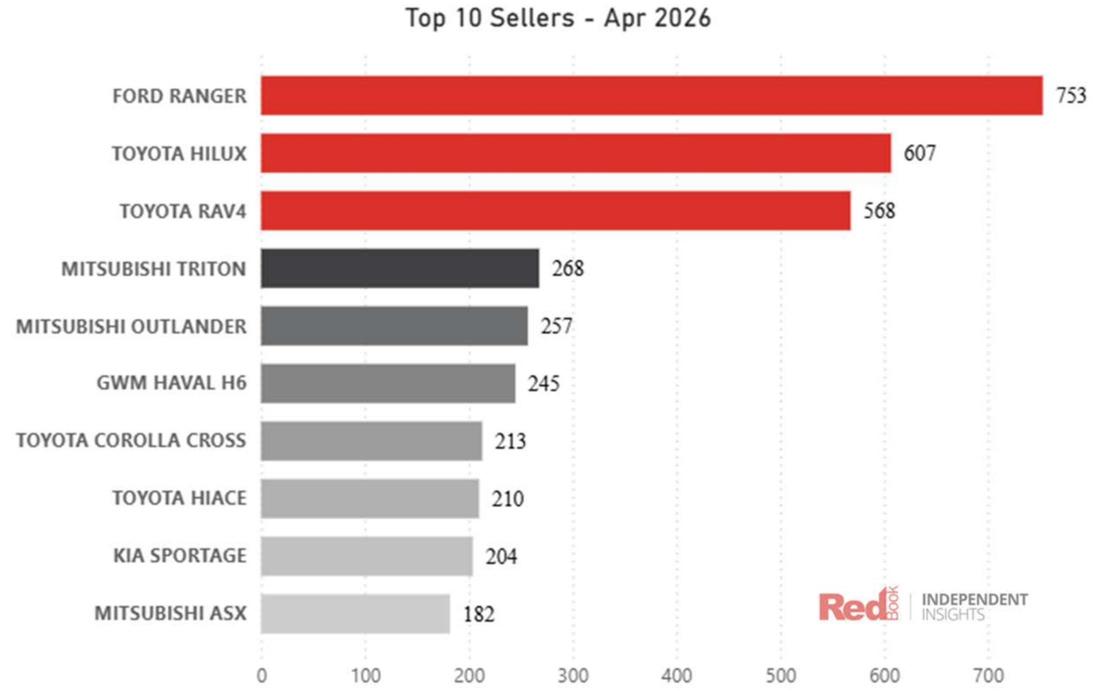
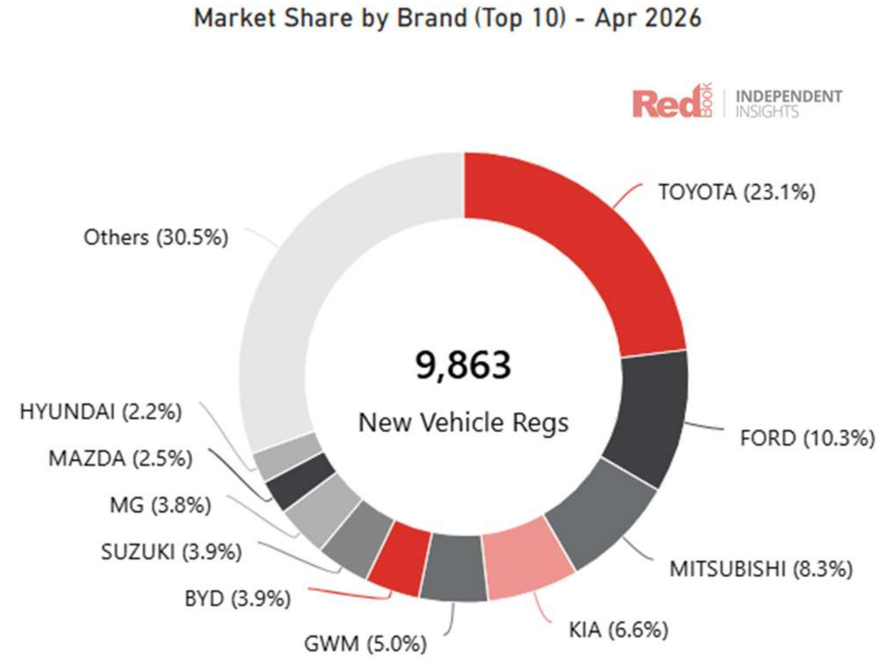
Top Sellers & Market Share





Top Sellers

1. **Ranger Leads April:** Ford Ranger ranks #1 with 753 registrations, ahead of Toyota Hilux at 607.
2. **RAV4 Remains Strong:** Toyota RAV4 stays in the top 3 with 568 registrations, showing continued SUV strength.
3. **Utes and SUVs Dominate:** Ranger, Hilux, Triton and key SUV models continue to make up most of the top rankings.

Market Share

1. **Toyota Still No.1:** Toyota leads the market with a strong 23.1% share in April.
2. **Ford & Mitsubishi Follow:** Ford holds #2 with 10.3%, followed by Mitsubishi at 8.3%.
3. **Chinese Brands Maintain Presence:** GWM reaches 5.0%, while BYD and MG remain in the top 10.

Apr 26

Top Sellers & Market Share

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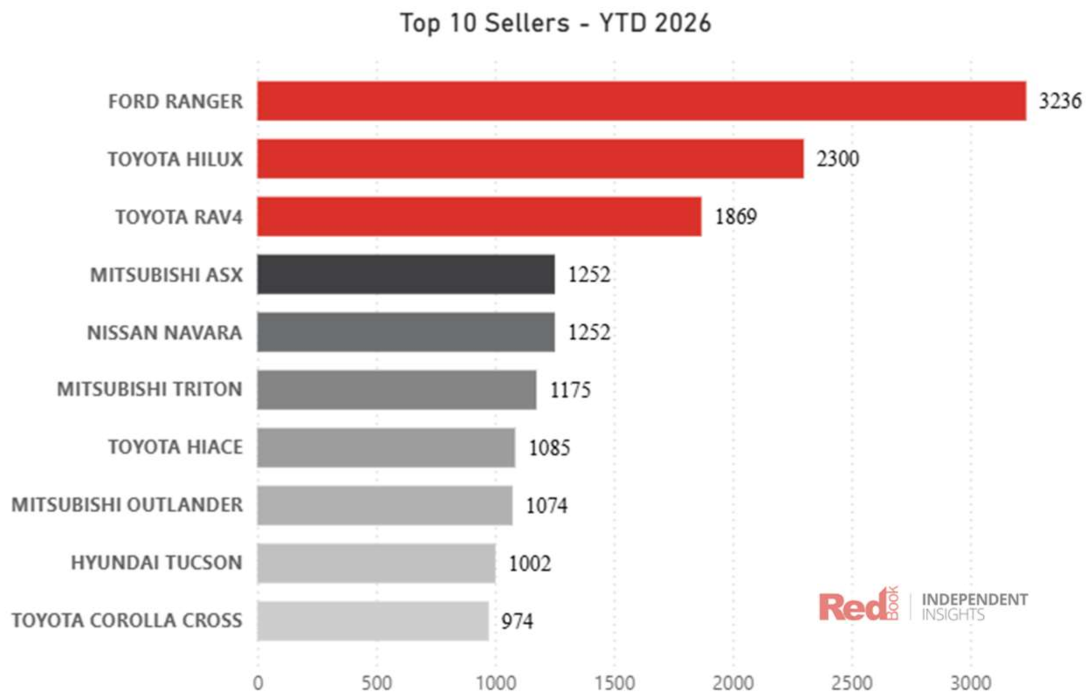

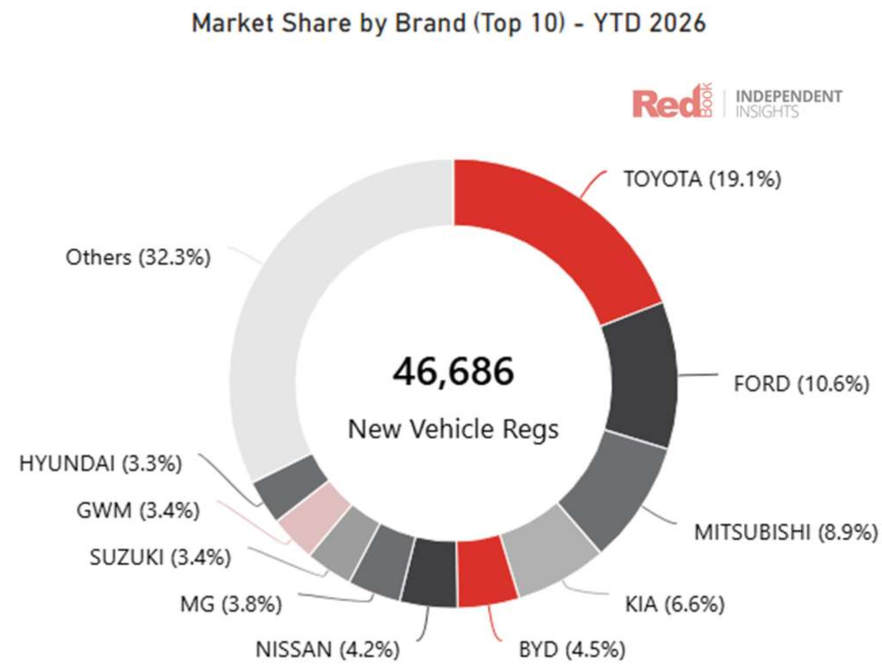

Top Sellers

1.SUV's and Utes dominate sales: SUVs (or "Wagons") make up nearly 60% of all sales. Utes are in second at nearly 20%. Hatchbacks are third with only 9% of the market share.

2. Ranger Leads YTD: Ford Ranger remains #1 with 3,236 registrations, followed by the Toyota Hilux and RAV4.

Market Share

1.Toyota Dominates YTD: Toyota leads with 19.1% share, maintaining clear dominance, but is down from 22.9% at the same time last year as other brands grow.

2.Ford & Mitsubishi Follow: Ford holds #2 with 10.6%, followed by Mitsubishi at 8.9%.

3.Chinese Brands Hold Ground: BYD, MG and GWM remain in the top 10.

Apr 26

NZ New Car Sales Trend

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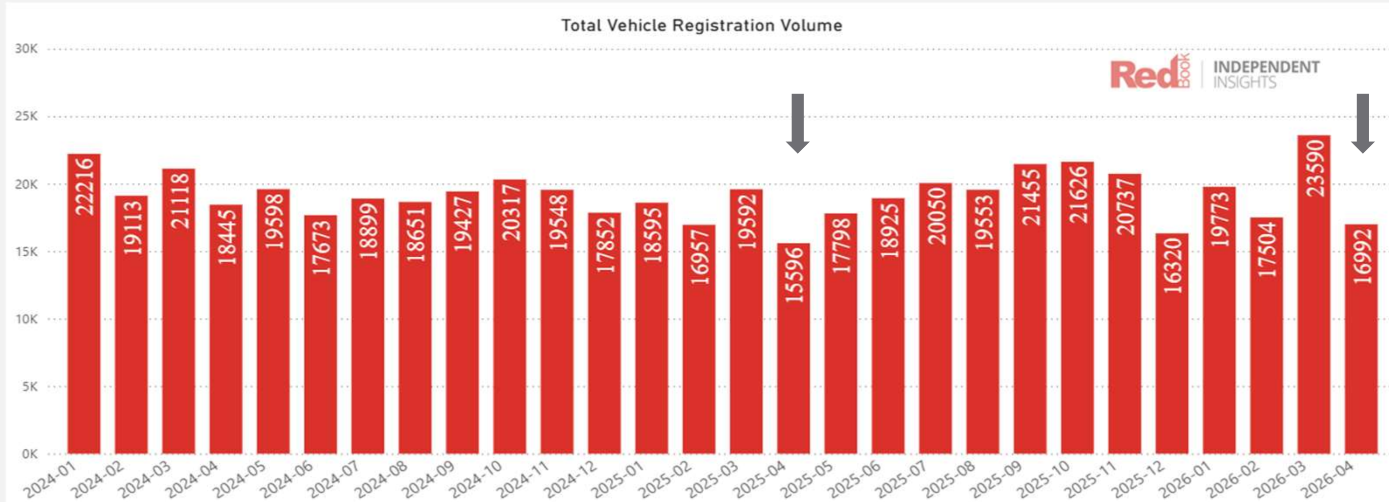
Market Trend

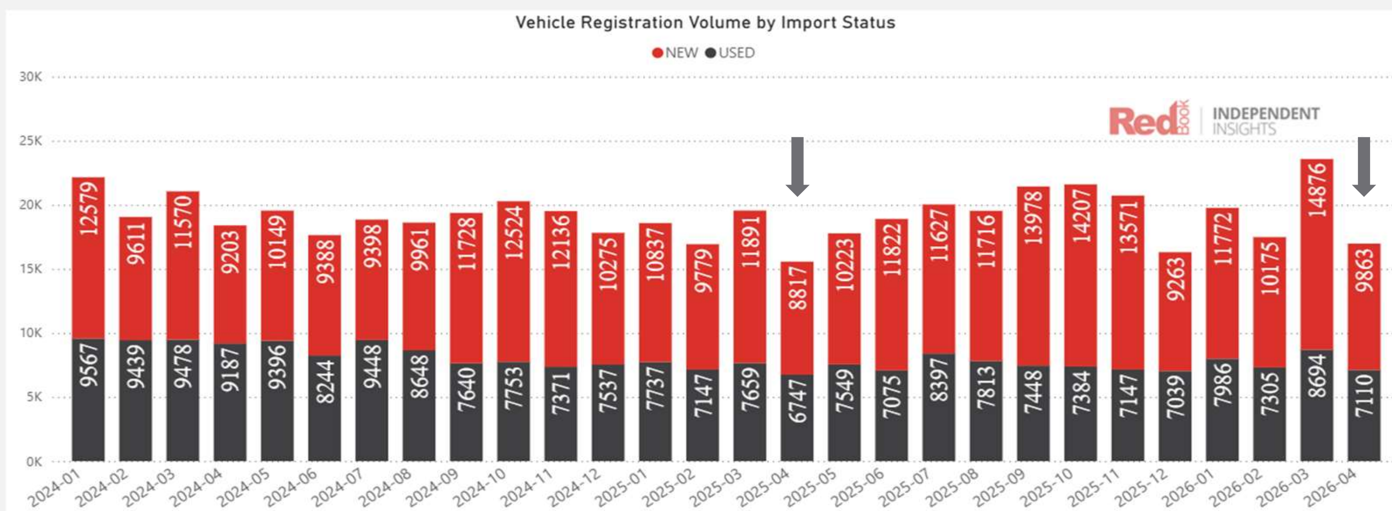
1. Registrations Ease After March Spike – Total registrations fell 28.0% MoM, from 23,590 in March to 16,992 in April.

2. Market Still Up YoY – April registrations were 9.0% higher than April 2025, keeping the market ahead of last year.

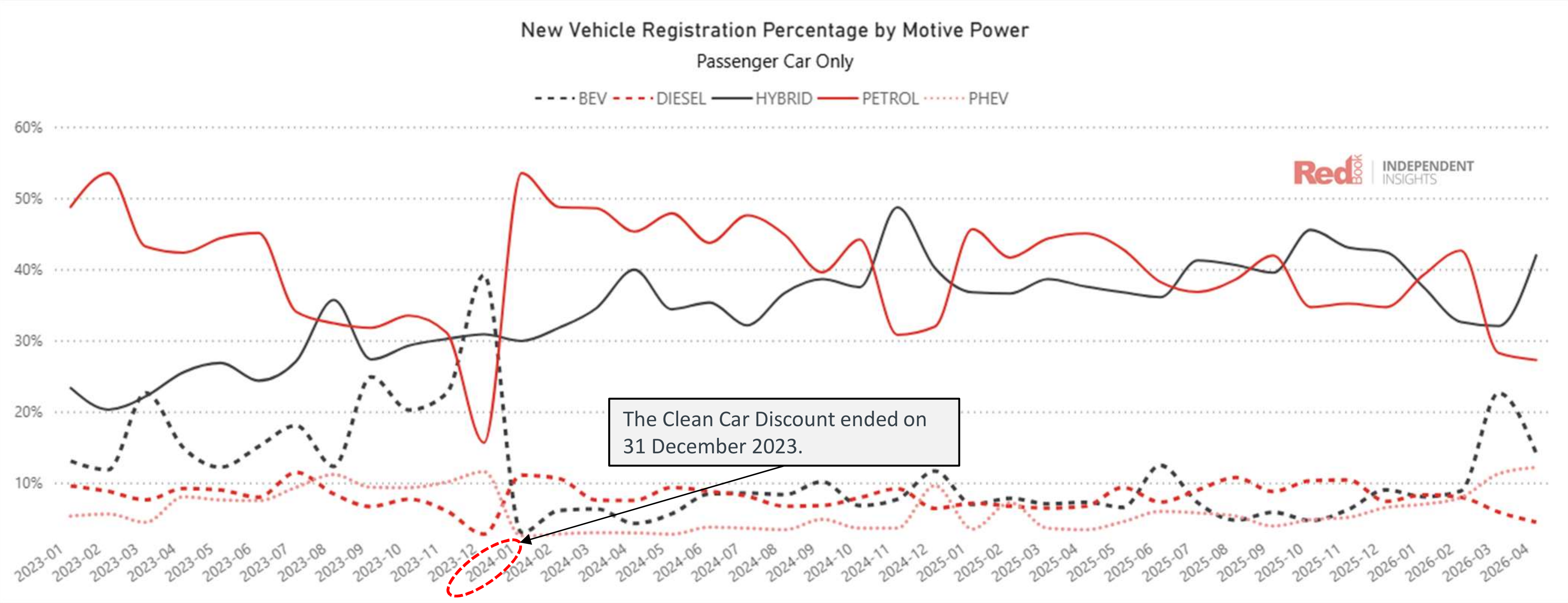
3. New Registrations Pull Back – New vehicle registrations dropped 33.7% MoM, but remained 11.9% higher YoY.

4. Used Registrations Also Soften – Used registrations fell 18.2% MoM, but were still 5.4% above April 2025.





Apr 26 New Car Sales Trend by Motive Power



Insights

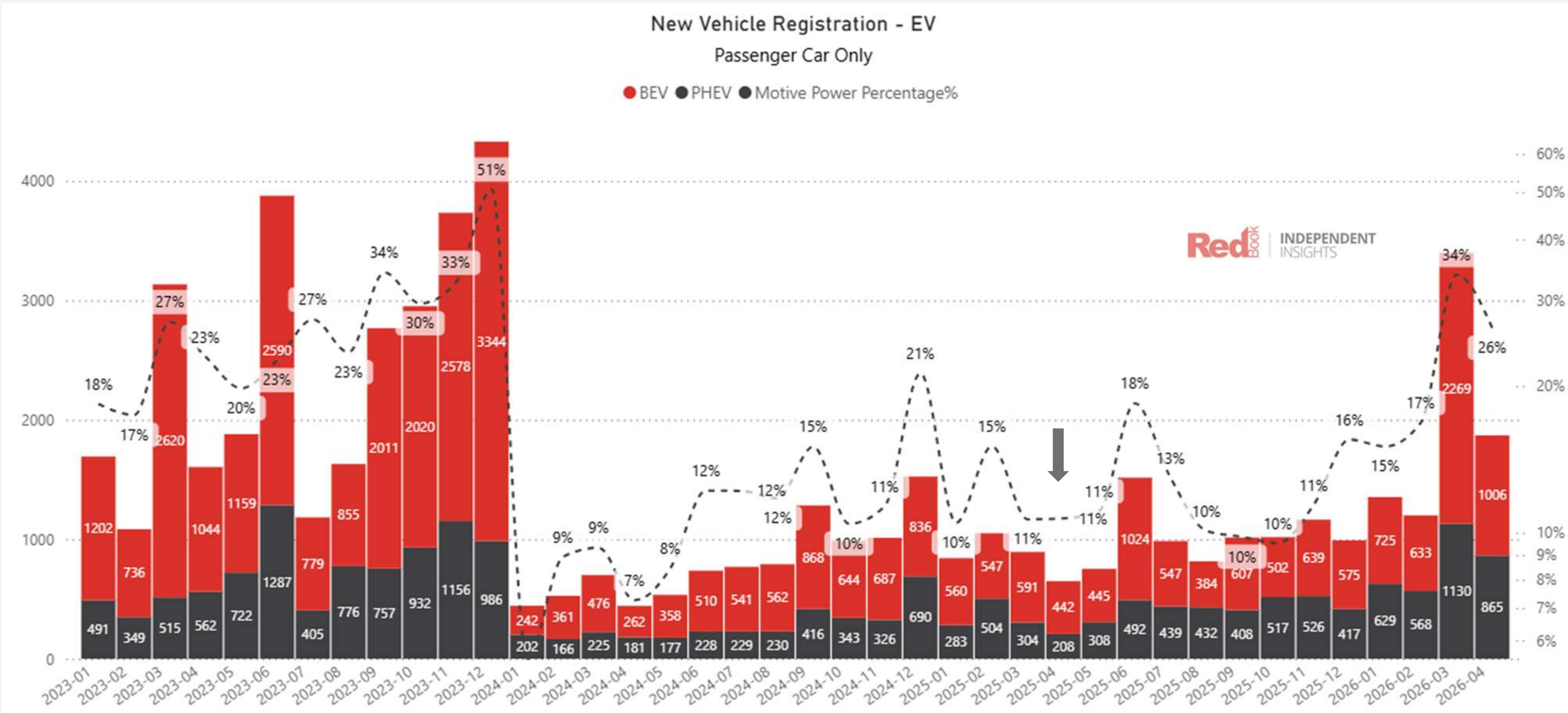
1.Petrol Remains Under Pressure: Petrol share continued to fall in April, extending the sharp pullback seen in March as a result of increasing fuel prices.

2.Hybrid Rebounds Strongly: Hybrid share climbed back above 40%, becoming the leading motive power again.

3.EV Trend Needs Watching: PHEV share continued to rise slightly, while BEV eased after March's spike, possibly reflecting supply tightness and delivery timing delays following strong demand in March.

Apr 26

EV New Car Sales Percentage

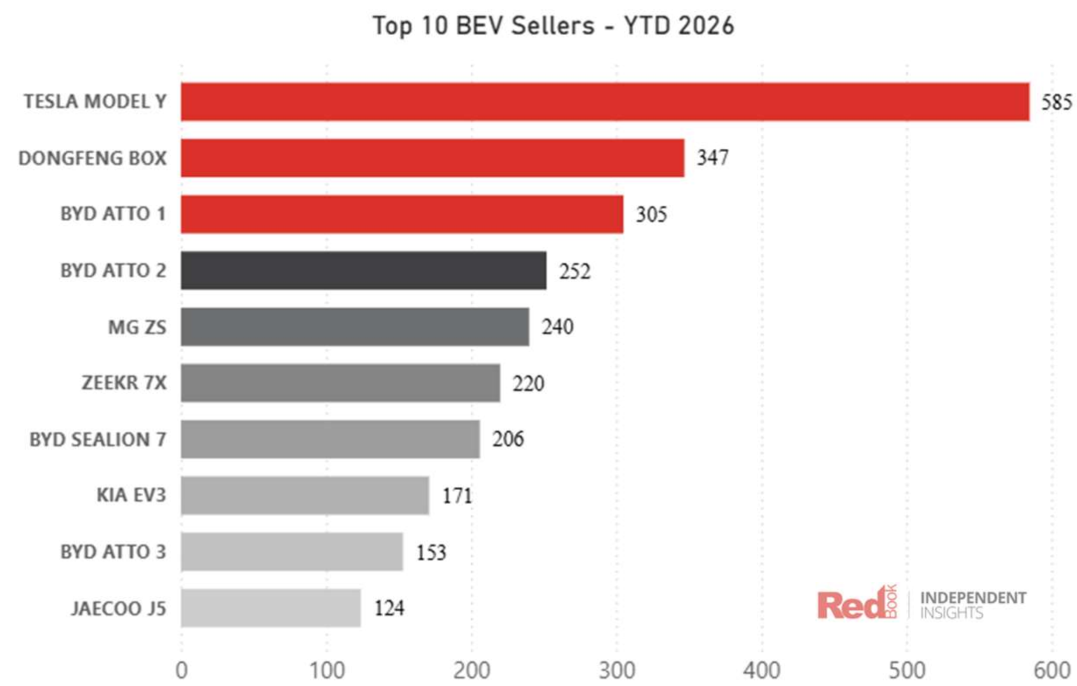


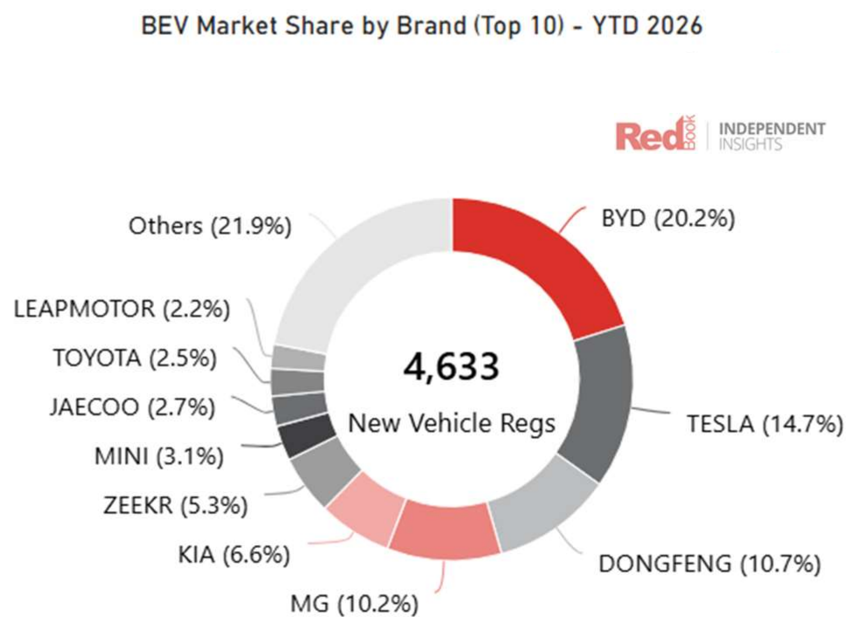
Insights

1. **EV Share Eases After March Spike:** Combined BEV and PHEV share fell from 34% in March to 26% in April, mainly driven by lower BEV registrations, possibly reflecting supply tightness and delivery timing delays following strong demand in March.
2. **Top-selling BEV and PHEV Models:** YTD 2026, **Tesla Model Y and Dongfeng BOX** led the market, followed by **BYD Sealion 5, BYD ATTO 1, BYD ATTO 2 and BYD Sealion 6**. Other strong performers included **Mitsubishi Eclipse Cross PHEV and Outlander PHEV, MG ZS, GWM Haval H6, Zeekr 7X and Jaecoo J7.**

Apr 26

BEV Top Sellers & Market Share





Top Sellers

1.Model Y Leads Clearly: Tesla Model Y is the top BEV YTD with 585 registrations, ahead of Dongfeng BOX at 347.

2.BYD Shows Strong Depth: Four BYD models (ATTO 1, ATTO 2, Sealion 7 and ATTO 3) feature in the top 10, highlighting BYD's broad BEV lineup.

Market Share

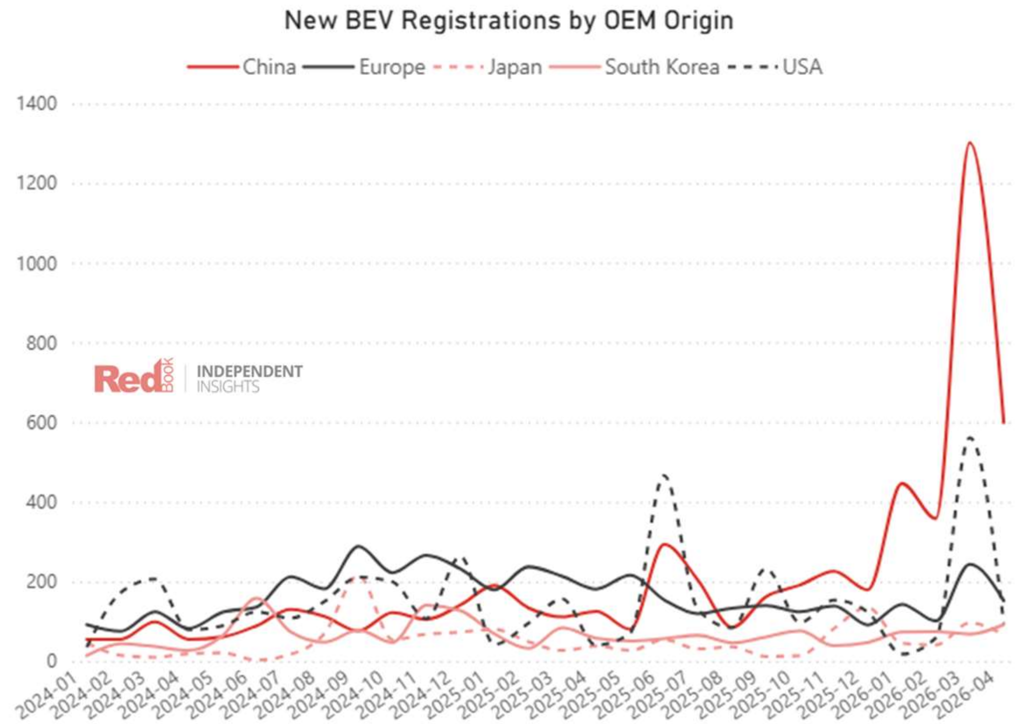
1.BYD Leads by Brand: BYD holds the largest BEV market share at 20.2%, ahead of Tesla at 14.7% and Dongfeng at 10.7%.

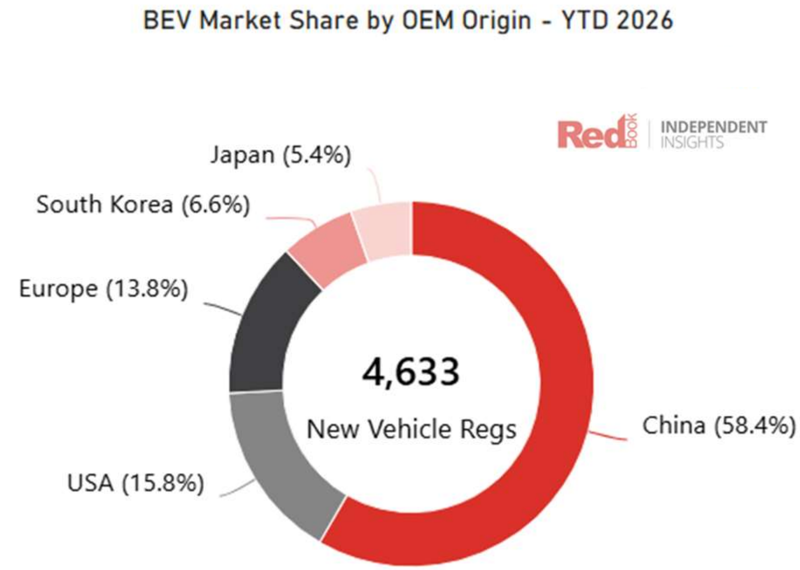
2.Challengers Emerging: MG, Kia and Zeekr remain solid BEV players, while Jaecoo and Leapmotor are starting to build presence..

Apr 26

BEV Market Trend by OEM Origin

INDEPENDENT INSIGHTS





Market Trend

1.China Eases but Stays High: China-origin BEV registrations pulled back from the March spike, but remained well above earlier months.

2.USA Pulls Back After Rebound: USA-origin BEV volumes also eased in April, highlighting continued volatility around Tesla-driven registrations.

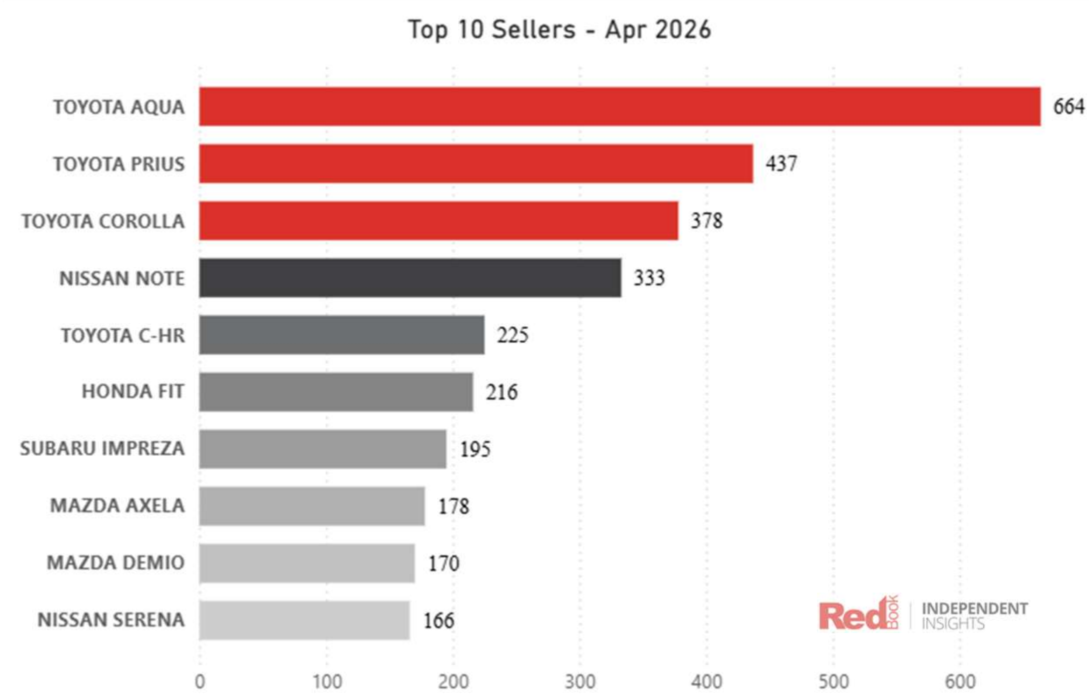
Market Share

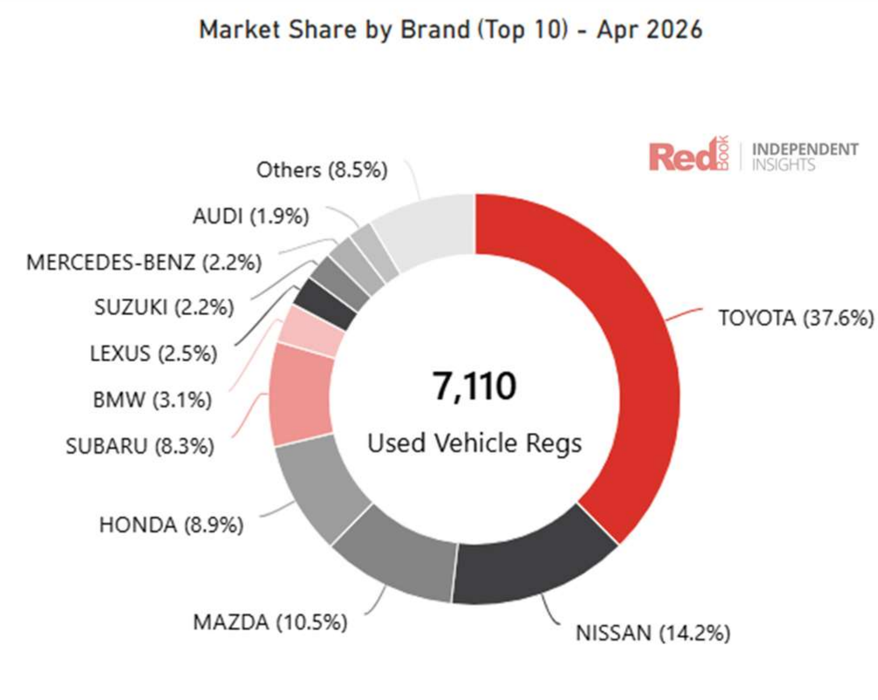
1.China Dominates YTD: China accounts for 58.4% of BEV registrations, far ahead of all other regions.

2.USA Holds No.2: USA remains second with 15.8%, followed by Europe at 13.8%.

Apr 26 Used Car Top Sellers & Market Share

Red Book INDEPENDENT INSIGHTS





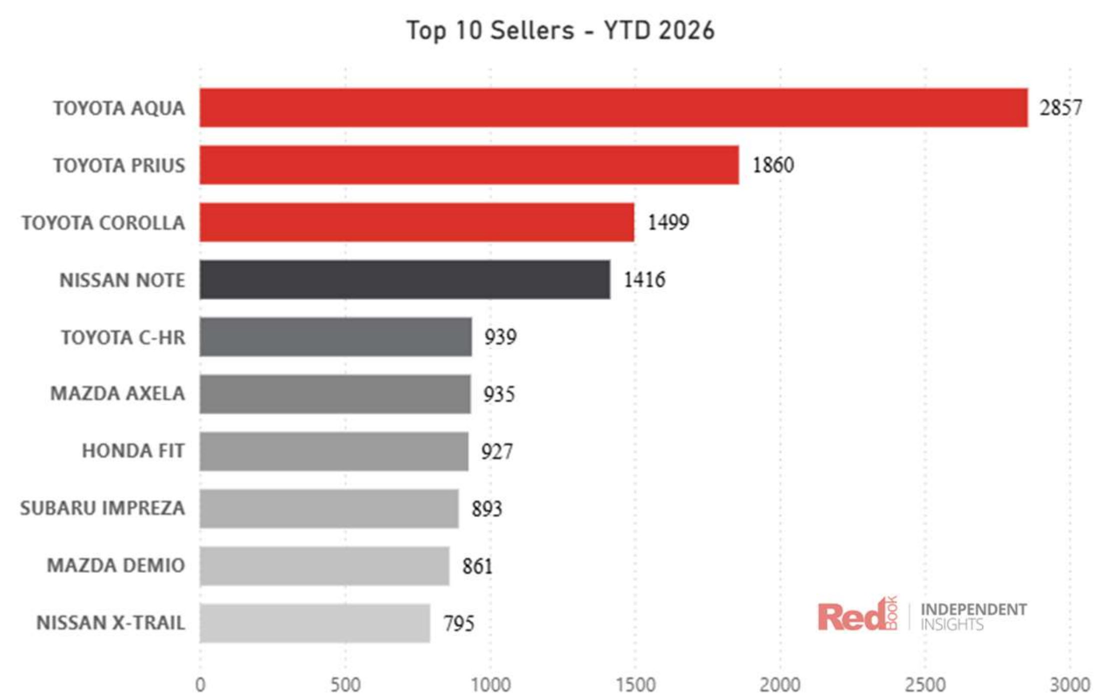
Top Sellers

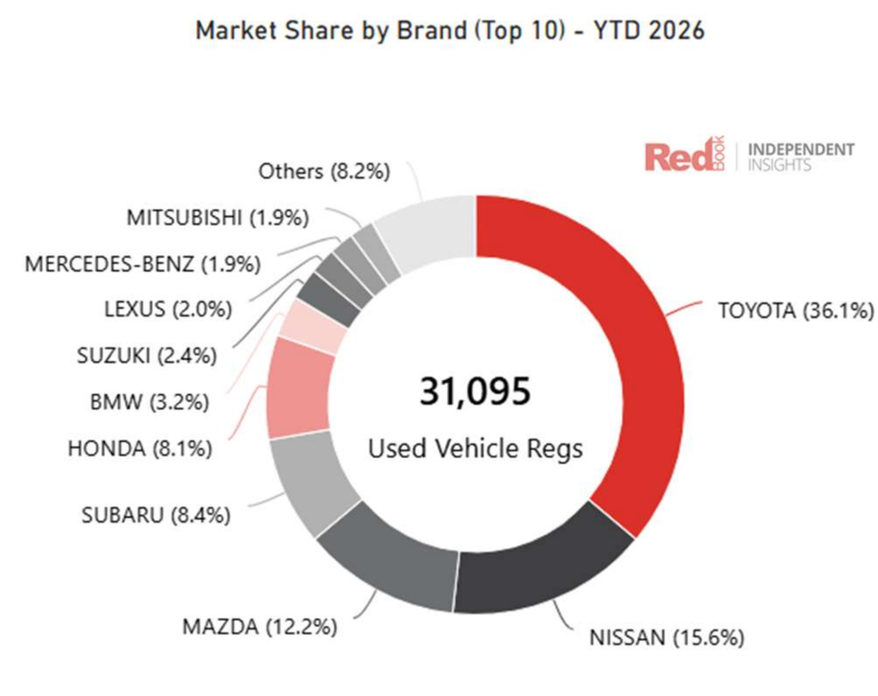
1. **Toyota Dominates the Used Market**: Aqua, Prius and Corolla rank as the top three used models in March, reinforcing Toyota's strong position.
2. **Nissan Note Leads Non-Toyota Models**: Nissan Note ranks #4 with 333 registrations, followed by C-HR, Fit and Impreza.

Market Share

1. **Hybrids Keep Ahead:** Toyota has a commanding lead over used car registrations due to their hybrid range of vehicles.
2. **Leaders remain:** Not a lot of change in the mix of cars coming in, just less of them.

Apr 26 Used Car Top Sellers & Market Share





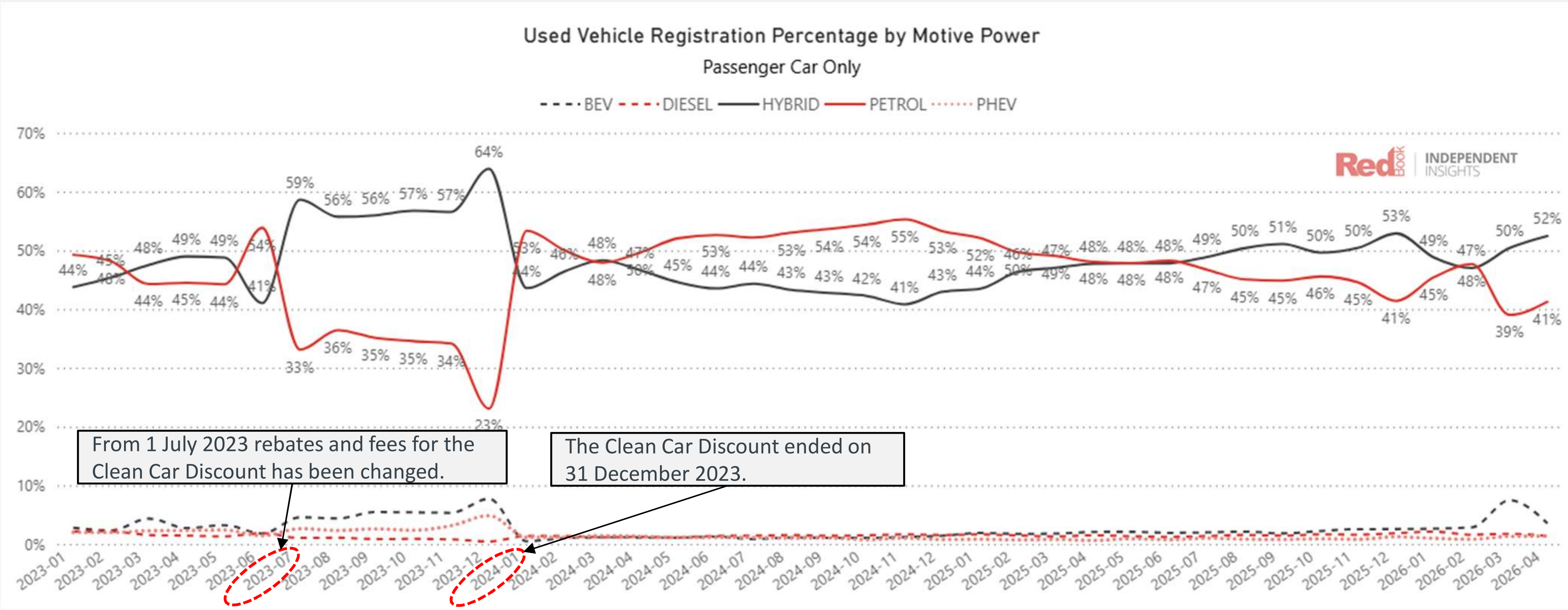
Top Sellers

1. **Toyota Leads the Model Rankings**: Aqua, Prius and Corolla feature prominently among the top-selling used vehicles.
2. **Fuel Efficiency Drives Demand**: Almost half of the top 10 models are hybrids or low fuel-consumption vehicles.

Market Share

1. **Toyota Dominates:** Toyota has a commanding lead with 36.1% of the used car registrations market.
2. **Euro's small:** BMW, Mercedes-Benz and Audi together account for only a small share of the market.

Apr 26 Used Car Sales Trend by Motive Power

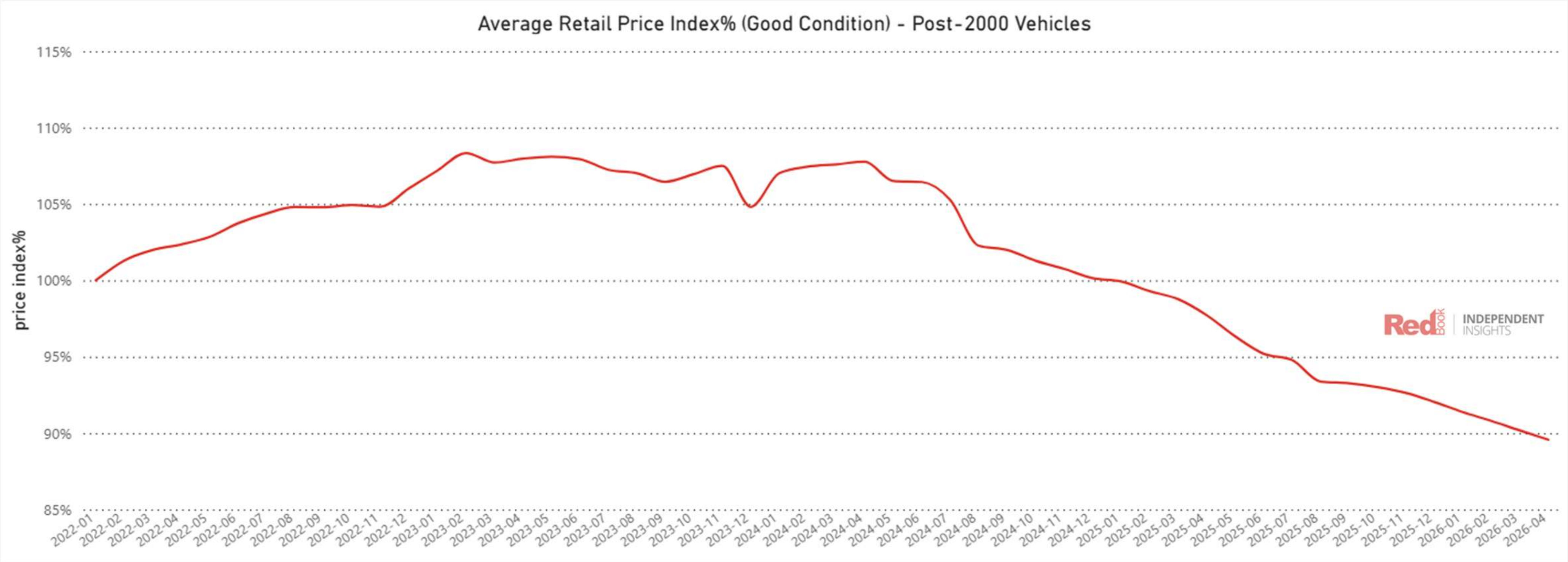


Insights

1. **Hybrid Remains Ahead:** Hybrid continues to lead the used market, rising to 52% in April.
2. **Petrol Slightly Recovers:** Petrol share lifted from March's low, but remains below earlier 2026 levels.
3. **BEV Eases After Spike**: BEV share pulled back after the March increase, suggesting the used EV market remains volatile and responsive to what is available in overseas markets.

Apr 26

Used Vehicle Price Index



Price Index

1. **Prices Edge Lower Again:** The average retail price index continued to ease in April 2026, extending the gradual decline seen over recent months.
2. **Gradual Downtrend Persists:** The broader downward trend remains in place. While monthly changes have become more moderate recently, April confirms that prices are still edging lower rather than stabilising.
3. **Changing Values** – we haven't yet seen a large correction in pricing because of the potential fuel supply issues, although this is likely with EV's and PHEV's firming in price and higher fuel consuming vehicles losing value.

Apr 26

Used Vehicle Price Index by Vehicle Type

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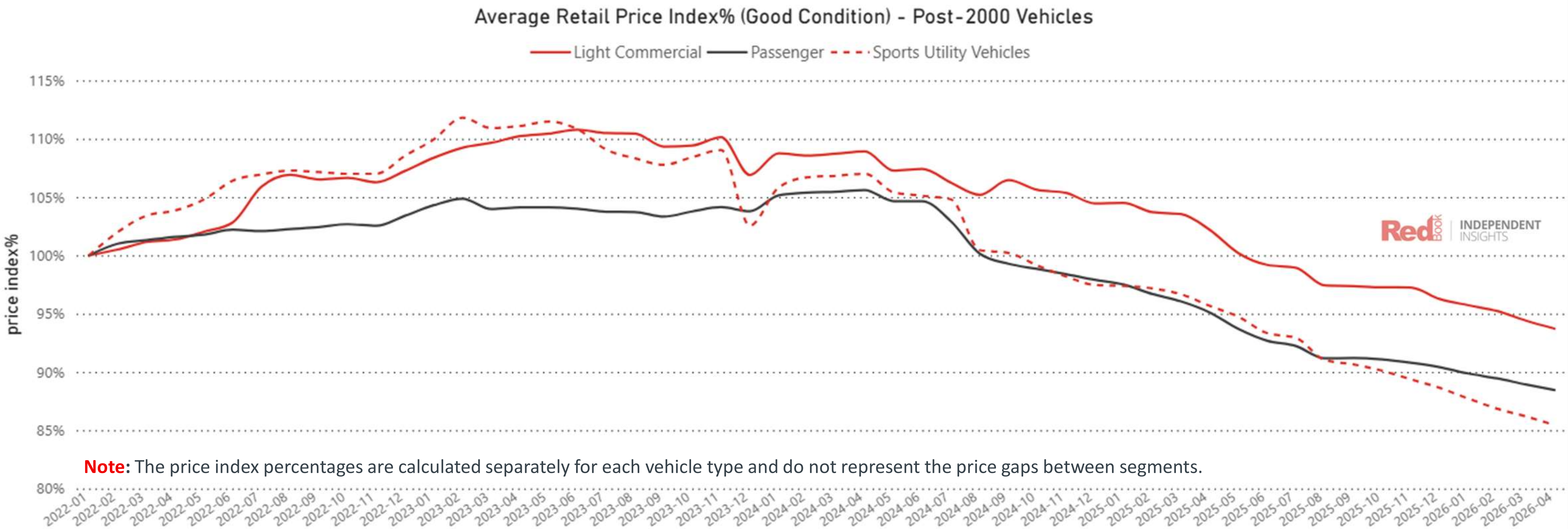

Note: The price index percentages are calculated separately for each vehicle type and do not represent the price gaps between segments.

Price Index

1. **Passenger Cars and Light Commercials Continue to Ease:** Both segments remained on a downward path in April 2026, following the broader softening trend seen over the past year, although light commercials continue to hold up better overall.
2. **SUVs Remain the Most Pressured Segment:** SUVs continue to show the deepest correction since the 2023 peak and remain the weakest-performing segment among the three vehicle types as of April 2026.

Apr 26

Used Vehicle Price Index by Motive Power

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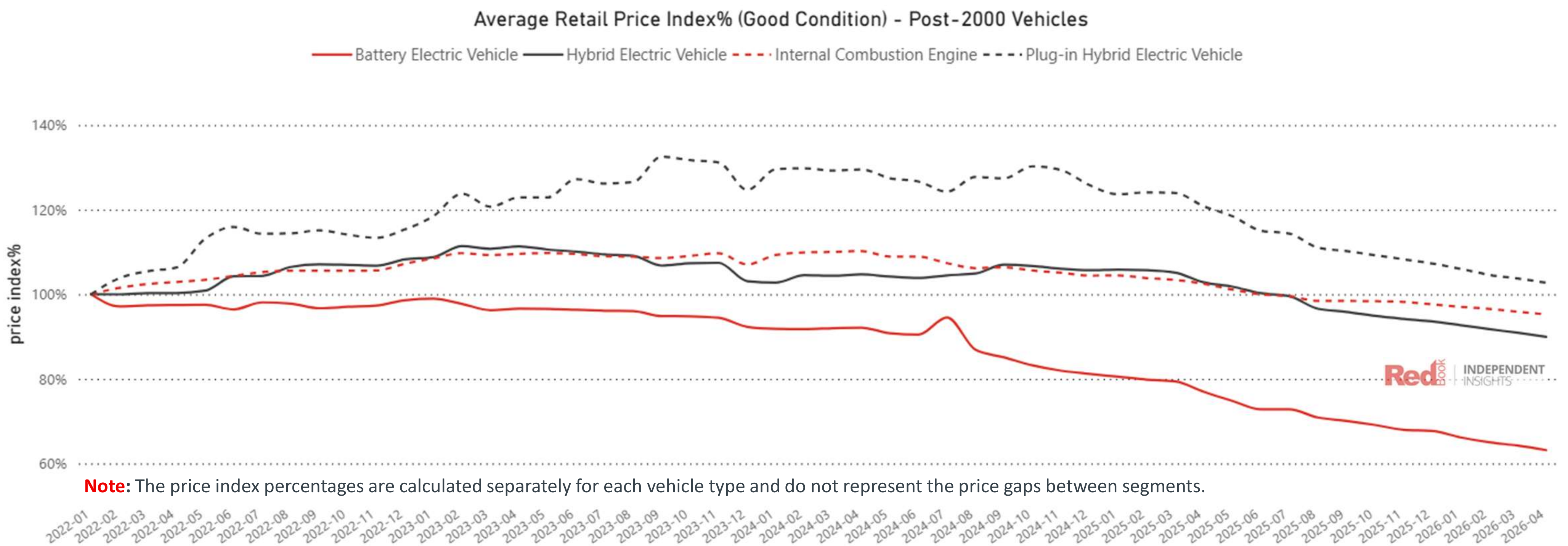

Note: The price index percentages are calculated separately for each vehicle type and do not represent the price gaps between segments.

Price Index

1. **ICE and Hybrids Continue to Ease:** Both ICE and hybrid prices continued to trend lower in April 2026, following the broader easing seen since the 2023 peak, although ICE has held up slightly better.
2. **PHEVs Remain the Most Resilient:** PHEV prices have also eased over time, but they continue to show the strongest relative performance among the four powertrain types.
3. **BEV Trend Worth Watching:** While BEVs remain under the most price pressure, stronger recent demand driven by fuel price pressures will be worth monitoring to see whether the price trend starts to shift.