

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

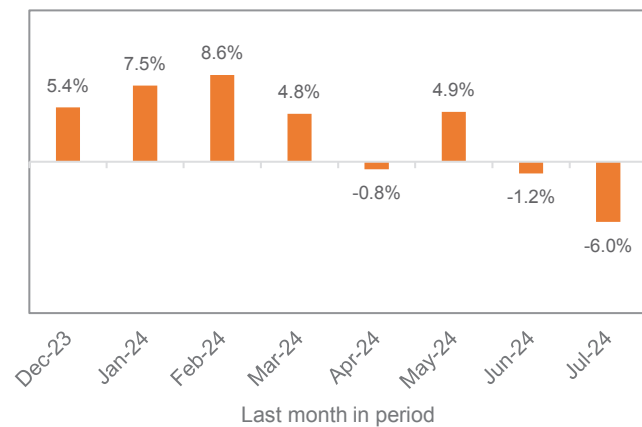
Data thru July 2024

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru July			YTD Market Share		
	6/23 & 7/23	6/24 & 7/24	% change	YTD '23	YTD '24	% change	YTD '23	YTD '24	change
Industry Total	25,781	21,370	-17.1%	82,868	82,284	-0.7%	28.4	25.0	-3.4
Cars	7,334	5,010	-31.7%	23,569	20,535	-12.9%	71.6	75.0	3.4
Light Trucks	18,447	16,360	-11.3%	59,299	61,749	4.1%			

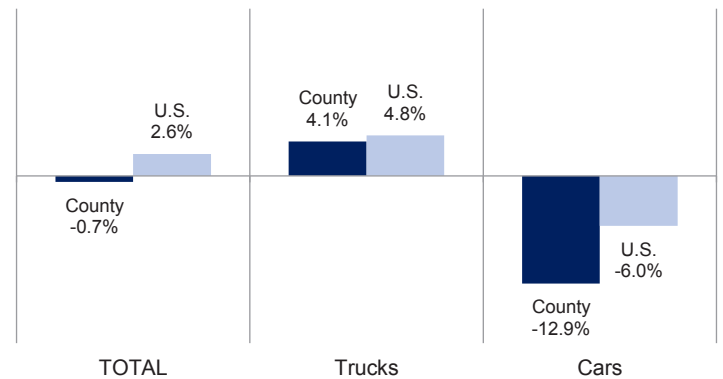
Data sourced from Experian Automotive. July '24 figures partially estimated. Note: due to the customary lag in recording of registrations, the impact on sales resulting from the CDK computer outage is largely reflected in July registrations.

Percent Change in Three Month Moving Average of New Retail Registrations versus Year Earlier



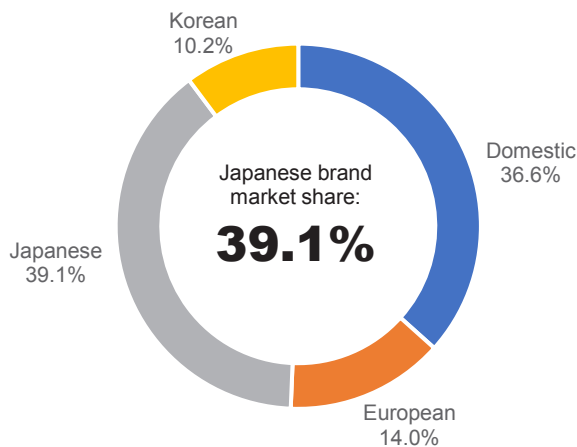
The graph above shows the year-over-year percent change in the three month moving average of new vehicle registrations. Data sourced from Experian Automotive.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '24 thru July vs. Year Earlier

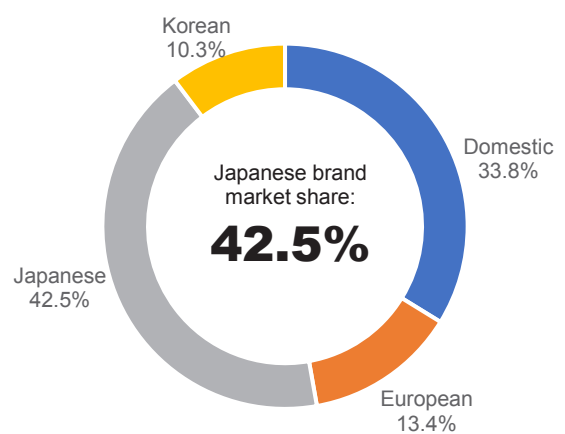


The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. Data sourced from Experian Automotive.

San Diego County Market Shares YTD '23 thru July



San Diego County Market Shares YTD '24 thru July



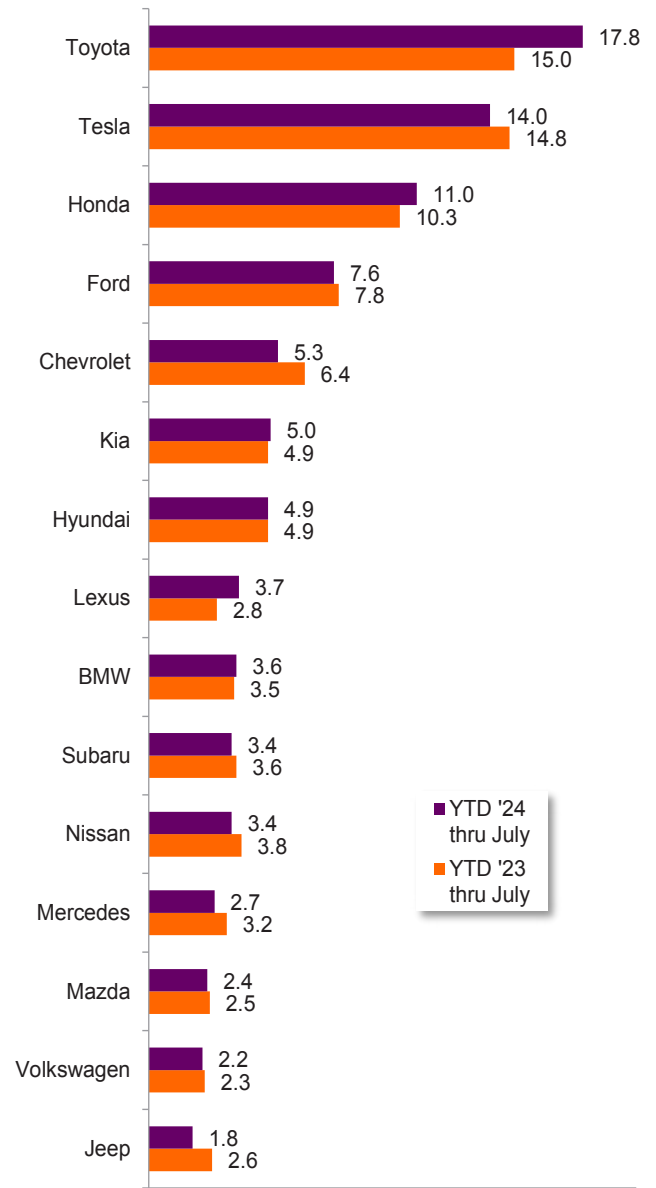
Data Information

Data presented in Auto Outlook measures new retail vehicle registrations in San Diego County. Monthly recording of registrations occurs when vehicle title information is processed, which may differ from date of sale. Title recording can occasionally be subject to processing delays by governmental agencies. For this reason, the year-to-date figures will typically be more reflective of market results.

San Diego County					
New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '23 thru July	YTD '24 thru July	% change	YTD '23 thru July	YTD '24 thru July
Acura	566	419	-26%	0.7%	0.5%
Alfa Romeo	37	41	11%	0.0%	0.0%
Audi	1,441	1,345	-7%	1.7%	1.6%
BMW	2,900	2,927	1%	3.5%	3.6%
Buick	134	138	3%	0.2%	0.2%
Cadillac	447	501	12%	0.5%	0.6%
Chevrolet	5,285	4,350	-18%	6.4%	5.3%
Chrysler	200	145	-28%	0.2%	0.2%
Dodge	392	352	-10%	0.5%	0.4%
Ford	6,449	6,250	-3%	7.8%	7.6%
Genesis	336	266	-21%	0.4%	0.3%
GMC	1,046	1,190	14%	1.3%	1.4%
Honda	8,572	9,013	5%	10.3%	11.0%
Hyundai	4,039	3,995	-1%	4.9%	4.9%
Infiniti	201	185	-8%	0.2%	0.2%
Jaguar	62	75	21%	0.1%	0.1%
Jeep	2,134	1,490	-30%	2.6%	1.8%
Kia	4,080	4,144	2%	4.9%	5.0%
Land Rover	679	702	3%	0.8%	0.9%
Lexus	2,303	3,063	33%	2.8%	3.7%
Lincoln	175	216	23%	0.2%	0.3%
Maserati	55	37	-33%	0.1%	0.0%
Mazda	2,105	1,995	-5%	2.5%	2.4%
Mercedes	2,656	2,258	-15%	3.2%	2.7%
MINI	269	228	-15%	0.3%	0.3%
Mitsubishi	151	85	-44%	0.2%	0.1%
Nissan	3,127	2,760	-12%	3.8%	3.4%
Polestar	43	127	195%	0.1%	0.2%
Porsche	598	590	-1%	0.7%	0.7%
Ram	1,073	707	-34%	1.3%	0.9%
Rivian	588	760	29%	0.7%	0.9%
Subaru	2,980	2,800	-6%	3.6%	3.4%
Tesla	12,277	11,498	-6%	14.8%	14.0%
Toyota	12,412	14,645	18%	15.0%	17.8%
Volkswagen	1,939	1,833	-5%	2.3%	2.2%
Volvo	790	610	-23%	1.0%	0.7%
Other	327	544	66%	0.4%	0.7%



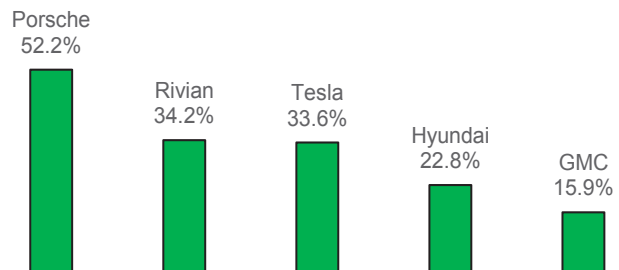
County Market Share for Top 15 Selling Brands YTD '24 thru July vs. Year Earlier



Top ten ranked brands in each percent change category are shaded gray. Data sourced from Experian Automotive.

Brands On the Move

Largest % increase in registrations during past 3 months (May '24 thru Jul '24) vs. preceding 3 months (Feb '24 thru Apr '24) Among top 20 selling brands in past three months



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