeit in a different order. There was just one new entry in the form of the Nissan Qashqai Acenta Premium model which knocked the Ford Ranger Wildtrak out of the list and took tenth spot.

Looking at the high level detail, the volume sold of the Top 10 dropped by 7.7% in comparison to January and the total % of market share dipped by 0.1% to 1.89%. From an average price perspective this fell by 7.5% to £16,203 and this will be due to the fairly expensive Ford Ranger leaving the list.

The biggest individual change in the data came in the form of a 5.7% drop in average price for the MG ZS, highlighting that cheaper variants had been sold during the month. The % of market share also increased by 0.4 percentage points in comparison to January.

Top 10 Fastest Selling Used Cars

The bars in this chart show the Average Days to Sale by individual fastest selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



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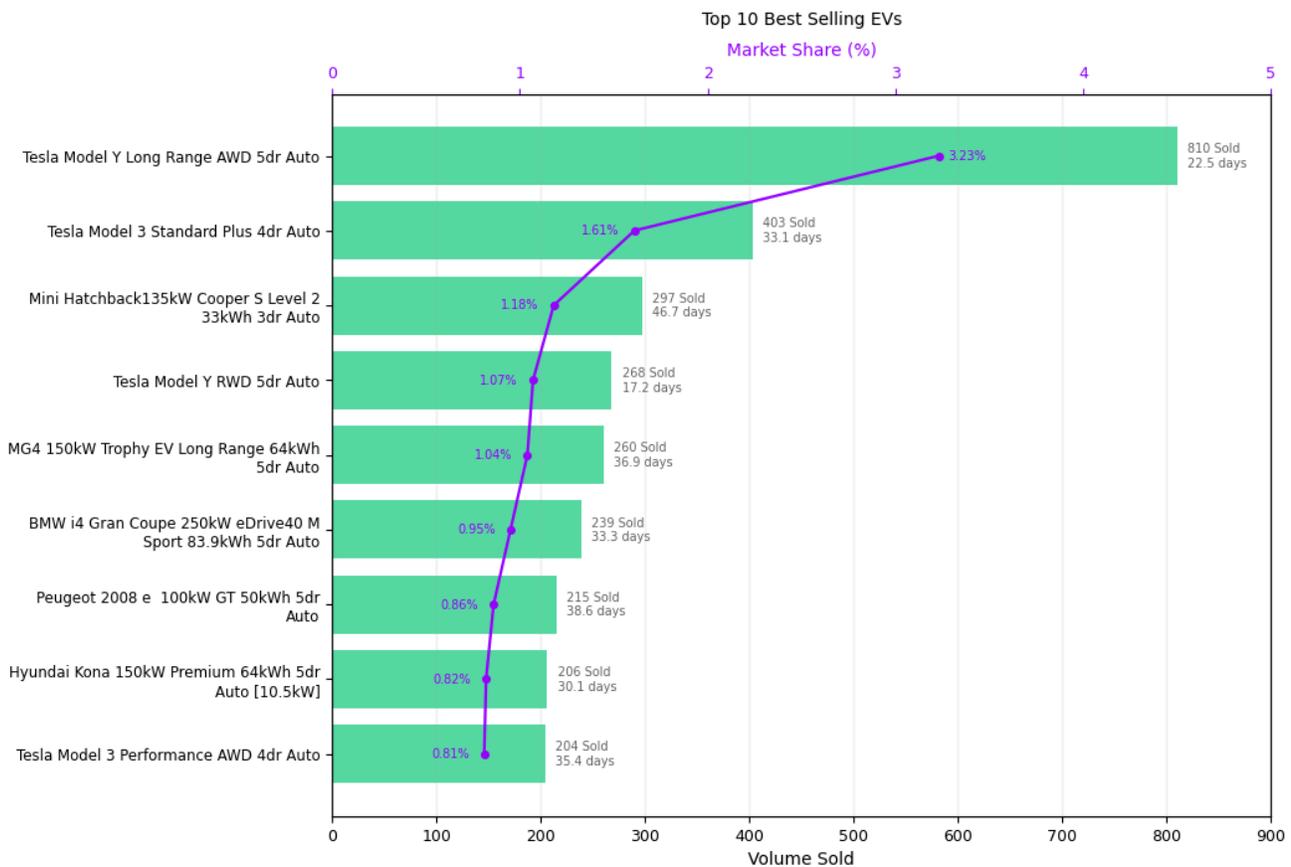
All change for the February data when compared to January with just the MG ZS and the Fiat 500 Lounge retaining spots in the list. The surprise leader as the Fastest Selling car was the

Suzuki Alto, albeit at the lowest average sale price of the Top 10 list. The MG is clearly the biggest seller in volume terms with 769 models sold.

It is interesting to note that overall there seems to have been a shift towards demand for cheaper cars with the average sale price dropping by 26.9% to £11,687 whilst the average days to sale also dropped significantly by 20 days to 17.8. Of equal note is the fact that the total market share of the Fastest Sellers dropped by 1.25% to just 0.46% of the total market.

Top 10 Best Selling EVs

The bars in this chart show the Volume sold by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



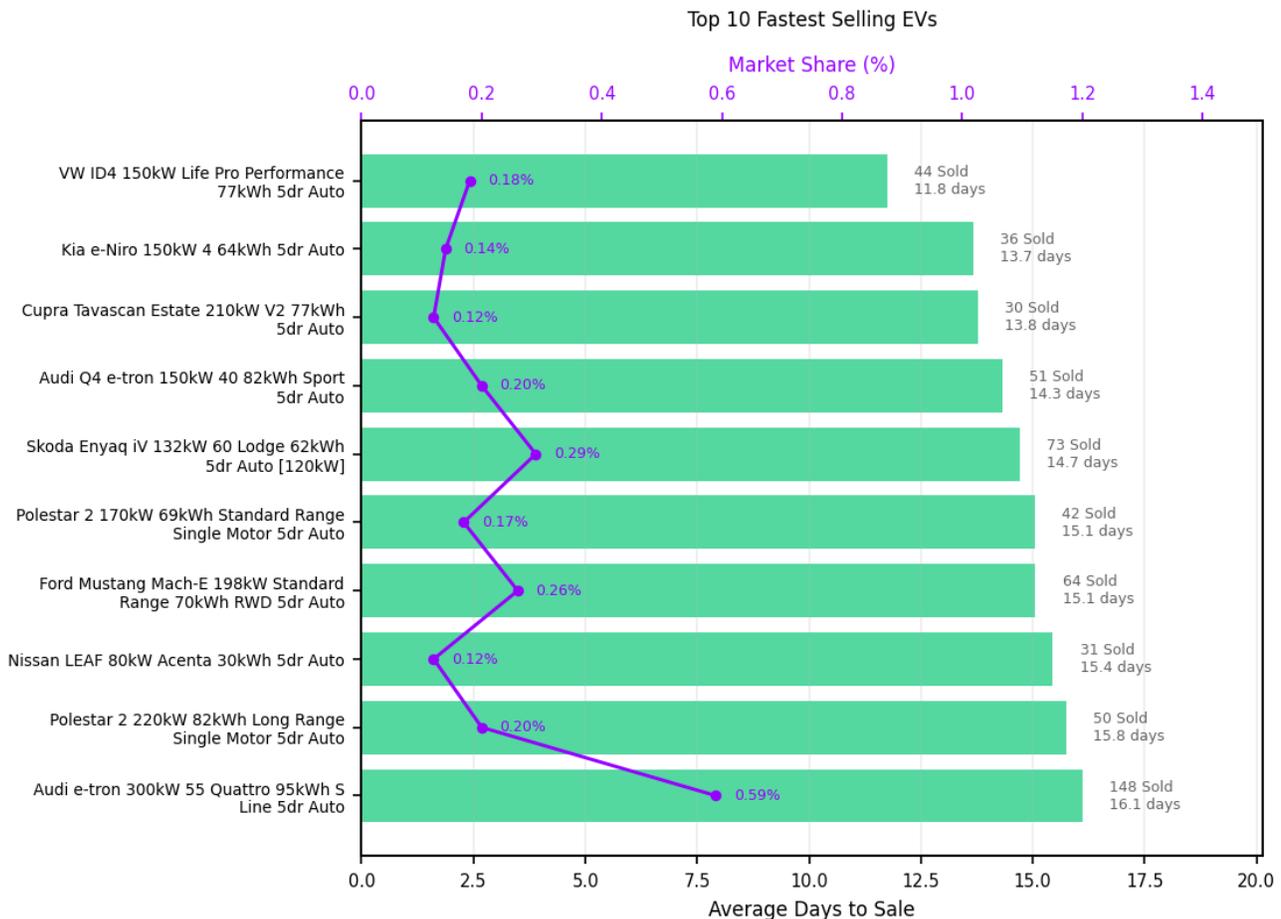
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For the second month running Tesla took five of the Top 10 Best Selling EV spots with the top 3 exactly the same as in January. Maybe this is expected given the volume of Teslas sold over the past years in comparison to other OEMs. There are three new entries in the form of the Peugeot 2008, the Hyundai Kona and the BMW i4 Gran Coupe, although the latter replaced a standard BMW i4 model.

In total, the Top 10 accounted for 14.8% of total sales which is almost exactly the same as January, whilst the average days to sale improved by three days to 32. The average price for the Top 10 fell by £1,497 to £18,811 which is largely due to the lower average price of two of the new entrants.

Top 10 Fastest Selling EVs

The bars in this chart show the Average Days to Sale by individual top selling models, with the number of each sold and the Average Days to Sale shown outside the bar and the % of Market Share is shown by the purple line:-



Data Powered by Brego Insight

As with the Top 10 Fastest Selling cars it was all change in February and in this category all the Top 10 are fresh models, although the Polestar versions are similar to the previous month. The surprise here is that there are no Tesla models in the Top 10 and it is the VW ID4 that was the Fastest Selling EV.

The data shows that overall the volume of cars in the Top 10 has dropped by a significant 84.8% whilst the average sale price has fallen by 0.5% to £19,395. In addition the average days to sale has dropped by 20.2 days to just 14.6.

Summary

To summarise, February was the second positive month for the auto sector. New car sales showed a significant 7.2% improvement over February 2025 and there was a far more buoyant mood in the used car sector. The data in this report shows that the market has diversified a little by virtue of the fact that there were so many changes in demand for certain cars and it would seem that the fastest selling cars and EV data demonstrates that the consumer was looking at variety in their buying choices. It is fair to say that this may have been driven by some dealer tactical retail pricing designed to shift older cars or that used car “sale” activity drove the sales agenda.

However, it is important to understand that activity and sales success was not good for everyone and certain dealer groups and a number of independent dealers have reported difficult trading conditions. This means that it is vital to understand market conditions and pay close attention to retail pricing, taking care to match used car stock purchases to the local market conditions and competitors.

Rest assured, Brego will ensure you get a full view of the month's activity rather than an almost full month view as given by some valuation providers.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting edge AI driven Insight tool to help bring detail and clarity to the complex UK used car market.