

UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION  
Washington, D. C. 20549

FORM 8-K

CURRENT REPORT  
Pursuant to Section 13 or 15(d) of  
the Securities Exchange Act of 1934

Date of Report: April 2, 2026  
(Date of earliest event reported)

FORD MOTOR COMPANY  
(Exact name of registrant as specified in its charter)

Delaware  
(State or other jurisdiction of incorporation)

1-3950  
(Commission File Number)

38-0549190  
(IRS Employer Identification No.)

One American Road  
Dearborn, Michigan  
(Address of principal executive offices)

48126  
(Zip Code)

Registrant's telephone number, including area code 313-322-3000

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions:

- Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

| <u>Title of each class</u>              | <u>Trading Symbol(s)</u> | <u>Name of each exchange on which registered</u> |
|---|--------------------------|--|
| Common Stock, par value \$.01 per share | F                        | New York Stock Exchange                          |
| 6.200% Notes due June 1, 2059           | FPRB                     | New York Stock Exchange                          |
| 6.000% Notes due December 1, 2059       | FPRC                     | New York Stock Exchange                          |
| 6.500% Notes due August 15, 2062        | FPRD                     | New York Stock Exchange                          |

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter).

Emerging growth company

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

**Item 8.01. Other Events.**

Our news release dated April 2, 2026 concerning U.S. sales in the first quarter of 2026 is filed as Exhibit 99 to this Report and incorporated by reference herein.

**Item 9.01. Financial Statements and Exhibits.**

| <u>Designation</u>         | <u>Description</u>  | <u>EXHIBITS*</u> | <u>Method of Filing</u> |
|----------------------------|---|------------------|-------------------------|
| <a href="#">Exhibit 99</a> | News release dated April 2, 2026 concerning first quarter 2026 U.S. sales |                  | Filed with this Report  |
| Exhibit 104                | Cover Page Interactive Data File (formatted in Inline XBRL)               |                  | **                      |

**SIGNATURE**

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

FORD MOTOR COMPANY  
(Registrant)

Date: April 2, 2026

By: /s/ David J. Witten  
David J. Witten  
Assistant Secretary

\* Any reference in the attached exhibit(s) to our corporate website(s) and/or other social media sites or platforms, and the contents thereof, is provided for convenience only; such websites or platforms and the contents thereof are not incorporated by reference into this Report nor deemed filed with the Securities and Exchange Commission.

\*\* Submitted electronically with this Report in accordance with the provisions of Regulation S-T.

## Ford Delivers Higher Q1 Retail Share Driven by Double-Digit SUV Growth; No. 1 Selling F-Series

- **Truck leadership:** F-Series continues as America's No. 1 truck in Q1 — the first step toward 50 straight years as the best-selling truck in America. Total pickup and van sales reached 257,475 vehicles
- **Large SUV sales surge:** Combined sales of Bronco, Explorer and Expedition rose 17.9%, the best start for this high-margin product lineup since 2002
- **Expedition sales climb:** Three-row SUV sales up 30.2% to 17,554 units, fueled by double-digit growth in every month of the quarter
- **Explorer gains:** America's No. 1 three-row SUV, Explorer, extended its lead with sales of 61,387 vehicles, a 29.7% increase
- **Continued off-road performance vehicle growth:** Ford's off-road performance vehicle sales rose 5%
- **No. 1 van:** Sales of the Ford Pro Transit Van, America's best-selling van, totaled 34,248
- **Commercial strength:** Ford kicks off the year as America's No. 1 commercial vehicle seller. Ford is on track to extend its commercial van leadership to 48 consecutive years
- **Subscriptions climb:** Paid software subscriptions for Ford Pro Intelligence rose approximately 29% in Q1, surpassing 865,000 active subscriptions to date
- **BlueCruise hands-free highway driving:** Surpassed 10.1 million cumulative hours
- **Lincoln SUV growth:** Aviator has record start; Navigator sales up

**DEARBORN, Mich., Apr. 2, 2026** — Powered by double-digit growth in Ford's high-margin large SUVs and F-Series' leadership as America's No. 1 truck, Ford delivered a higher first quarter retail share amid a shifting industry landscape.

Ford's strategic shift toward high-margin SUVs like Expedition and Explorer lifted its estimated retail market share to 11.6% - a 0.2 percentage point increase. This gain was achieved even as the company managed the planned sunsetting of the Escape and Lincoln Corsair.

Total sales declined 8.8%, reflecting these transitions and a particularly strong industry performance in March 2025, making for a difficult year-ago comparison. Ford will enter the second half of the year with a more focused, high-demand product mix [as F-Series inventory normalizes](#), and the Explorer and Bronco family gain further momentum.

F-Series in Q1 continued to demonstrate its market leadership as America's best-selling truck, delivering 159,901 trucks with sales growing sequentially in February and March. F-Series achieved its strongest volume for the quarter in March at 62,238 trucks sold.



F-Series sales momentum continued to strengthen even as dealer supply remained tight over year ago levels. While demand remains high, year-over-year F-Series sales in Q1 reflects a retiming of commercial production which is part of Ford's recovery plan following last year's Novelis plant fires. Ford expects the Novelis recovery plan to be uneven, with more volume recovery in the back half of the year.

"The first quarter showed our team worked hard to maintain retail share and navigate a changing industry, while underlying demand remains strong for F-Series, SUVs and the Ford Pro business," said [Andrew Frick, president, Ford Blue and Model e](#). "We're focusing on our high-demand segment strengths while continuing to meet the needs of our customers with affordable and premium vehicle choices."

## By the Numbers (Q1 2026)

- **Total sales:** 457,315 vehicles — estimated retail share growth of 0.2 percentage points to 11.6% for Q1
- **Total pickups and vans:** America's best-selling truck manufacturer, with 257,475 sales
- **F-Series:** 159,901 sales; America's best-selling truck
- **Bronco Sport** off to a record start: 35,021 SUVs
- **Explorer:** America's best-selling three row SUV: 61,387 SUVs
- **Ford Transit:** America's best-selling van: 34,248 vans sold
- **Ford Pro paid software subs:** topped 865,000 (+ approx. 29% in Q1)
- **BlueCruise hands-free driving:** exceeded 10.1 million cumulative hours

## Ford Trucks Continue as No. 1 in America with the Most Diverse Powertrain Offering in the Industry

F-Series began the year with 159,901 trucks sold, outselling its nearest competitor by 31,000 trucks.

- The Ford F-150 hybrid continued as America's best-selling full-size hybrid pickup on sales of 12,904 vehicles.
- Maverick hybrid sales totaled 17,050 in Q1 making it America's best-selling overall hybrid pickup.
- As America's best-selling van, Transit sales totaled 34,248 vans to begin the year.
- Ford truck sales for the year, including pickups and vans, reached 257,475 trucks, starting Ford off as America's No.1 selling truck manufacturer.

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## Explorer, Expedition Drive Growth

- Sales of Explorer, America's best-selling three-row SUV, jumped 29.7% on sales of 61,387 SUVs in Q1. Explorer continues to broaden its customer appeal by offering more choices to customers with the affordable Active and ST-line trims along with high-end Tremor and Platinum trims.
- Combined sales of the high-value Explorer Active and ST-line trims climbed 36.8% in Q1, while the higher trim Platinum and Tremor series were up 64.5%. Explorer Tremor posted its best monthly sales in March since its launch in October last year.
- Expedition began the year with sales of 17,554 SUVs, up 30.2%.
- The Bronco family, including Bronco and Bronco Sport, achieved a new record start to the year on sales of 66,218 SUVs sold, thanks to Bronco Sport's best-ever first quarter sales of 35,021 SUVs — up 5.0%. The affordable entry level Bronco Sport saw a 10.3% gain to begin the year.
- Off-road performance trims (all Bronco, Raptor, Tremor, FX4) accounted for 23.5% of Ford's U.S. total mix to start the year, up 3.1 percentage points over Q1 last year. Sales of these off-road performance trims were up 5.0% in Q1 on sales of 107,349 trucks and SUVs. Expedition and Explorer Tremor models had the largest percentage gains in Q1.

## Responding to Customer Demand for Affordability

Ford's commitment to providing a diverse range of price points paid off in Q1, as combined sales of entry-level trims for Maverick, Ranger and Bronco Sport were up 8.4%.

- Driving the growth were strong sales of the entry level XL Ranger, up 45.5%, while total sales of the entry level Bronco Sport achieved a 10.3% increase in Q1.
- Ford Ranger recorded a Q1 sales increase of 19.2% on sales of 17,775 pickups. At the higher end of Ranger trim series, Ranger Raptor sales were up 36.1% for Q1.

## Commercial Leadership: Ford Pro

Ford starts the year No. 1 in commercial vehicles, based on Ford's analysis of the most recent registration data for January, with Class 1-7 truck and van share up 1 percentage point year-over-year.



## Digital and Services: Momentum Continues for Ford Pro Intelligence and BlueCruise

- Ford Pro Intelligence paid software subscriptions grew by approximately 29% year-over-year in Q1 with a total of more than 865,000 active subscriptions today.
- BlueCruise hands-free highway driving surpassed 10.1 million cumulative hours at the end of the first quarter, with updates continuing to provide new hands-free capability to earlier model year vehicles.

## Lincoln SUVs Gain

Driven by a record-setting first quarter for Aviator, Lincoln's large luxury SUV lineup saw significant gains. Aviator sales surged 31.4% to 6,266 vehicles, complemented by a 6.5% rise in Navigator sales, which totaled 4,322 units.

## Looking Ahead

Ordering for the new [Mustang RTR](#) is now available and the high-performance [Mustang Dark Horse SC](#) ordering opens later in April. Later this spring, ordering will open for the [30th edition trim package in the Expedition](#), which goes on sale this summer.

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### **About Ford Motor Company**

*Ford Motor Company (NYSE: F) is a global company based in Dearborn, Michigan, committed to helping build a better world, where every person is free to move and pursue their dreams. The company's Ford+ plan for growth and value creation combines existing strengths, new capabilities, and always-on relationships with customers to enrich experiences for customers and deepen their loyalty. Ford develops and delivers innovative, must-have Ford trucks, sport utility vehicles, commercial vans and cars and Lincoln luxury vehicles, along with connected services, including BlueCruise (ADAS) and security. The company offers freedom of choice through three customer-centered business segments: Ford Blue, engineering iconic gas-powered and hybrid vehicles; Ford Model e, inventing breakthrough electric vehicles ("EVs") along with embedded software that defines always-on digital experiences for all customers; and Ford Pro, helping commercial customers transform and expand their businesses with vehicles and services tailored to their needs. Additionally, the Company provides financial services through Ford Motor Credit Company. Ford employs about 169,000 people worldwide. More information about the company and its products and services is available at [fromtheroad.ford.com](http://fromtheroad.ford.com).*

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