RedBook | INDEPENDENT INSIGHTS

DATA & INSIGHTS
AUGUST 2026

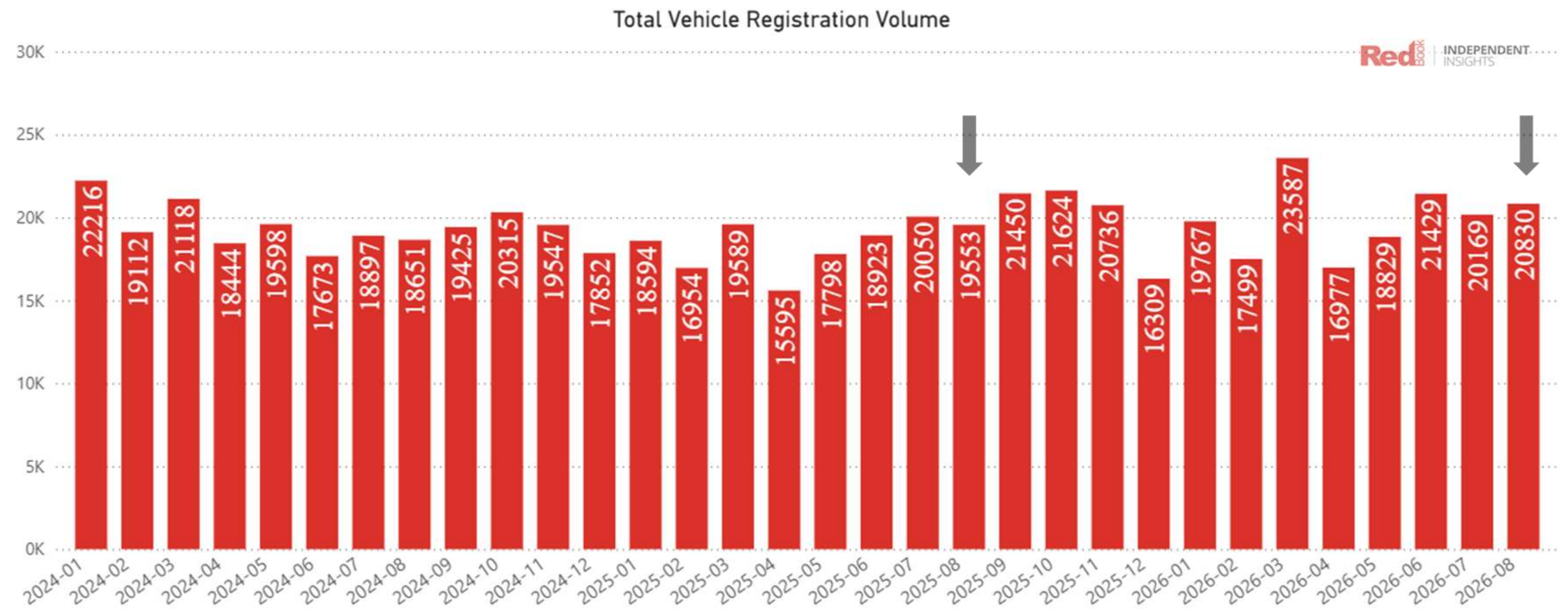
MONTHLY

MARKET UPDATE

NZ new and used vehicle registrations, electrification, market share and used vehicle price index trends.

IN THIS ISSUE

NZ Overall Car Registrations Trend



KEY INSIGHTS

Registrations Increase

Total registrations increased 3.3% MoM to 20,830 in August.

Market Up YoY

Total registrations were 6.5% higher than August 2025.

Source: RedBook Insights

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CHAPTER 1

NEW MARKET

This section covers New Zealand's new vehicle market in August 2026, highlighting top sellers, brand share and overall sales trends. Toyota Hilux led the August model market, while Toyota strengthened its brand lead.

+5% MoM
New regs up MoM.

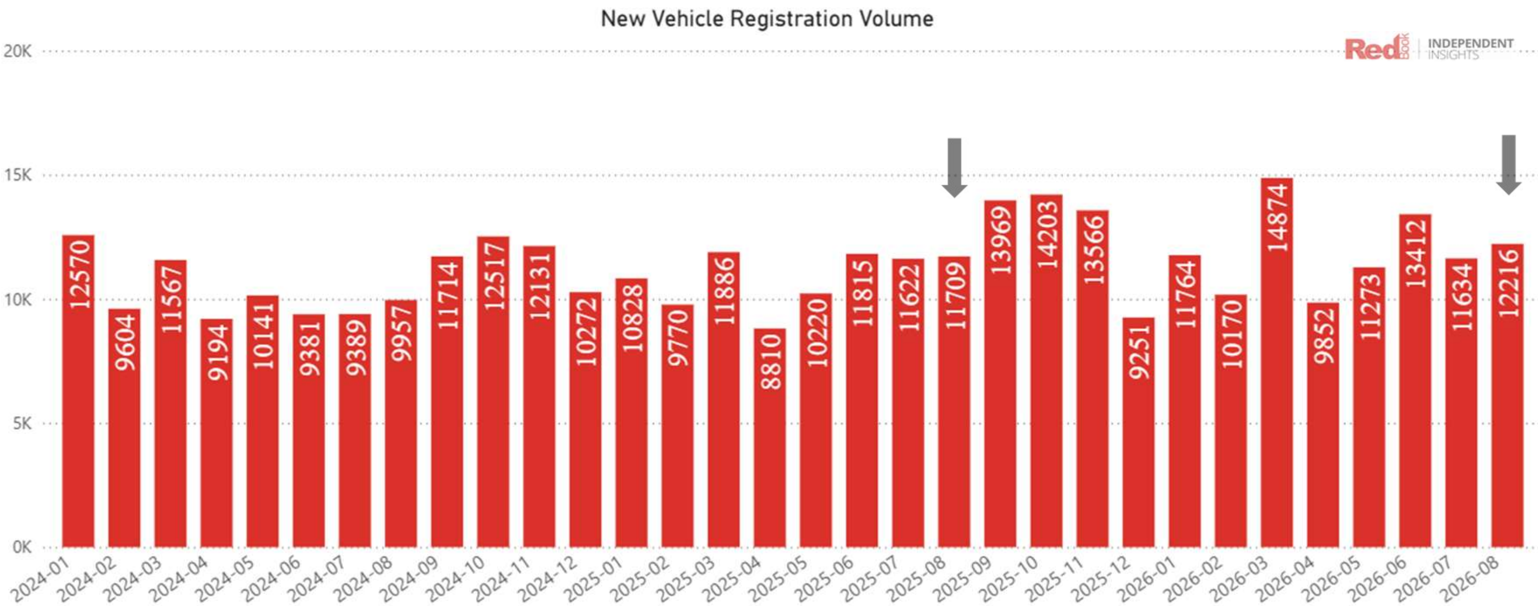
+4.3% YoY
New market higher YoY.

890
Hilux led August new model market.

NEW MARKET

AUGUST 2026

NZ New Car Sales Trend



KEY INSIGHTS

New Market Improves

New registrations rose 5.0% MoM to 12,216 in August.

YoY Growth

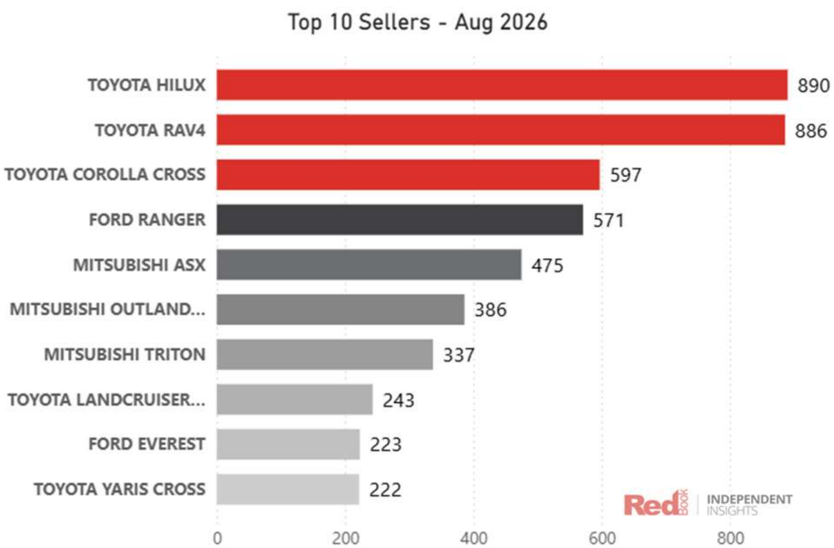
New registrations were 4.3% higher than August 2025.

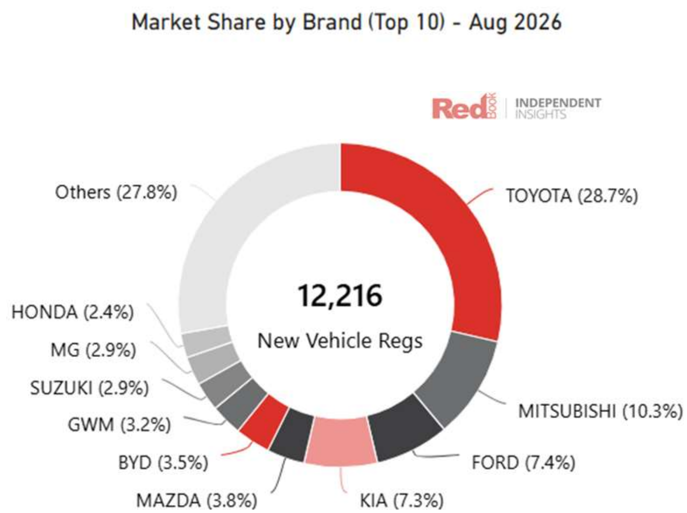
Below March Peak

August improved from July, but remained below March's 2026 peak.

Source: RedBook Insights

Top Sellers & Market Share — Monthly





KEY INSIGHTS

Hilux Leads

Toyota Hilux led August with 890 registrations, just ahead of Toyota RAV4 at 886.

RAV4 Close No.2

Toyota RAV4 ranked second, reinforcing SUV strength in August.

Rental Support

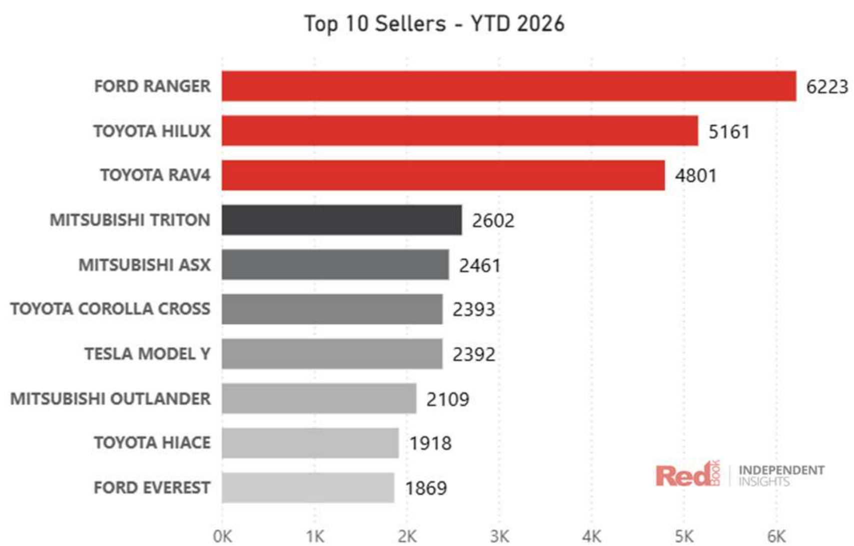
Rental demand boosted Toyota, led by Corolla Cross, RAV4 and Yaris Cross.

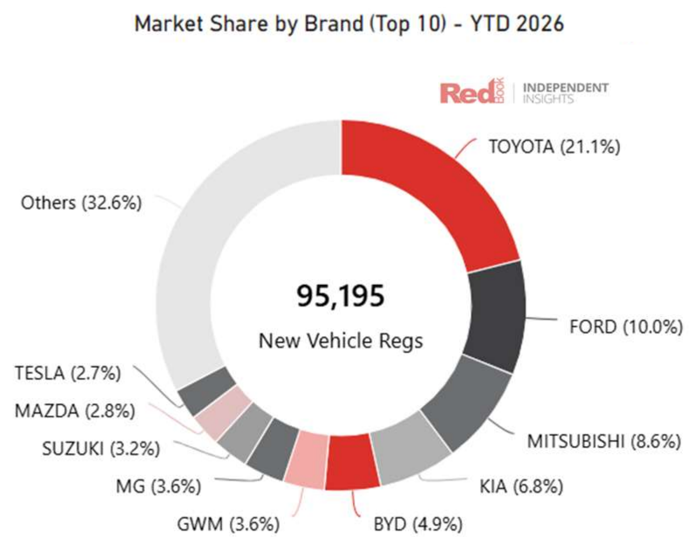
Mitsubishi & Ford Follow

Mitsubishi held 10.3%, with Ford and Kia close behind.

Source: RedBook Insights

Top Sellers & Market Share — YTD





KEY INSIGHTS

Ranger Holds No.1

Ford Ranger leads YTD with 6,223 registrations, ahead of Hilux and RAV4.

Toyota Leads YTD

Toyota holds the top brand position with 21.1% share; Ford follows at 10.0%.

Model Y Still Visible

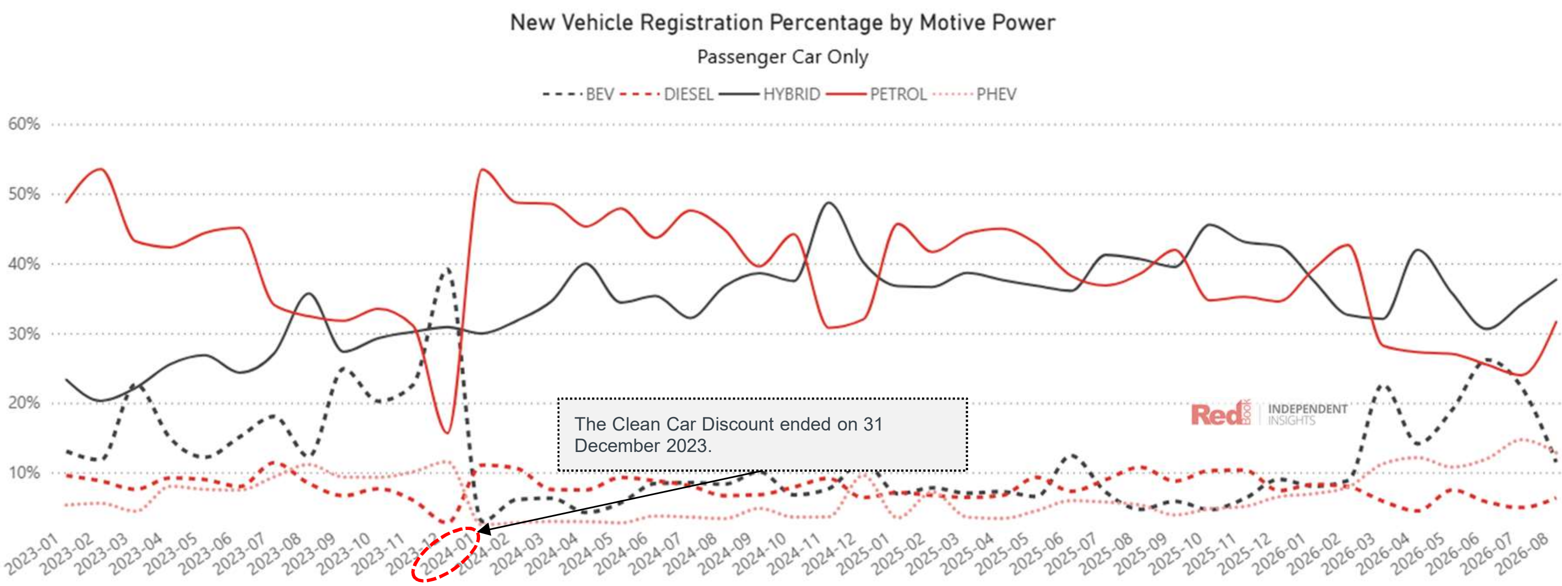
Tesla Model Y remains in the YTD top 10, reinforcing BEV presence.

Mitsubishi Solid

Mitsubishi holds 8.6%, supported by Triton, ASX and Outlander.

Source: RedBook Insights

New Car Sales Trend by Motive Power



KEY INSIGHTS

Hybrid Still Leads

Hybrid recovered in August and remained the leading passenger powertrain.

Petrol Rebounds

Petrol share lifted sharply in August, narrowing the gap with hybrid.

EV Share Pulls Back

As expected, BEV and PHEV both eased from recent highs, bringing EV share lower.

Source: RedBook Insights

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CHAPTER 2

ELECTRIFICATION

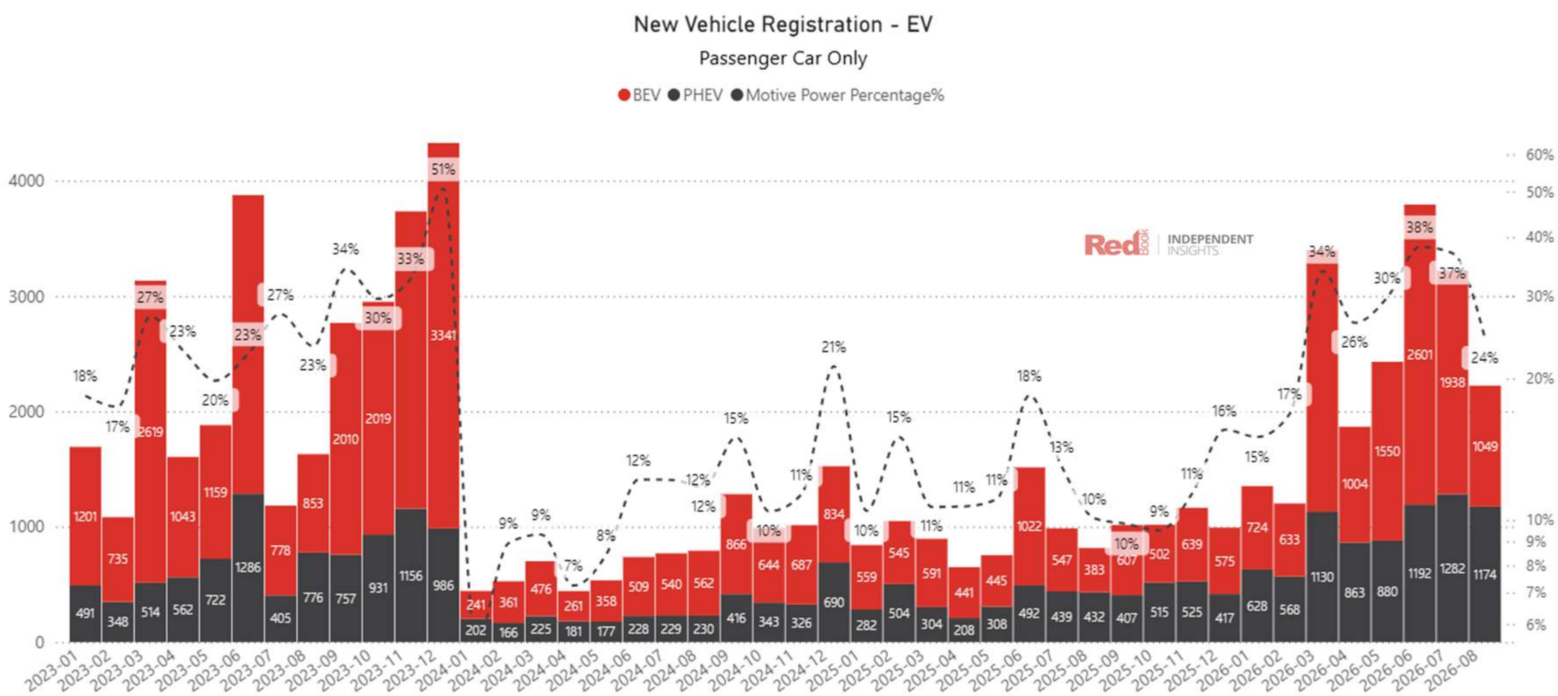
This section explores key electrification trends in New Zealand, including EV share, BEV leadership, and market share by OEM origin. EV share pulled back in August, while Tesla remained the leading BEV brand and China-origin vehicles retained the majority YTD.

24%
EV share of new passenger registrations in August

22.1%
Tesla BEV market share YTD 2026

56%
China-origin BEV share YTD 2026

EV New Car Sales Percentage



KEY INSIGHTS

EV Share Pulls Back

Combined BEV and PHEV share fell to 24% in August after June/July strength.

BEV Softer

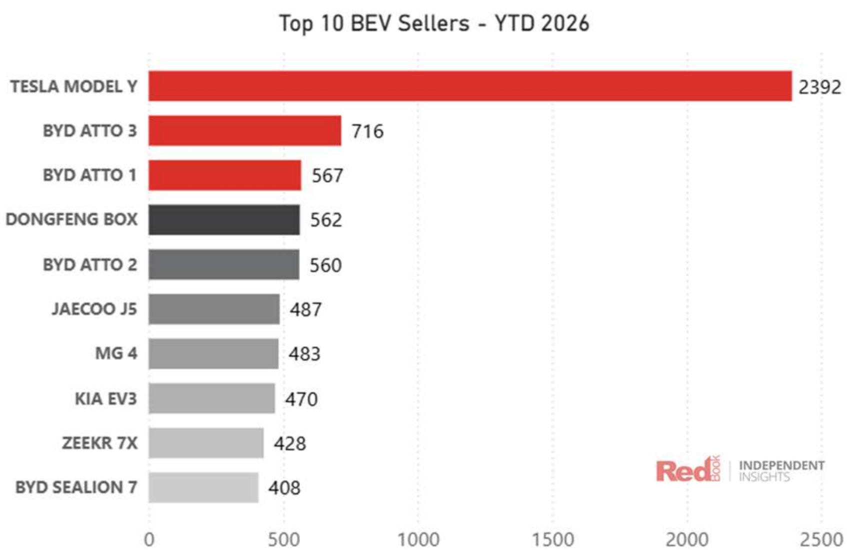
BEV registrations eased to 1,049, reducing the overall EV share.

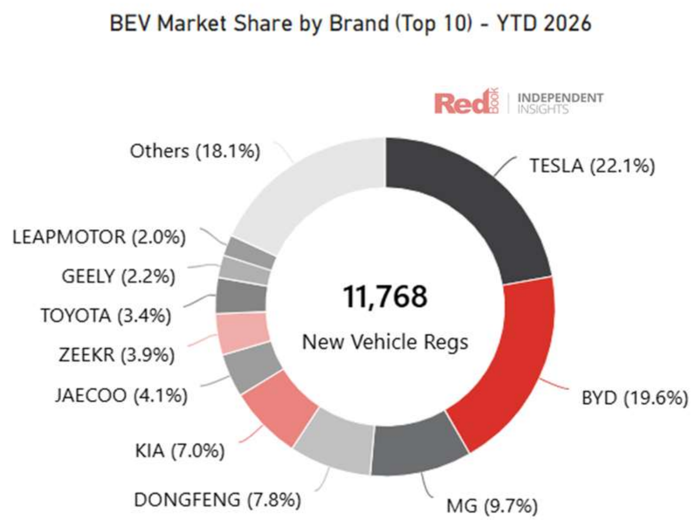
PHEV Holds Support

PHEV registrations reached 1,174, slightly ahead of BEV in August.

Source: RedBook Insights

BEV Top Sellers & Market Share





KEY INSIGHTS

Model Y Leads Clearly

Tesla Model Y is the top BEV YTD with 2,392 units, well ahead of BYD ATTO 3.

BYD Shows Depth

Four BYD models feature in the top 10, highlighting strong lineup coverage.

Tesla Leads by Brand

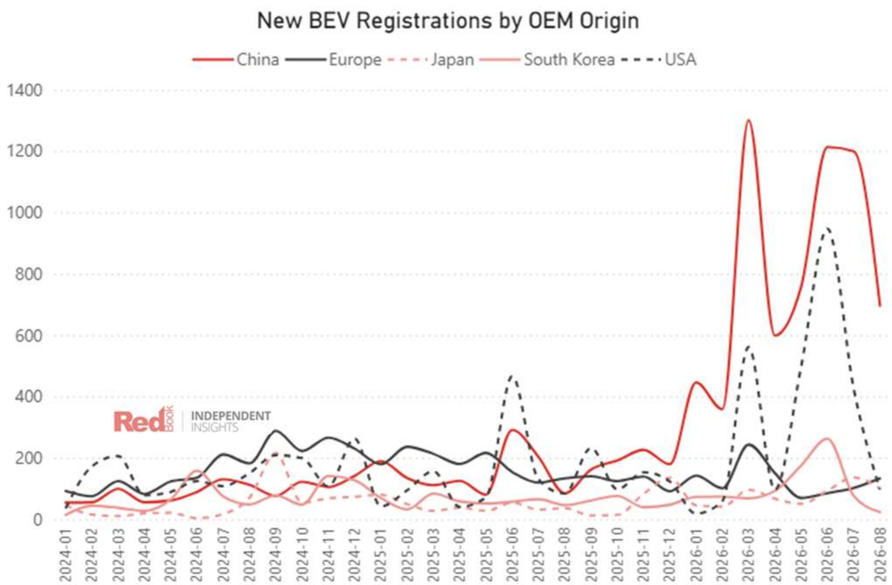
Tesla leads BEV market share at 22.1%, closely followed by BYD at 19.6%.

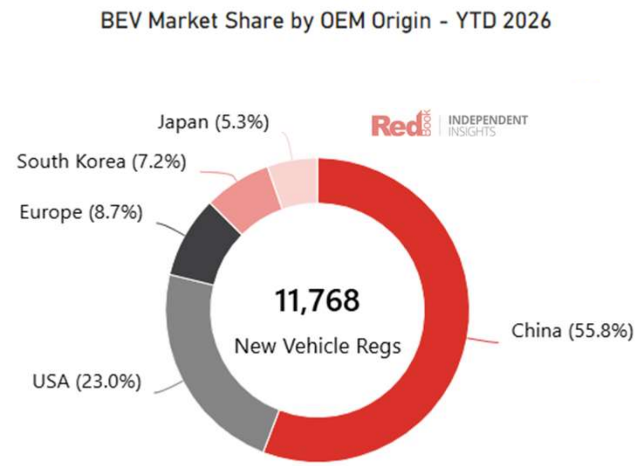
MG & Dongfeng Visible

MG, Dongfeng and Kia remain notable BEV challengers behind Tesla and BYD.

Source: RedBook Insights

BEV Market Trend by OEM Origin





KEY INSIGHTS

China Dominates

China accounts for 55.8% of BEV registrations, still far ahead of other origins.

U.S. Second

The U.S. holds the No.2 position at 23.0%, supported largely by Tesla.

China Eases in Aug

China-origin BEV volumes pulled back in August after strong June/July volumes.

U.S. Softens

U.S. volumes fell sharply from July, reflecting Tesla-related volatility.

Source: RedBook Insights

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CHAPTER 3

LIGHT COMMERCIAL

This section covers New Zealand's light commercial market in August 2026, highlighting registration trends, top sellers, brand share and motive power. Toyota Hilux led the August LCV market, while Toyota also led brand share.

+3% MoM
LCV regs up MoM.

32.4%
Toyota led YTD brand share.

890
Hilux led the August LCV market.

New Light Commercial Registration Volume

KEY INSIGHTS

August Lift

New light commercial registrations rose 2.7% MoM to 2,579 in August.

YoY Still Softer

August 2026 registrations were 14.2% lower than August 2025.

Below March Peak

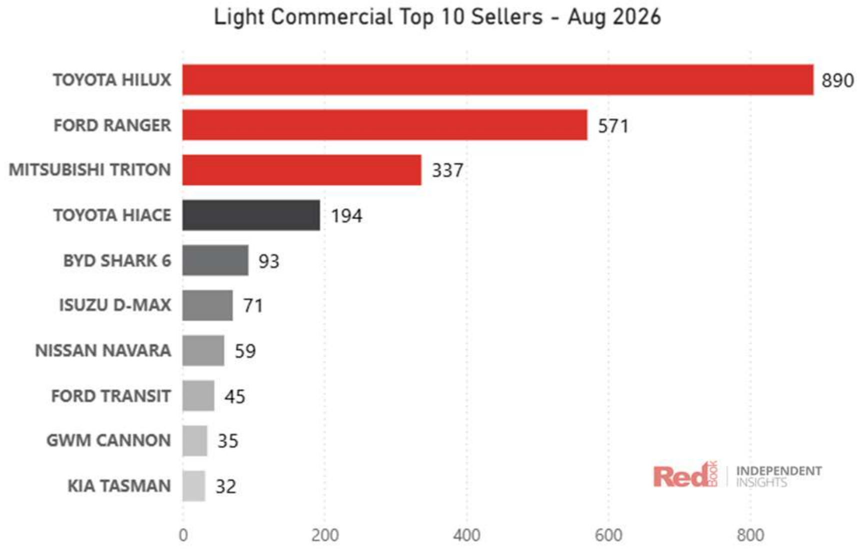
August remained well below the March spike of 4,304.

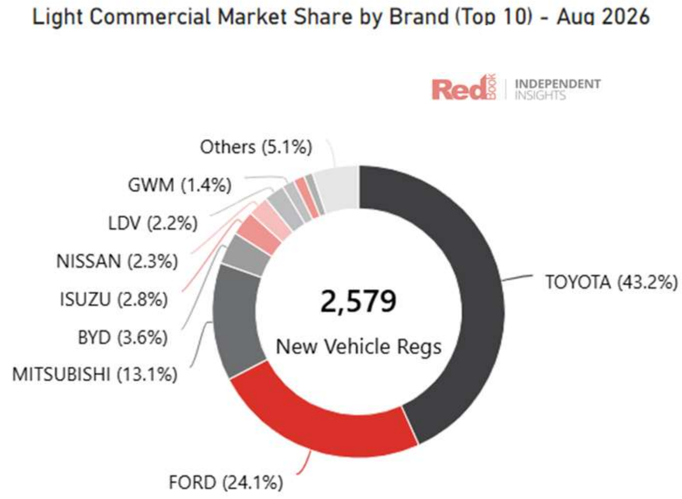
YTD Near 2025

YTD LCV volume remains broadly in line with 2025, supported by ute demand.

Source: RedBook Insights

Light Commercial Top Sellers & Market Share — Monthly





KEY INSIGHTS

Hilux Leads

Toyota Hilux led August with 890 registrations, ahead of Ford Ranger at 571.

Triton No.3

Mitsubishi Triton ranked third with 337, while Toyota Hiace ranked fourth.

Toyota Tops Brands

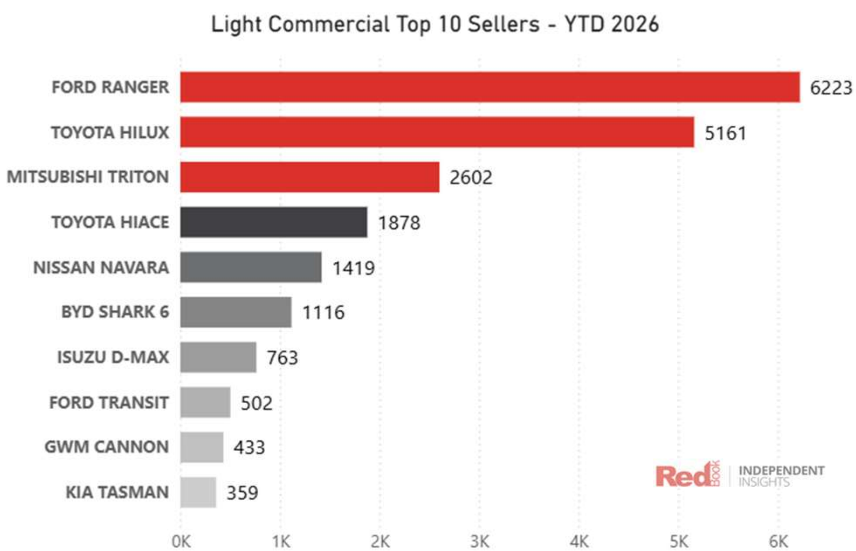
Toyota led August brand share at 43.2%, ahead of Ford at 24.1%.

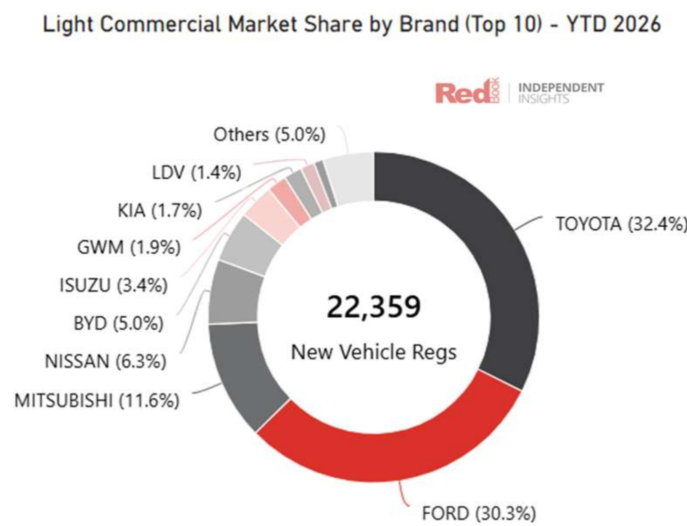
Shark 6 Visible

BYD Shark 6 reached 93 registrations, keeping plug-in ute demand visible.

Source: RedBook Insights

Light Commercial Top Sellers & Market Share — YTD





KEY INSIGHTS

Ranger Holds No.1

Ford Ranger leads YTD with 6,223 registrations, ahead of Hilux at 5,161.

Toyota Edges Ford

Toyota holds 32.4% YTD share, ahead of Ford on 30.3%.

Toyota Depth

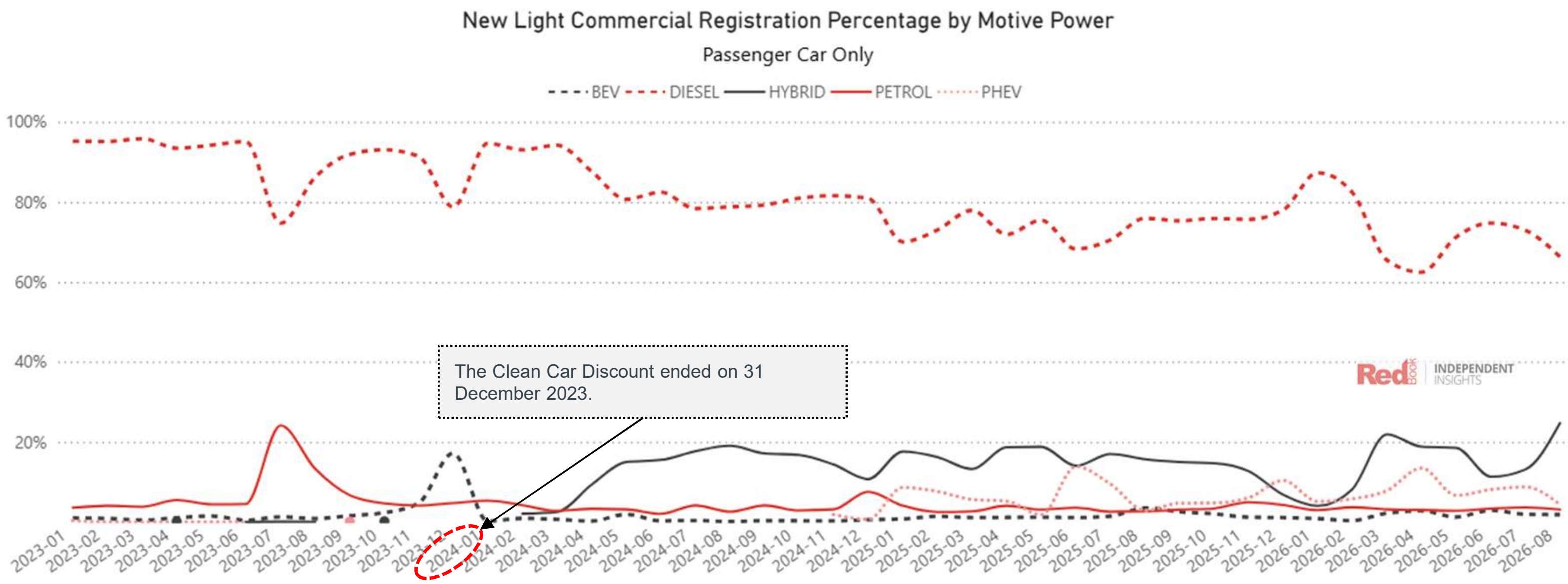
Hilux and Hiace keep Toyota competitive across both ute and van segments.

Emerging Challengers

BYD Shark 6 ranks sixth YTD, while GWM and Kia also sit in the top 10.

Source: RedBook Insights

Light Commercial Sales Trend by Motive Power



KEY INSIGHTS

Diesel Still Dominates

Diesel remained the clear leader, but its share eased again in August.

Hybrid Jumps

Hybrid share lifted sharply in August, as more choice becomes available, strengthening its No.2 position.

PHEV Steady

PHEV remained visible in 2026, supported by models such as BYD Shark 6.

Source: RedBook Insights

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CHAPTER 4

USED MARKET

This section covers New Zealand's used car market, highlighting top-selling models, brand market share, and sales trends by motive power to show what's driving demand.

36.4%
Toyota dominated used-car market share.

212
Nissan Leaf was the highest-selling used EV
in August.

Hybrid Leads
Hybrids remained the leading used-market powertrain.

USED MARKET
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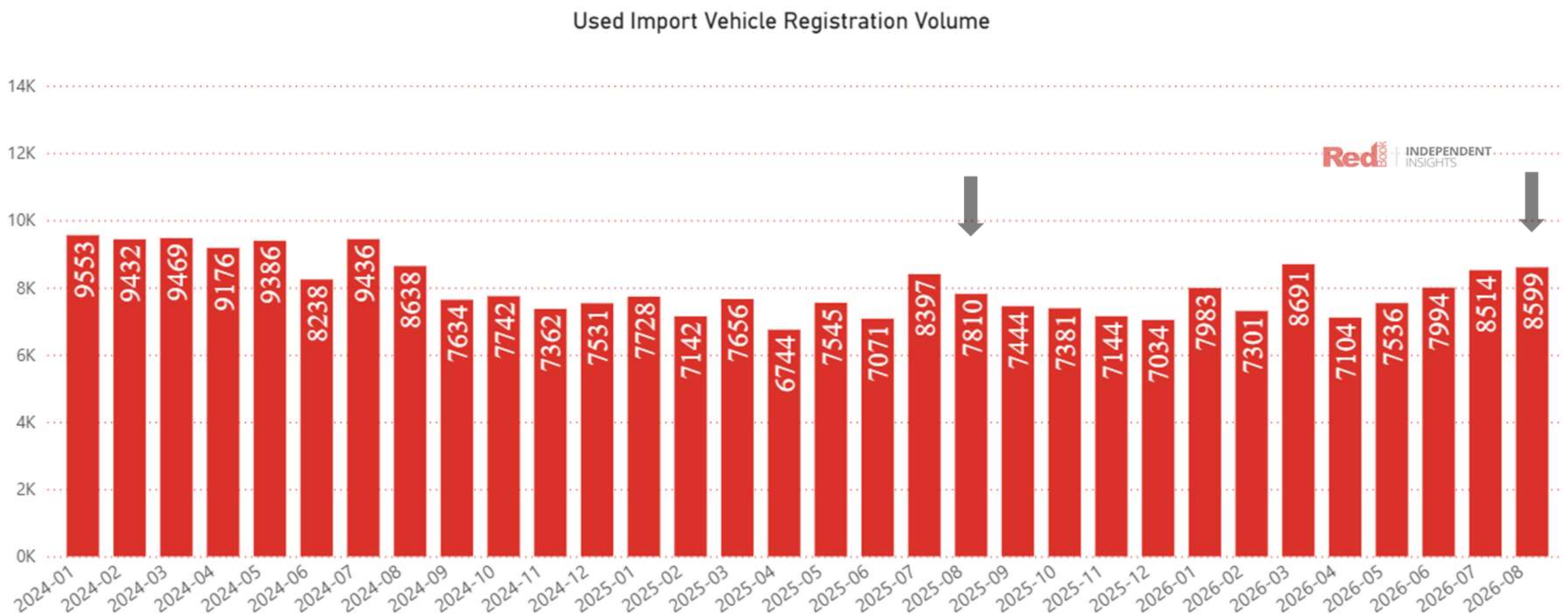
NZ Used Car Sales Trend



KEY INSIGHTS

Used Edges Up

Used import registrations rose 1.0% MoM to 8,599 in August.

YoY Stronger

August volume was 10.1% higher than August 2025.

Near March High

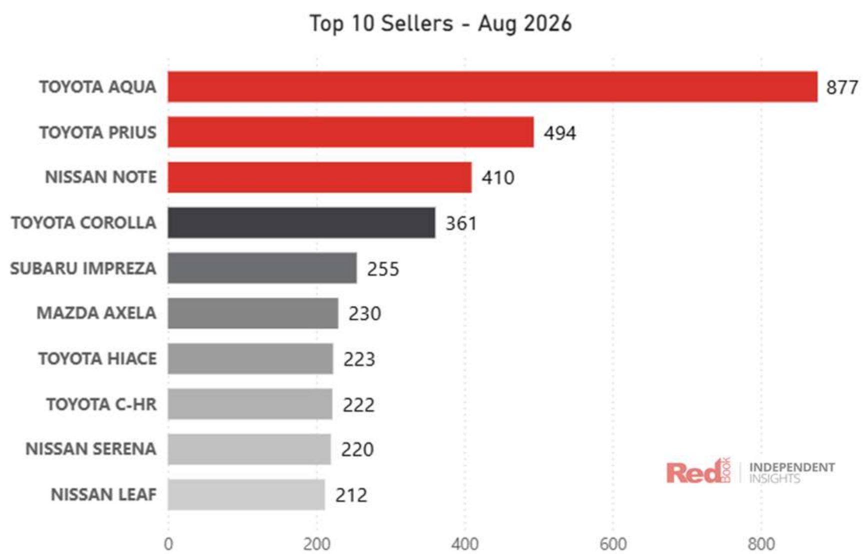
August was close to March's 2026 high of 8,691 registrations.

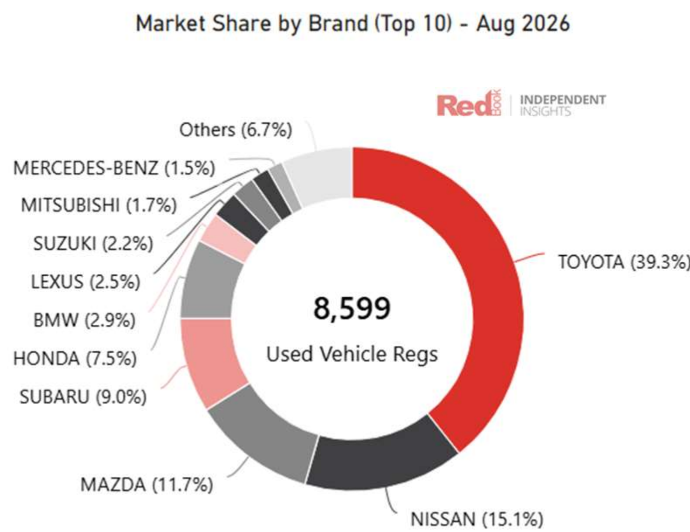
Hybrid Supports

Hybrid imports strengthened and continued to support used demand.

Source: RedBook Insights

Used Car Top Sellers & Market Share — Monthly





KEY INSIGHTS

Aqua Leads

Toyota Aqua led August with 877 registrations, ahead of Toyota Prius.

Note Ranks Third

Nissan Note ranked third with 410 registrations.

Leaf Top Used EV

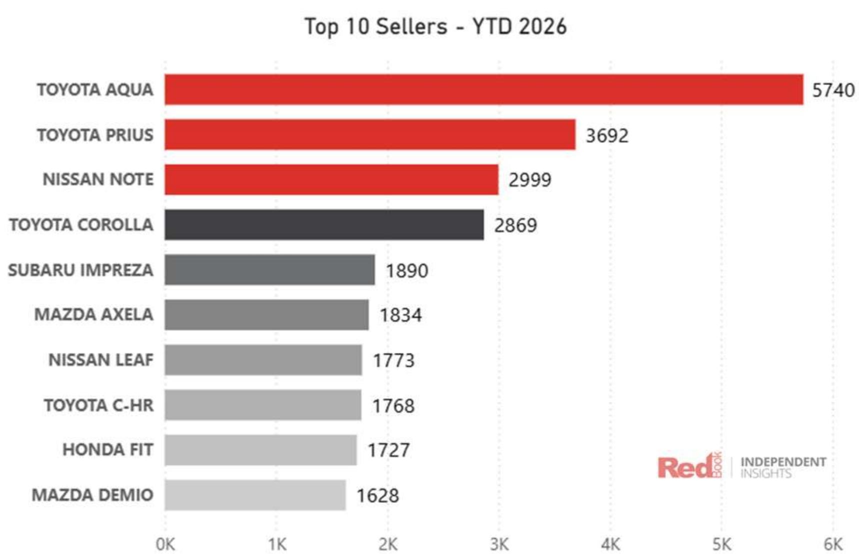
Nissan Leaf reached 212 units, the highest-selling used EV in August.

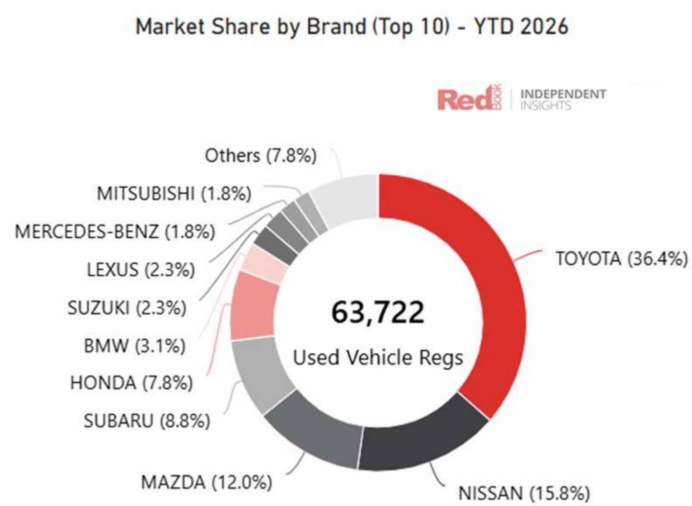
Toyota Dominates

Toyota held 39.3% of monthly used import registrations.

Source: RedBook Insights

Used Car Top Sellers & Market Share — YTD





KEY INSIGHTS

Toyota Leads Models

Aqua, Prius and Corolla feature prominently among top used vehicles.

Fuel Efficiency Drives

Half of the top 10 are hybrids or fuel-efficient models.

Toyota Dominates

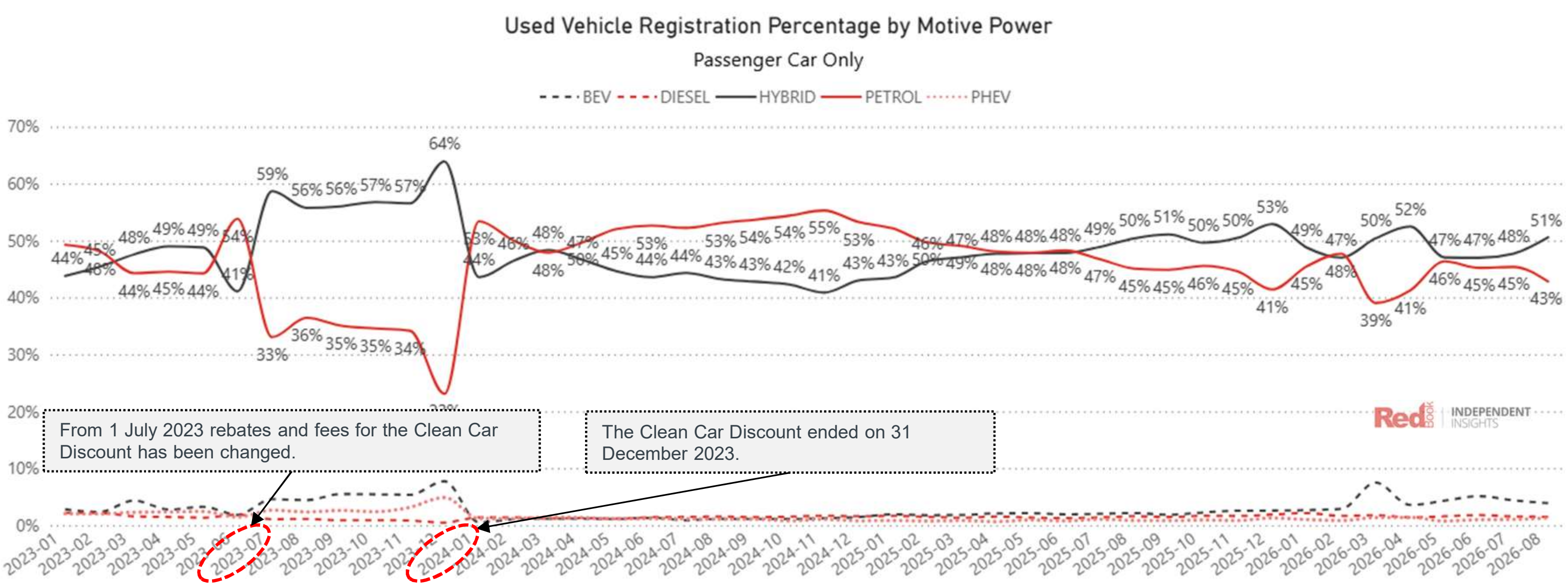
Toyota holds a commanding 36.4% share of used registrations.

Euro Brands Small

BMW, Mercedes-Benz and Audi together account for a relatively small share.

Source: RedBook Insights

Used Car Sales Trend by Motive Power



KEY INSIGHTS

Hybrid Extends Lead

Hybrid climbed to about 51% of used registrations in August.

Petrol Eases

Petrol fell to around 43%, widening the gap with hybrid.

BEV Still Low

BEV share remained low, despite staying above early-2026 levels.

Source: RedBook Insights

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CHAPTER 5

PRICE INDEX

This section reviews the Used Vehicle Price Index and how pricing trends are unfolding across different vehicle types and motive power. We highlight where values are easing, where pressures remain, and which segments are proving more resilient.

Easing Continues

The Used Vehicle Price Index continued to edge lower, with the correction still orderly in August.

SUVs Under Pressure

SUVs continue to show the sharpest correction among vehicle types.

BEV Decline Moderates

BEV values remain soft, but recent declines are beginning to ease.

Used Vehicle Price Index

KEY INSIGHTS

Easing Continues

The index edged lower in August, with the correction continuing at a gradual pace.

Downtrend Intact

Monthly declines remain orderly, but the index has not yet flattened.

Source: RedBook Insights

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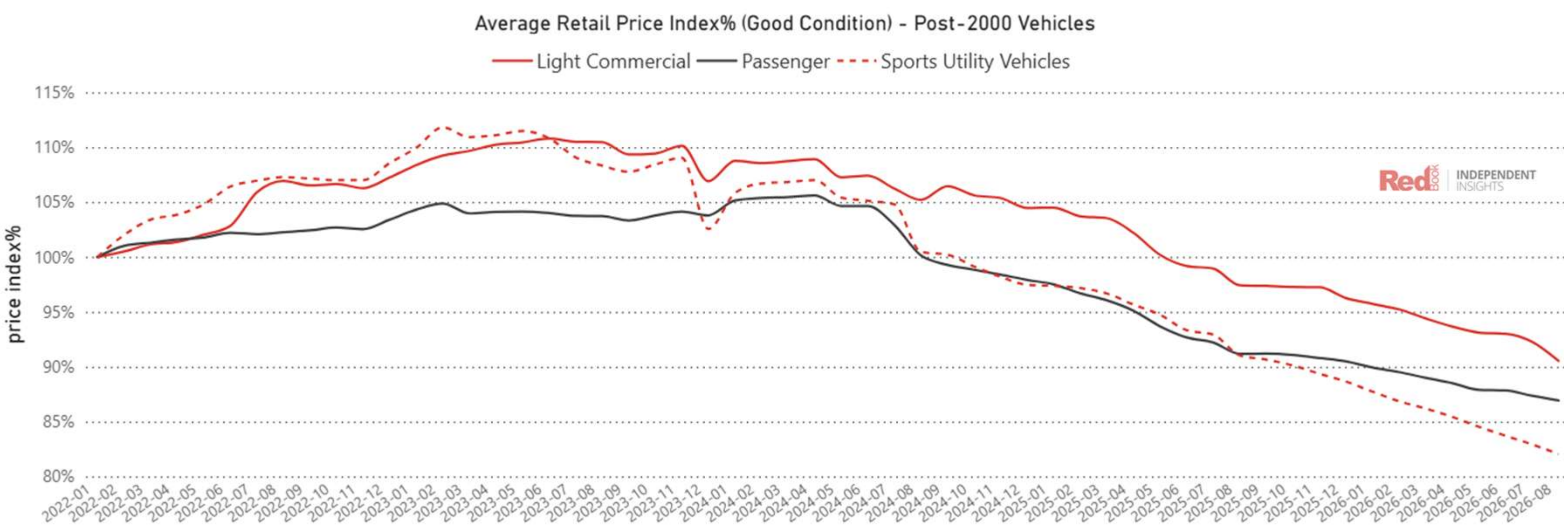
Used Vehicle Price Index by Vehicle Type



KEY INSIGHTS

Light Commercials Firmer

Light commercials remain relatively stronger than passenger and SUV segments.

SUVs Correct Most

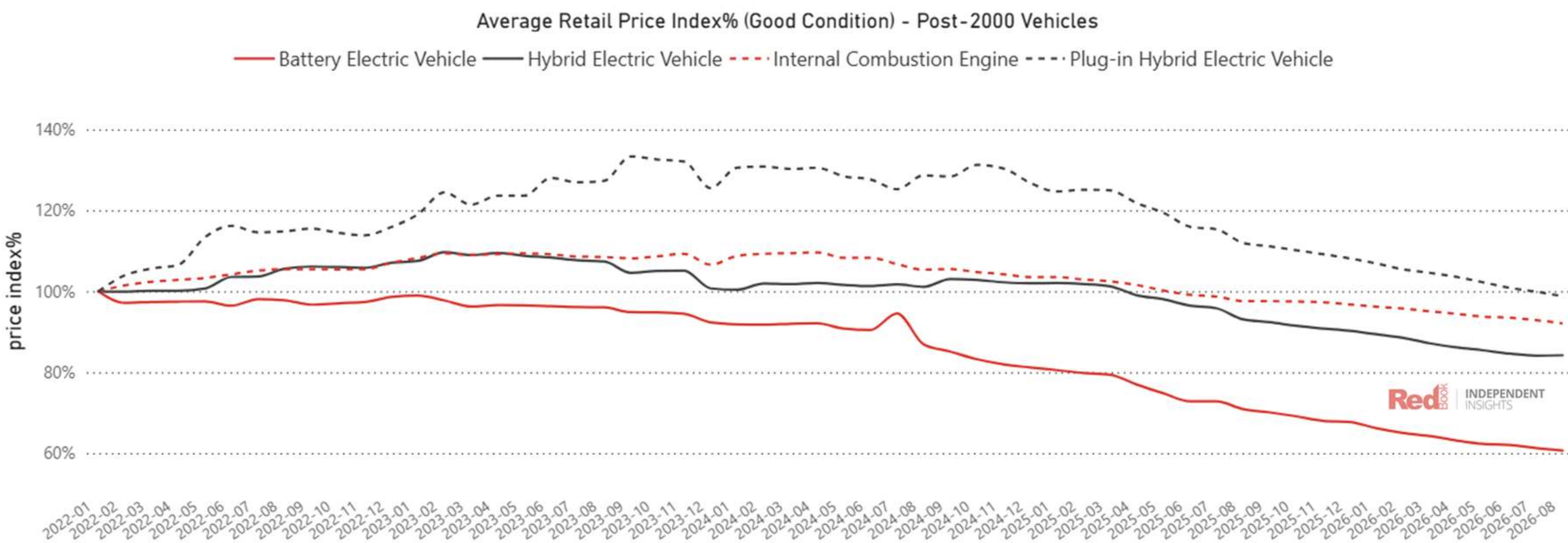
SUVs remain the weakest segment, with the latest decline continuing in August.

Orderly Declines

All major vehicle types eased further, with no sharp break in trend.

Source: RedBook Insights

Used Vehicle Price Index by Motive Power



KEY INSIGHTS

ICE & Hybrids Similar

ICE and hybrid prices remain relatively close, though both continued to ease.

PHEVs More Resilient

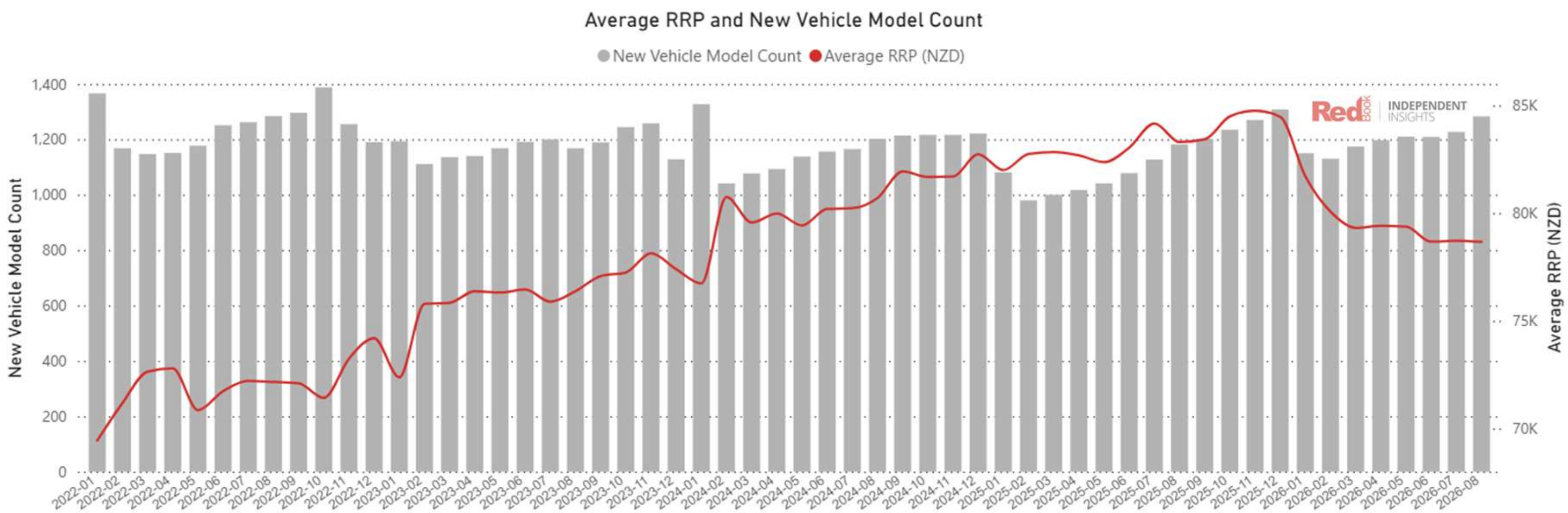
PHEVs remain the strongest motive-power segment, but the recent trend is still lower.

BEV Decline Moderates

BEV prices remain the weakest, but recent movements suggest downward pressure is beginning to ease.

Source: RedBook Insights

New Vehicle RRP Trend



KEY INSIGHTS

Long-Term Rise

Average new-vehicle RRP climbed from about $70K in early 2022 to above $84K in late 2025.

Recent Turn Lower

RRP fell sharply in early 2026 and has recently levelled near $79–80K.

Model Count Stable

New-vehicle model count has stayed broadly stable, mostly around 1,100–1,300 despite monthly variation.

Source: RedBook Insights