





DATA & INSIGHTS
JUNE 2026

MONTHLY

MARKET UPDATE

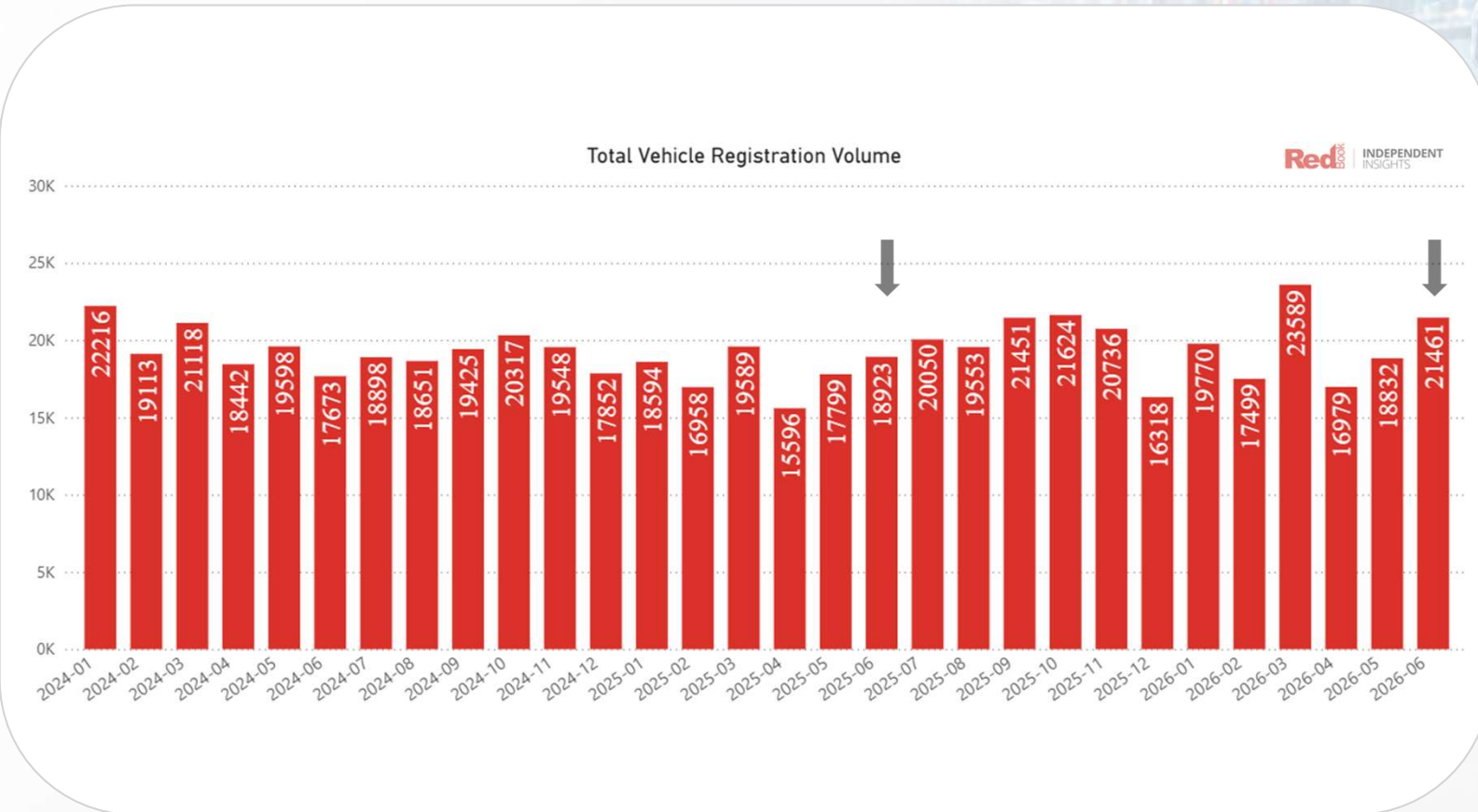
NZ new and used vehicle registrations, electrification, market share and used vehicle price index trends.

IN THIS ISSUE

-  NZ Market Overview
-  Electrification & Motive Power
-  Market Share Trends
-  Used Vehicle Price Index



NZ Overall Car Registrations Trend



KEY INSIGHTS

Registrations Rise

Total registrations rose 14.0% month-on-month to 21,461 in June.

Market Up YoY

Total registrations were 13.4% higher than June 2025.

DATA & INSIGHTS

JUNE 2026

CHAPTER 1

NEW MARKET

This section covers New Zealand's new vehicle market in June 2026, highlighting top sellers, brand share and overall sales trends. Tesla Model Y stood out as **BEV momentum returned**, alongside continued strength from utes and SUVs.



19.2% MoM

New registrations up month-on-month.



+13.7% YoY

New market growth versus June 2025.



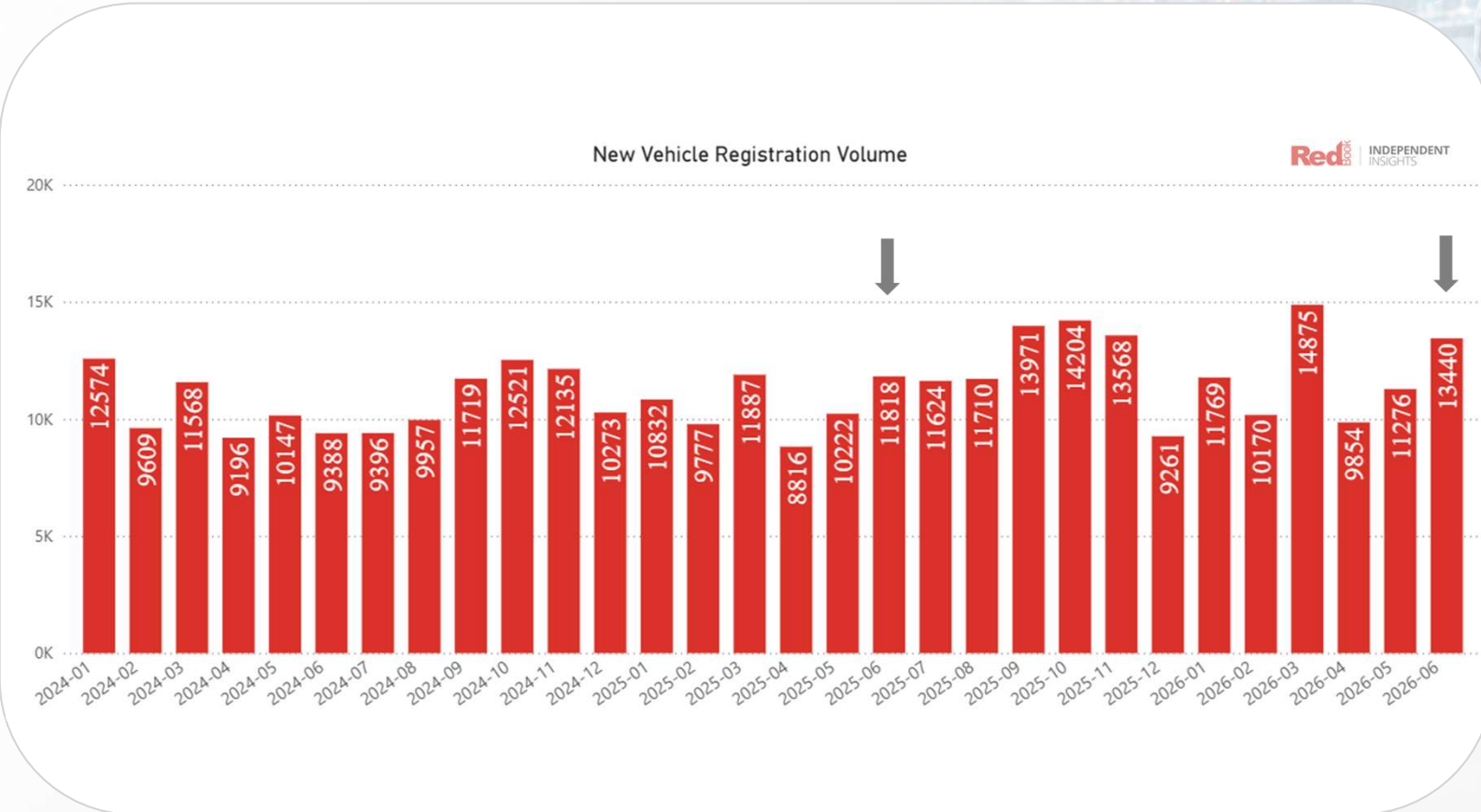
908

Tesla Model Y led the new model market in June.

NZ New Car Sales Trend

KEY INSIGHTS

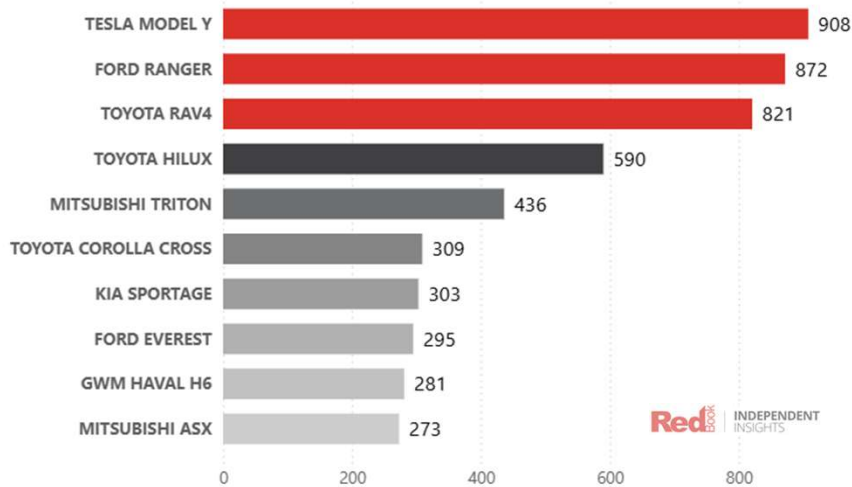
- New Rebound**
New registrations rose 19.2% MoM to 13,440 in June.
- Market Up YoY**
New registrations were 13.7% higher than June 2025.
- Above April Low**
June recovered strongly and moved back above 13k registrations.



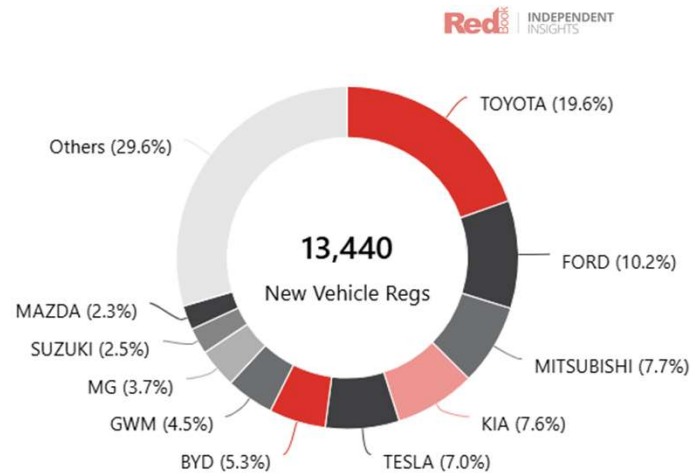
Source: RedBook Insights

Top Sellers & Market Share — Monthly

Top 10 Sellers - Jun 2026



Market Share by Brand (Top 10) - Jun 2026

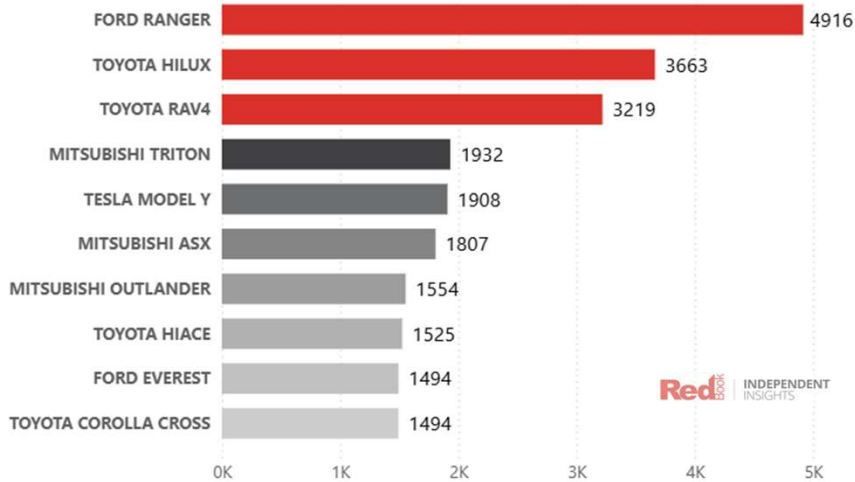


KEY INSIGHTS

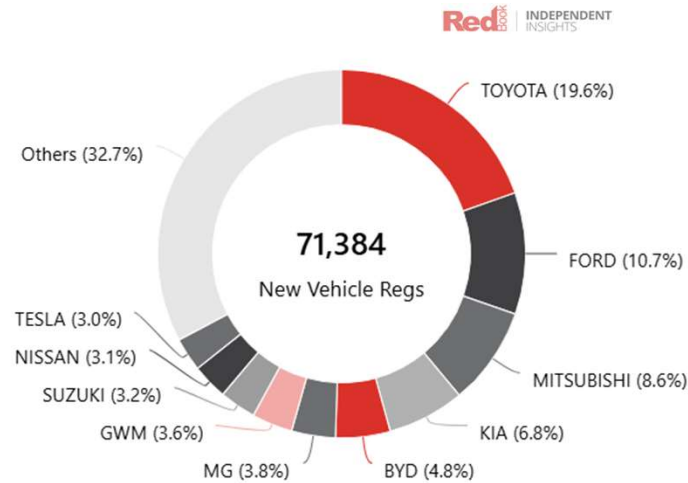
- Model Y Leads**
 Tesla Model Y leads June with 908 registrations, ahead of Ford Ranger at 872.
- RAV4 Strong**
 Toyota RAV4 ranks third with 821 registrations, confirming SUV strength.
- Toyota Still No.1**
 Toyota leads monthly brands with 19.6% share, ahead of Ford at 10.2%.
- Tesla Share Lift**
 Tesla reached 7.0% brand share, helped by strong Model Y demand.

Top Sellers & Market Share — YTD

Top 10 Sellers - YTD 2026



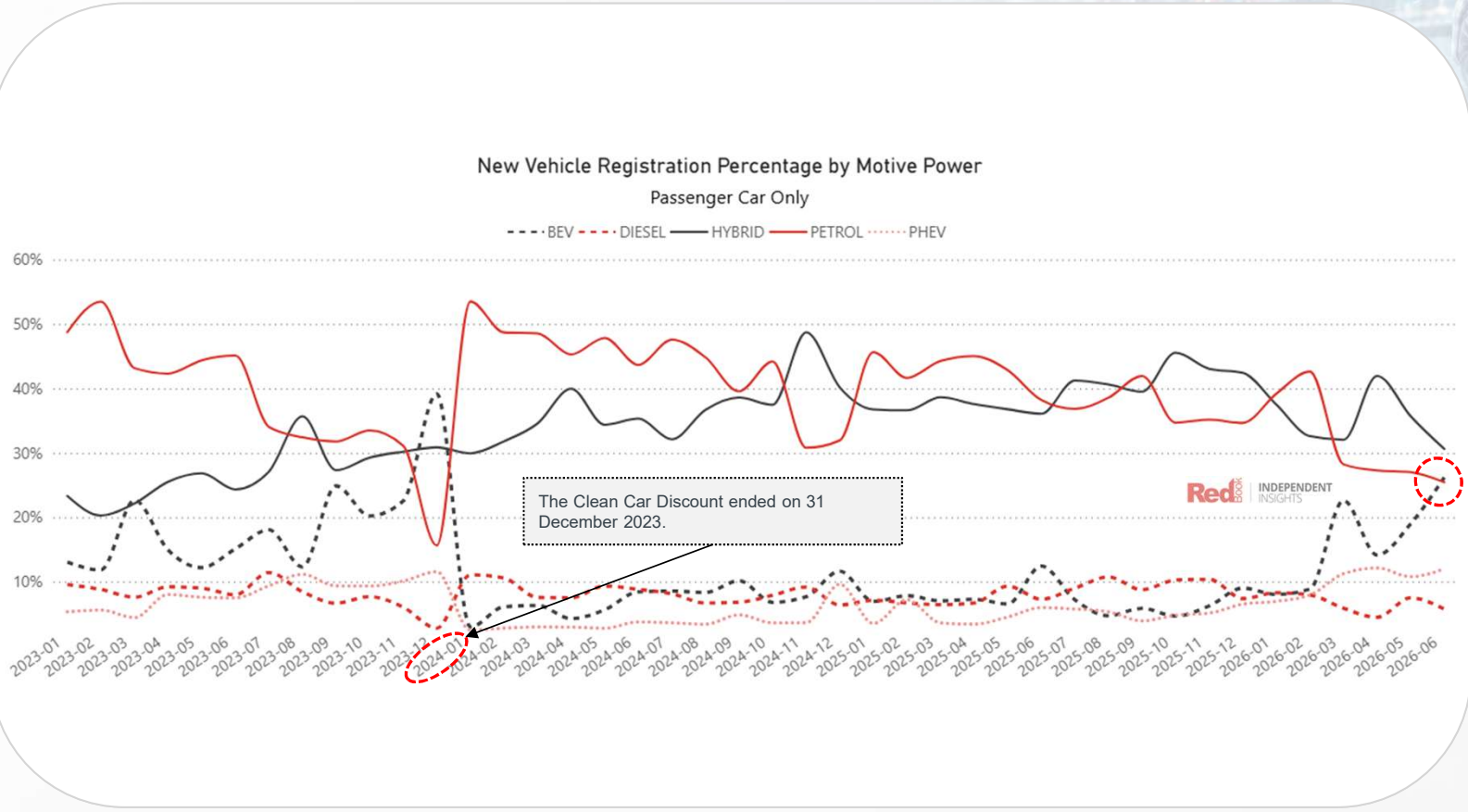
Market Share by Brand (Top 10) - YTD 2026



KEY INSIGHTS

- SUVs, Utes & BEV**
SUVs and utes dominate, while Model Y ranks fifth YTD among new models.
- Ranger Holds No.1**
Ford Ranger leads YTD with 4,916 registrations, ahead of Hilux and RAV4.
- Toyota Leads YTD**
Toyota holds the top brand position with 19.6% share; Ford follows at 10.7%.
- Mitsubishi Solid**
Mitsubishi holds 8.6%, supported by Triton, ASX and Outlander.

New Car Sales Trend by Motive Power



KEY INSIGHTS

- Petrol Slips Behind**
Petrol stayed lower in June and sat slightly behind BEV.
- Hybrid Still Leads**
Hybrid eased from April's rebound but remained the leading powertrain.
- BEV Edges Petrol**
BEV recovered and slightly exceeded Petrol in June, lifting EV presence.

ELECTRIFICATION

This section explores key electrification trends in New Zealand, including EV share, BEV leadership, and market share by OEM origin. These insights highlight the accelerating shift towards electrification and the brands and regions leading the transition.



38%

EV share of new passenger registrations in June



24.0%

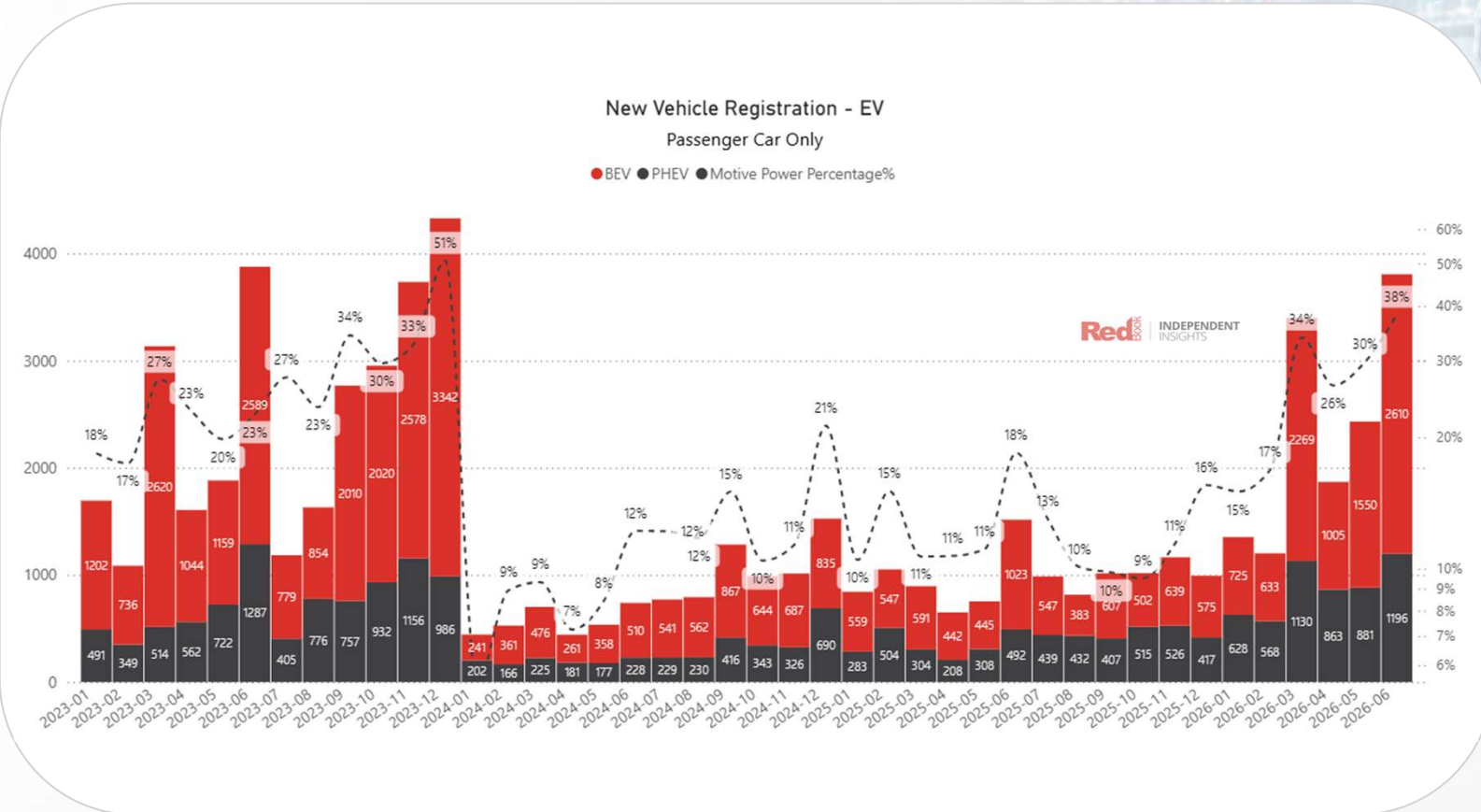
Tesla BEV market share YTD 2026



53%

China-origin BEV share YTD 2026

EV New Car Sales Percentage

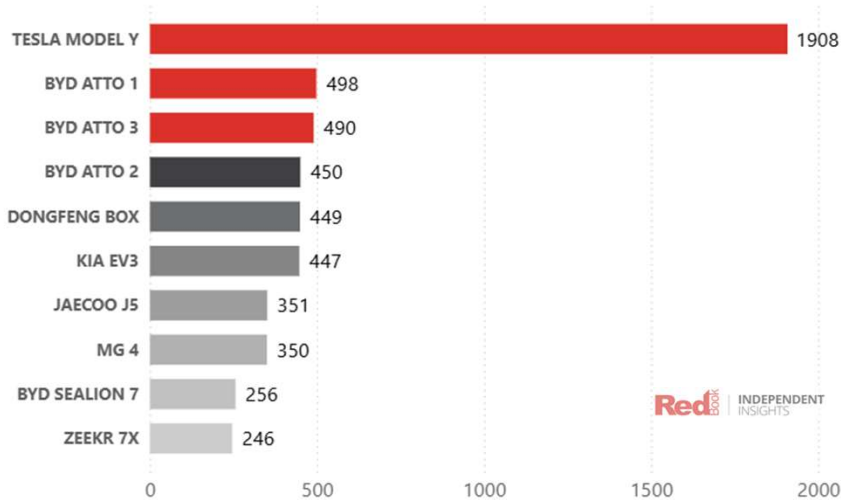


KEY INSIGHTS

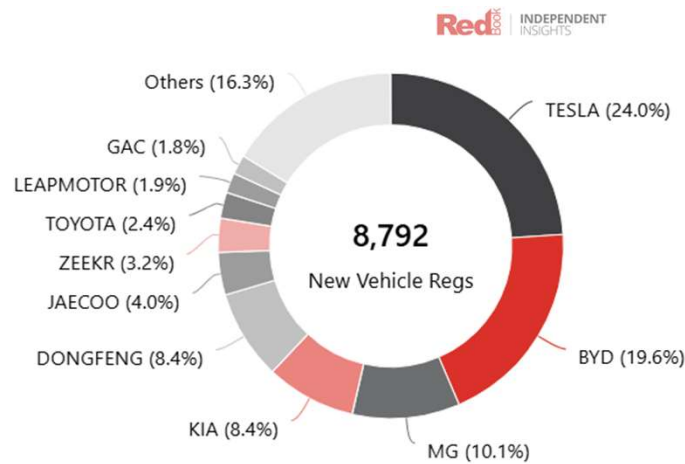
- EV Share to 38%**
 Combined BEV and PHEV share lifted to 38% in June, the highest 2026 level.
- Above March Spike**
 June moved above March's 34% spike and stayed well above early-2026 levels.
- BEV Leads the Lift**
 BEV registrations rose sharply, led by Model Y and several Chinese models.

BEV Top Sellers & Market Share

Top 10 BEV Sellers - YTD 2026



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



KEY INSIGHTS

Model Y Leads Clearly

Tesla Model Y is the top BEV YTD with 1,908 units, well ahead of BYD ATTO 1.

BYD Shows Depth

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

Tesla Leads by Brand

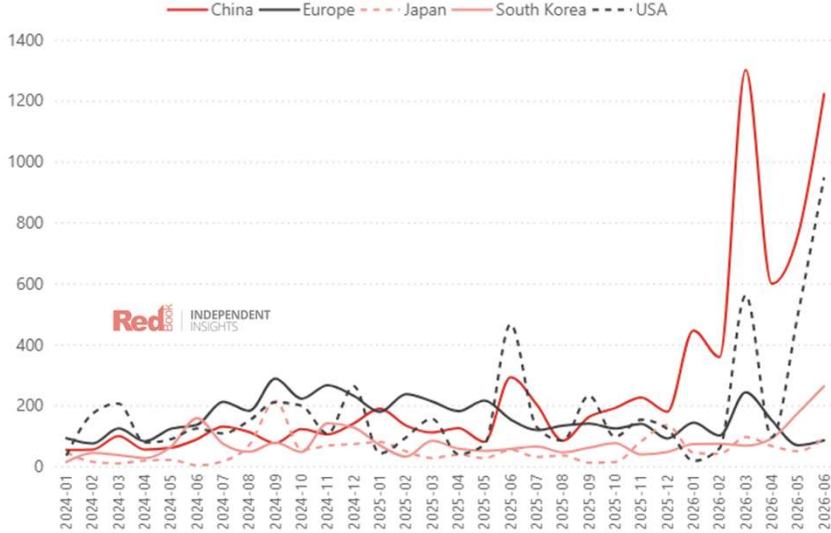
Tesla leads BEV market share at 24.0%, ahead of BYD at 19.6%.

MG & Kia Visible

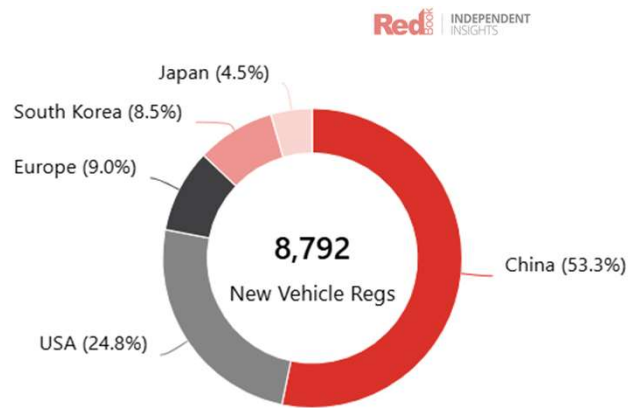
MG, Kia and Dongfeng also hold notable BEV shares behind Tesla and BYD.

BEV Market Trend by OEM Origin

New BEV Registrations by OEM Origin



BEV Market Share by OEM Origin - YTD 2026



KEY INSIGHTS

China Dominates
China accounts for 53.3% of BEV registrations, still far ahead of other origins.

U.S. Second
The U.S. holds the No.2 position at 24.8%, supported largely by Tesla.

China Recovers
China-origin BEV volumes lifted again in June after April's pullback.

U.S. Rebounds
U.S. volumes also strengthened in June, highlighting Tesla-related volatility.

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CHAPTER 3

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.



35.9%

Toyota dominated used-car market share.



232

Nissan Leaf was the highest-selling used EV in June.



Hybrid Leads

Hybrids remained the leading used-market powertrain.

NZ Used Car Sales Trend

Used Import Vehicle Registration Volume



KEY INSIGHTS

Used Rebounds
Used import registrations rose 6.1% MoM to 7,999 in June.

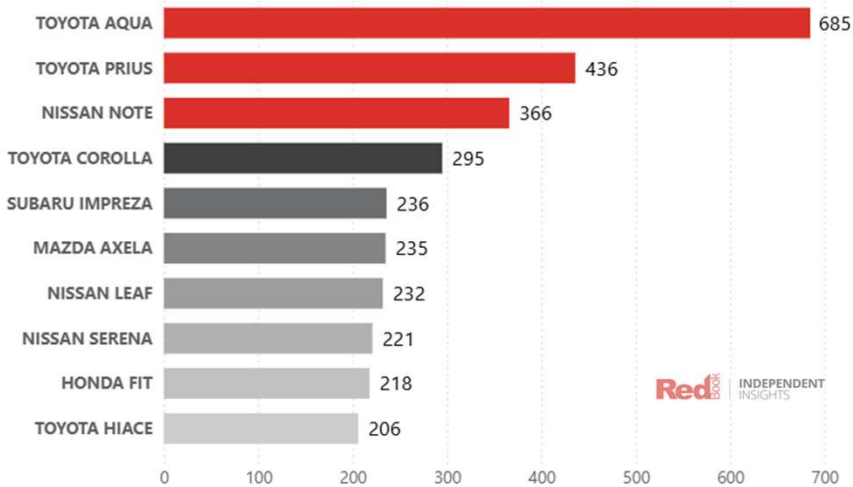
YoY Higher
June volume was 13.1% higher than June 2025.

Below March Peak
Volumes improved from April and May but remained below the March high.

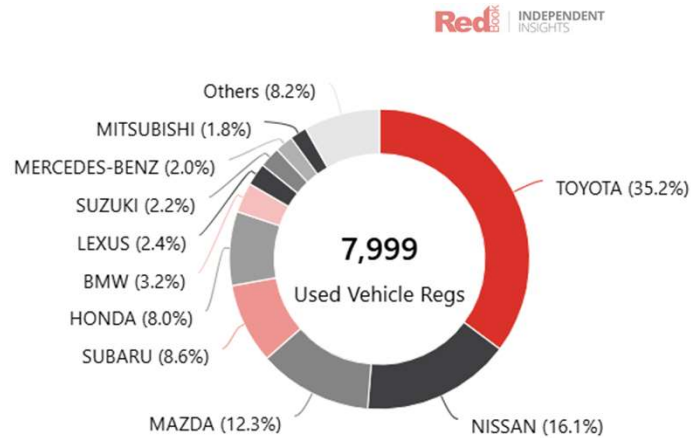
Stable Demand
Used demand firmed, with hybrid imports supporting activity.

Used Car Top Sellers & Market Share — Monthly

Top 10 Sellers - Jun 2026



Market Share by Brand (Top 10) - Jun 2026



KEY INSIGHTS



Aqua Leads

Toyota Aqua leads June with 685 registrations, ahead of Toyota Prius.



Note Ranks Third

Nissan Note ranks third with 366 registrations.



Leaf Top Used EV

Nissan Leaf reaches 232 units, the highest-selling used EV in June.

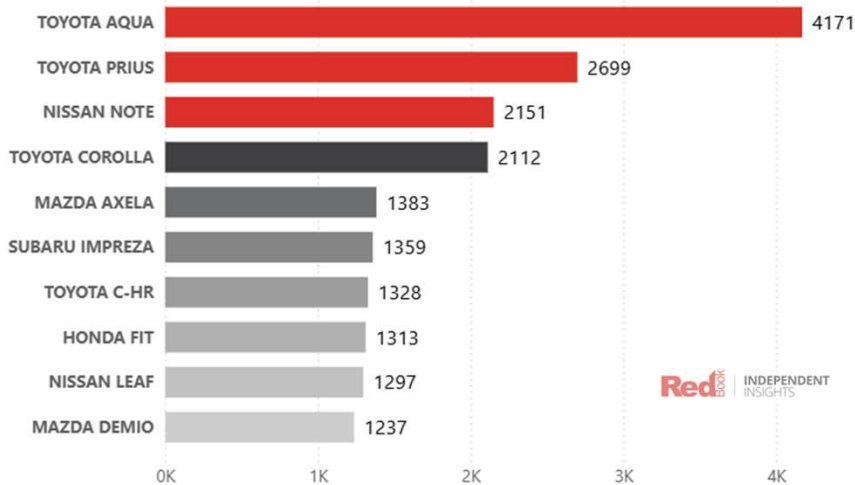


Toyota Still Dominates

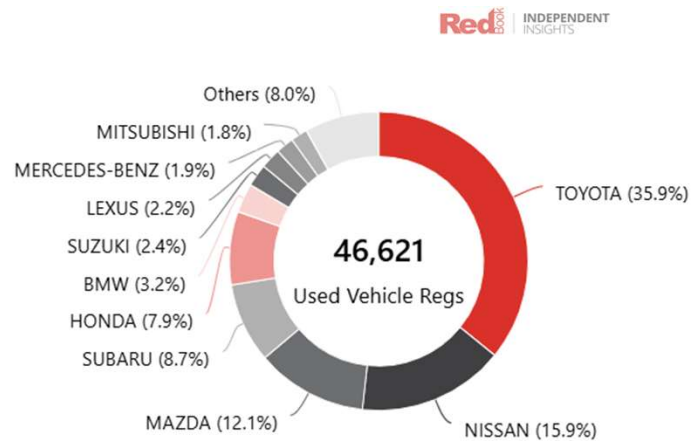
Toyota holds 35.2% of monthly used import registrations.

Used Car Top Sellers & Market Share — YTD

Top 10 Sellers - YTD 2026



Market Share by Brand (Top 10) - YTD 2026

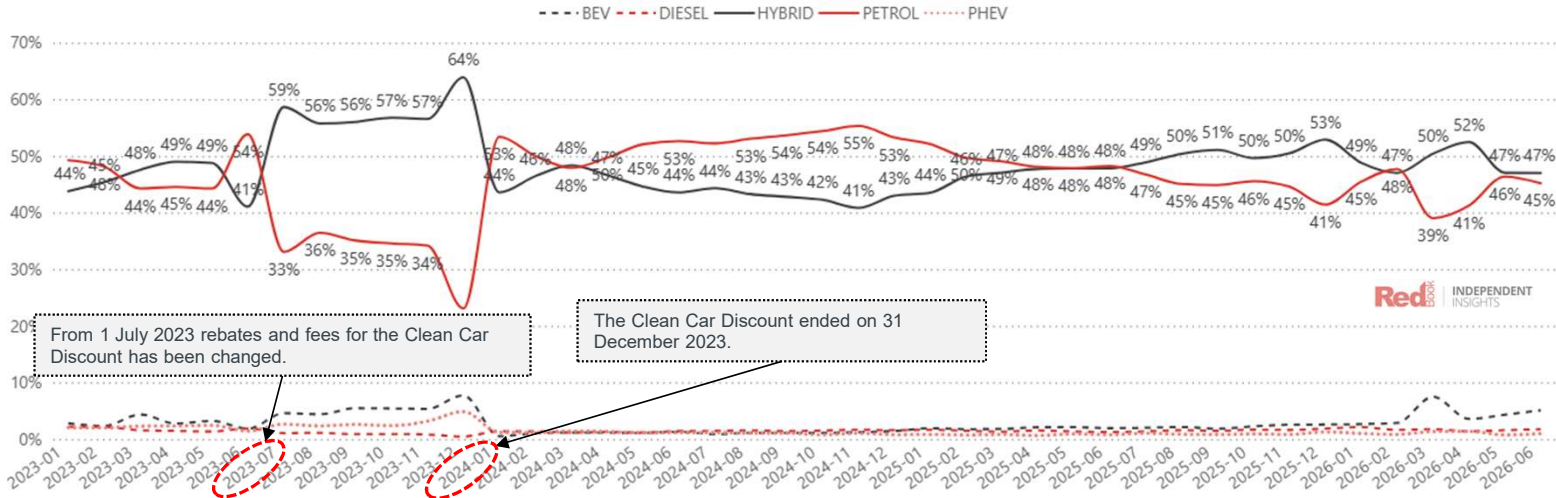


KEY INSIGHTS

- Trophy Icon** **Toyota Leads Models**
Aqua, Prius and Corolla feature prominently among top used vehicles.
- Fuel Pump Icon** **Fuel Efficiency Drives**
Almost half of the top 10 models are hybrids or low-consumption vehicles.
- Trophy Icon** **Toyota Dominates**
Toyota holds a commanding 35.9% share of used registrations.
- Globe Icon** **Euro Brands Small**
BMW, Mercedes-Benz and Audi together account for a relatively small share.

Used Car Sales Trend by Motive Power

Used Vehicle Registration Percentage by Motive Power
Passenger Car Only



From 1 July 2023 rebates and fees for the Clean Car Discount has been changed.

The Clean Car Discount ended on 31 December 2023.

KEY INSIGHTS

- Hybrid Still Leads**
 Hybrid remains slightly ahead at around 47% of used registrations.
- Petrol Recovers**
 Petrol settled around 45%, narrowing the gap with hybrid.
- BEV Still Low**
 BEV share remains low, despite a modest lift from April.

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 or stabilising, where pressures remain, and which segments are proving more resilient.



Easing Slows

The Used Vehicle Price Index shows early signs of flattening after the post-2023 correction.



SUVs Under Pressure

SUVs continue to show the sharpest correction among vehicle types.

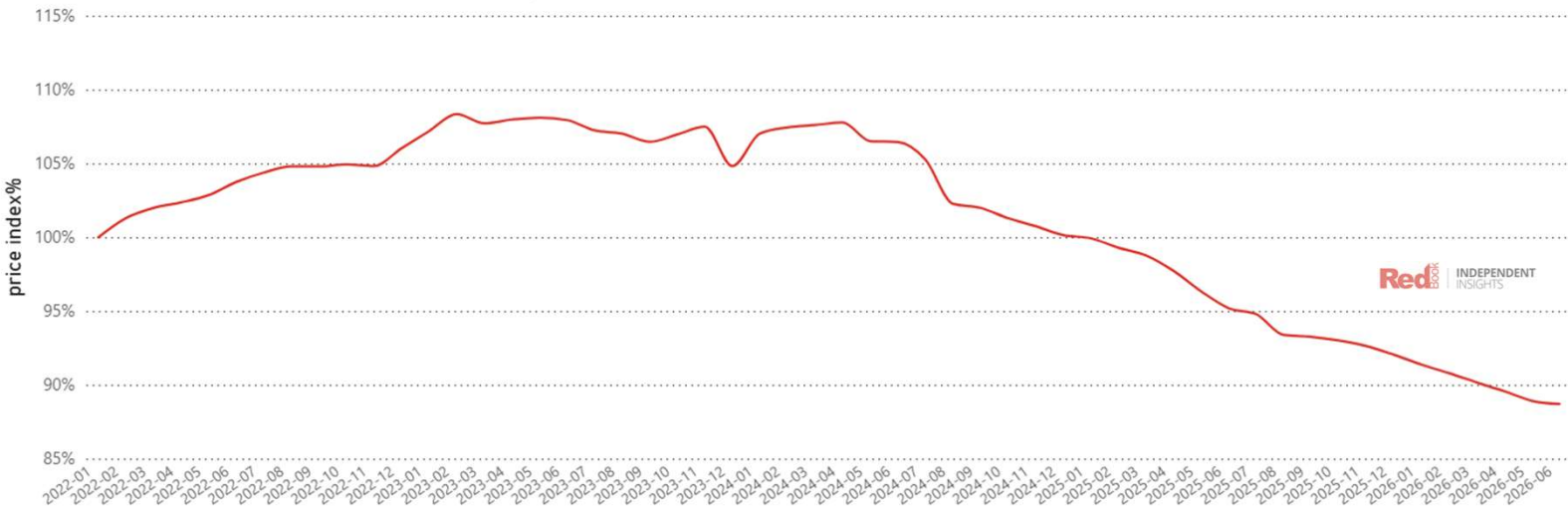


BEV Flattening

BEV values remain soft, but show early signs of flattening.

Used Vehicle Price Index

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



KEY INSIGHTS

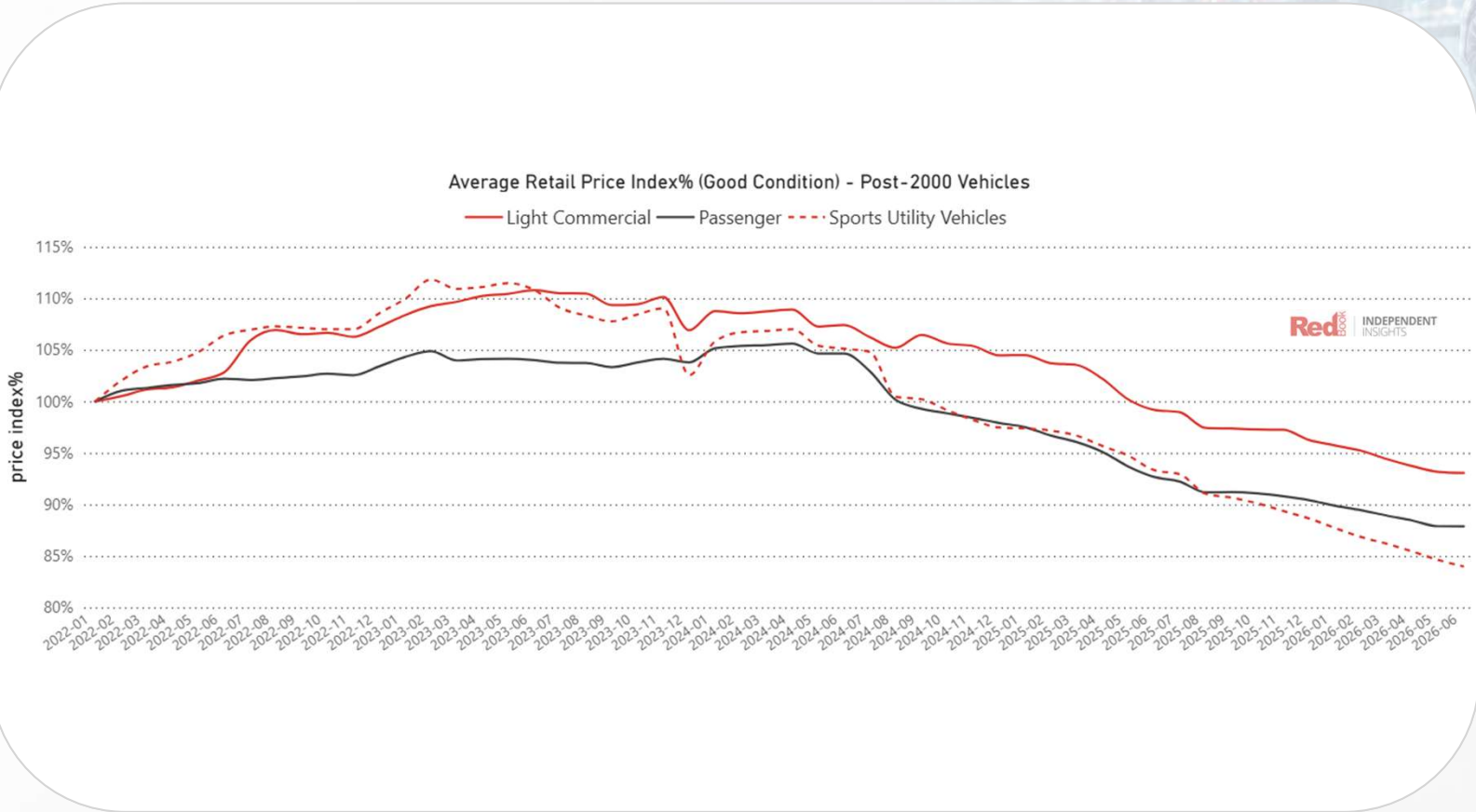
Easing Slows

The index edged lower in June, but the latest movement suggests the decline is flattening.




Stabilisation Emerging

Monthly declines remain modest, pointing to early stabilisation rather than a sharper correction.

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, though the latest decline has become more gradual.
-  **Declines Flattening**
Segment movements were modest in June, suggesting the broader correction is starting to level out.

Used Vehicle Price Index by Motive Power



KEY INSIGHTS

ICE & Hybrids Similar
ICE and hybrid prices remain close, with both showing a softer rate of decline.

PHEVs More Resilient
PHEVs remain the strongest motive-power segment and are closer to stabilising.

BEV Flattening
BEV prices remain soft overall, but recent movement suggests the decline is starting to flatten.