2026

Commercial Vehicle Market Overview

Solera Vehicle Solutions | cap hpi

2026

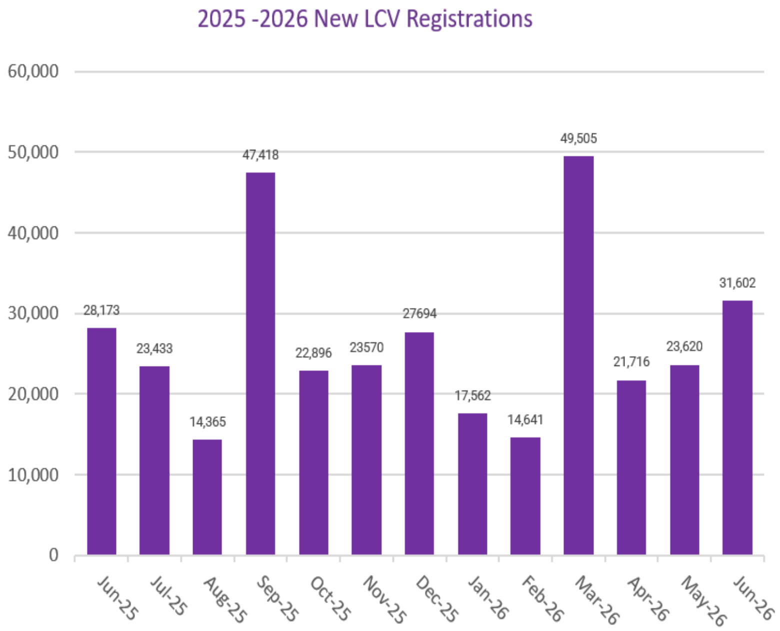
LCV Market Overview

Internal

August 2026

LCV Market Overview

Half year new LCV registrations accelerate in Q2



The latest SMMT LCV registration figures for June show a modest year on year increase of 2,598 units during the first half of 2026 compared with the same period in 2025. However, growth accelerated in Q2, with an additional 5,637 LCVs registered compared with Q2 2025.

While this suggests that the new LCV market is strengthening as the year progresses, the same cannot be said for all sectors. Most notably, double-cab pick-up registrations continue to be heavily impacted by the BIK rule changes, falling by almost 57% (-1,587 units) in June.This decline was more than offset by strong growth in the panel van sectors.

For what it’s worth

Views from the block – trade buyers reluctant to throw good money after bad

According to the meetings we’ve had with auction officials over the past month, the resounding message has been "more of the same". The market continues to be flooded with duplicate de-fleeted vehicles, many of them in plain white, with low specifications, high mileages and exhibiting above average signs of wear and tear.

The used LCV market is often faced with an unbalanced mix of duplicate de-fleeted stock, more often than not in plain white, or "vanilla", as one of our auction contacts describes them. When large numbers of identical vehicles enter the market simultaneously, oversupply can quickly place downward pressure on prices. Conversely, shortages of desirable models can strengthen values.

Alongside supply levels, vehicle condition and mileage remain the primary drivers of auction performance. Well prepared vehicles with sensible mileages continue to attract the strongest bids, while poorly prepared or high mileage vehicles are increasingly difficult to sell. In a market where margins remain under pressure, buyers are prioritising stock that can be retailed quickly with minimal preparation. Vehicles requiring significant cosmetic or mechanical work struggle to attract bids and, in many cases, continue to circulate around the block unsold.

Any colour you like as long as it’s white

Vehicle colour has raised its head a few times over the past few months in our discussions with our auction contacts, this has prompted us to take a closer look at the effect colour has on the used LCV market.

Since its introduction in 1984, the guide values published in CAP Red Book had always used plain white vans as the benchmark. White was clearly the colour of choice, providing a blank canvas for vehicle livery and, once the livery was removed, appealing to the widest audience when remarketed at the end of a vehicle's first life.

From white van man to every colour counts

However, by 2014, the reign of the "white van man" was coming to an end as vans in a much broader range of colours progressively appeared in trade transaction data. In some sectors, white vans became outnumbered by other colours, reaching the point where the sample size for white vehicles alone was no longer sufficient to produce the most accurate guide values. At that stage, CAP Red Book changed its methodology to use the average transaction prices of vans in all colours.

Colours in today's van market

Today, in addition to the standard plain white finish, manufacturers offer a wide range of solid and metallic paint colours. These are typically available as optional extras at an additional cost over the standard vehicle price. Colour has become an important aspect of brand identity, with many manufacturers promoting new models in distinctive launch colours to enhance brand recognition.

Some manufacturers also allow large fleet customers to order batches of vans in bespoke corporate colours, reducing commissioning time and lowering costs. Depending on the colour chosen and the fleet operator, this can have either a positive or negative effect on a vehicle's resale value.

It's a wrap!

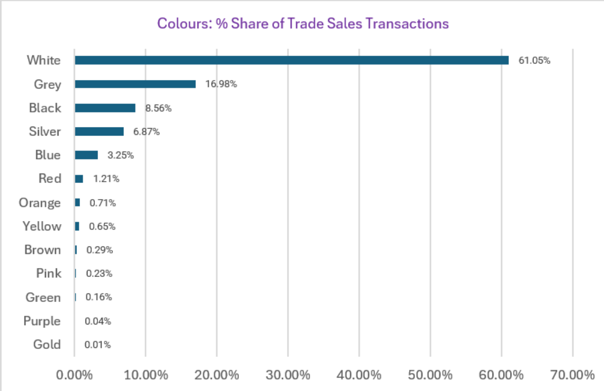
Another practice that became increasingly popular was the use of vinyl wraps to change vans from more desirable colours, such as metallic silver, to corporate fleet colours. The wrap could then be removed before disposal, helping sellers maximise the vehicle's resale value while preserving the original paintwork.

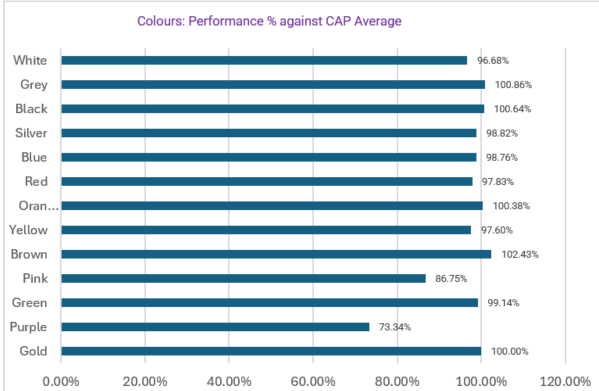
It's worth noting that operators of vans that have been vinyl wrapped, where the main colour has been changed, must update the V5C registration certificate with the DVLA. Similarly, at the end of a van's first life and the wrap is removed, the V5C will need updating again.

How colour relates to price performance against the guide values

The used LCV wholesale market is extremely volatile and particularly sensitive to changes in the wider economic climate. While age, mileage, condition and supply volumes remain the main drivers of market prices, colour is one of many additional factors that can influence trade sale prices.

The following charts are based on our trade sales research data for vehicles up to 5 years old. The first chart shows the distribution of sales transactions for vehicles in the various colours. The second chart, for the same data set, shows the trade sales performances, against CAP Average guide values.





As the first chart clearly shows, white has accounted for just over 61% of all trade sales over the past five years, affirming its continued popularity among hire companies and large fleet operators. It is therefore no surprise that the used van wholesale market is, from time to time, saturated with plain white vehicles.

The abundance of white vans in the wholesale market may help explain why their average trade price lags significantly behind that of other colours as illustrated in the performance chart.

Whilst grey and silver vans account for a combined share of almost 24% of trade sales, many are likely to have been vinyl wrapped in company corporate colours, allowing operators to benefit from higher sale prices when they are eventually remarketed at the end of their first life.

It's worth bearing in mind that colour is just one of the many factors that determine a vehicle's market value so we are not suggesting this chart should be taken as a guide to how much a vehicle is worth.

Age, mileage and condition have long been the primary drivers of trade prices. However, as vehicles remain in service for longer periods, mileage has become an increasingly important consideration when assessing current used stock profiles. With average mileages continuing to rise, higher levels of cosmetic damage and general wear and tear are becoming more prevalent. Age, mileage and condition as well as colour are intrinsically linked

Guide price changes in this edition

The guide price movements in this edition of Red Book are -1.6% at 3 year / 60K and -1.7% overall.

The following charts are intended to give subscribers an indication of how the guide prices have moved in each sector. As always, the devil is in the detail and we always recommend using our valuation products to determine the actual guide price movements of individual models.

Indicative guide price movements by fuel types

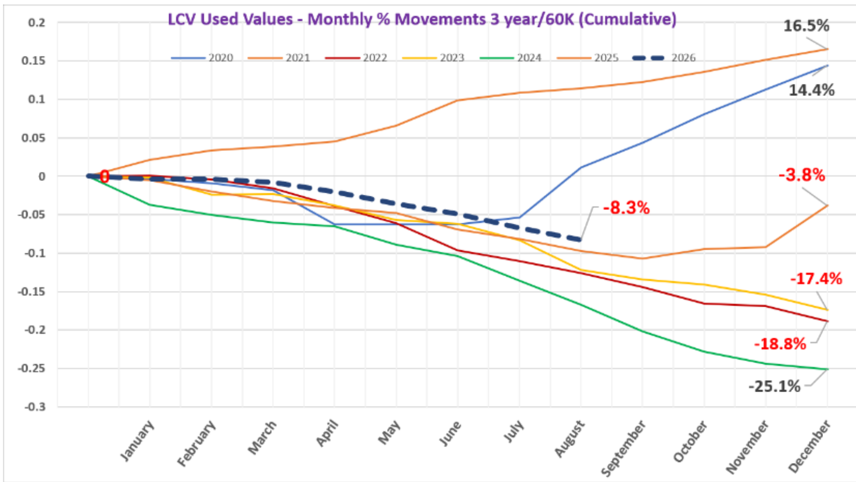
Fuel Types	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
Diesel	-2.0%	-1.7%	-1.7%	-1.8%	-2.0%
Petrol	-1.8%	-1.9%	-1.9%	-2.5%	-4.1%
Electric	-0.8%	-0.9%	-0.8%	-0.5%	-0.5%
Petrol Series PHEV	3.8%	7.1%	6.1%	2.5%	-0.3%
Petrol Parallel PHEV	-1.3%	-0.9%	-0.7%		-1.1%
Petrol/Electric Hybrid	-1.9%	-2.0%	-2.1%	-1.9%	

LCV Sector	3Yr60k	Overall
Micro Van		-0.8%
City Van	-1.9%	-2.0%
Small Van	-2.8%	-3.5%
Medium Van	-3.1%	-3.0%
Large Van	-2.6%	-2.6%
E City Van		-1.0%
E Small Van	-1.4%	-0.9%
E Medium Van	0.8%	0.0%
E Large Van	-1.6%	-1.3%
E Chassis - Derived	-0.4%	-0.2%
E 4x4 Pick-up Lifestyle SUV	13.4%	12.8%
E Mini-bus		-1.0%
E Vat Qualifying	-1.0%	-1.0%
Over 3.5T	-0.3%	-0.4%
All Terrain Workhorse	-2.1%	-2.2%
Forward Control Vehicle	2.7%	1.0%
Chassis - Derived	-1.5%	-1.7%
All Terrain Lifestyle	-1.2%	0.2%
Mini-bus	4.7%	4.2%
Vat Qualifying	-0.3%	-0.5%
Overall Average Movements	-1.6%	-1.7%

Indicative guide price movements BEV sector

BEV Sector	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
E City Van	-1.2%			-1.0%	-1.0%
E Small Van	-1.9%	-1.9%	-1.4%	0.1%	1.5%
E Medium Van	-1.0%	-0.5%	0.4%	0.1%	0.5%
E Large Van	-1.5%	-1.4%	-1.6%	-1.0%	-0.9%
E Chassis - Derived	0.1%	-0.1%	-0.4%	-0.2%	-1.0%
E 4x4 Pick-up Lifestyle SUV	11.2%	13.1%	13.4%	13.4%	
E Mini-bus	-1.0%	-1.2%			
E Vat Qualifying	-1.0%	-1.0%	-1.0%	-1.0%	-1.0%

Used light commercial vehicle cumulative guide price movements 3 years/60k (all sectors)



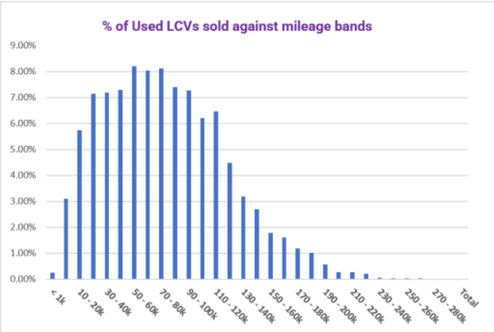
This chart highlights the sharp fluctuations in guide price movements between 2020 and 2026. Prices peaked in 2020 and 2021 during the height of the pandemic, before declining to more sustainable levels by late 2023.
Represented by the dashed line, the cumulative downward movement so far in 2026 is -8.3%.

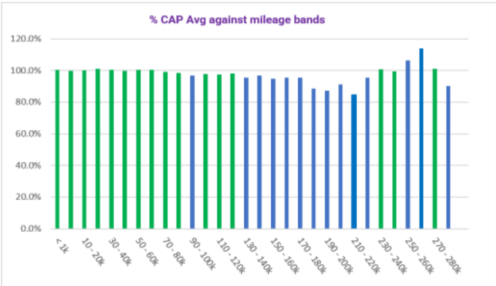
It's worth noting from this chart that in September last year used LCV prices increased as the market responded to stock shortages across most LCV sectors. It remains to be seen if we will witness similar stock shortages this year.

Commercial Editorial

By cap hpi

Analysis of guide price performance of higher mileage vehicles





The following charts are based on our June research data. They represent both the distribution of used LCVs sold across mileage bands from 1,000 up to 300,000 miles, and the sales performance within each mileage band. By comparing the two charts, which share exactly the same horizontal axis, it can be determined how accurate the guide prices are for each of the mileage bands and what proportion of the sales data is represented within each of them.

Recent trends in our research data suggests a shift in market sensitivity towards higher mileage vehicles. The chart opposite reflects the current performance against the mileage bands following the adjustments we've made for this edition. Generally, we have increased the depreciation rate for mileage bands over 50K.

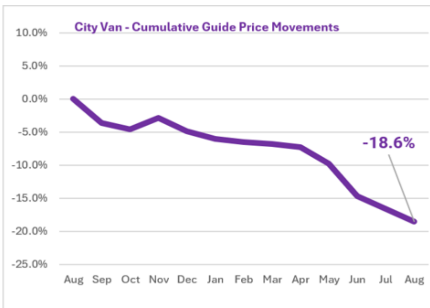
Sectors – what you need to know

Best-selling City Vans by sales volume

45293 TRANSIT COURIER PETROL (2014 - 2023) - 1.0 EcoBoost Leader Van [6 Speed] (19-23)
42522 TRANSIT COURIER DIESEL (2014 - 2023) - 1.5 TDCi Trend Van [6 Speed] (18-23)
43639 FIESTA DIESEL (2018 - 2020) - 1.5 TDCi Van (18-20)
42521 TRANSIT COURIER DIESEL (2014 - 2023) - 1.5 TDCi Van [6 Speed] (18-19)
42524 TRANSIT COURIER DIESEL (2014 - 2023) - 1.5 TDCi 100ps Limited Van [6 Speed] (18-23)
41923 CORSAVAN DIESEL (2014 - 2018) - 1.3 CDTi 16V 95ps ecoTEC Van [Start/Stop] (17-18)
42523 TRANSIT COURIER DIESEL (2014 - 2023) - 1.5 TDCi 100ps Trend Van [6 Speed] (18-23)
42519 TRANSIT COURIER PETROL (2014 - 2023) - 1.0 EcoBoost Limited Van [6 Speed] (18-23)
14411 FIORINO CARGO DIESEL (2008 - 2016) - 1.3 16V Multijet Van (08-15)
30871 TRANSIT COURIER DIESEL (2014 - 2023) - 1.5 TDCi Trend Van (14-18)

City van - guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
FIAT		-1.8%	-1.9%	-1.9%	-1.9%
FORD	-2.0%	-2.0%	-2.0%	-2.0%	-2.1%
TOYOTA	-1.9%	-2.0%	-2.1%	-1.9%	



Commercial Editorial

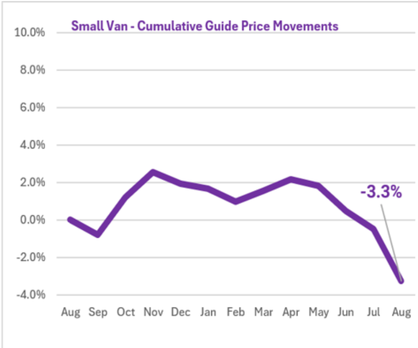
By cap hpi

Best-selling Small Vans by sales volume

44398 PARTNER STANDARD DIESEL (2018 - 2024) - 1000 1.5 BlueHDi 100 Professional Van (19-21)
56316 BERLINGO M DIESEL (2018 - 2024) - 1.5 BlueHDi 1000Kg Enterprise Ed 100ps 6 Speed S/S (22-24)
56336 PARTNER STANDARD DIESEL (2018 - 2024) - 1000 1.5 BlueHDi 100 Professional Premium + Van (22-24)
53412 BERLINGO M DIESEL (2018 - 2024) - 1.5 BlueHDi 1000Kg Enterprise Pro 100ps [6 Speed] (21-22)
18445 BERLINGO L1 DIESEL (2008 - 2018) - 1.6 HDi 625Kg Enterprise 75ps (10-16)
55328 PARTNER STANDARD DIESEL (2018 - 2024) - 1000 1.5 BlueHDi 100 Professional Prem Van [6 Spd] (21-22)
42539 TRANSIT CONNECT 220 L1 DIESEL (2018 - 2024) - 1.5 EcoBlue 100ps Van (18-19)
42534 TRANSIT CONNECT 200 L1 DIESEL (2018 - 2021) - 1.5 EcoBlue 120ps Limited Van (18-21)
44515 BERLINGO M DIESEL (2018 - 2024) - 1.5 BlueHDi 1000Kg Enterprise 100ps (19-21)
42561 TRANSIT CONNECT 240 L2 DIESEL (2018 - 2024) - 1.5 EcoBlue 120ps Limited Van (18-21)

Small van - guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
CITROEN	-2.9%	-2.7%	-3.1%	-5.6%	-9.0%
FIAT	-2.0%	-2.0%	-2.0%	-3.1%	-3.8%
FORD	-2.0%	-0.4%	-0.2%	-2.3%	-6.3%
MERCEDES-BENZ	-2.0%	-2.0%	-2.1%		-2.1%
NISSAN	-3.0%	-3.8%	-4.2%	-2.6%	-2.0%
PEUGEOT	-2.4%	-3.2%	-5.6%	-7.1%	-9.6%
RENAULT	-2.0%	-2.0%	-2.1%	-2.0%	-1.9%
TOYOTA	-2.6%	-3.3%	-3.9%	-3.9%	-3.9%
VAUXHALL	-2.6%	-4.1%	-6.2%	-6.1%	-6.3%
VOLKSWAGEN	-3.0%	-3.0%	-3.0%	-3.0%	-3.0%

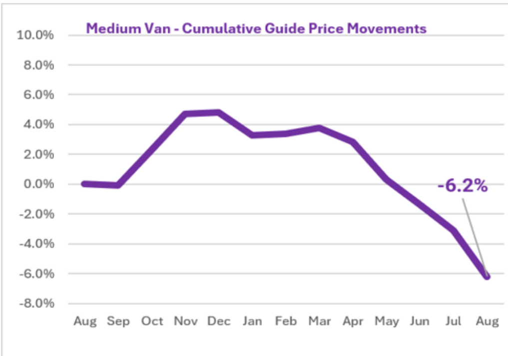


Best-selling Medium Vans by sales volume

42060 TRANSIT CUSTOM 280 L1 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 130ps Low Roof Limited Van (17-23)
42077 TRANSIT CUSTOM 300 L2 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 130ps Low Roof Limited Van (17-23)
42069 TRANSIT CUSTOM 300 L1 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 130ps Low Roof Limited Van (17-23)
44474 TRANSIT CUSTOM 300 L1 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 105ps High Roof Leader Van (19-23)
44449 TRANSIT CUSTOM 320 L1 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 105ps Low Roof Leader Van (19-23)
57322 TRANSIT CUSTOM 280 L1 DIESEL FWD (2023 —) - 2.0 EcoBlue 136ps H1 Van Limited (23-)
45851 VIVARO L2 DIESEL (2019 - 2024) - 2900 1.5d 100PS Dynamic H1 Van (19-22)
44446 TRANSIT CUSTOM 300 L1 DIESEL FWD (2017 - 2023) - 2.0 EcoBlue 105ps Low Roof Leader Van (19-23)
44322 VIVARO L2 DIESEL (2019 - 2024) - 2900 1.5d 100PS Sportive H1 Van (19-22)
57331 TRANSIT CUSTOM 300 L1 DIESEL FWD (2023 - 2024) - 2.0 EcoBlue 136ps H1 Van Limited (23-24)

Medium van - guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
CITROEN	-2.1%	-3.2%	-3.9%	-3.9%	-4.0%
FIAT	-3.1%	-3.4%	-4.0%	-3.9%	-3.9%
FORD	-2.0%	-2.0%	-4.4%	-6.4%	-7.8%
MAXUS	-2.1%	-1.8%			
MERCEDES-BENZ	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
NISSAN	-1.0%	-0.8%	0.0%	-0.4%	-2.0%
PEUGEOT	-2.4%	-3.1%	-4.5%	-5.9%	-7.9%
RENAULT	-2.5%	-3.7%	-4.5%	-3.3%	-2.0%
RENAULT TRUCKS UK	-2.0%	-2.0%	-2.0%		
TOYOTA	-5.3%	-4.1%	-3.2%	-3.1%	-3.2%
VAUXHALL	-2.3%	-3.8%	-6.0%	-7.1%	-8.5%
VOLKSWAGEN	-2.1%	-1.0%	0.1%	0.9%	2.2%



Commercial Editorial

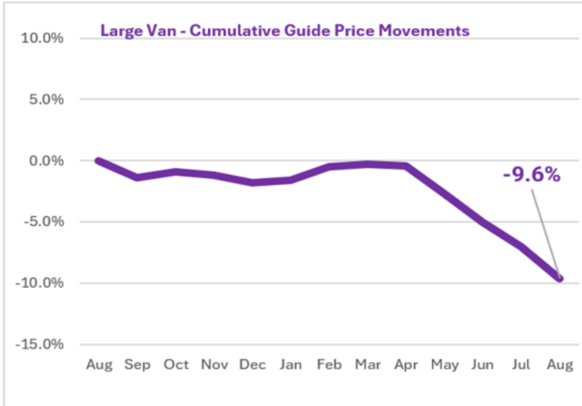
By cap hpi

Best-selling Large Vans by sales volume

44606 TRANSIT 350 L3 DIESEL RWD (2019 —) - 2.0 EcoBlue 130ps H3 Leader Van (19-24)
37861 TRANSIT 350 L2 DIESEL FWD (2014 - 2019) - 2.0 TDCi 130ps H3 Van (16-19)
42593 CRAFTER CR35 MWB DIESEL FWD (2017 - 2025) - 2.0 TDI 140PS Trendline Business High Roof Van (18-23)
55899 DELIVER 9 LWB DIESEL FWD (2020 - 2024) - 2.0 D20 150 High Roof Van (21-24)
49244 SPRINTER 315CDI L3 DIESEL RWD (2020 - 2023) - 3.5t H2 Progressive Van (20-23)
49238 SPRINTER 315CDI L2 DIESEL RWD (2020 - 2023) - 3.5t H2 Progressive Van (20-23)
44591 TRANSIT 350 L3 DIESEL FWD (2019 —) - 2.0 EcoBlue 130ps H3 Leader Van (19-24)
44275 RELAY 35 L3 DIESEL (2014 - 2024) - 2.2 BlueHDi H2 Van 140ps Enterprise (19-23)
49208 SPRINTER 314CDI L3 DIESEL RWD (2018 - 2021) - 3.5t H2 Progressive Van (20-21)
38252 MOVANO 35 L2 DIESEL FWD (2010 - 2019) - 2.3 CDTI H2 Van 130ps (16-19)

Large van - guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
CITROEN	-2.5%	-2.5%	-3.6%	-5.1%	-6.9%
FIAT	-2.5%	-2.8%	-2.9%	-3.0%	-3.0%
FORD	-2.7%	-2.1%	-2.4%	-4.0%	-6.5%
IVECO	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
MAN	-2.0%	-2.0%	-2.0%	-2.0%	-2.0%
MAXUS	-1.9%	-3.0%	-3.9%	-4.1%	-3.9%
MERCEDES-BENZ	-2.0%	-2.0%	-2.0%	-1.0%	-0.9%
NISSAN	-1.3%	0.0%	0.9%	0.1%	-2.0%
PEUGEOT	-2.5%	-2.5%	-3.0%	-3.0%	-3.0%
RENAULT	-3.1%	-3.2%	-4.4%	-7.7%	-7.6%
RENAULT TRUCKS UK	-6.0%	-7.5%	-7.4%	-7.4%	-8.5%
TOYOTA	-2.0%	-1.9%			
VAUXHALL	-2.9%	-3.8%	-6.2%	-5.6%	-6.7%
VOLKSWAGEN	-2.0%	-2.1%	-3.0%	-2.0%	-2.0%

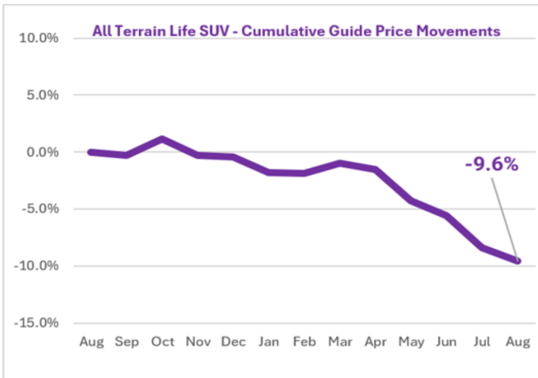


Best-selling All Terrain Lifestyle/SUV by sales volume

44067 RANGER DIESEL (2019 - 2022) - Pick Up Double Cab Wildtrak 2.0 EcoBlue 213 Auto (19-22)
56276 RANGER DIESEL (2022 —) - Pick Up Double Cab Wildtrak 2.0 EcoBlue 205 Auto (22-26)
35006 RANGER DIESEL (2015 - 2019) - Pick Up Double Cab Wildtrak 3.2 TDCi 200 Auto (15-19)
49099 HILUX DIESEL (2020 —) - Invincible X D/Cab Pick Up 2.8 D-4D Auto (20-24)
45402 NAVARA DIESEL (2016 - 2022) - Double Cab Pick Up Tekna 2.3dCi 190 TT 4WD Auto (19-22)
39511 NAVARA DIESEL (2016 - 2022) - Double Cab Pick Up Tekna 2.3dCi 190 4WD Auto (16-19)
57529 RANGER DIESEL (2022 —) - Pick Up Double Cab Tremor 2.0 EcoBlue 205 Auto (23-26)
56277 RANGER DIESEL (2022 —) - Pick Up D/Cab Wildtrak 3.0 EcoBlue V6 240 Auto (22-)
39510 NAVARA DIESEL (2016 - 2022) - Double Cab Pick Up Tekna 2.3dCi 190 4WD (16-19)
35284 L200 DIESEL (2015 - 2019) - Double Cab DI-D 178 Barbarian 4WD (15-19)

All Terrain Life/SUV- guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
FIAT				-1.1%	-1.1%
FORD	-1.0%	-1.0%	-2.4%	-3.4%	-3.4%
GWM	-1.1%				
ISUZU	-1.2%	-2.0%	-2.3%	-2.4%	-1.3%
KGM	-1.0%	-1.0%			
MAXUS	-1.1%	-1.1%			
MERCEDES-BENZ					8.1%
MITSUBISHI					2.5%
NISSAN				4.4%	7.0%
SSANGYONG		-1.0%	-1.0%	-1.0%	-0.8%
TOYOTA	-0.4%	0.7%	1.8%	2.2%	4.8%
VOLKSWAGEN	-1.0%	-1.0%	-1.0%		-1.0%



Commercial Editorial

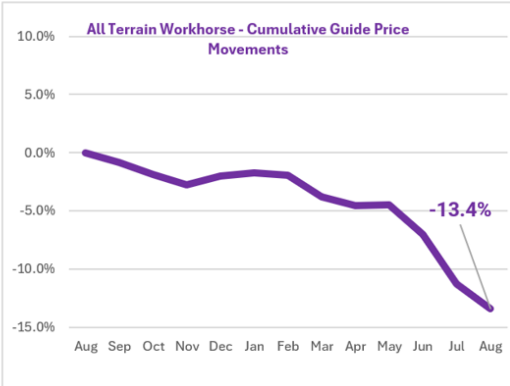
By cap hpi

Best-selling All Terrain Workhorse by sales volume

38349 HILUX DIESEL (2016 - 2020) - Active Extra Cab Pick Up 2.4 D-4D (16-20)
38347 HILUX DIESEL (2016 - 2020) - Active Pick Up 2.4 D-4D (16-19)
38351 HILUX DIESEL (2016 - 2020) - Active D/Cab Pick Up 2.4 D-4D (16-20)
51383 HILUX DIESEL (2020 —) - Active D/Cab Pick Up 2.4 D-4D (20-24)
44056 RANGER DIESEL (2019 - 2022) - Pick Up Double Cab XL 2.0 EcoBlue 170 (19-22)
60938 DEFENDER 90 DIESEL (2020 —) - 3.0 D250 Hard Top S Auto [3 Seat] (24-)
51518 D-MAX DIESEL (2020 - 2025) - 1.9 Utility Double Cab 4x4 (20-25)
24962 D-MAX DIESEL (2012 - 2017) - 2.5TD Extended Cab 4x4 (12-17)
54098 DEFENDER 90 DIESEL (2020 —) - 3.0 D250 Hard Top SE Auto (21-24)
45873 L200 DIESEL (2019 - 2021) - Double Cab DI-D 150 4Life 4WD (19-21)

All Terrain Workhorse - guide price adjustments by manufacturer

Manufacturer	1Yr20k	2Yr40k	3Yr60k	4Yr80k	5Yr100k
DACIA	-1.0%	-1.0%	-1.0%	-1.0%	-0.9%
FORD	-1.0%	-1.1%	-1.1%	-1.1%	-1.1%
INEOS	-1.0%	-1.0%			
ISUZU	-1.0%	-1.0%	-1.1%	-1.0%	-0.9%
KGM	-1.0%				
LAND ROVER	-4.0%	-4.0%	-4.0%	-4.0%	-3.9%
MITSUBISHI					-1.0%
NISSAN				-1.0%	-1.0%
SUZUKI		-1.2%	-0.9%	-1.1%	-1.0%
TOYOTA	-1.1%	-1.0%	-1.0%	-1.0%	-1.0%



Ken Brown
LCV Valuations Editon

July 2026

HGV market overview

Following on from last month May does seem to have been just a blip, because as we went to press both stock volume and sales picked up considerably late in the month. In June auction entries were down on May's figures which has helped values.

Despite slightly lower sales only a handful of values have been negatively affected, and there are growing numbers of positive movements, so things are ticking along quite nicely at present.

Trailer stocks increased last month, but sales receded and with so many similar trailers available some auctions are entering smaller selections of the same types in an effort to manage stocks and maintain values.

Dealers advise that business is generally steady, but Bank of England interest rates are being closely monitored as movements in the rate can affect what and how they buy for stock. Whilst some good enquiries are forthcoming, the task appears to be procuring vehicles to match those enquiries.

Manufacturers advise that business remains healthy, reporting that they expect sales to peak soon and then slow towards the end of the year as more stock is due to return and with new vehicle deliveries slowing a little purchasing a used truck becomes a good choice.

Used truck & trailer statistics.

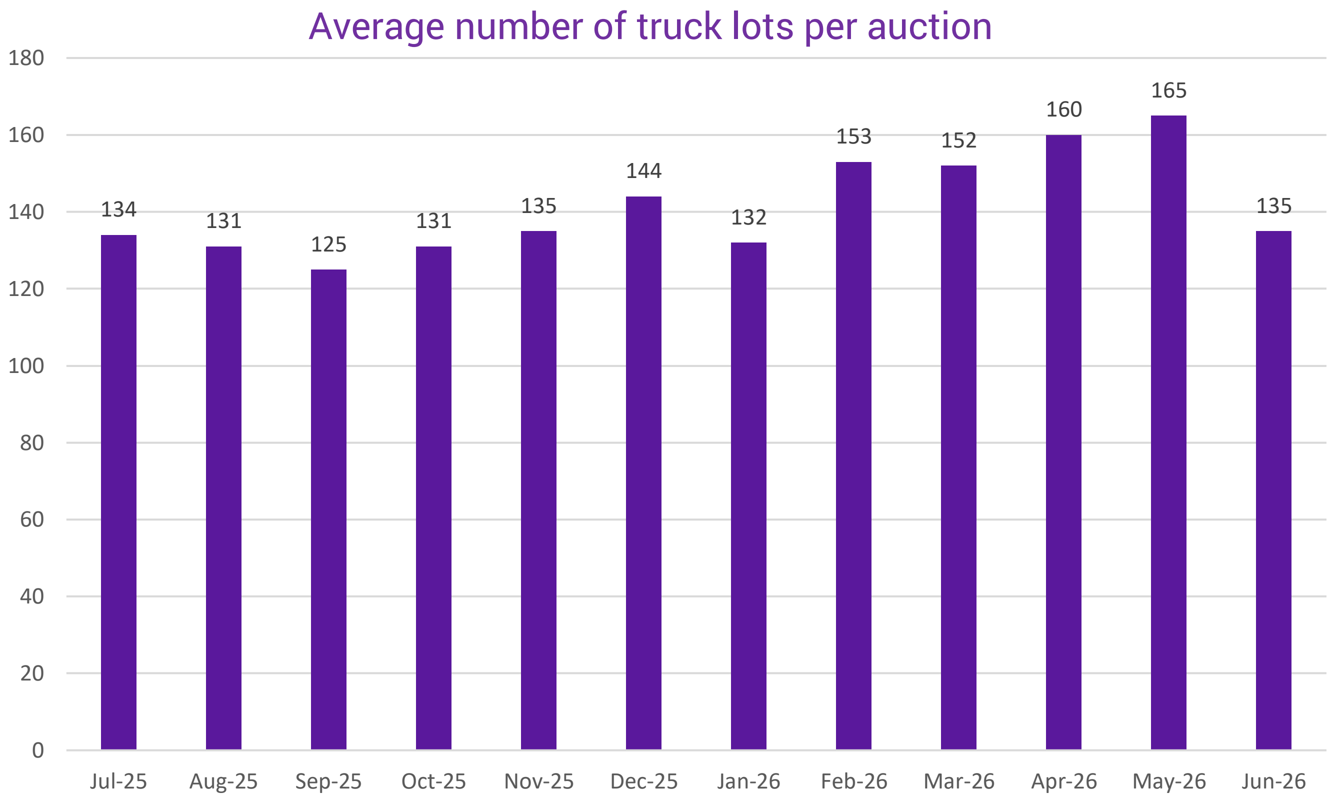
Over the last month the average number of truck entries at auctions decreased by 18.2%, and the number of on-the-day sales fell by 2.6%. Sales were 27.6% more than in June 2025 when the average number of entries per auction was 2.9% more than this year.

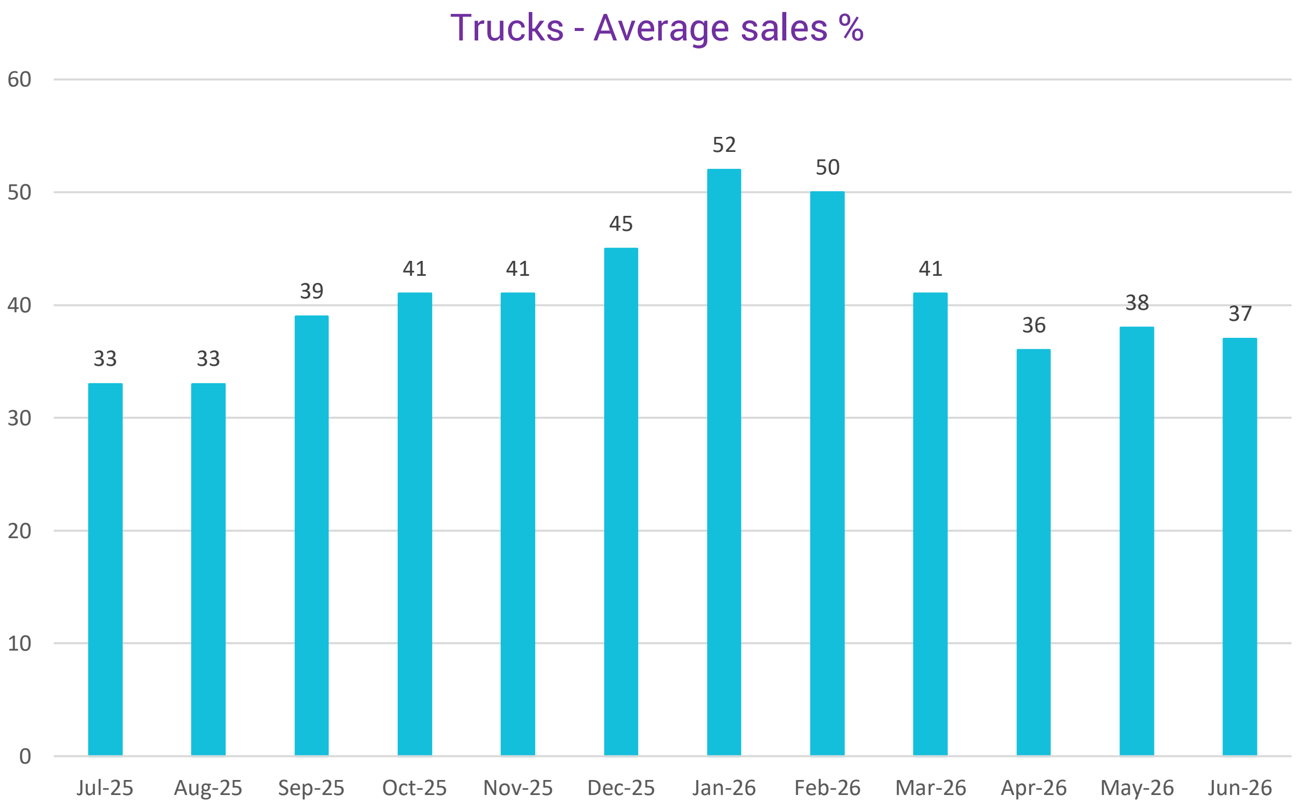
Trailer entries increased by 15.6% last month whilst sales decreased by 10.0%. Sales were 25.0% less than last June when the average number of entries was 26.9% less than this year.

Over the previous month the number of vehicles under seven years of age increased by 5.5%, whilst vehicles over nine years old decreased by 2.6%. Trailers saw a decrease of 7.3% in those under seven years of age and those over nine-year-old increased by 0.3%.

The above statistics are based on six auctions and 960 total truck and trailer lots offered up to and including the 15th June, and as always, we remind you that these are 'hammer sales' on-the-day and provisional sales which are subsequently successfully converted are not included.

The following two graphs illustrate the average number of truck lots which have been available at auctions each month followed by the average number of truck sales as a percentage of the average number of truck lots.

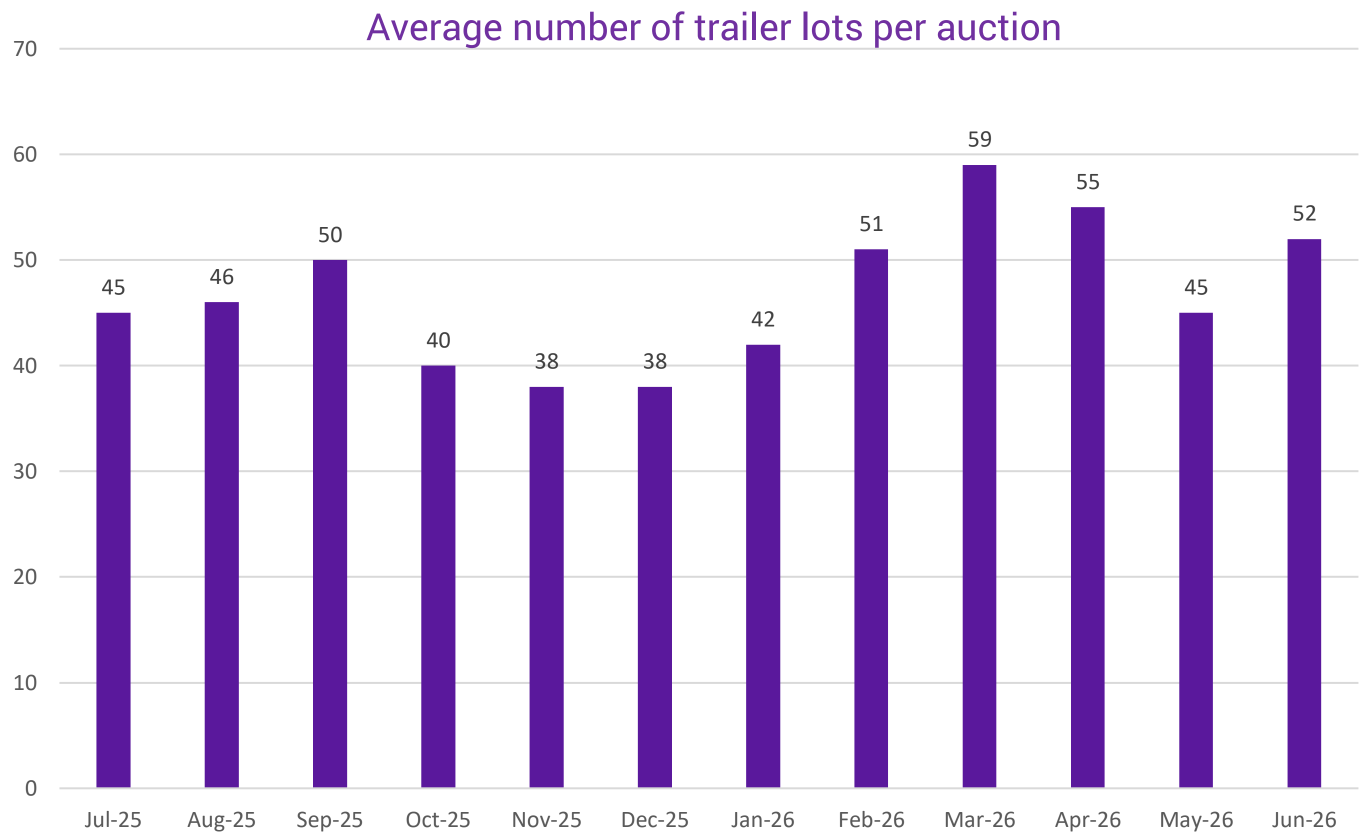

Average number of truck lots per auction
180
160
140
120
100
80
60
40
20
0
134
131
125
131
135
144
132
153
152
160
165
135
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Apr-26
May-26
Jun-26

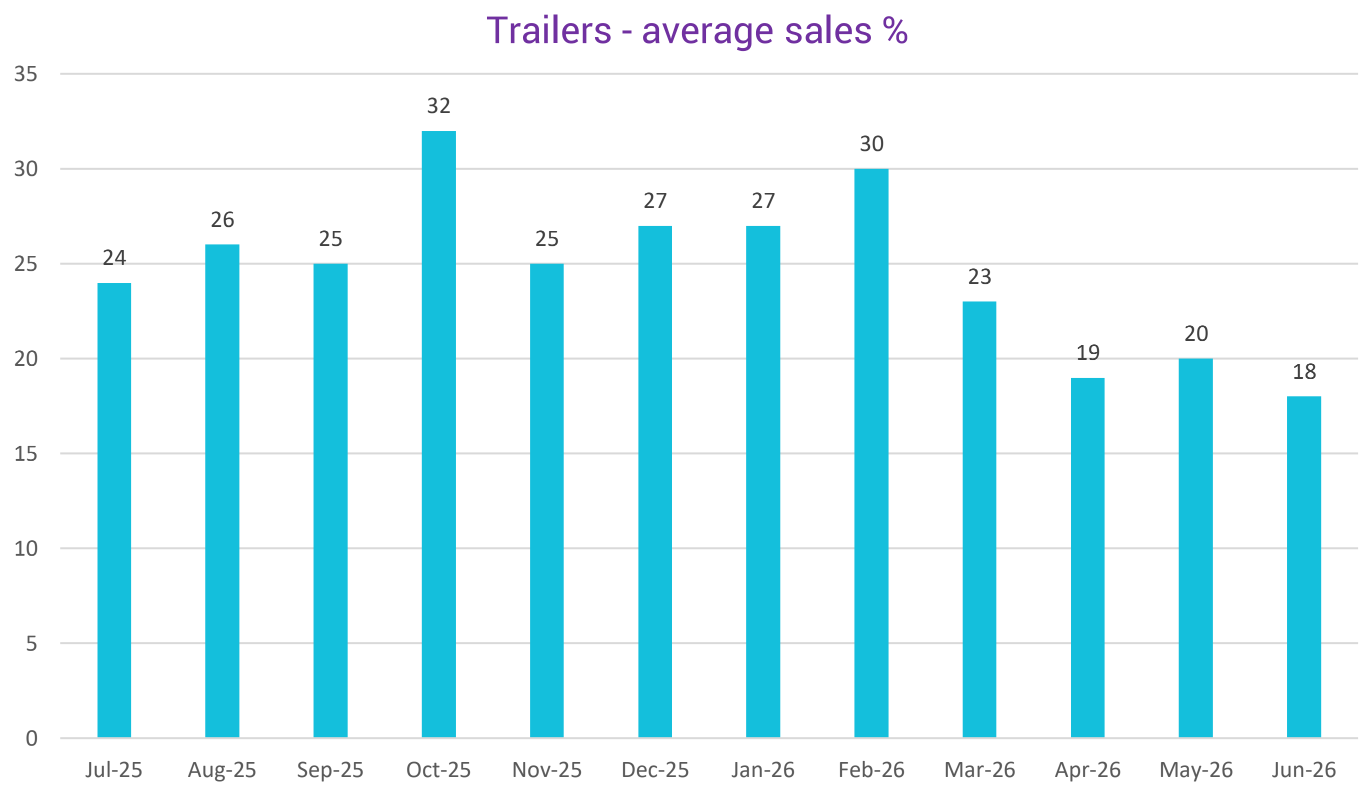

Trucks - Average sales %
60
50
40
30
20
10
0
33
33
39
41
41
45
52
50
41
36
38
37
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Apr-26
May-26
Jun-26

Commercial editorial

By cap hpi

The two graphs below illustrate the average number of trailer lots which have been available at auctions each month followed by the average number of trailer sales as a percentage of the average number of trailer lots.





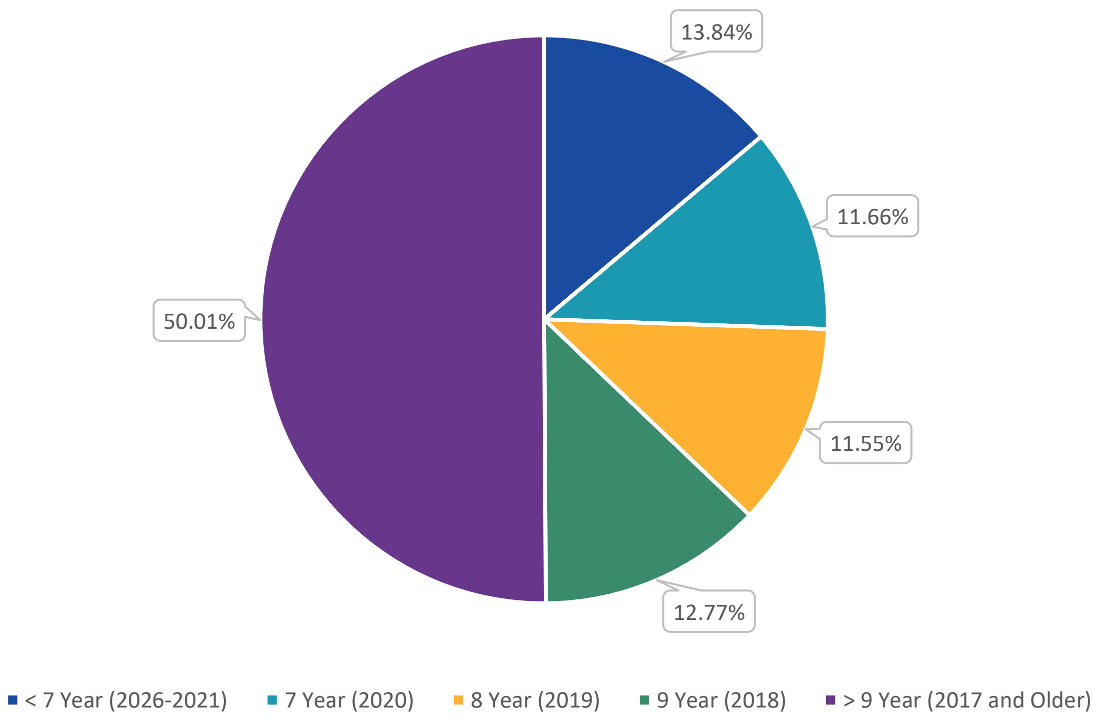
SOLERA Vehicle Solutions | cap hpi

Commercial editorial

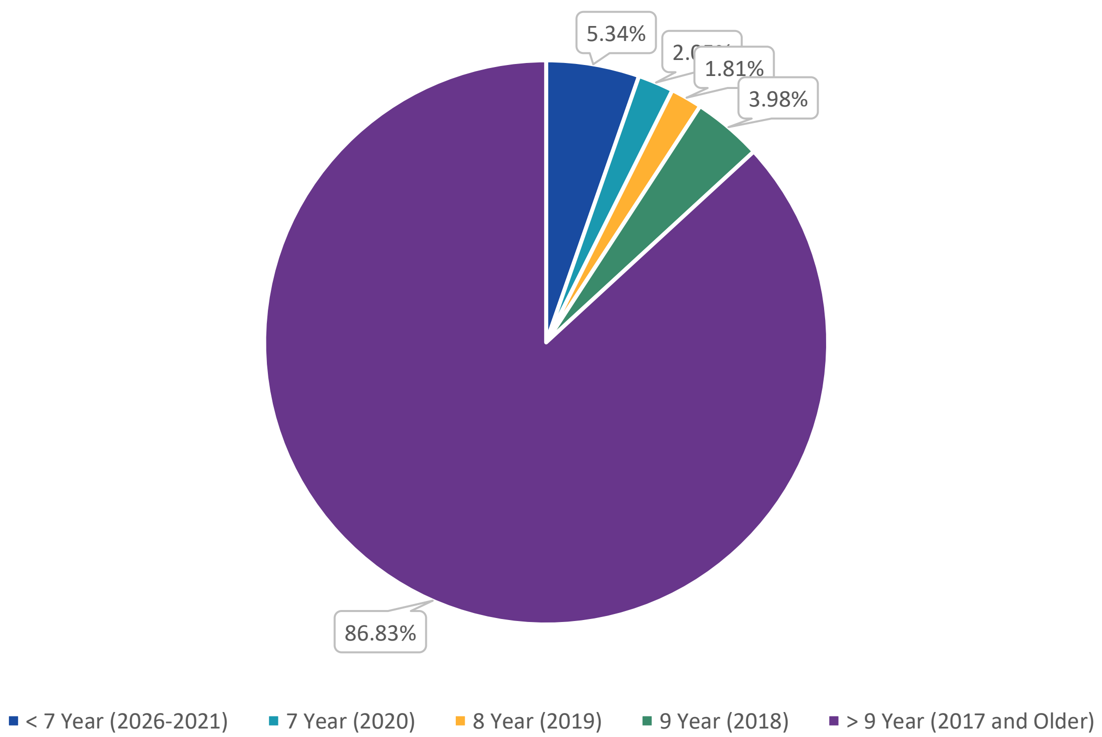
By cap hpi

The following illustrates the age profile of trucks and trailers seen at auctions during 2026. The age of entries shown as a percentage of the total truck and trailer lots viewed.

Truck auction lots by age

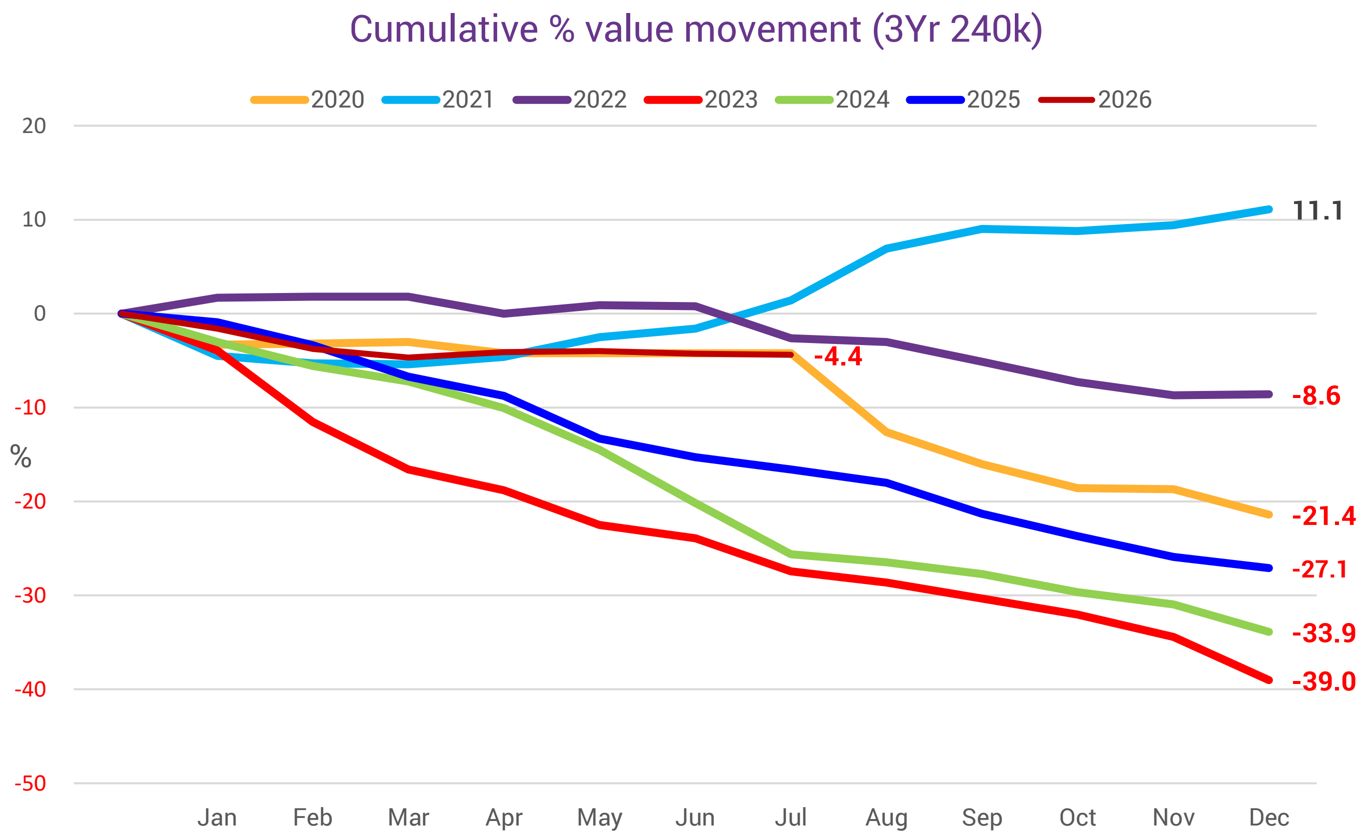


Trailer auction lots by age



Statistics for all the above graphs are correct up to and including 15th June 2026.

Finally, the following chart illustrates the cumulative % change in guide values over recent years.



Sector Summary

7.5t to 12t vehicles - Euro 6

- The values of most models remain steady with just a couple of negative movements and a similar number of increases.

Despite being numerous in the marketplace, vehicles in this sector are now performing steadily, and falling values seem to have stalled to the point where many vehicles have seen values remain steady and, in some instances, increase.

A good selection of 7.5 tonne vehicles, and the even more popular 12 tonne models, have kept stock churning. However, there are still some examples which are finding the going just a little tough. These are predominantly the less tidy vehicles or those with high mileage. If a truck has the combination of both it is likely to appear several times at auction before sense prevails and it is eventually sold with a lower reserve value.

Tippers are popular at present and a good selection of late registered examples all attracted good attention, However, as tippers age their condition generally declines and cab interiors, often with cloth seats instead of plastic, suffering more than their exterior condition. So, if you are in the market for a tipper don't let a good exterior condition fool you.

More 2023 12 tonne Iveco Eurocargo and Mercedes-Benz Atego pole erection units have been available, and whilst many sell at first attempt, values are slowly declining.

A good selection of sweepers has been available recently, the best example being a 2020 70 plate left hand drive DAF FA LF180 Scarab with 64,000 kilometres which sold for £31,750.

13t to 18t vehicles - Euro 6

- Here too the values of most models have remained steady with just a few negative movements and a similar number of increases.

18 tonne fridges have again increased in volume with the DAF LF again being available in increasing numbers, but sale values remain robust, (for now!).

Other run of the mill models are generally met with reasonable enthusiasm, with some dropsides and tippers performing well, some increasing in value. Anything non-standard is attracting additional interest, but interest does not always result in a sale.

More traffic management dropsides, mainly Iveco Eurocargo and Mercedes Econic, most with crash cushions, continue to appear. The later plate models are doing reasonably well but older vehicles are struggling to find buyers. It is, after all,a limited aftermarket.

Mobile libraries and exhibition units at this weight are rare sights. Most that appear tend to be older but because they generally have low mileage, they are often prove desirable providing they can easily be converted into race transporters or motorhomes.

Gully suckers have been readily available recently, primarily on DAF chassis. The best of the bunch was a 2021 71 plate DAF FA LF230 18 tonne day cab with a whale tank with 33,000 kilometres which sold for £56,500.

Sweepers in this sector included a 20 plate 16 tonne left hand drive DAF FA LF230 Johnston dual brush with 187,000 kilometres which sold for £43,500.

Multi-wheelers - Euro 6

- The values of most three-axle vehicles are unchanged with a couple of positive movements and a couple of negative movements to note. The majority of four axle values also remain unchanged except for just a couple of hook loader models which have declined.

Interest in 6x2 vehicles is there, but some types are selling at reducing values, even many late plate examples are struggling to make the money, that said, some curtains have fared well recently.

6x4 tippers are relatively scarce and generally sell well when they appear. Those carrying cranes selli like hot cakes.

Four axle vehicles are performing well with most offerings being tippers which are matching demand. Hook-loaders are less in number and recent examples have failed to make the grade with some selling at reduced values.

Commercial editorial

By cap hpi

Plant carriers have been popular auction lots, especially if fitted with a crane, and the bigger the better! A couple of 8x2 day cab DAF plant carriers, without cranes, appeared recently from a well-known plant hire company and as usual bidding was brisk.

Refuse trucks are readily available but specification is important and needs to meet a buyer's requirements for any interest to be generated. Some tidy examples, five to seven years of age, have been selling but often most don't generate a bid sufficient to conclude a sale. Many older examples are selling for little more than scrap value, after all there's a lot of steel to be had from a refuse truck.

A sprinkling of vacuum tankers stimulated good interest, but 8x4 cement mixers were met with little enthusiasm and a couple of volumetric examples fared no better.

Vehicles of note recorded include a 21 plate DAF FAX CF480 8x2 space cab flat with a Fassi F345 crane and 328,000 kilometres which sold for £85,000.

A 2016 66 plate 6x2 Scania R450 Highline cab beavertail with a Fassi F365 crane and 688,000 kilometres sold for £48,000.

Finally, a 2020 70 plate Volvo FM320 6x2 day cab barrier rig vehicle with piledriver which had 119,000 kilometres sold for £99,500.

Tractor units - Euro 6

- 6x2 values remain steady with just a small number of increases and few decreases. Some 4x2's values have decreased for a few models but are otherwise unchanged.

Little change here. 6x2 vehicles keep appearing but there is sufficient demand to keep them selling and with buyers spending their cash stock keeps flowing.

Recent sales of the previous model DAF XF's have seen values start to decline as an increasing number of the new generation model appear and are being purchased in preference.

There are still good numbers of Scania R and Iveco S-Ways available, closely followed by Mercedes-Benz Actros which are plentiful.

4x2 vehicles have been available in quantity recently and as a result a few values have fallen.

Trailers

- Trailers – Values for most types have remained steady, the exceptions being reductions for curtains and tippers.

The number of trailers available remains high and, with a dip in sales, values of the most populous types are beginning to see values come under pressure.

Curtain trailers have again been available in large numbers and further negative value movements have occurred. However, it is not all bad news as flats have been very popular and have seen values increase a little.

Commercial editorial

By cap hpi

Rob Smith
HGV Valuations Editor