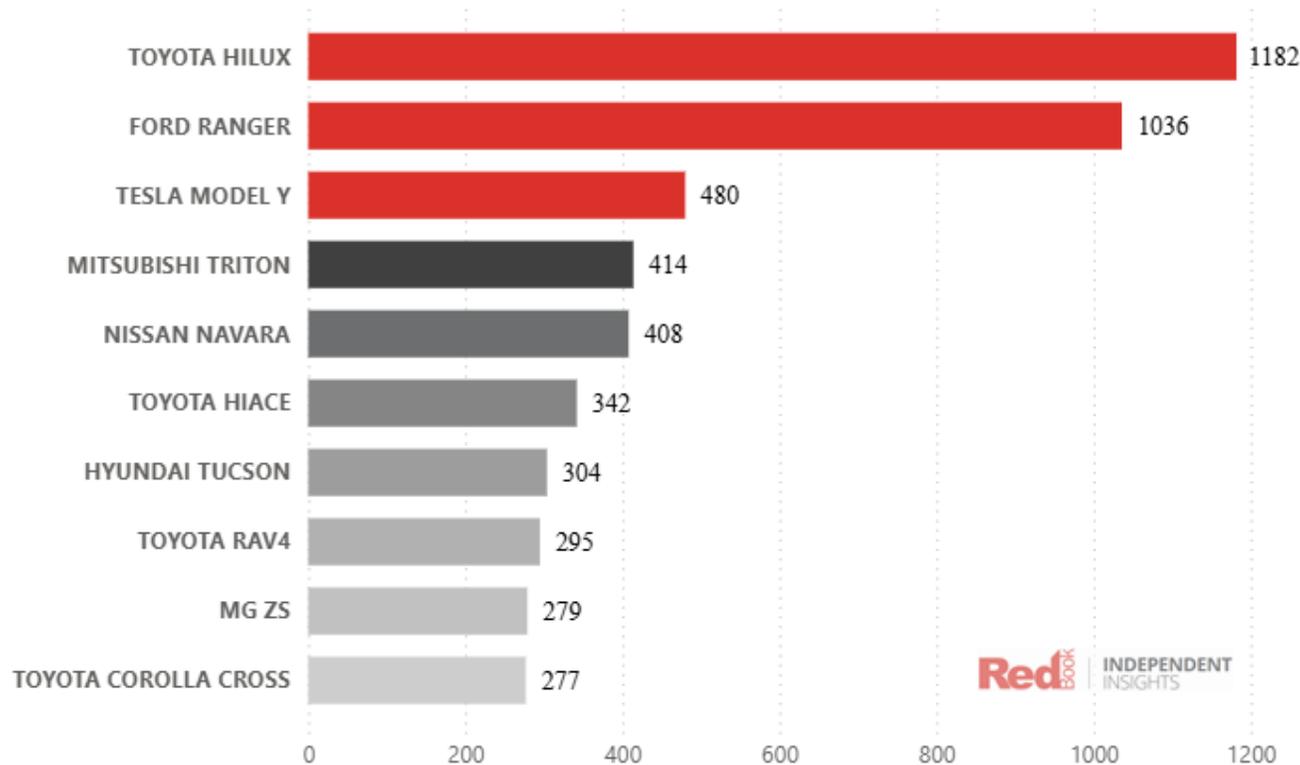
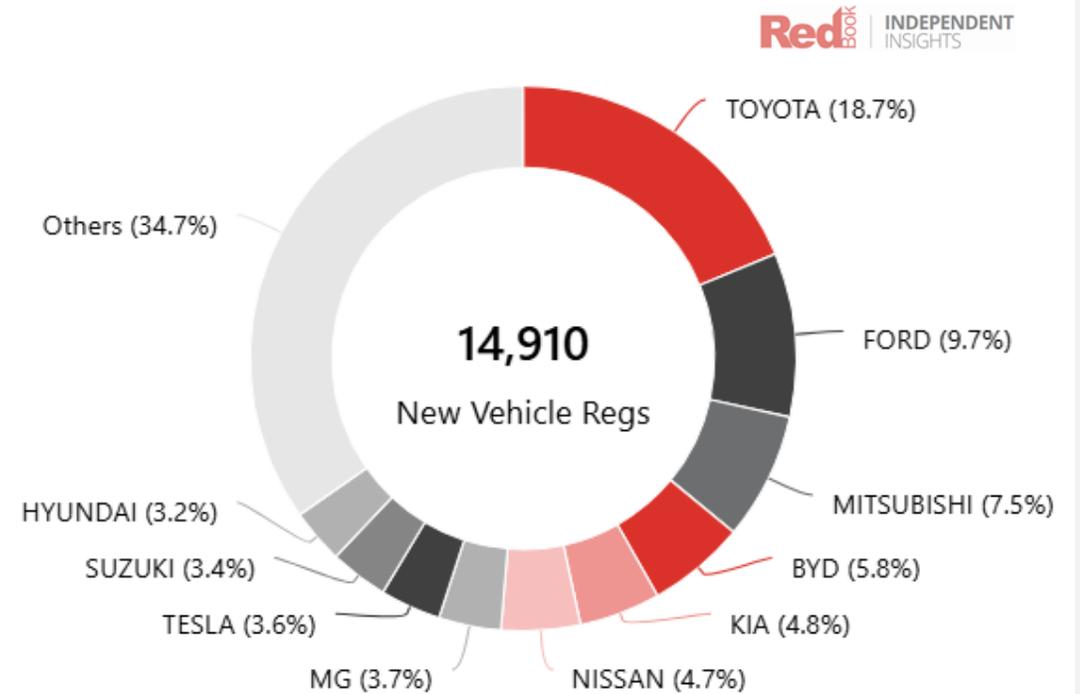


Top 10 Sellers - Mar 2026



Market Share by Brand (Top 10) - Mar 2026



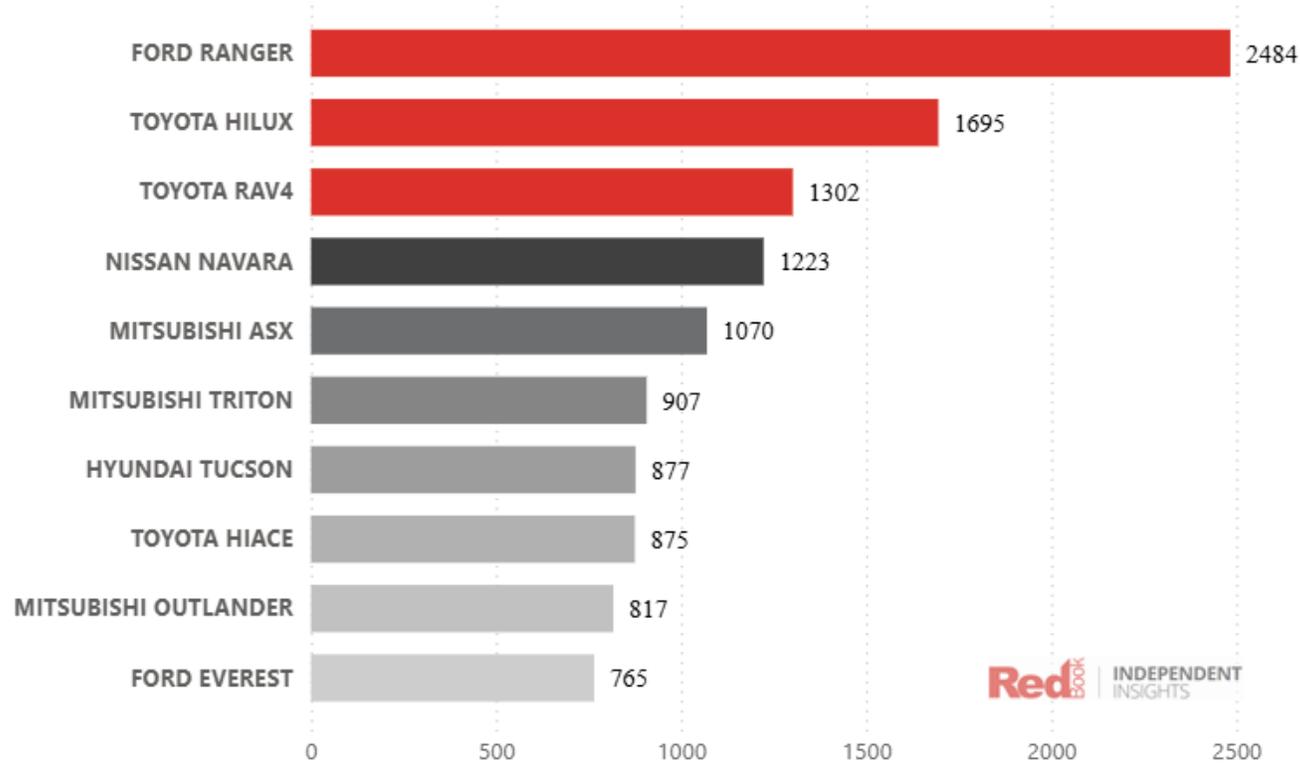
Top Sellers

1.Hilux Leads, Ranger Close Behind: Toyota Hilux remains #1 (1,182), with Ford Ranger strong at #2 (1,036).
2.Model Y Stands Out: Tesla Model Y ranks #3 (480), leading passenger vehicles as EV's gain popularity due to fuel crisis.
3.Utes Dominate: Hilux, Ranger, Triton and Navara continue to dominate the top rankings.

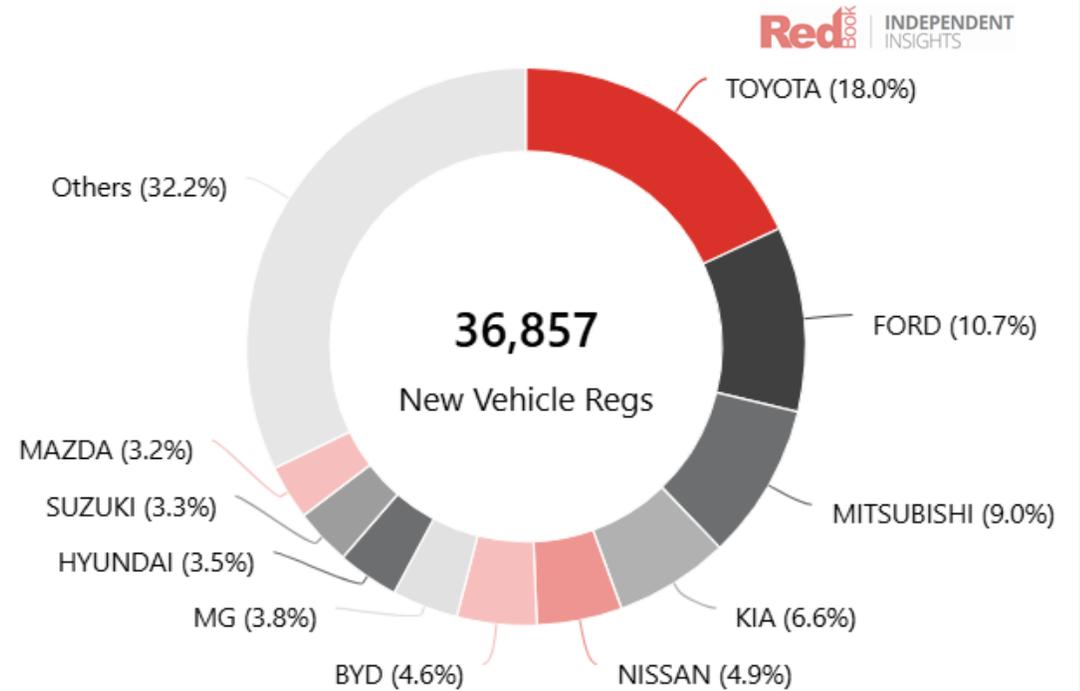
Market Share

1.Toyota Still No.1: Toyota leads with 18.7% market share.
2.Ford & Mitsubishi Follow: Ford (9.7%) and Mitsubishi (7.5%) remain solid in #2 & #3 positions.
3.Chinese Brands Gaining: BYD (5.8%) and MG (3.7%) continue to build presence.

Top 10 Sellers - YTD 2026



Market Share by Brand (Top 10) - YTD 2026



Top Sellers

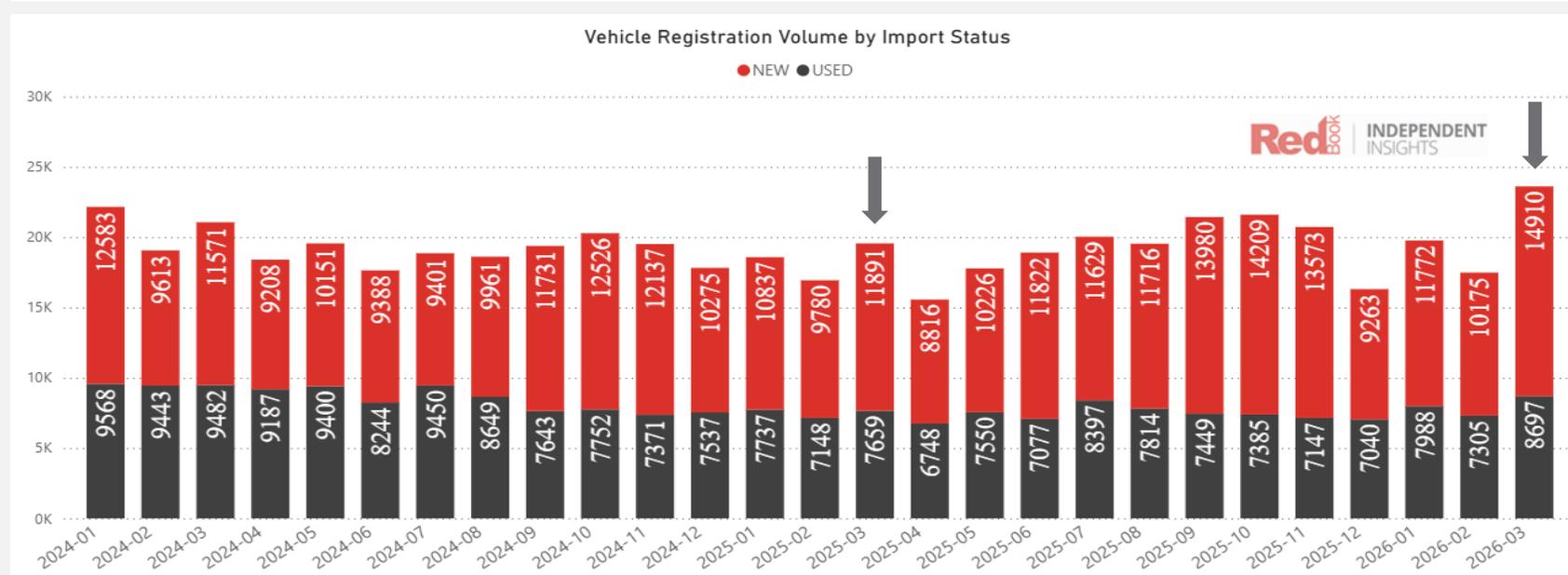
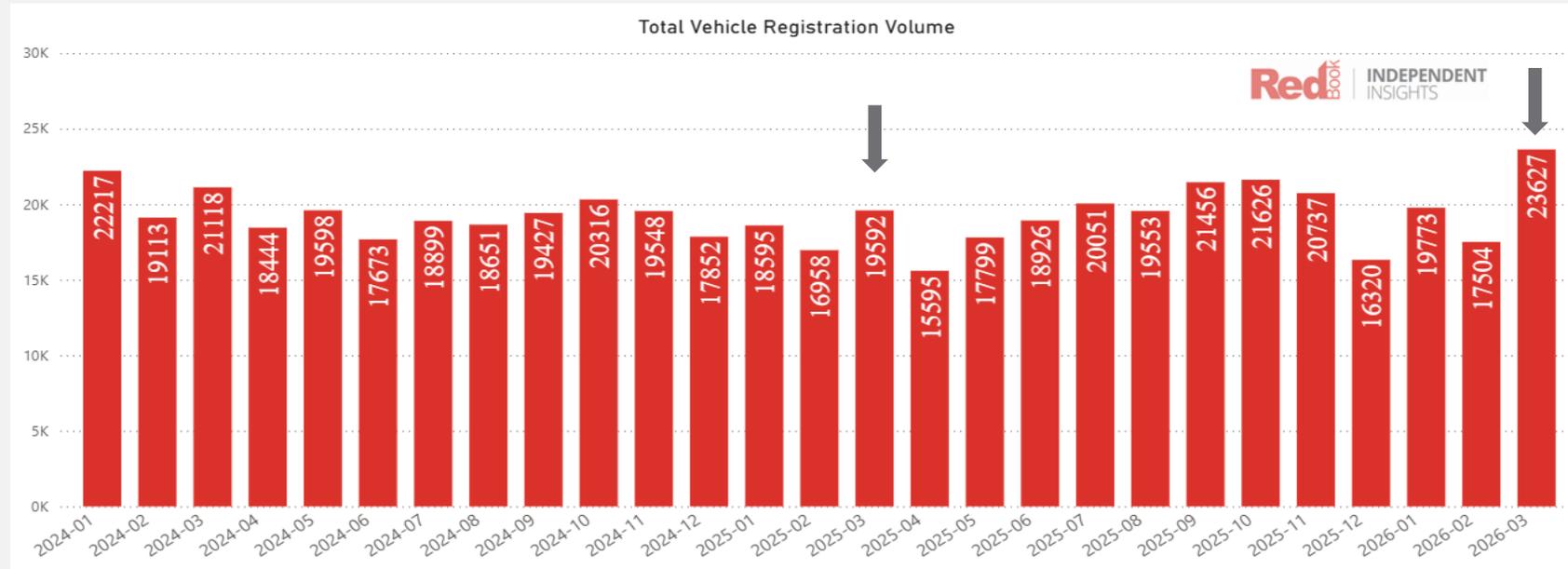
- 1.SUV's and Utes dominate sales:** SUVs (or "Wagons") make up nearly 60% of all sales. Utes are in second at nearly 20%. Hatchbacks are third with only 9% of the market share.
- 2. Ford Ranger holds No.1 Spot:** The Ford Ranger remains the top-selling model, followed by the Toyota Hilux and RAV4.

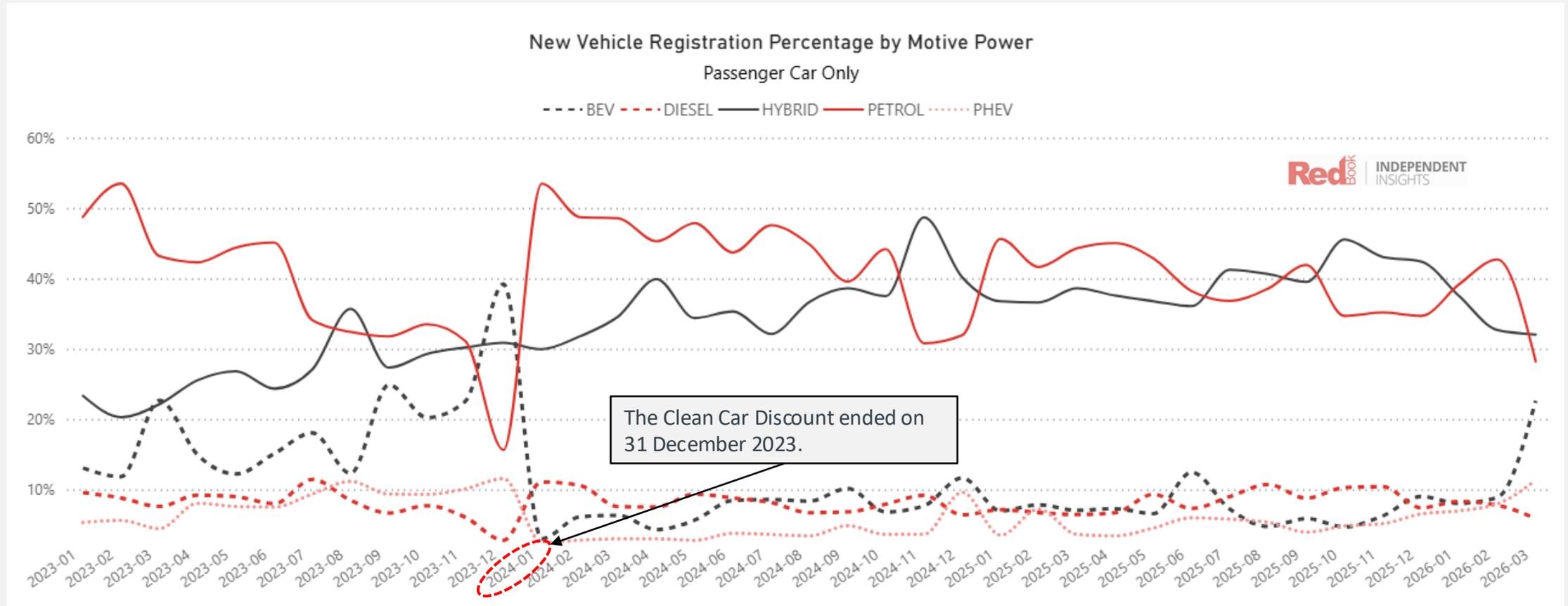
Market Share

- 1.Toyota Dominates YTD:** Toyota leads with 18.0% share, maintaining clear dominance.
- 2.Ford Strengthens No.2:** Ford at 10.7%, supported heavily by Ranger volumes.
- 3.Mitsubishi Solid No.3:** Mitsubishi reaches 9.0%, driven by ASX, Triton and Outlander.

Market Trend

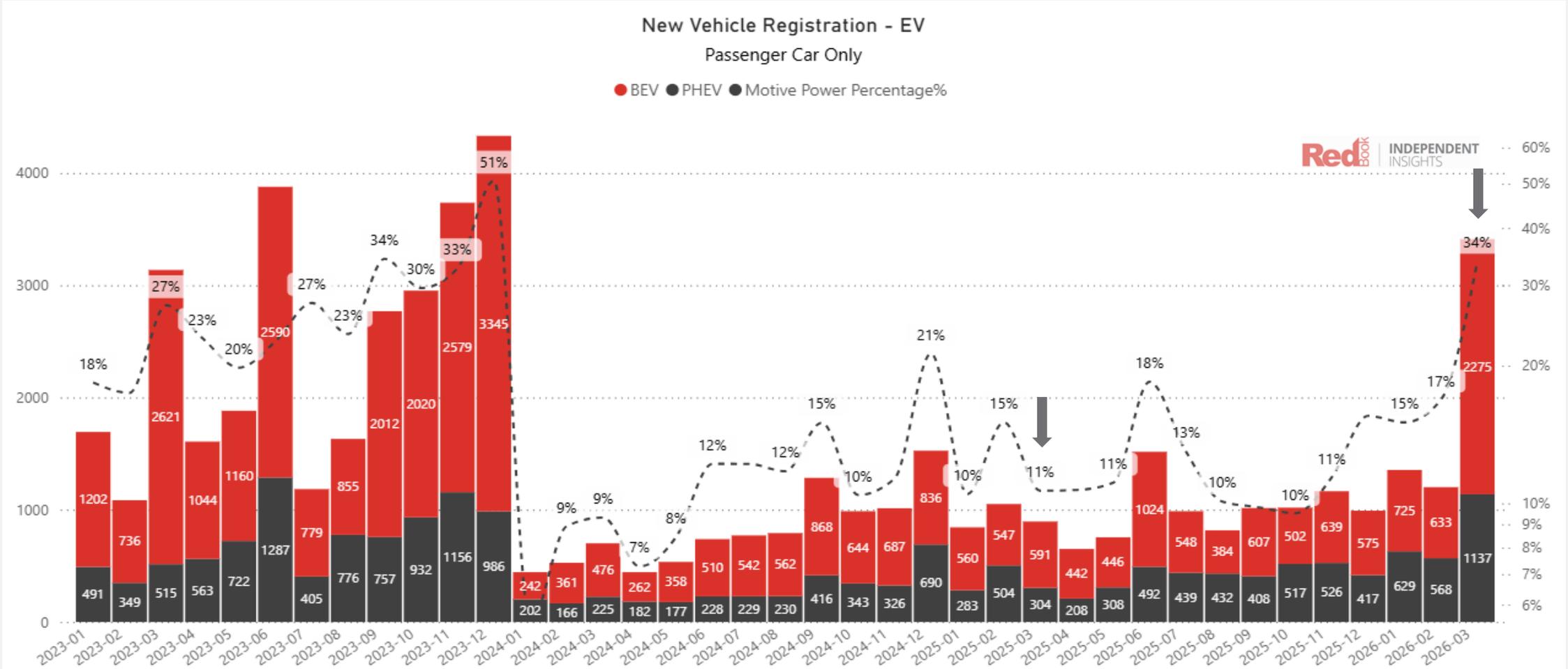
- 1. Registrations Jump 35.0% MoM** – Total registrations increased from 17,504 in February to 23,627 in March.
- 2. Total Market Up 20.6% YoY** – Total registrations were 20.6% higher than March 2025 (19,592).
- 3. New Registrations Lead Growth** – New vehicle registrations rose 46.5% MoM and 25.4% YoY, driving most of the market rebound.
- 4. Used Registrations Also Improve** – Used registrations increased 19.1% MoM and 13.6% YoY, showing a solid recovery as well.





Insights

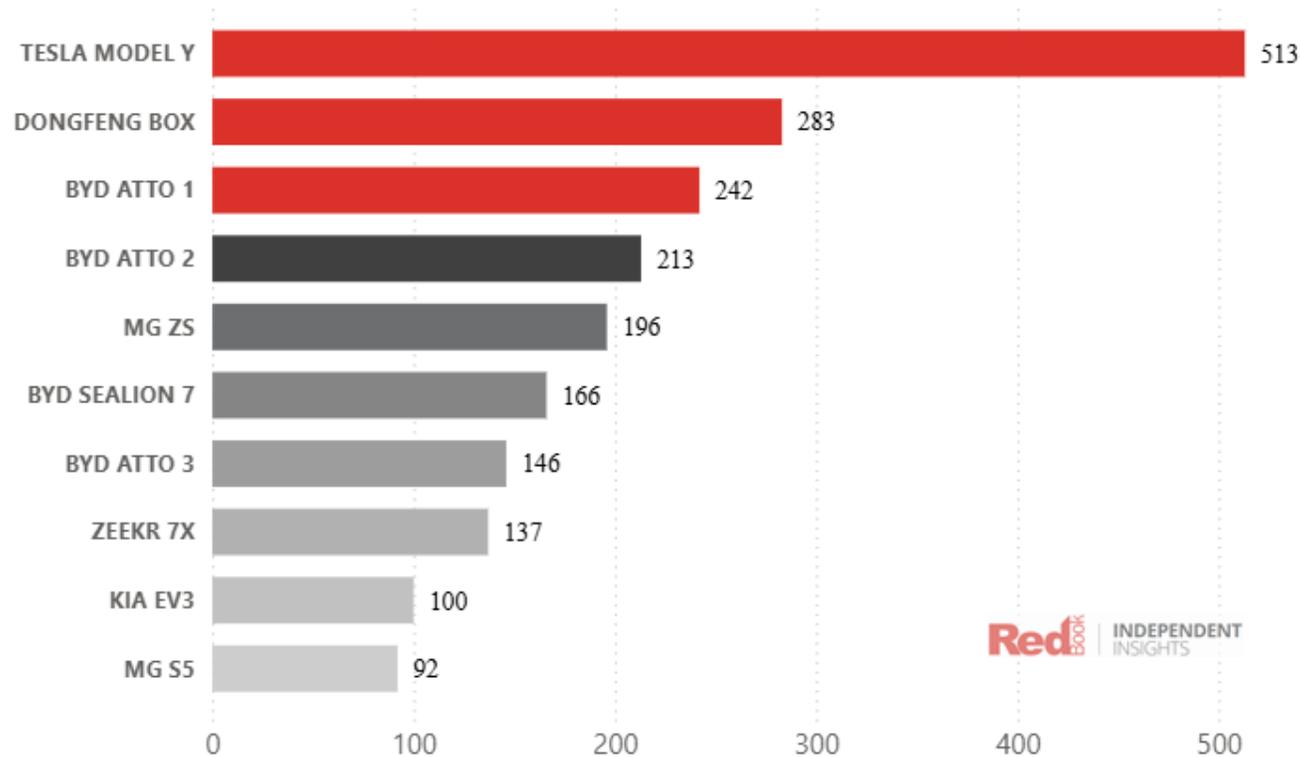
- 1. Petrol Drops Sharply:** Petrol share falls significantly in March after a quick surge in February.
- 2. Hybrid Also Softens:** Hybrids continue to ease slightly.
- 3. EV Share Jumps:** BEV and PHEV both increased in March, supported by the recent sharp rise in fuel prices, which seems to have encouraged more buyers to consider EVs over petrol models.



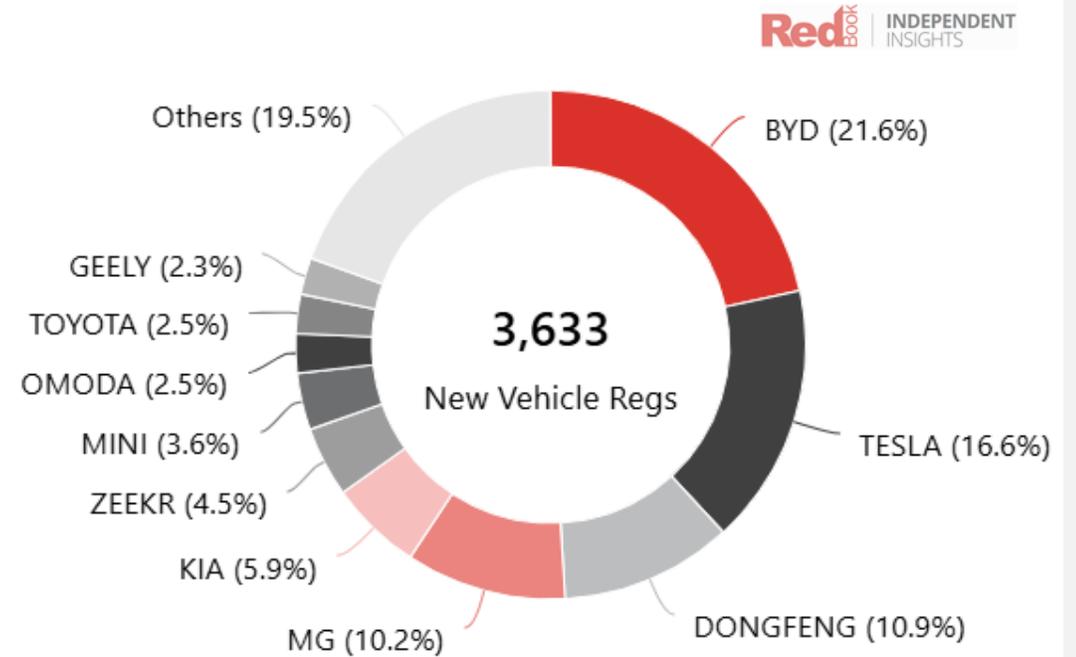
Insights

- EV Share Rises to 34%:** Combined BEV and PHEV share jumped from 17% in February to 34% in March of all newly registered passenger cars, reaching the highest level since January 2024, after the Clean Car Discount ended.
- 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**, **MG ZS**, **GWM Haval H6**, **Zeekr 7X** and **Jaecoo J7**.

Top 10 BEV Sellers - YTD 2026



BEV Market Share by Brand (Top 10) - YTD 2026



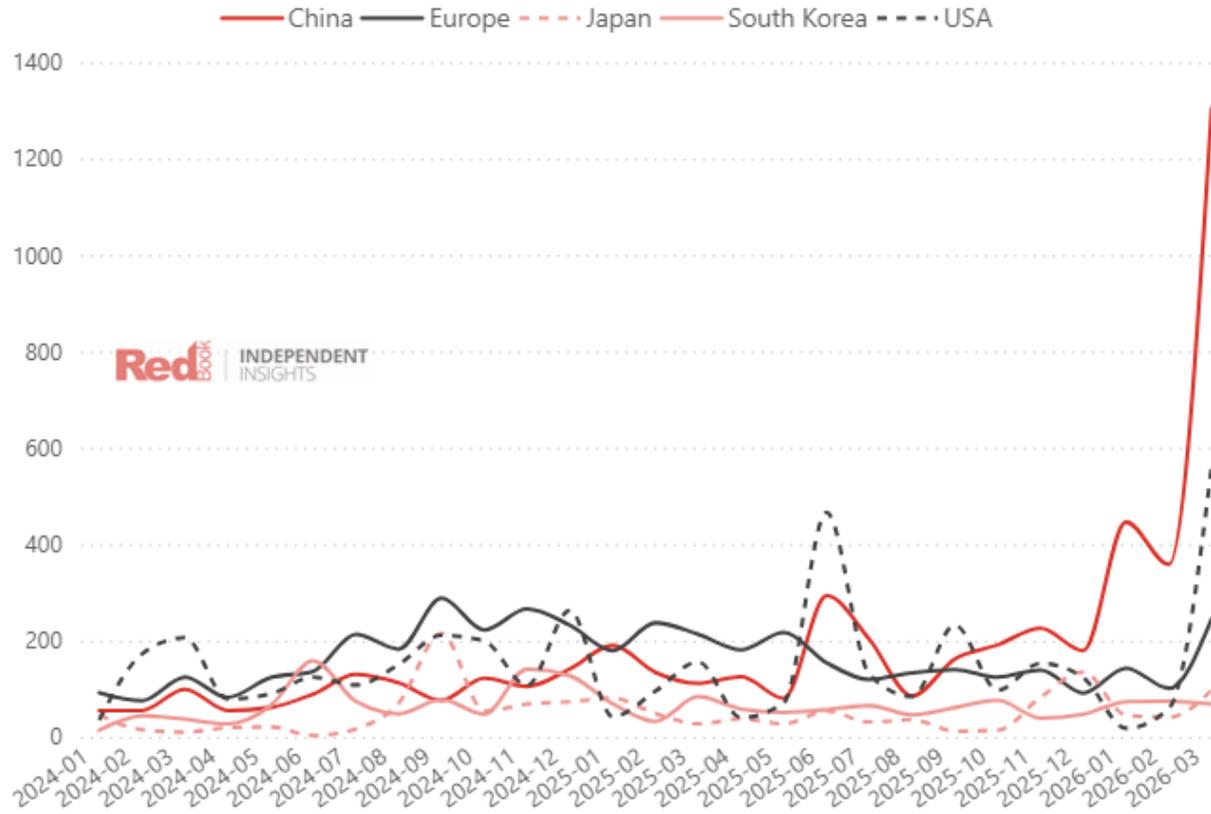
Top Sellers

- 1. Model Y Leads Clearly:** Tesla Model Y is the top BEV YTD (513 units), well ahead of Dongfeng BOX (283).
- 2. BYD Strong Depth:** Four BYD models (ATTO 1, ATTO 2, Sealion 7, ATTO 3) feature in the top 10, highlighting strong lineup coverage.

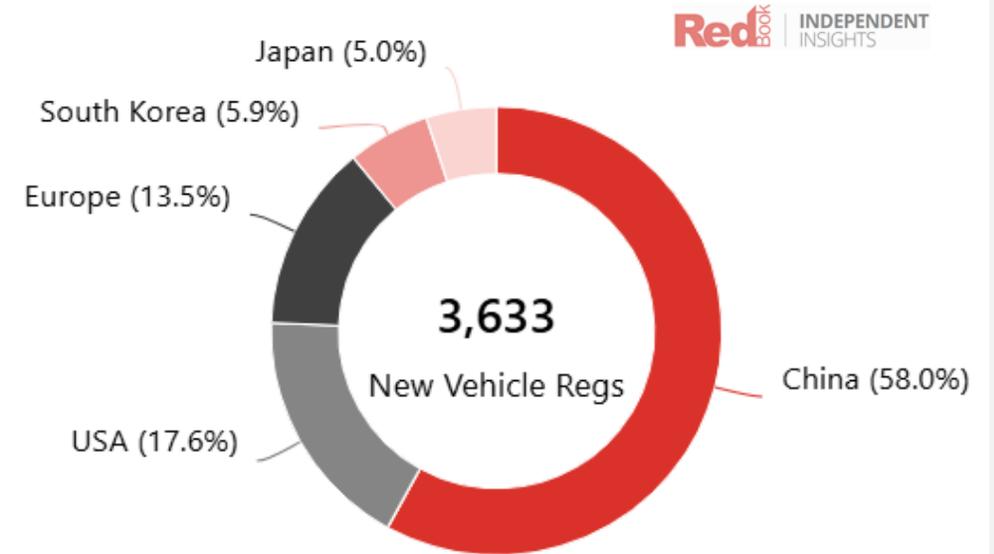
Market Share

- 1. BYD Leads by Brand:** BYD holds the largest BEV market share with 21.6%, ahead of Tesla (16.6%) and Dongfeng (10.9%).
- 2. Challengers Emerging:** MG (10.2%) and Kia (5.9%) show solid presence, with Zeekr (4.5%) gaining traction.

New BEV Registrations by OEM Origin



BEV Market Share by OEM Origin - YTD 2026



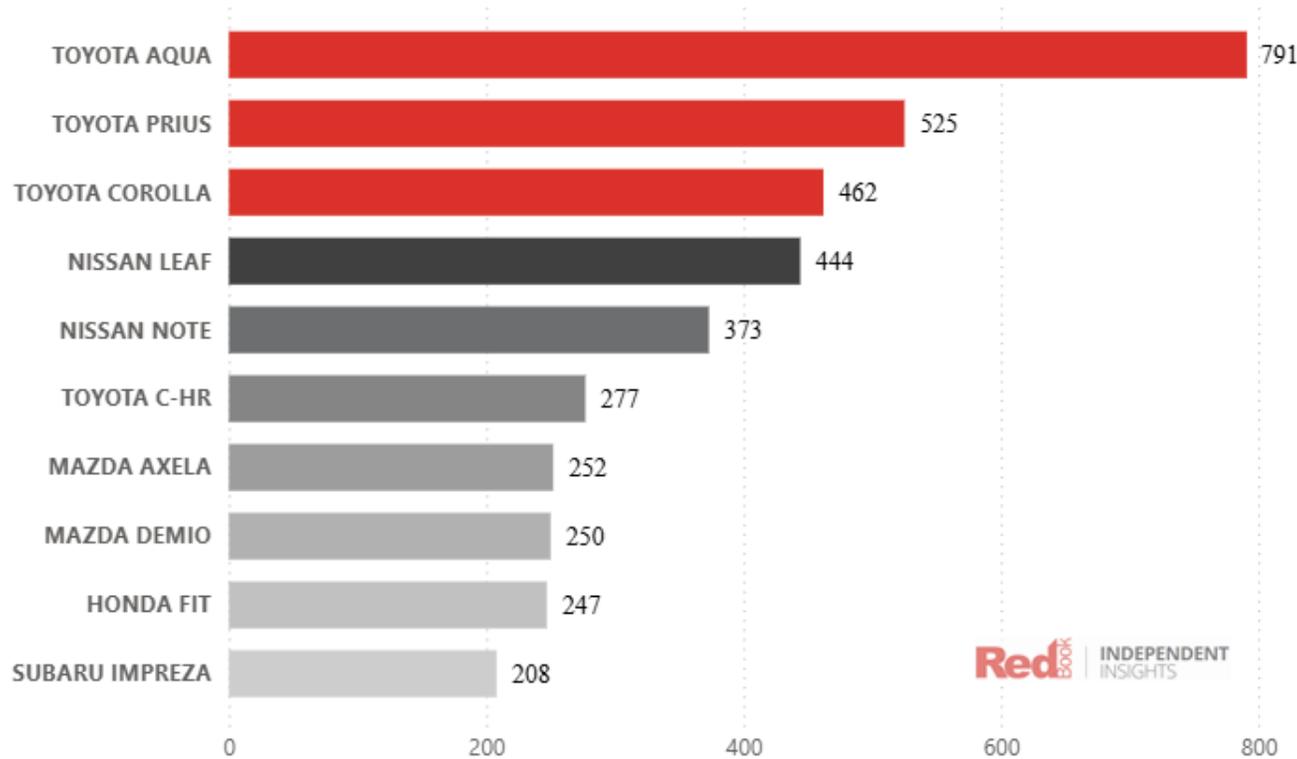
Market Trend

- 1.China Surges:** China-origin BEV registrations jump sharply in March, with the availability to respond to the increased demand due to the fuel crisis.
- 2.U.S. Rebounds:** U.S. BEV volumes rebound in March, largely supported by a strong recovery in Tesla, highlighting ongoing volatility.

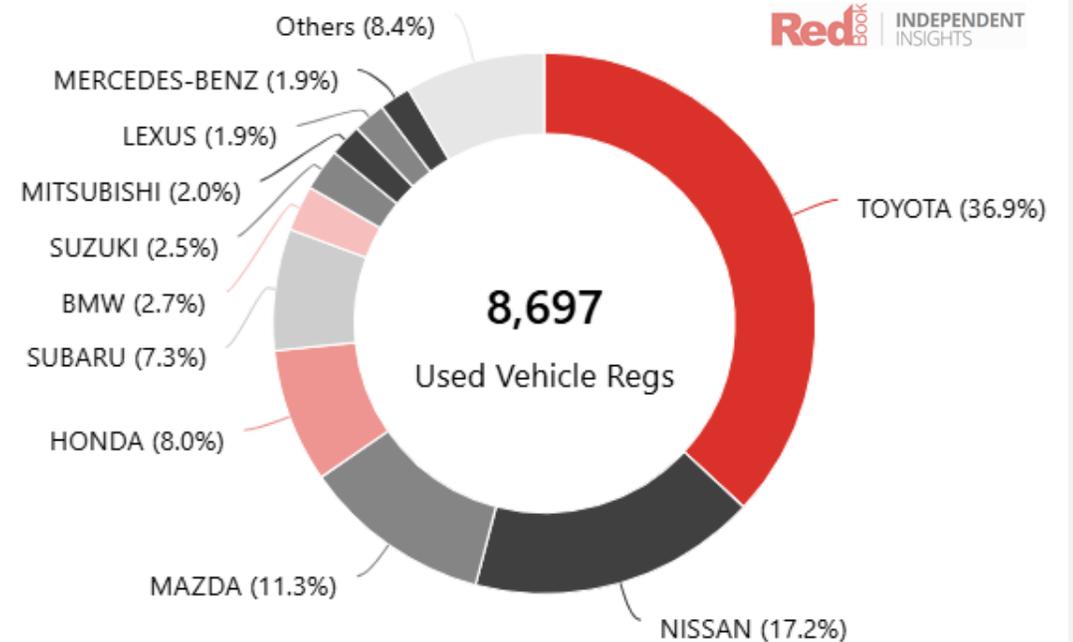
Market Share

- 1.China Dominates:** China (58%) accounts for the majority of BEV registrations, far ahead of all other regions.
- 2.U.S. Second:** U.S. holds the No.2 position with 17.6%, though still well behind China.

Top 10 Sellers - Mar 2026



Market Share by Brand (Top 10) - Mar 2026



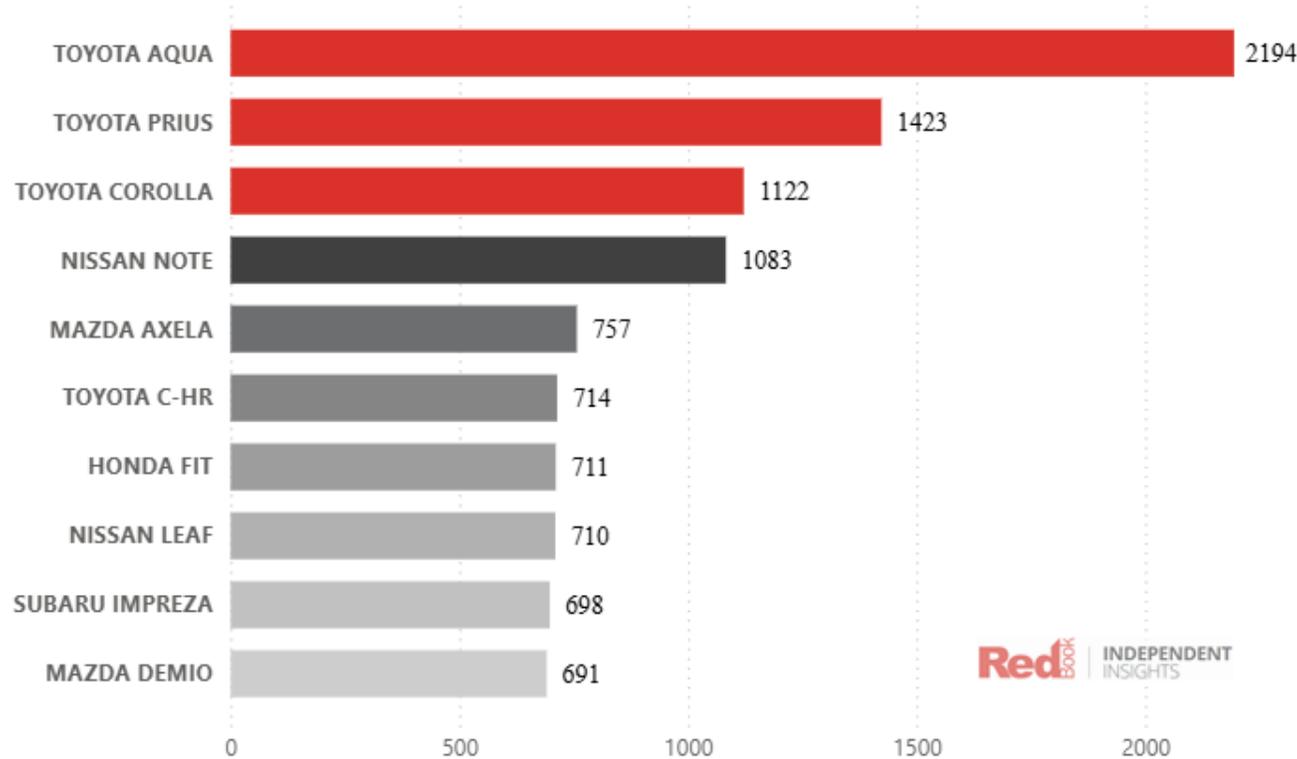
Top Sellers

- 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. Leaf Stands Out as the Key EV:** Nissan Leaf ranks #4 with 444 units, making it the highest-selling EV in the used market.

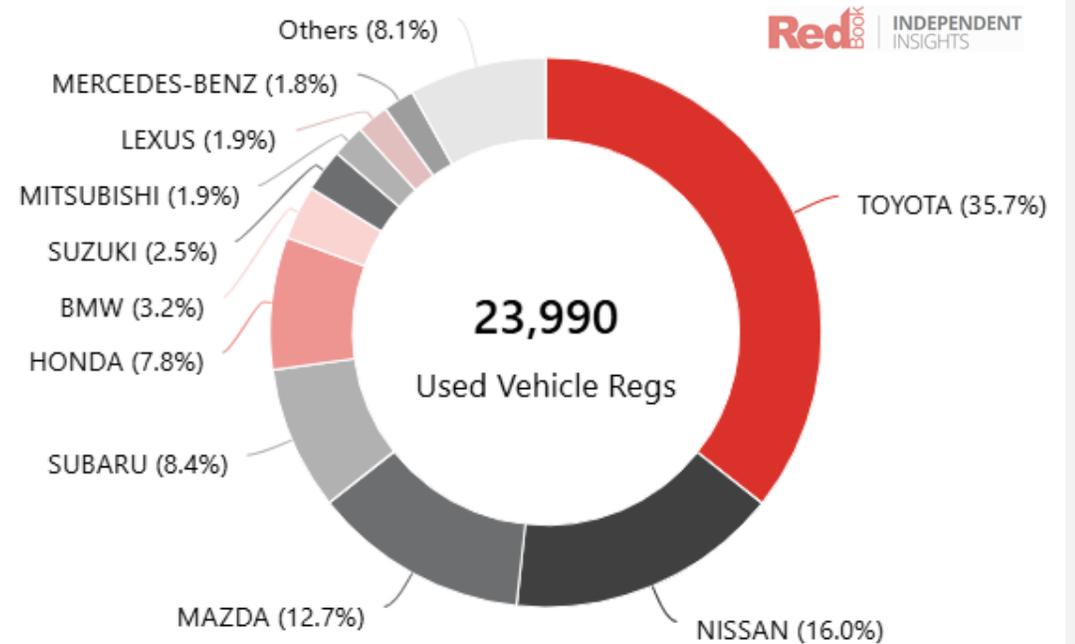
Market Share

- 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.

Top 10 Sellers - YTD 2026



Market Share by Brand (Top 10) - YTD 2026

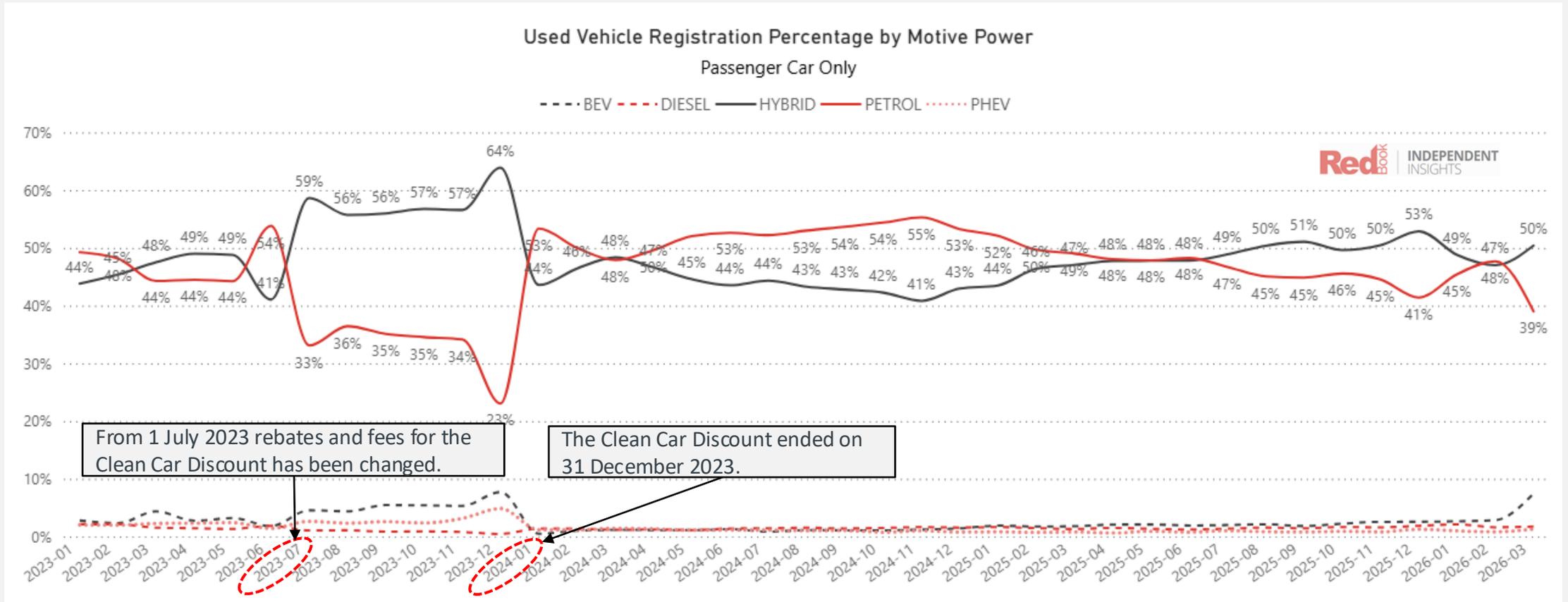


Top Sellers

- 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

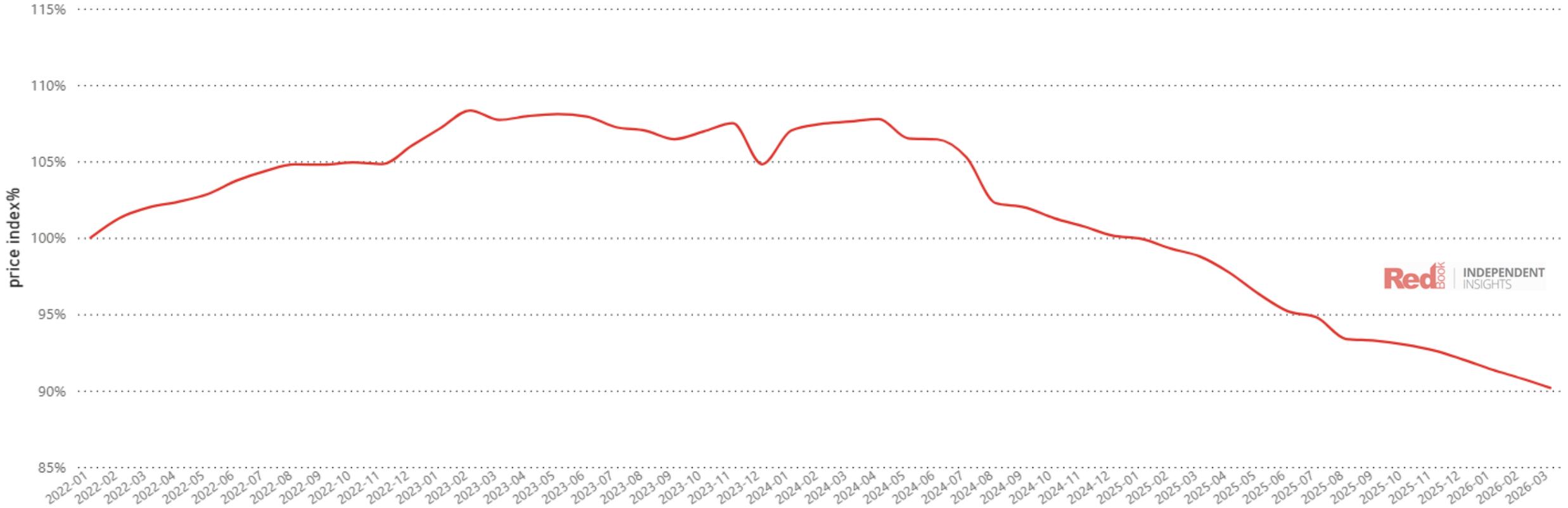
- 1. Toyota Dominates:** Toyota has a commanding lead with 35.7% of the used car registrations market.
- 2. Euro's Small:** BMW, Mercedes-Benz and Audi together account for only a small share of the market.



Insights

- 1. Hybrid Leads:** Hybrid remains the dominant powertrain in the used market.
- 2. Petrol Down:** Petrol share drops sharply in March, likely reflecting the impact of higher fuel prices on buyer preferences.
- 3. BEV Picks Up:** BEV share increases from a low base, suggesting fuel price pressure may also be starting to influence the used market.

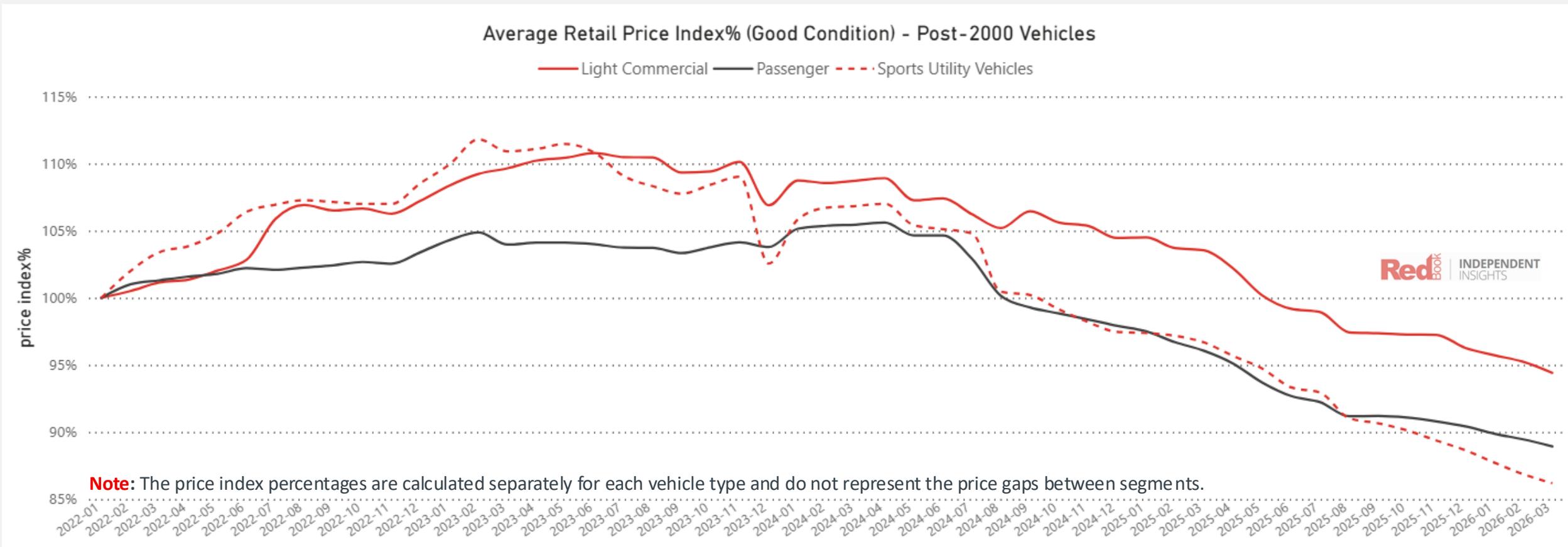
Average Retail Price Index% (Good Condition) - Post-2000 Vehicles



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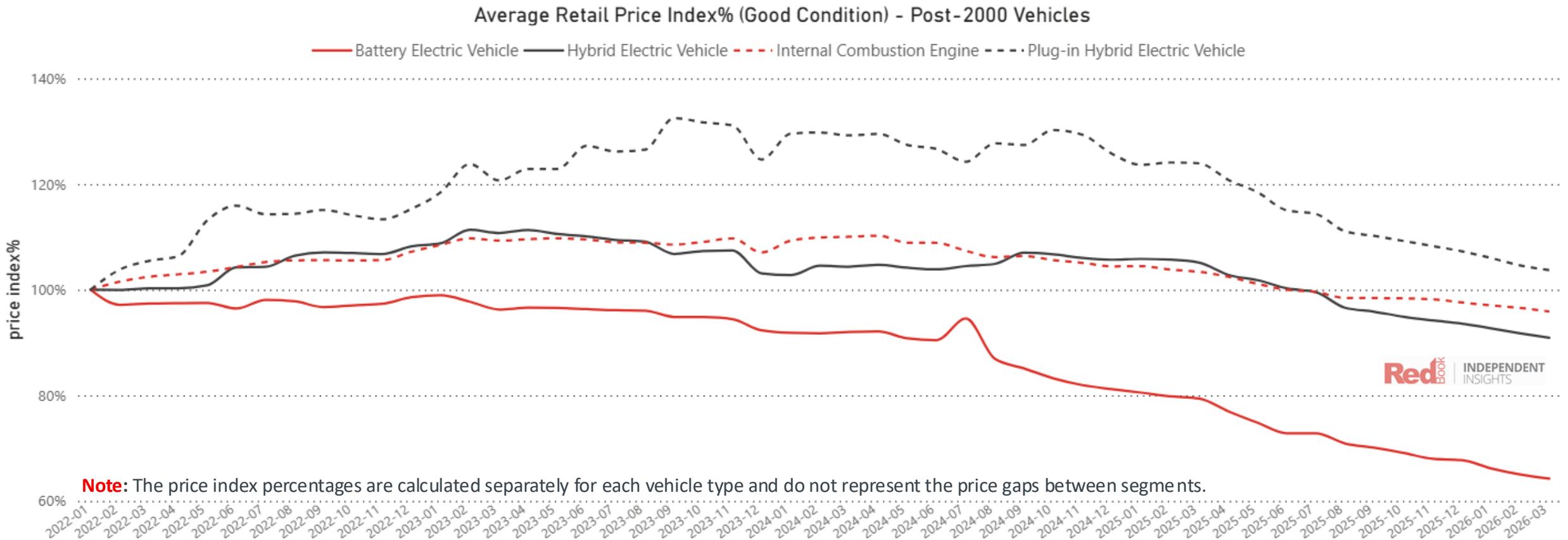
Price Index

- 1. Prices Continue to Ease:** After peaking in early 2023, the price index has declined steadily to by March 2026.
- 2. Downtrend Still Intact:** Prices continue to trend lower, although the pace of decline has moderated over the past few months.



Price Index

- 1. Passenger Cars and Light Commercials Show Similar Trends:** Both segments followed a similar path, peaking in early 2023 before moving into a steady decline. This downward trend has continued through March 2026, although the pace of easing has slowed in recent months.
- 2. SUVs See the Sharpest Correction:** SUVs have recorded the largest price decline since 2023 and remain the most under pressure segment as of March 2026.



- Price Index
1. **ICE and Hybrids Follow a Similar Trend:** After peaking in early 2023, both ICE and hybrid prices have trended down through March 2026, moving along a broadly similar path.
 2. **PHEVs Remain More Resilient:** PHEV prices have also eased, but they have held up better than other electrified segments.
 3. **BEV Turning Point to Watch:** While BEVs have recorded the sharpest price declines since 2023, stronger recent demand will be worth watching for early signs of price stabilisation.