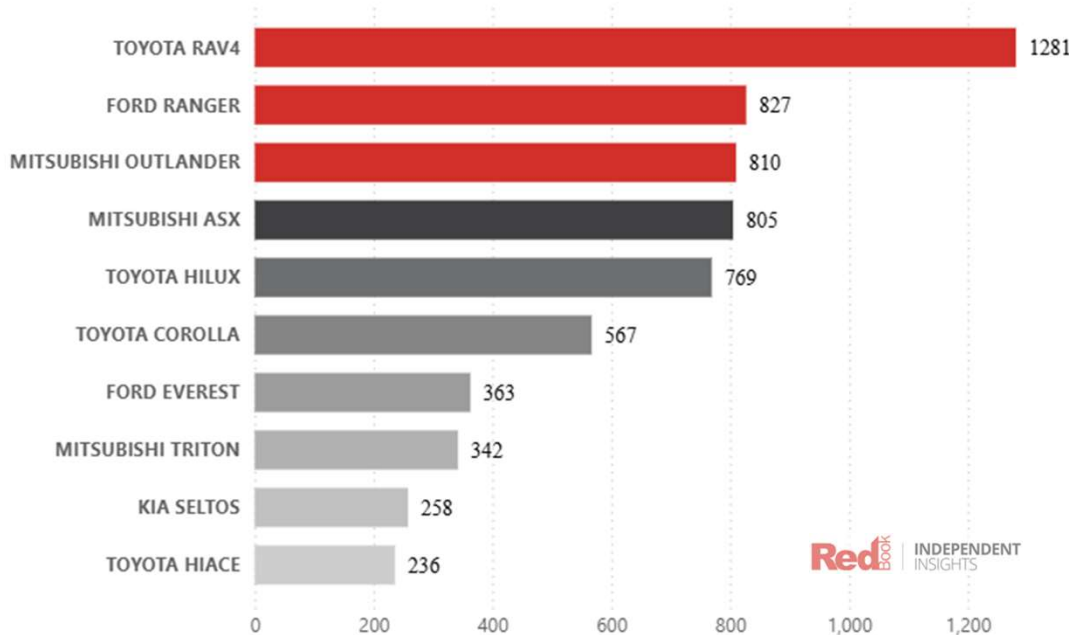
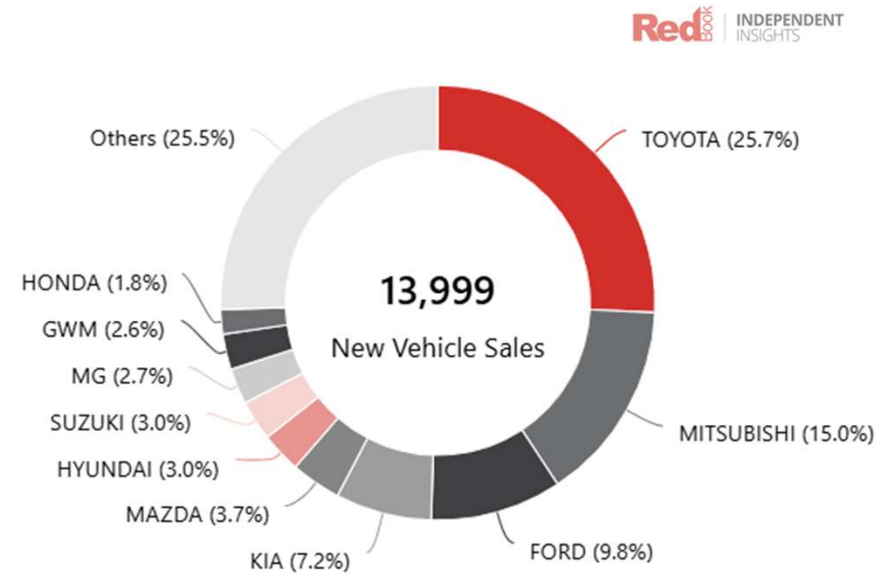


Top 10 Sellers - Sep 2025



Market Share by Brand (Top 10) - Sep 2025



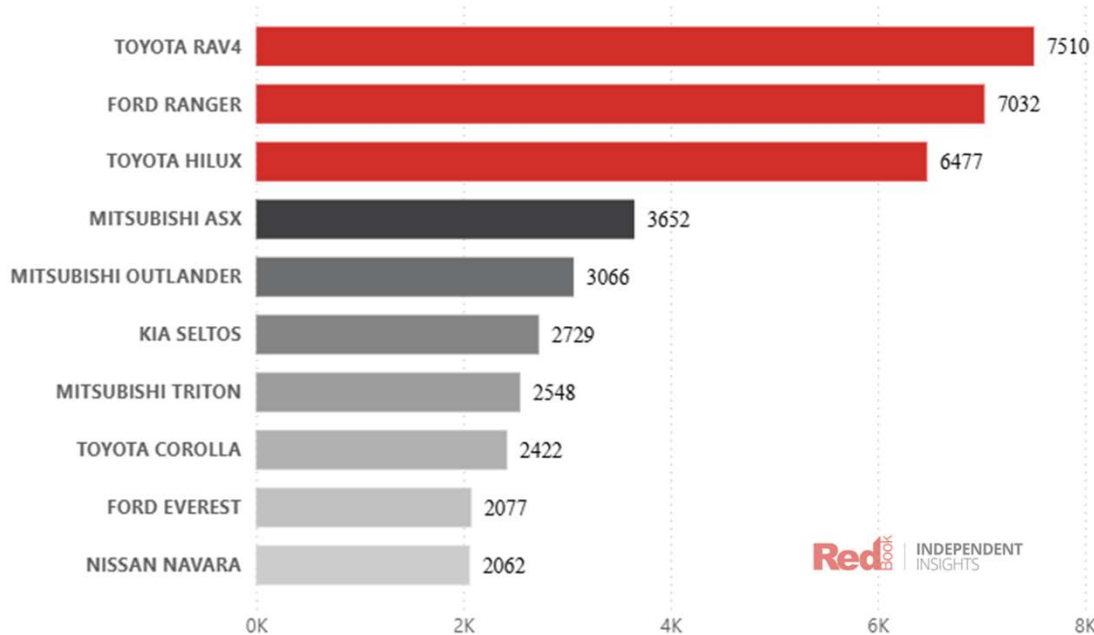
Top Sellers

- 1. Toyota RAV4 Continues on Top with Strong Rental Sales:** The Toyota RAV4 leads the market with 1,281 units sold, including 667 units to the rental sector.
- 2. Ford Ranger Follows:** Ford Ranger (827 units) remains strong.
- 3. Mitsubishi Rentals Boost Sales:** Of the 810 Outlander units registered, 611 were to the rental market as were 438 of the 805 ASX units registered.

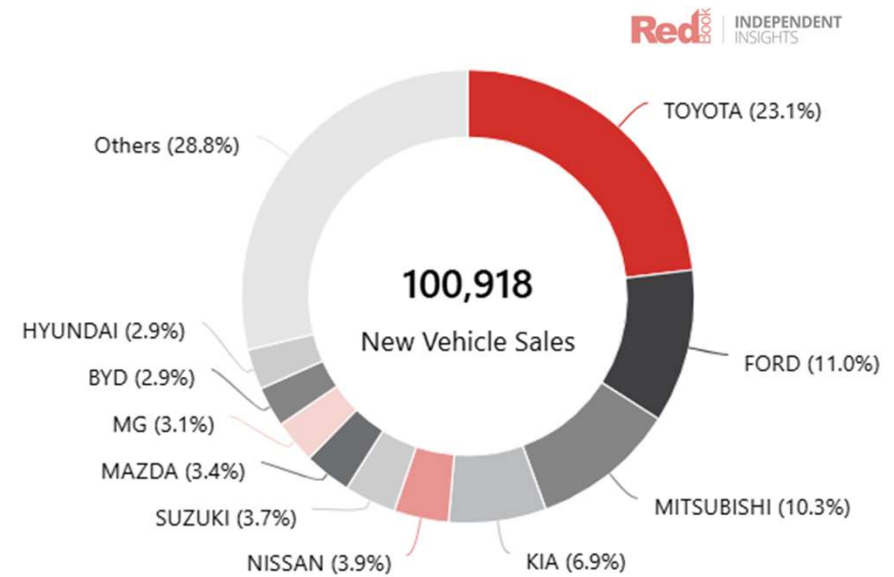
Market Share

- 1. Toyota Dominates:** Toyota continues to hold the largest market share at 25.7%.
- 2. Mitsubishi and Ford Compete:** Mitsubishi holds No.2 position with 15.0%, Ford follows with 9.8% for the month of September 2025.

Top 10 Sellers - YTD 2025



Market Share by Brand (Top 10) - YTD 2025



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 21%. Hatchbacks are third with only 9% of the market share.
- 2. Toyota RAV4 Regains No.1 Spot:** The RAV4 reclaims the top position, edging out the Ford Ranger by a narrow margin.

Market Share

- 1. Toyota Dominates YTD:** Toyota holds the largest market share at 23.1%, showing its continued dominance in the market.
- 2. Big brands leaking market share to new Chinese brands:** All the big brands have dropped market share this YTD as the new Chinese brands have started growing.

Sep 25

NZ New Car Sales Trend

Market Trend

1. Notable increase from Previous Month –

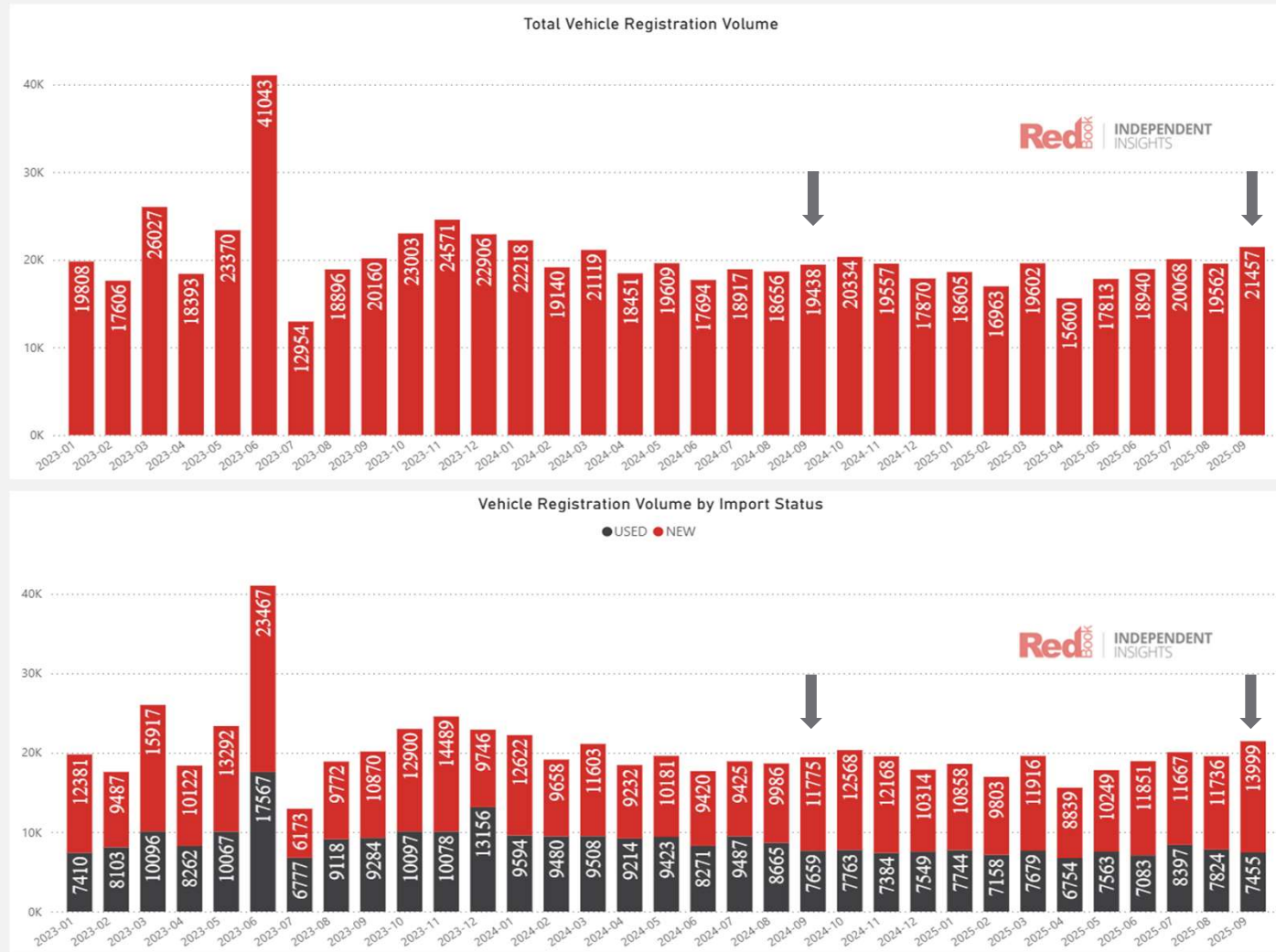
Overall vehicle registrations rose 10% compared with August 2025. New registrations were up strongly by 19% – supported by 1,700 additional rental units, while used registrations fell 5%.

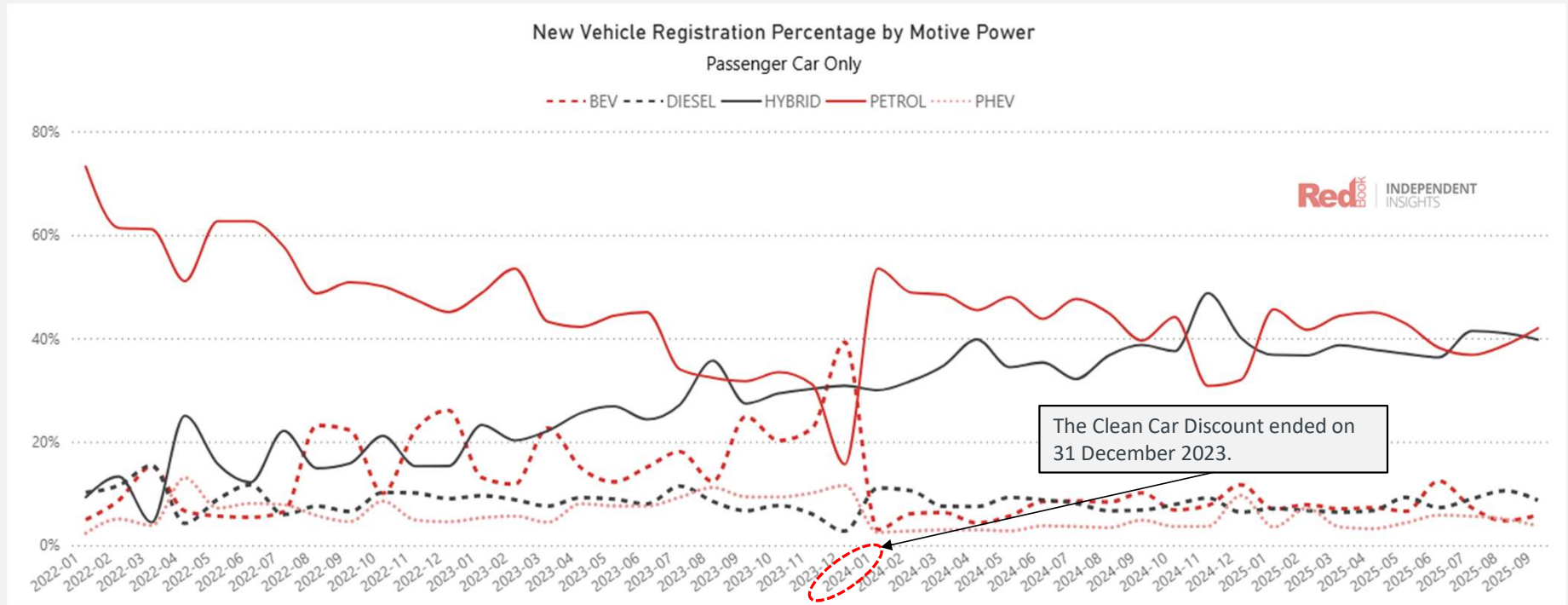
2. Significant YoY Growth in New Registrations –

New registrations rose 19% compared to September 2024.

3. Used Registrations Down 3% YoY –

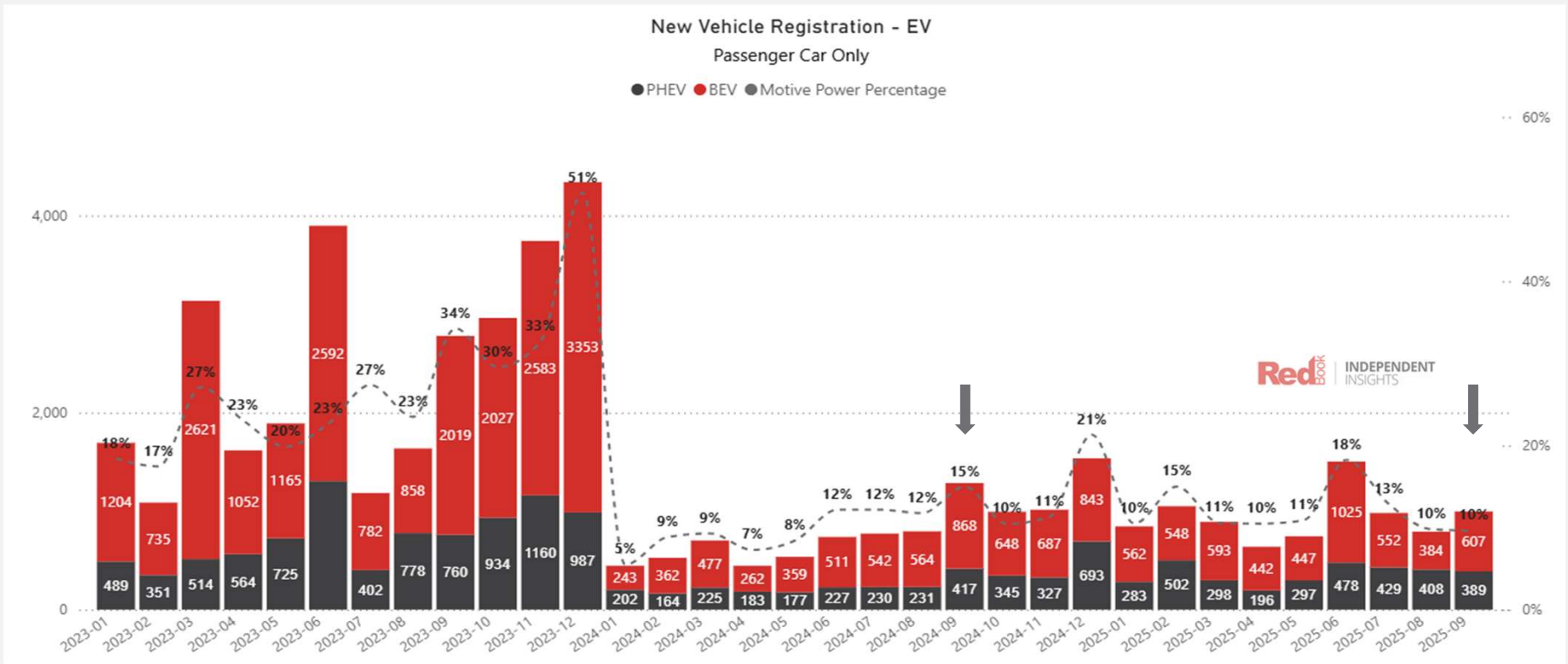
Used registrations declined 3% compared with September 2024, reflecting the continued slowdown in the used vehicle market.





Insights

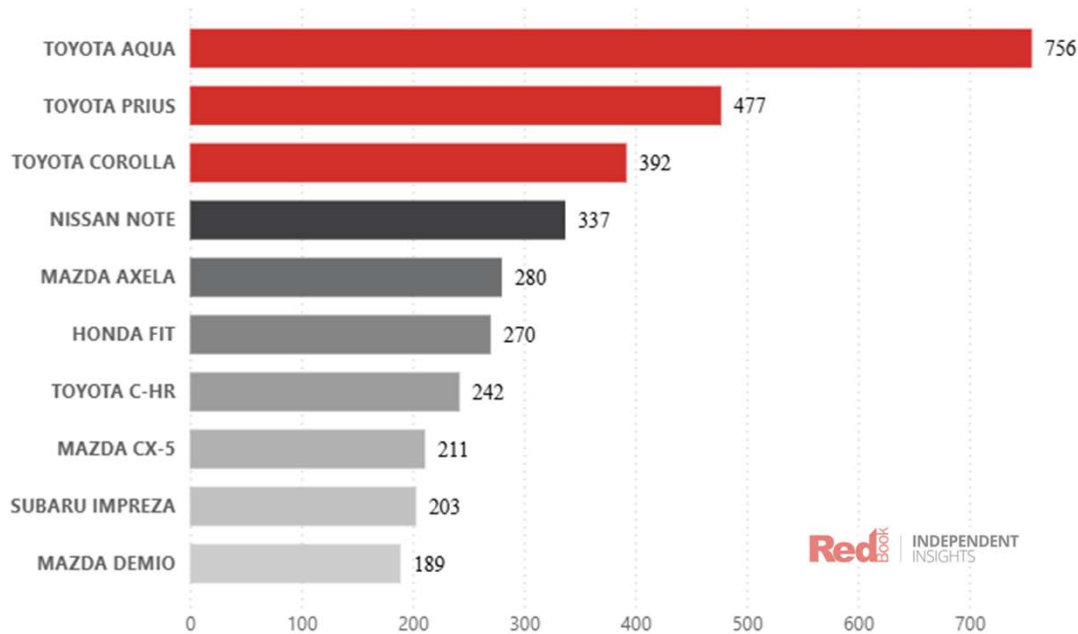
- 1. Rise in Petrol, Slight drop in Hybrid:** Petrol vehicle registrations increased slightly, while hybrid registrations slightly dropped in September 2025.
- 2. EV Registrations Show Slight Recovery:** BEV registrations recorded a modest increase compared to the previous month, while PHEV volumes remained relatively stable. Overall, EV registrations showed a slight recovery from the declines of the past three months, although totals show lower than the same period last year.



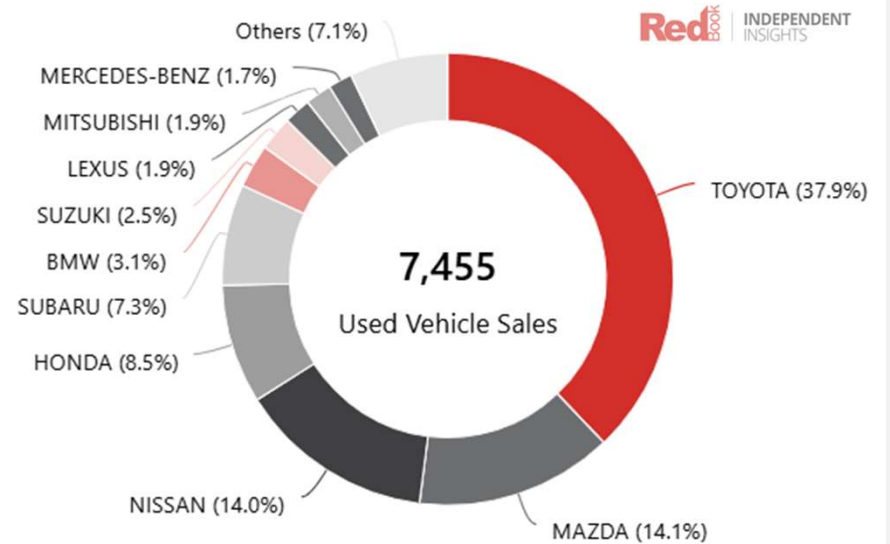
Insights

- EV Registrations Show Slight Recovery:** BEV registrations recorded a modest increase compared to the previous month, while PHEV volumes remained relatively stable. Overall, EV registrations showed a slight recovery from the declines of the past three months, although numbers are lower than the same period last year.
- The top-selling models** in September 2025 included the **Tesla Model Y and Model 3, BYD Sealion 7 and ATTO 3, Kia EV5 and EV3, MG S5, BMW i Series, the all-electric Mini Countryman, and the Omoda E5.**

Top 10 Sellers - Sep 2025



Market Share by Brand (Top 10) - Sep 2025



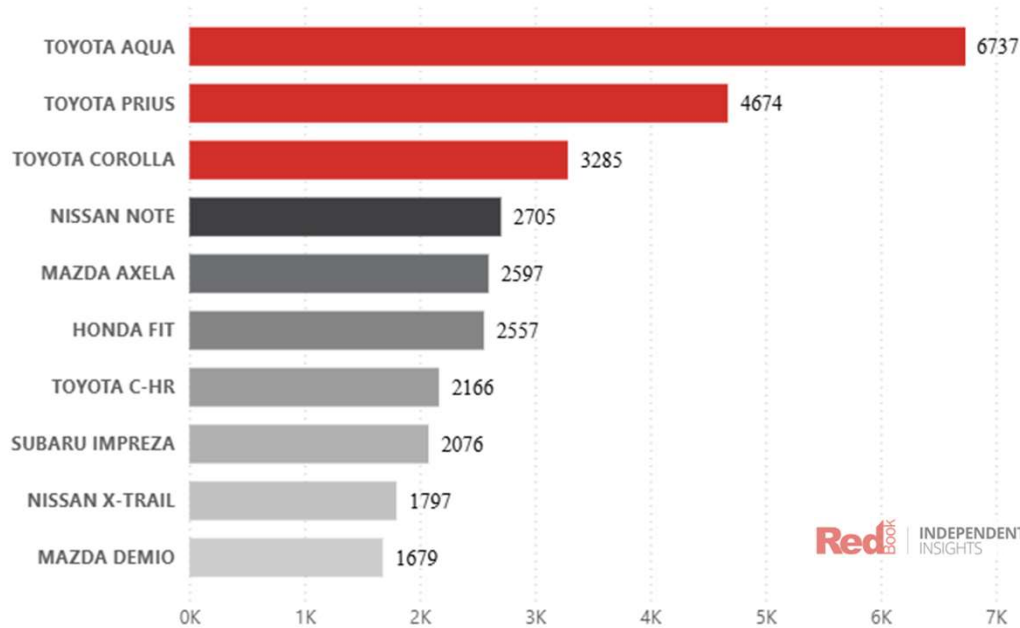
Top Sellers

- 1. Toyota's Prominence:** Toyota models, including the Aqua, Prius and Corolla, are among the most registered.
- 2. Hybrids Dominance:** Nearly half of the list above is made up of hybrids or low petrol usage vehicles.

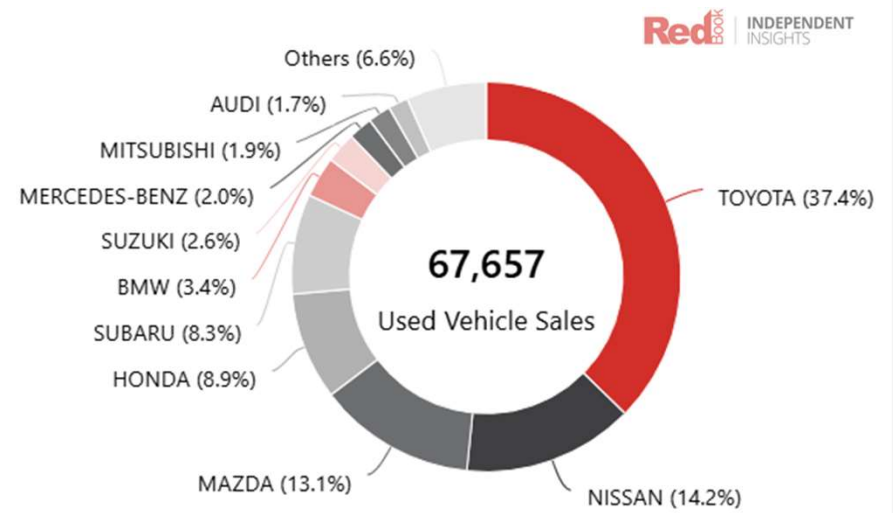
Market Share

- 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 2025



Market Share by Brand (Top 10) - YTD 2025

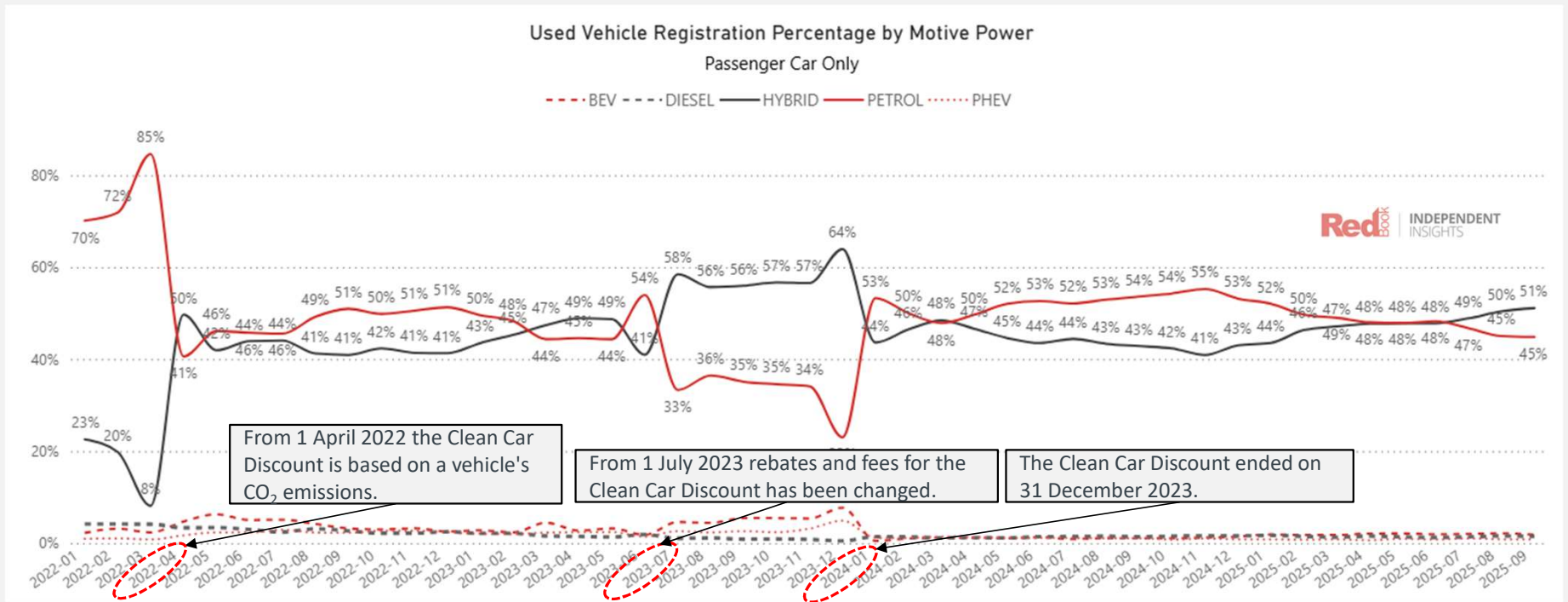


Top Sellers

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Market Share

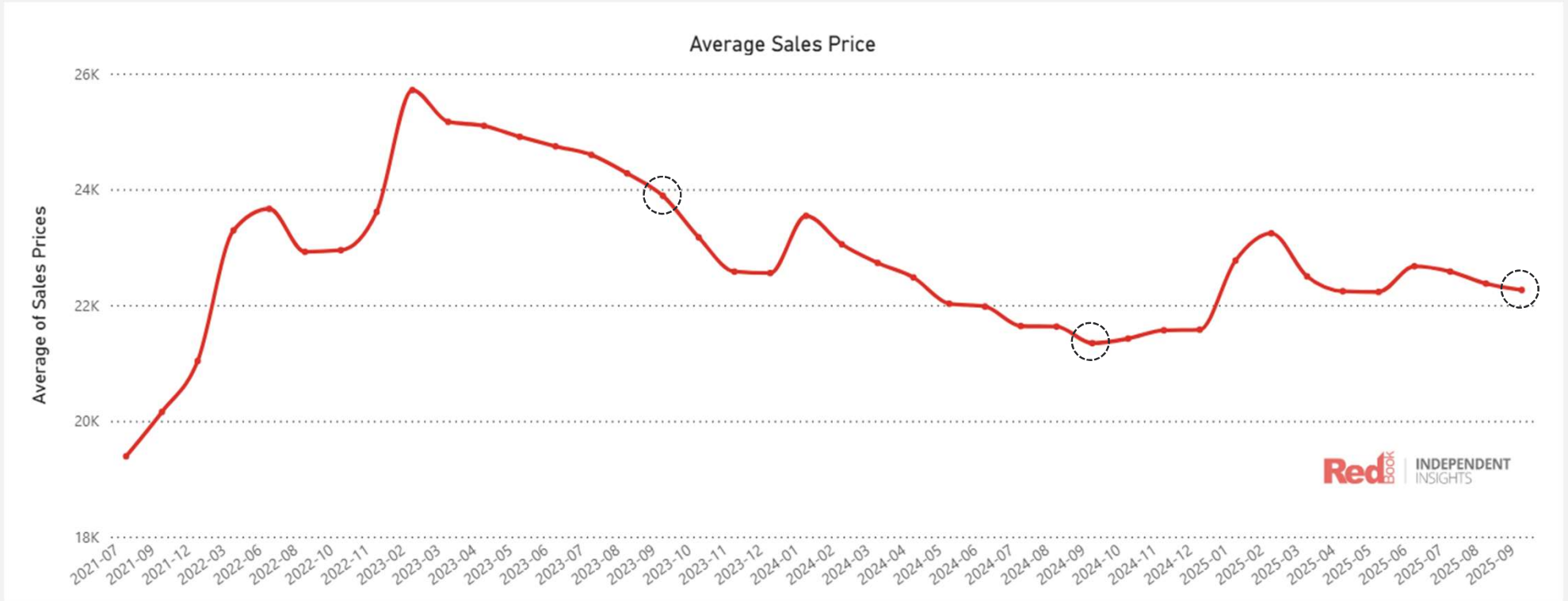
- 1. Toyota Dominates:** Toyota has a commanding lead with 37.4% of the used car registrations market.
- 2. Euro's small:** BMW, Mercedes-Benz, and Audi together account for just 7.1% of the market share, while Japanese brands dominate.



Insights

1. Hybrid Registrations Overtaking Petrol: In September 2025, hybrid vehicle registrations continued to grow. While petrol vehicle share has gradually declined in recent months, hybrid registrations have been steadily recovering since November 2024.

2. BEV and PHEV Remain Limited: BEV and PHEV registrations continue to make up a small fraction of the total.

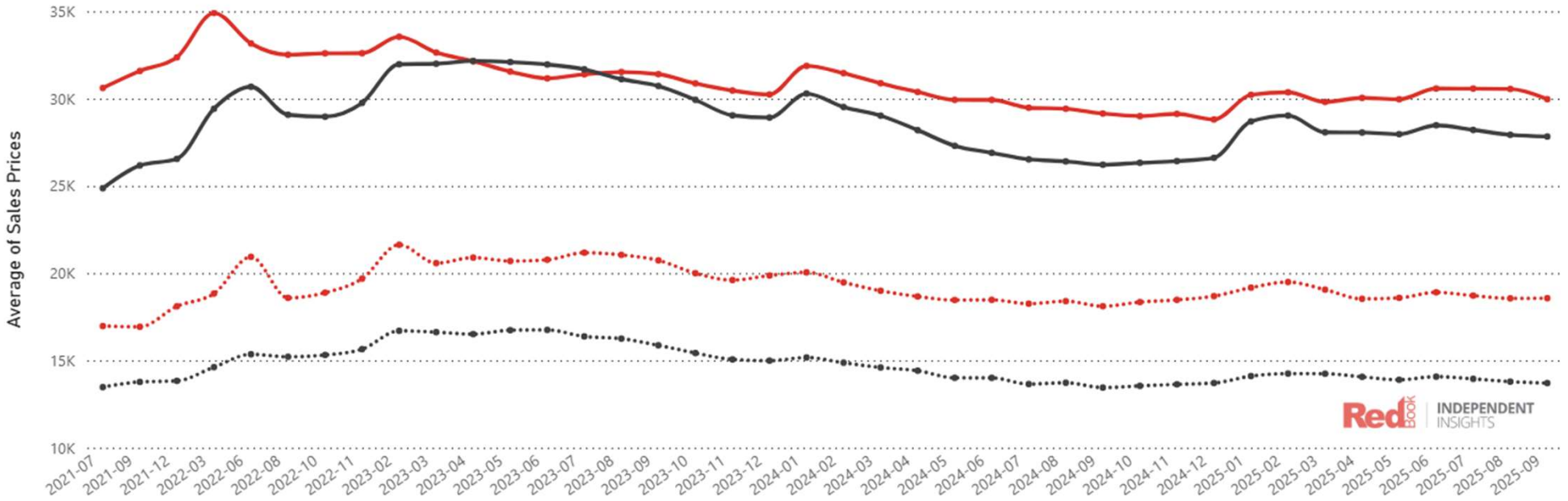


Price Index

1. Used Car Prices Continue to Decline: In September 2025, used car prices edged down further, extending the dip seen over the past two months. While prices remain above the same period last year, they are now clearly below the levels recorded in September 2023.

Average Sales Price by Vehicle Type

..... Hatchback — Light Commercial Saloon/Wagon — SUV



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Price Index

1. Price Trends by Vehicle Type: In September 2025, used vehicle prices declined across Light Commercial Vehicles (utes mostly), while prices for other vehicle types remained stable compared with the previous month.