

# AutoGrab Market Intelligence Australia's Used Car Market | YTD June 2026

Sales Decline, Discounting Widens, EVs Defy Volumes Grow

[Mid-Year 2026 Automotive Insights Report | Source: AADA x AutoGrab](#)

In the first six months of 2026, Australia's used car market moved from year-on-year growth in January to progressively larger year-on-year declines by June, alongside a rising rate of discounting. Total sales for the half came to 1,300,018, down 6.6% on the 1,391,227 sold in H1 2025. The monthly pattern behind that headline figure is set out below.

## Headlines

- Year-on-year sales declines widened over the half, with June recording the largest decline of the year to date.
- The rate of discounting held broadly flat through Q1, then rose from April.
- Vehicles aged 1 to 5 years depreciated faster than in 2025, and by June petrol and diesel prices had fallen to or below their year-earlier levels.
- EVs recorded the largest volume growth of the half; hybrid showed the most stable pricing of any fuel type.

## Key Statistics: H1 2026 vs H1 2025

Total Sales (H1)

**1,300,018**

*Down 6.6% vs H1 2025*

National Used Price (Jun)

**83.5%**

*Down from 89.8 in January (-7.0%)*

June 2026 vs. June 2025  
Sales Movement

**-16.2%**

*Weakest month*

2025 Equivalent Price Fall

**-1.7%**

*Jan-Jun 2025, for comparison*

June Absorption Rate

**55.5%**

*Lowest of any month in 2026*

EV Sales (H1)

**25,417**

*Up 54.6% year-on-year*

June Discount Incidence

**51.1%**

*Highest of any month in 2026*

PHEV Sales (H1)

**11,920**

*Up 468.4% year-on-year*

## Part 1: Sales, Down Nationally, But Not Evenly

The year-on-year rate of decline widened over the half rather than holding steady. January was still growing year-on-year. By June, sales were down 16.2% on the same month in 2025, the largest monthly decline of the half.

**TABLE 1: SALES, YTD 2026 vs YTD 2025 BY MONTH**

All used & demo vehicles up to 20 years old.

Month	2026	2025	YoY Movement
January	223,508	212,524	+5.2%
February	213,856	215,207	-0.6%
March	222,810	245,121	-9.1%
April	203,525	226,029	-10.0%
May	221,323	235,784	-6.1%
June	214,996	256,562	-16.2%
<b>Aggregate</b>	<b>1,300,018</b>	<b>1,391,227</b>	<b>-6.6%</b>

Every state and territory sold fewer used vehicles in H1 2026 than H1 2025. The Northern Territory recorded the largest fall (-14.8%); it is also the smallest market by volume, so its percentage is more sensitive to small absolute changes. Tasmania recorded the smallest fall, down 1.5%, while every mainland state fell by at least 5.6%.

**TABLE 2: SALES, YTD 2026 vs YTD 2025 BY STATE**

All used & demo vehicles up to 20 years old.

State	H1 2026	H1 2025	Change
NSW	375,846	403,366	-6.8%
VIC	314,322	337,570	-6.9%
QLD	293,484	311,035	-5.6%
WA	179,981	191,428	-6.0%
SA	89,379	98,502	-9.3%
TAS	31,328	31,796	-1.5%
ACT	12,098	13,330	-9.2%
NT	3,580	4,200	-14.8%

**TABLE 3: SALES, YTD 2026 vs YTD 2025 BY SEGMENT**

All used &amp; demo vehicles up to 20 years old.

Segment	H1 2026	H1 2025	Change
PAS	513,496	575,192	-10.7%
SUV	525,173	539,076	-2.6%
LCV - Utes	221,751	233,887	-5.2%
LCV - Vans & Buses	39,598	43,072	-8.1%

*Passenger cars fell by more than four times the proportional decline of SUVs (-10.7% versus -2.6%). SUVs have been gaining share for several years, and in H1 2026 the decline was concentrated in passenger cars, with SUVs recording a smaller fall.*

## Part 2: YTD Absorption Rate and Discounting

Absorption rate (sales as a share of listed stock) adds context to the sales figures. It rose through Q1, dipped in April, recovered in May, then fell to its lowest point of the year in June at 55.5%. The June fall was driven mainly by supply: listed stock rose 14.1% month-on-month, from 339,728 to 387,527, while sales fell 2.9% over the same period. Listings grew faster than sales in June.

**TABLE 4: ABSORPTION RATE, JANUARY TO JUNE 2026**

All used & demo vehicles up to 20 years old.

Month	For Sale	Sales	Absorption Rate
January	345,308	223,508	64.7%
February	321,602	213,856	66.5%
March	327,762	222,810	68.0%
April	343,021	203,525	59.3%
May	339,728	221,323	65.1%
June	387,527	214,996	55.5%

*Absorption fell in three of the six months, and the lowest reading came in June. On this measure, the gap between supply and sales was at its widest point of the half at the end of H1.*

The share of vehicles sold with a discount began the year at 44.9%, held broadly flat through Q1, then rose from April, passing 50% in May and reaching 51.1% by June, the highest of the half. Discount depth followed a similar path, flat through April before widening to -3.7% in June. This increase coincided with the fall in absorption rate over the same period.

**TABLE 5: PERCENTAGE OF VEHICLES SOLD WITH A DISCOUNT**

1 to 5 years old vehicles.

Fuel Type	Jan	Feb	Mar	Apr	May	Jun
Petrol	44.3%	44.1%	44.4%	46.3%	50.5%	51.0%
Diesel	45.6%	44.4%	43.3%	46.7%	51.7%	52.5%
Hybrid	43.8%	46.1%	45.9%	43.7%	47.7%	48.4%
EV	46.3%	46.4%	40.3%	32.4%	44.0%	48.5%
PHEV	53.7%	55.3%	53.6%	46.8%	46.6%	49.1%
<b>Average</b>	<b>44.9%</b>	<b>44.7%</b>	<b>44.2%</b>	<b>45.1%</b>	<b>50.3%</b>	<b>51.1%</b>

Petrol and diesel accounted for most of the increase in discounting in the second half of the period. Diesel's discount depth nearly doubled across the half, from -2.6% in January to -3.7% in June, the largest full-period change of any fuel type. Hybrid recorded the most stable discounting across the six months, never posting the highest discount incidence or depth in any single month.

EV discounting moved more widely than any other fuel type over the half. Discount incidence fell to a low of 32.4% in April, then rose to 48.5% by June, finishing higher than it started. Depth followed the same pattern: -3.2% in January, easing to -2.0% by April, then widening to -3.3% in June, close to its January level. Over the six months, EV discounting showed no net change, ending June near where it began in January.

**TABLE 6: DISCOUNT DEPTH**  
*1 to 5 years old vehicles.*

Fuel Type	Jan	Feb	Mar	Apr	May	Jun
Petrol	-2.8%	-2.8%	-2.8%	-3.1%	-3.6%	-3.8%
Diesel	-2.6%	-2.6%	-2.5%	-2.9%	-3.4%	-3.7%
Hybrid	-2.3%	-2.5%	-2.6%	-2.3%	-2.5%	-2.9%
EV	-3.2%	-3.3%	-2.7%	-2.0%	-2.7%	-3.3%
PHEV	-4.2%	-4.7%	-4.3%	-3.3%	-3.3%	-3.2%
<b>Aggregate</b>	<b>-2.7%</b>	<b>-2.8%</b>	<b>-2.7%</b>	<b>-2.8%</b>	<b>-3.4%</b>	<b>-3.7%</b>

*PHEV was the only fuel type where discounting eased consistently over the half. It began the year as the most heavily discounted category and recorded its lowest discount incidence and depth of the half in June.*

## Part 3: Top 20 Makes and Top 20 Models

Three of the twenty makes grew: BMW, Mercedes-Benz and Audi, all premium brands. MG and GWM recorded the largest declines in the table (-17.3% each); both have grown strongly in recent new-car sales in Australia, so their used-vehicle supply may not yet reflect that growth. Audi recorded the largest increase at +11.5%.

**TABLE 7: TOP 20 MAKES BY SALES YTD**

All used & demo vehicles up to 20 years old.

Make	YTD 2026	YTD 2025	Change
Toyota	220,389	236,111	-6.7%
Ford	106,136	111,845	-5.1%
Mazda	105,450	117,416	-10.2%
Hyundai	93,696	104,681	-10.5%
Mitsubishi	79,473	85,206	-6.7%
Holden	73,177	80,064	-8.6%
Nissan	70,985	81,889	-13.3%
Volkswagen	65,195	70,117	-7.0%
Kia	54,384	56,133	-3.1%
Subaru	51,017	51,944	-1.8%
BMW	44,725	43,325	+3.2%
Mercedes-Benz	43,461	42,736	+1.7%
Honda	35,996	42,593	-15.5%
Audi	33,593	30,115	+11.5%
Suzuki	25,919	30,481	-15.0%
Isuzu	19,907	22,879	-13.0%
MG	19,005	22,973	-17.3%
Jeep	17,146	18,764	-8.6%
GWM	17,003	20,552	-17.3%
Land Rover	14,327	14,954	-4.2%

**TABLE 8: TOP 20 MODELS BY SALES YTD**

All used &amp; demo vehicles up to 20 years old.

Model	YTD 2026	YTD 2025	Change
Ford Ranger	46,966	45,473	+3.3%
Toyota HiLux	42,126	43,363	-2.9%
Toyota Corolla	33,931	39,161	-13.4%
Mazda 3	28,701	33,009	-13.1%
Hyundai i30	24,717	26,282	-6.0%
Toyota RAV4	22,567	21,443	+5.2%
Mitsubishi Triton	22,525	24,783	-9.1%
Toyota Camry	22,131	25,216	-12.2%
Holden Commodore	21,887	22,541	-2.9%
Nissan Navara	21,126	23,686	-10.8%
Volkswagen Golf	20,005	22,346	-10.5%
Mazda CX-5	19,162	20,132	-4.8%
Toyota Landcruiser	19,146	18,978	+0.9%
Mitsubishi Outlander	18,362	17,426	+5.4%
Toyota Landcruiser Prado	17,873	18,752	-4.7%
Subaru Forester	16,718	15,679	+6.6%
Nissan X-Trail	16,693	18,285	-8.7%
Mazda BT-50	14,460	15,541	-7.0%
Isuzu D-Max	13,995	16,226	-13.7%
Hyundai Tucson	13,603	16,181	-15.9%

*The Subaru Forester recorded the largest increase in the top 20 at +6.6%. The Ford Ranger was the only ute to grow; every other ute in the list declined, several by double digits. The Hyundai Tucson recorded the largest decline in the table at -15.9%, wider than Hyundai's brand-level -10.5%.*

## Part 4: Vehicles Are Taking Longer to Sell in 2026

Every month of H1 2026 took longer to sell than the equivalent month in 2025. The gap narrowed in some months and widened in others but remained positive throughout.

The two years followed different paths. In 2025, days to sell reached their low in March (47.3 days) and rose gradually from there. In 2026, days to sell fell from January to April, reaching their low one month later than in 2025, then rose to 54.4 in May, the largest single-month increase in either year. This May increase occurred in the same month that discount incidence first passed 50% and absorption rate declined, so April and May show a consistent change across three measures.

**TABLE 9: WEIGHTED AVERAGE DAYS TO SELL - DEALER & PRIVATE COMBINED**

1 to 5 years old vehicles

Month	2026	2025	Gap
January	56.0	51.4	+4.6
February	52.6	51.2	+1.4
March	50.7	47.3	+3.4
April	50.4	49.4	+1.0
May	54.4	50.6	+3.8
June	53.9	50.3	+3.6

*June eased slightly from May's high but remained well above both April's low and the entire 2025 comparison. That is consistent with the broader half-year pattern: a market that found a new, worse equilibrium from April onward rather than one that spiked briefly and returned to trend.*

## Part 5: EV Trend

EV, PHEV and Hybrid combined account for 92,742 of 1,300,018 total sales, or 7.1% of the market.

**TABLE 10: SALES BY FUEL TYPE YTD**

All used & demo vehicles up to 20 years old.

Fuel Type	H1 2026	H1 2025	Change
Petrol	825,309	915,802	-9.9%
Diesel	379,756	395,701	-4.0%
Hybrid	55,405	58,266	-4.9%
EV	25,417	16,445	+54.6%
PHEV	11,920	2,097	+468.4%
LPG	2,211	2,916	-24.2%

Tesla remained the largest pure-EV brand by volume, led by the Model 3 and Model Y. The fastest year-on-year growth came from smaller-volume brands: BYD, Polestar and Volkswagen each grew by more than 100%.

**TABLE 11: TOP 10 EV BY MAKE**

All used & demo vehicles up to 20 years old.

Make	H1 2026	H1 2025	Change
Tesla	7,402	5,001	+48.0%
MG	2,582	1,753	+47.3%
Kia	1,927	944	+104.1%
BMW	1,898	1,972	-3.8%
BYD	1,767	643	+174.8%
Hyundai	1,246	726	+71.6%
Volkswagen	990	69	+1,334.8%
Mercedes-Benz	834	909	-8.3%
Volvo	801	826	-3.0%
Polestar	732	180	+306.7%

EV average days to sell fell by close to half across the period, from 60.6 in January to 38.9 in June, and were below the 2025 comparison for most of the second quarter.

*EV volume grew and selling times shortened over the half. Over the same period, EV discounting showed no net change: discount incidence finished June higher than in January, and depth in June was close to its January level.*

## Part 6: Pricing Trend, 2026 Compared with 2025

In 2026, the weighted average retained value fell 6.3 points across the half (-7.0%). In 2025 it fell 1.4 points over the same months (-1.7%), and did so gradually, with little change through March and April. In 2026 the decline continued each month, about four times the size of the 2025 fall, and without the mid-year flat period seen in 2025.

**TABLE 12: WEIGHTED AVERAGE RV% MOVEMENT BY MONTH**

*1 to 5 years old vehicles.*

Month	2026	2025	Gap
January	89.8%	84.3%	+5.5 pts
February	89.2%	84.2%	+5.0 pts
March	87.6%	83.9%	+3.7 pts
April	87.1%	83.9%	+3.2 pts
May	85.1%	83.5%	+2.6 pts
June	83.5%	82.9%	+0.4 pts

Petrol, diesel and hybrid all began the year with 2026 prices above the equivalent 2025 month, and that gap narrowed over the half. By June, diesel and hybrid had fallen below their 2025 levels, meaning a one-year-old diesel or hybrid vehicle was retaining less of its value than the same-aged vehicle a year earlier. Petrol was close to the same point, with a June gap of +1.0 points.

**TABLE 13: WEIGHTED AVERAGE RV% MOVEMENT BY FUEL TYPE**

*1 to 5 years old vehicles.*

Fuel Type	Jan 2026 vs 2025 Gap	Jun 2026 vs 2025 Gap
Petrol	+6.3 pts	+1.0 pts
Diesel	+3.9 pts	-0.4 pts
Hybrid	+4.1 pts	-1.3 pts
EV	+7.0 pts	+6.2 pts
PHEV	+14.0 pts	+9.6 pts

*EV and PHEV retained a premium over 2025 levels through June, even though EV prices fell within 2026. EV values declined month-on-month during 2026 but remained above their 2025 levels at the same points in the year. Petrol and diesel prices fell faster in 2026 and by June had converged with or fallen below their 2025 levels.*

## Methodology and Data Notes

All data is sourced from the AutoGrab Automotive Insights Report (AIR), aggregating Private and Dealer listings, January to June 2026, compared against the equivalent period in 2025.

Sales figures reflect delisted (sold) vehicles and are deduplicated across platforms to count unique vehicles only once. Discount, pricing and days-to-sell figures reflect vehicles one to five years old unless otherwise noted. Absorption rate equals monthly sales divided by total vehicles listed for sale in the same period. "Listed for Sale" figures are month-end snapshots rather than a cumulative YTD tally.

Weighted Average Days to Sell, Discount figures and Retained Value (RV%) cover 1-5 years old vehicles excluding Demonstrator. Retained Value represents the difference between a vehicle's original listed asking price and its final listed price at the point of sale. A discounted vehicle is one where any price reduction was made between first listing and the date of sale. Discount percentage is the average of those reductions across all discounted vehicles in the reporting period.

Sales and top make/model figures cover vehicles up to 20 years old including demonstrator and excluding new car sales.

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