JDPOWER

Commercial Truck Guidelines

November 2026 Market Update



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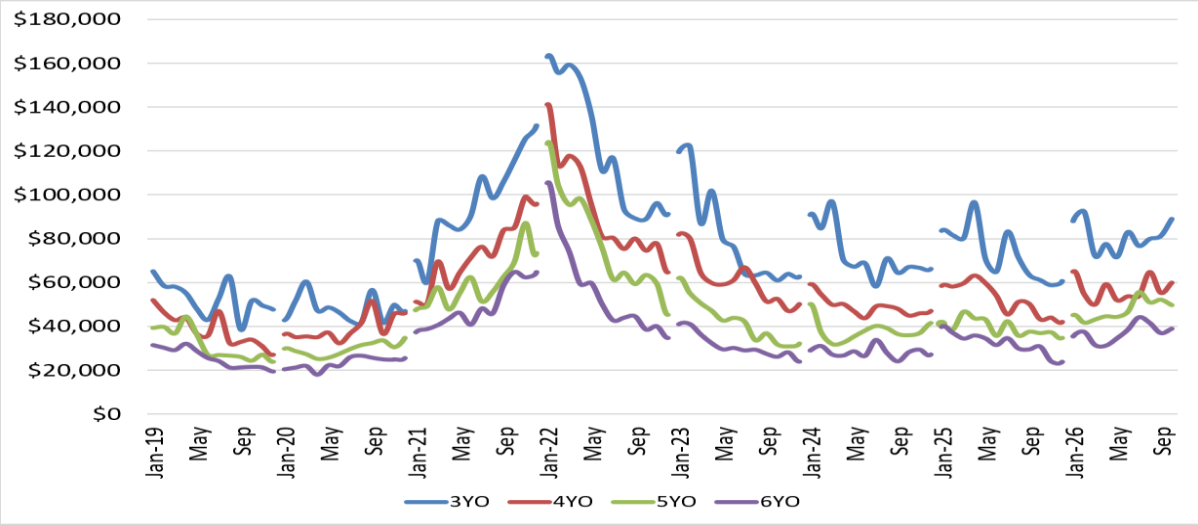
SELLING PRICES

Retail market strength held firm through October.

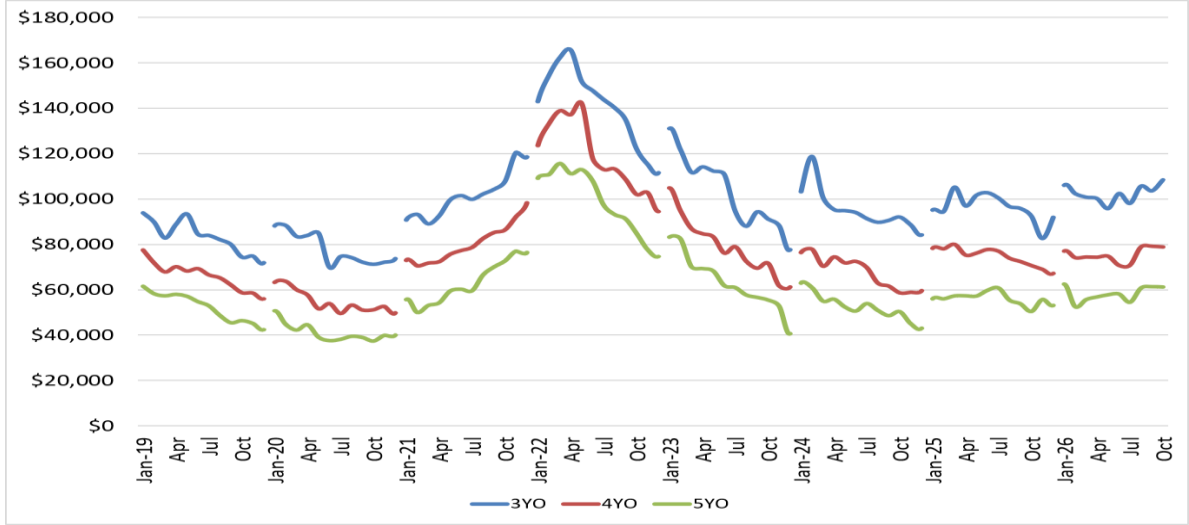
	Month-Over-Month	Year-Over-Year	YTD2026 vs. YTD2025	Avg. Monthly Depreciation – YTD2026	10/2026 vs. Late 2018/early 2019	10/2026 vs. late 2019
Retail Selling Prices	+1.8%	+16.3%	+2.3%	+0.5%	+9.7% (nominal) -18.2% (real)	+42.4% (nominal) +8.4% (real)
Wholesale Selling Prices*	N/A	N/A	N/A	N/A	N/A	N/A
Auction Selling Prices	+2.9%	+34.0%	+10.1%	+1.4%	+22.6% (nominal) -8.4% (real)	+96.1% (nominal) +49.6% (real)

** Inadequate data due to delayed submission from partner*

Average Auction Hammer Price: 3- to 6-Year-Old Benchmark Sleeper Tractor



Average Retail Selling Price: 3- to 5-Year-Old Sleeper Tractors



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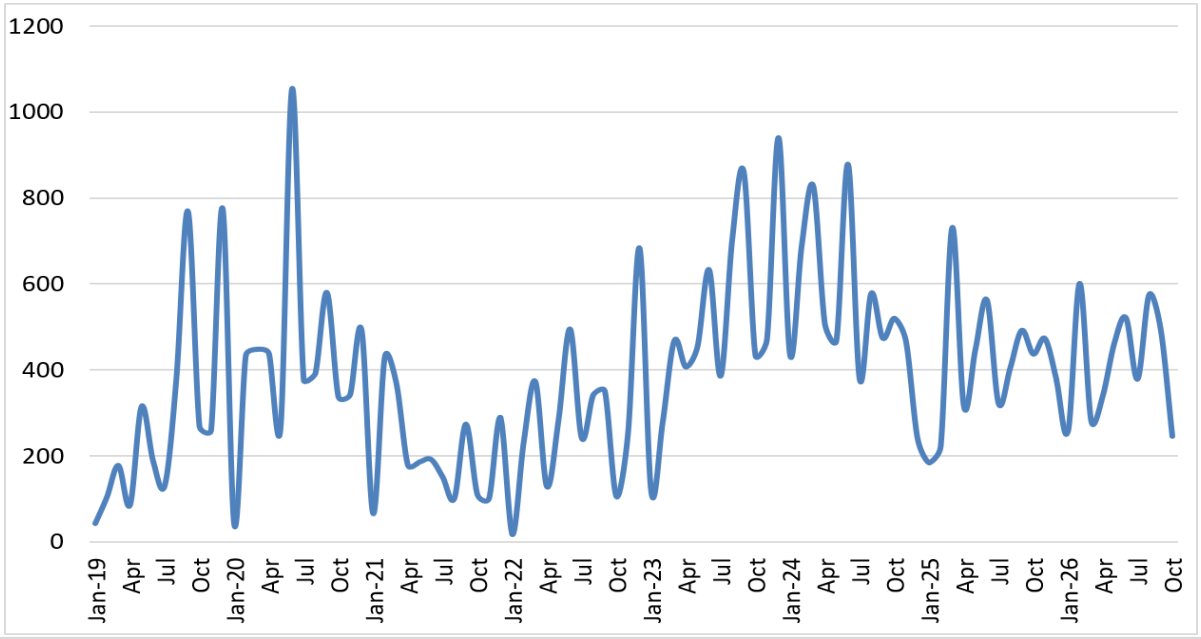
SALES VOLUME

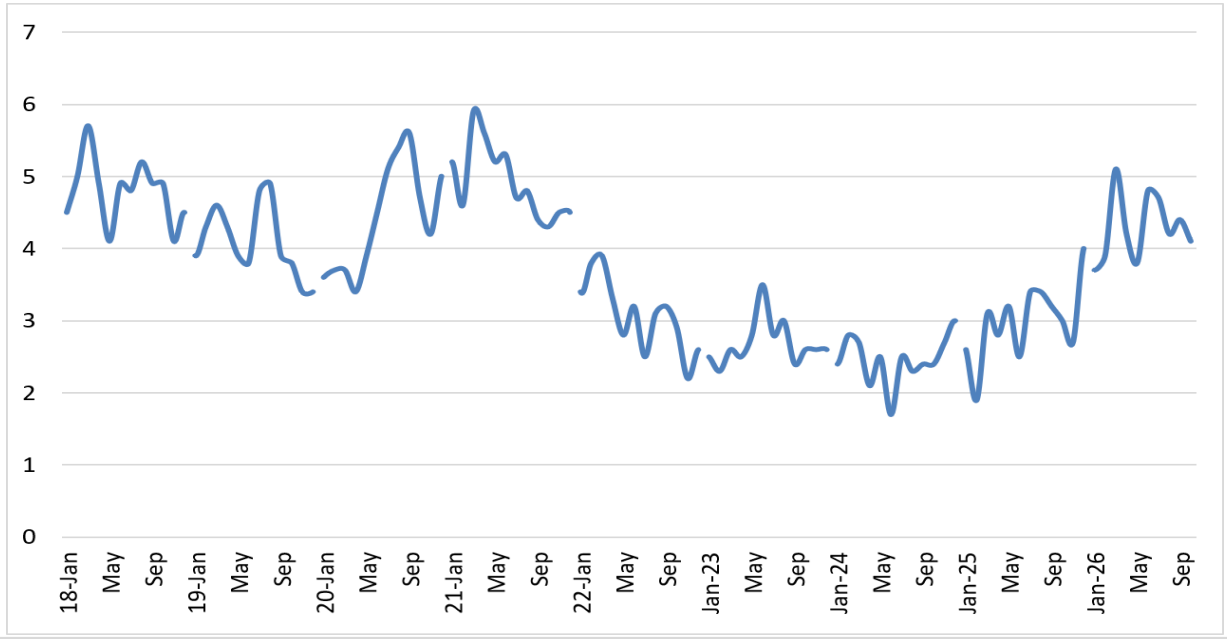
Retail sales per dealership dipped mildly in October, largely due to a lack of inventory to sell.

	Month-Over-Month	Year-Over-Year	YTD 2026 vs. YTD 2025
Retail Sales per Rooftop	-0.3 Truck	+0.7 Truck	+1.4 Trucks
Wholesale Sales per Rooftop	-0.2 Truck	-0.6 Truck	-0.2 Truck
Auction Volume	-14.1%	Unchanged	+4.9%

Auction Volume of the Three Most Common Sleeper Tractors (3- to 7-Year-Old)



Sales per Dealership Rooftop



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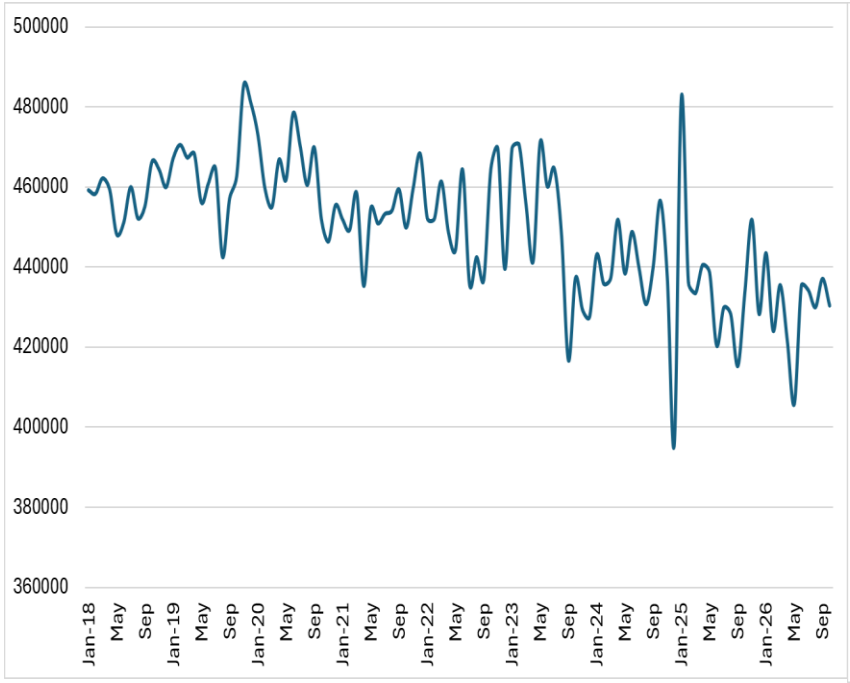
RETAIL METRICS

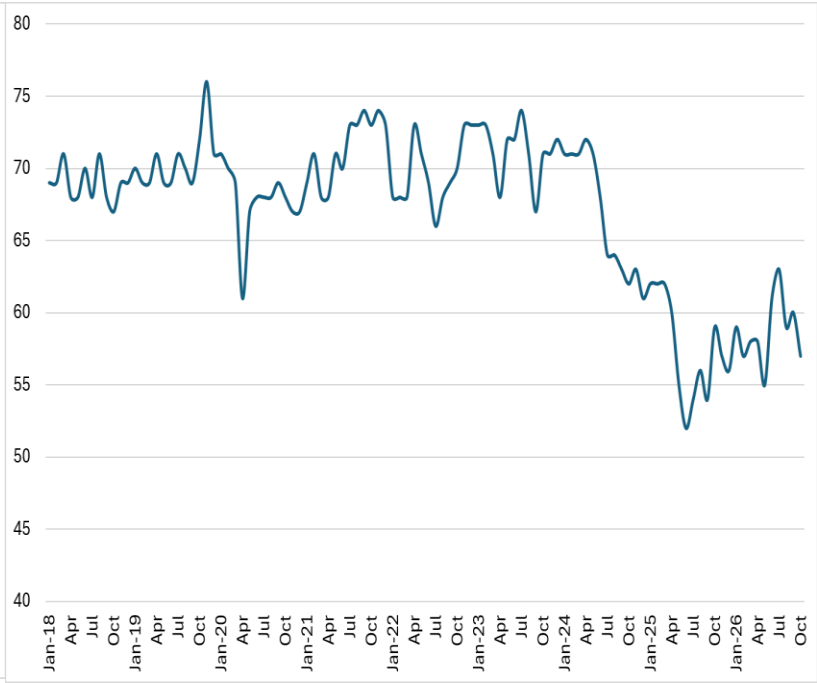
Retail pricing strength remains most evident in the under-5-year-old, less-than-450,000-mile segment.

	Month-Over-Month	Year-Over-Year	YTD2026 vs. YTD2025	Vs. Long-Term (Pre-2020) Trend
Average Age	-3 Months	-2 Months	+2 Months	-13 Months
Average Mileage	-1.5%	-0.8%	-1.4%	-11.9%

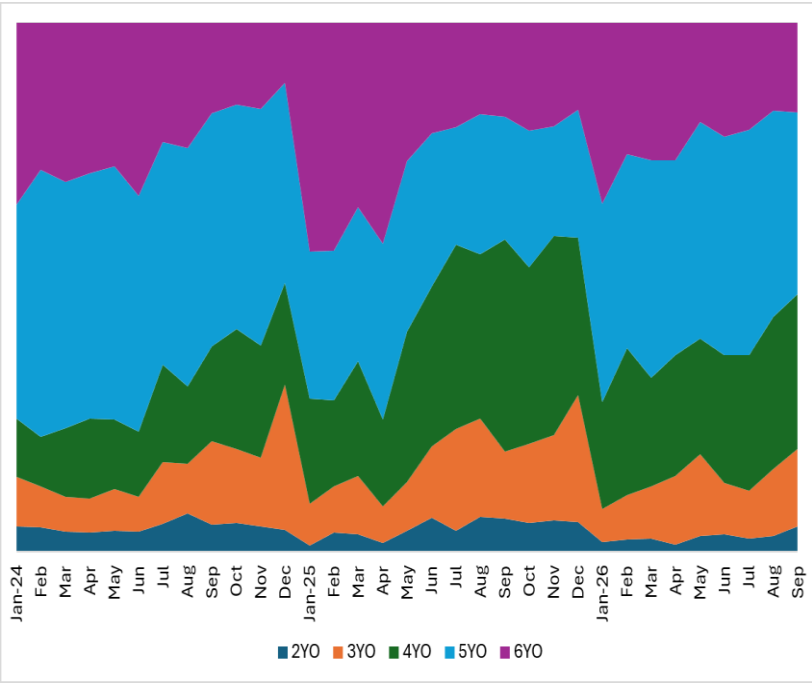
Average Mileage of all Sleepers Reported Sold (Retail)



Average Age of all Sleepers Reported Sold (Retail)



Relative Proportion of Sleepers Retailed by Age



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SUMMARY

New Class 8 deliveries showed strength starting in June and ramped up substantially in October. Truckmakers have significant ground to cover to fulfill model-year 2027 orders (which will be pushed into MY2028). We've been expecting deliveries to increase as parts constraints relax, meaning more trades. Fortunately, capacity utilization is forecast to remain tight into 2027, counteracting the pricing pressure of increased trades.

Note: This month's data is subject to change due to a delay in submissions from one of our partners.

This monthly update is a broad and general sample of JD Power analytical capabilities. For information about our valuation products, residual forecasting, make and model benchmarking, raw data and other services, contact Chris Visser at chris.visser@jdpa.com, visit our website at jdpowervalues.com or download our MarketValues app.

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