

Q1 2026 Report: The Collector & Exotic Car Market

Auction-realized prices and the public-market backdrop

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The quarter's apex; six cars cleared \$10M+

31 of 68

Seven-figure lots that were Ferrari

Ferrari led on value: \$203.5M across just 181 lots

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The quarter in brief

The collector and exotic car market opened 2026 in resilient form. Across the first quarter, auction houses cleared \$702.5 million across 7,535 sold lots — approximately flat against Q1 2025 on a gross basis, and up 44% on a like-for-like basis at the houses tracked in both quarters. What initially appears to be volatility is, on closer inspection, the auction calendar: capital and volume move with the sale season rather than with the broader economy.

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The public-market backdrop: the showroom vs. the saleroom

The collector market did not track the showroom. Through the quarter the mass-market automakers diverged sharply: Ford advanced (a double-digit year-to-date gain on a Q1 earnings beat, aided by a \$1.3B tariff refund following a February Supreme Court ruling), General Motors held approximately flat (also beating estimates, with a ~\$500M refund), and Stellantis declined materially — down approximately 30% year-to-date despite returning to profitability. Even the listed luxury-auto pure-plays de-rated: Ferrari (NYSE: RACE) and Porsche shares both fell on tariff, China and guidance concerns.

The physical assets moved in the opposite direction. Hagerty's Supercar Index rose approximately 19% in the quarter — halo Ferraris such as the 288 GTO and Enzo up over 100% — and ALT/FNDATA's auction data showed like-for-like capital up 44%. The decoupling is one of asset versus equity: a blue-chip collector car trades on scarcity and heritage, not on the carmakers' quarterly tariff arithmetic.

THE SIGNAL

When the automakers' equities come under pressure on tariffs and EV demand, the blue-chip collector car behaves as a hard asset — independent of, and in Q1 2026 inversely correlated with, the listed auto sector.

Month-by-month (Q1 2026)

January – the Scottsdale surge

The year opened at considerable pace. January alone captured \$626 million across 5,255 sold lots — the majority of the entire quarter — driven by the Arizona auction season at Mecum and Barrett-Jackson. Each of the quarter's top lots hammered here, led by the \$38.5M Ferrari 250 GTO, a \$17.9M Enzo, a \$12.4M GT40 Mk II, and a \$12.2M F50.

February – the seasonal lull

With the Arizona sales concluded, February moderated to \$12.2 million across 339 lots — not a contraction but the customary off-season trough between the winter and spring marquee auctions.

March – the spring rebound

Activity recovered into March, which cleared \$64.0 million across 1,941 lots as the spring sales calendar resumed. The pattern — a January peak, a February lull, a March recovery — recurs year to year; it reflects the cadence of the auction season rather than a market signal.

What moved the market

Collector preference remained anchored in traditional form factors — convertibles, coupes, performance trucks, premium sedans, and high-end SUVs. By volume, the American mass-luxury marques predominated: Chevrolet moved approximately 2,000 lots and Ford approximately 1,287, the muscle-and-truck core of the US auction circuit.

VOLUME VS. VALUE

The divergence between volume and value is the defining feature. By capital, Ferrari stood apart: just 181 Ferrari lots carried \$203.5M — more value than any other marque — followed by Chevrolet (\$165M), Ford (\$95M) and Porsche (\$28M). The volume is American; the capital is Italian.

FERRARI'S DOMINANCE AT THE TOP

Of the 68 lots that cleared \$1M+, 31 were Ferraris, and six cars cleared \$10M+. Hammer prices across the elite subset ranged from approximately \$3M to the \$38.5M 250 GTO — with collectors treating Maranello's finest as sovereign-grade assets rather than as vehicles.

THE PREMIUM FOR TIME

The pinnacle cars share a single attribute: age. The 250 GTO, Enzo, GT40 and F50 are 20th-century machines. The premium for historical rarity substantially exceeds the premium for raw modern performance.

Where it cleared

The high-value market is geographically concentrated: approximately 97% of Q1 value cleared in the United States, with the United Kingdom, France and Canada accounting for the majority of the remainder. This reflects the physical infrastructure of the collector-car world — the established houses (Mecum, Barrett-Jackson, RM Sotheby's, Bonhams) are anchored in the West — rather than where the buyers reside. High-net-worth capital from Asia, the Middle East and Latin America routinely routes through these Western hubs to acquire the assets.

What to watch

Q1 2026 reinforces a market that is driven by heritage and scarcity rather than by the macroeconomic cycle. Three patterns are likely to define the remainder of the year:

01

Scarcity outweighs performance

Capital concentrates in finite, historic supply — pre-1975 Ferraris above all. Modern hypercars continue to sell, but the asymmetric returns accrue to unrepeatable 20th-century icons rather than to the latest performance specifications.

02

Decoupled from the showroom

Collector values held firm (like-for-like +44%) even as the mass-market automakers absorbed tariffs, swings in EV demand and higher energy costs. The collector market trades on heritage and scarcity rather than on the new-car cycle.

03

The calendar is the cycle

Volume and value move with the auction season — January's Scottsdale flagship sales, a quiet February, the spring marquee auctions — rather than with the broader economy. The quarter is best read by the calendar, not interpreted as a trend.

The collector car asset class remains substantially decoupled from everyday economic friction. As tariffs, EV calibration and regulation reshape the manufacturing landscape, the finite pool of 20th-century landmark machinery is likely to grow only scarcer — and, for disciplined collectors, comparatively more valuable. Outperformance accrues to those who hold rarity and read the auction calendar rather than the headlines.

“Scarcity outweighs performance: a finite pool of 20th-century landmark cars continues to yield asymmetric returns even as the new-car sector remains under pressure.”

ALT/FNDATA Research

Methodology & about

METHODOLOGY

This report is based on ALT/FNDATA's record of collector and exotic cars cleared at auction worldwide — filtered to completed auction sales (excluding unsold or withdrawn lots). Q1 2026 reflects 7,535 sold lots (\$702.5M); Q1 2025, 8,030 (\$767.7M). Because the set of houses tracked shifts from quarter to quarter, year-over-year change is reported both gross (–8%) and on a like-for-like basis for the houses present in both quarters (+44% value), the latter being the cleaner market read. Values are realized prices converted to USD. Automaker figures are Q1 2026 share-price and results data as reported by the issuers and the financial press.

ALT/FNDATA is a market-data platform tracking 10M+ auction results across 100+ houses worldwide — the neutral, cross-market record of what luxury and alternative assets actually sell for at the hammer, not asking prices.

Source: ALT/FNDATA, “Q1 2026 Report: The Collector & Exotic Car Market” (June 2026). Based on auction-realized prices for collector and exotic cars cleared at the auction houses ALT/FNDATA tracks, with public-market context from Q1 2026 automaker performance. © 2026 ALT/FNDATA · altfnadata.com/reports/collector-car-market-report-q1-2026

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