

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

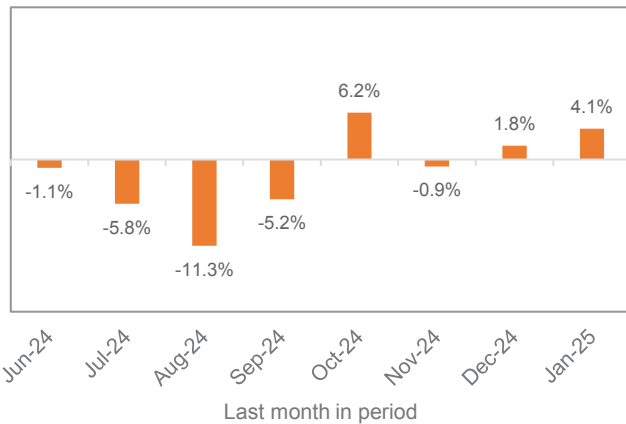
Data thru January 2025

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual			Annual Market Share		
	12/23 & 1/24	12/24 & 1/25	% change	2023	2024	% change	2023	2024	change
Industry Total	22,570	26,726	18.4%	142,549	142,492	0.0%	28.5	25.2	-3.3
Cars	5,951	6,211	4.4%	40,608	35,860	-11.7%	71.5	74.8	3.3
Light Trucks	16,619	20,515	23.4%	101,941	106,632	4.6%			

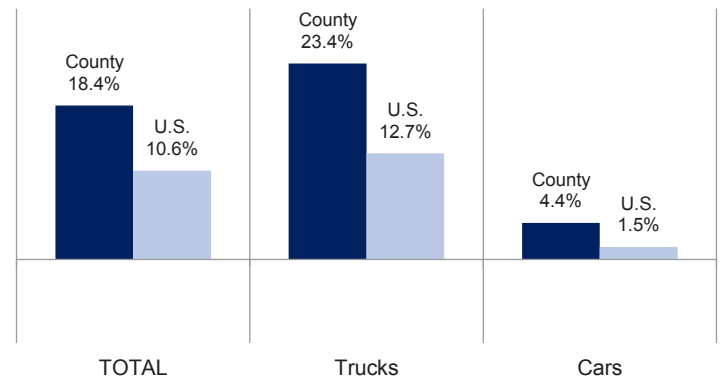
Data sourced from Experian Automotive. January '25 figures partially estimated.

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.

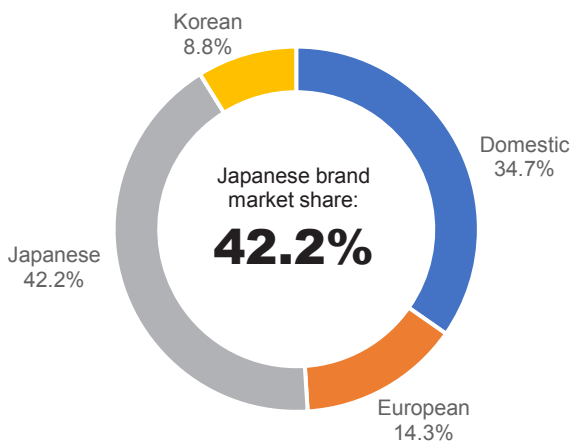
Percent Change in County and U.S. New Retail Light Vehicle Markets Dec. '24 & Jan. '25 vs. Year Earlier



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.

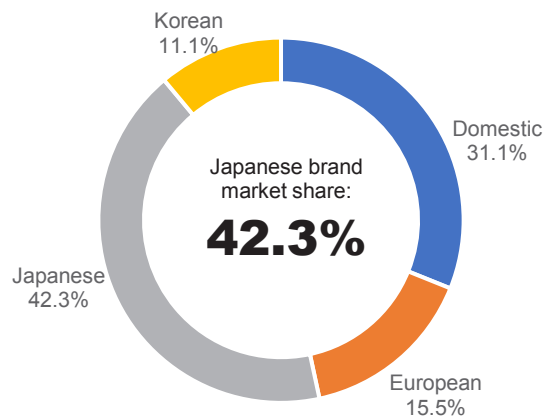
San Diego County Market Shares

Dec. '23 & Jan. '24



San Diego County Market Shares

Dec. '24 & Jan. '25



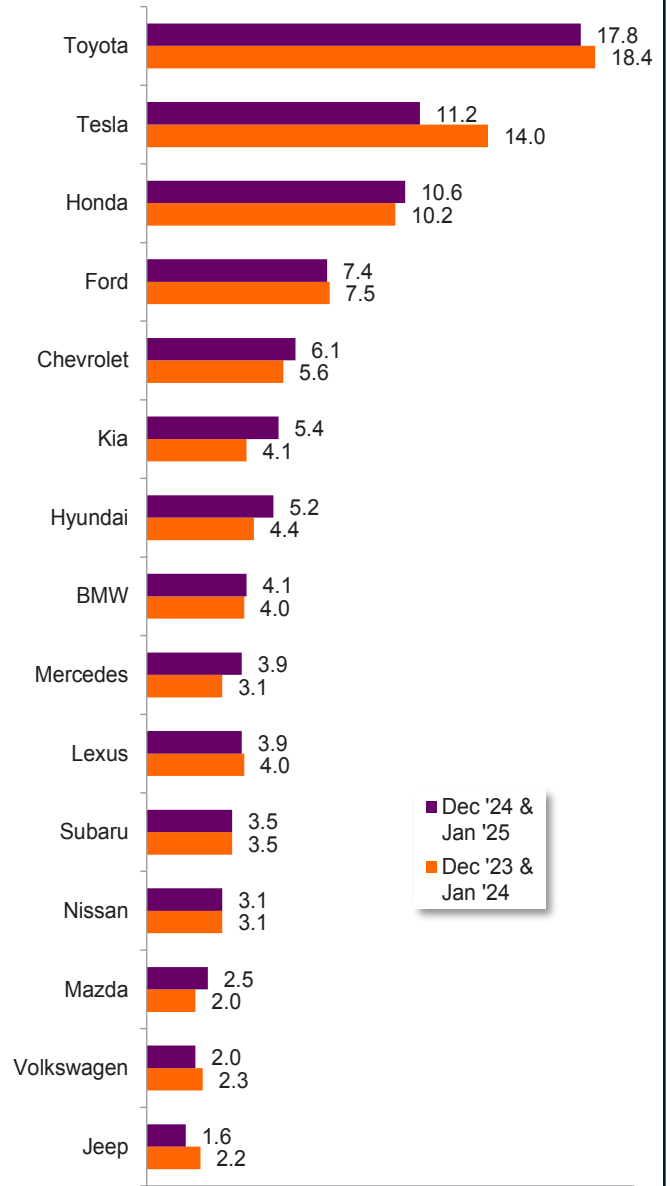
Data Information

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	
	Dec '23 & Jan '24	Dec '24 & Jan '25	% change	Dec '23 & Jan '24	Dec '24 & Jan '25
Acura	135	147	9%	0.6%	0.6%
Alfa Romeo	22	10	-55%	0.1%	0.0%
Audi	390	426	9%	1.7%	1.6%
BMW	898	1,090	21%	4.0%	4.1%
Buick	32	70	119%	0.1%	0.3%
Cadillac	118	172	46%	0.5%	0.6%
Chevrolet	1,259	1,623	29%	5.6%	6.1%
Chrysler	58	22	-62%	0.3%	0.1%
Dodge	70	35	-50%	0.3%	0.1%
Ford	1,690	1,987	18%	7.5%	7.4%
Genesis	76	96	26%	0.3%	0.4%
GMC	267	407	52%	1.2%	1.5%
Honda	2,313	2,830	22%	10.2%	10.6%
Hyundai	997	1,390	39%	4.4%	5.2%
Infiniti	40	72	80%	0.2%	0.3%
Jaguar	13	16	23%	0.1%	0.1%
Jeep	487	425	-13%	2.2%	1.6%
Kia	921	1,451	58%	4.1%	5.4%
Land Rover	182	295	62%	0.8%	1.1%
Lexus	911	1,037	14%	4.0%	3.9%
Lincoln	48	41	-15%	0.2%	0.2%
Maserati	15	7	-53%	0.1%	0.0%
Mazda	460	661	44%	2.0%	2.5%
Mercedes	694	1,036	49%	3.1%	3.9%
MINI	63	85	35%	0.3%	0.3%
Mitsubishi	22	30	36%	0.1%	0.1%
Nissan	704	825	17%	3.1%	3.1%
Polestar	12	17	42%	0.1%	0.1%
Porsche	195	292	50%	0.9%	1.1%
Ram	254	213	-16%	1.1%	0.8%
Rivian	300	275	-8%	1.3%	1.0%
Subaru	779	943	21%	3.5%	3.5%
Tesla	3,171	2,986	-6%	14.0%	11.2%
Toyota	4,151	4,765	15%	18.4%	17.8%
Volkswagen	522	528	1%	2.3%	2.0%
Volvo	167	252	51%	0.7%	0.9%
Other	134	169	26%	0.6%	0.6%



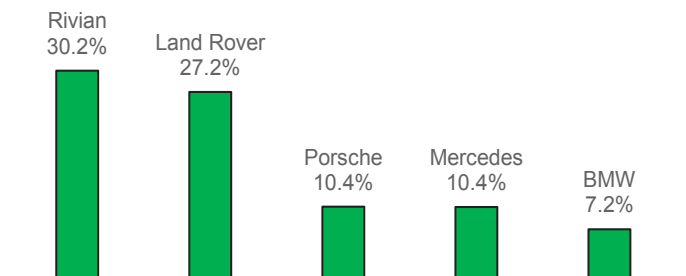
County Market Share for Top 15 Selling Brands Dec. '24 & Jan. '25 vs. Year Earlier



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 (Nov '24 thru Jan '25) vs. preceding 3 months (Aug '24 thru Oct '24) Among top 20 selling brands in past three months



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