

# San Diego Outlook

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Covering the San Diego County automotive market

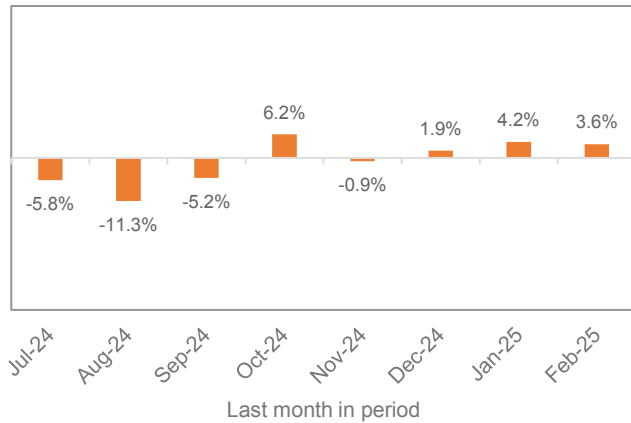
Data thru February 2025

## San Diego County New Retail Car and Light Truck Registrations

	YTD thru Feb.			Previous Three Months			3 month Market Share		
	YTD '24	YTD '25	% change	12/23-2/24	12/24-2/25	% change	12/23-2/24	12/24-2/25	change
Industry Total	25,249	25,581	1.3%	35,737	37,035	3.6%			
Cars	6,636	5,962	-10.2%	9,442	8,676	-8.1%	26.4	23.4	-3.0
Light Trucks	18,613	19,619	5.4%	26,295	28,359	7.8%	73.6	76.6	3.0

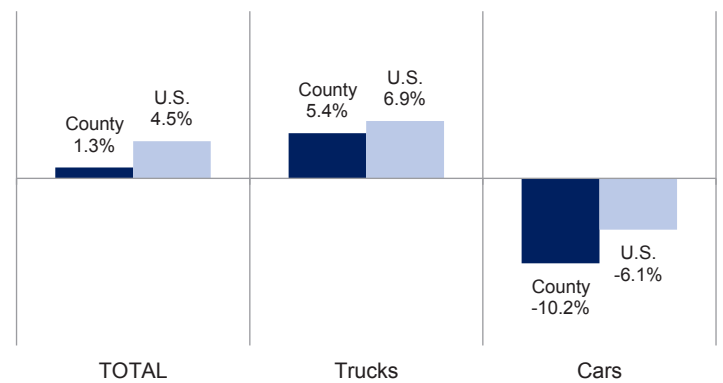
Data sourced from Experian Automotive. Figures for February 2025 are partially estimated.

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



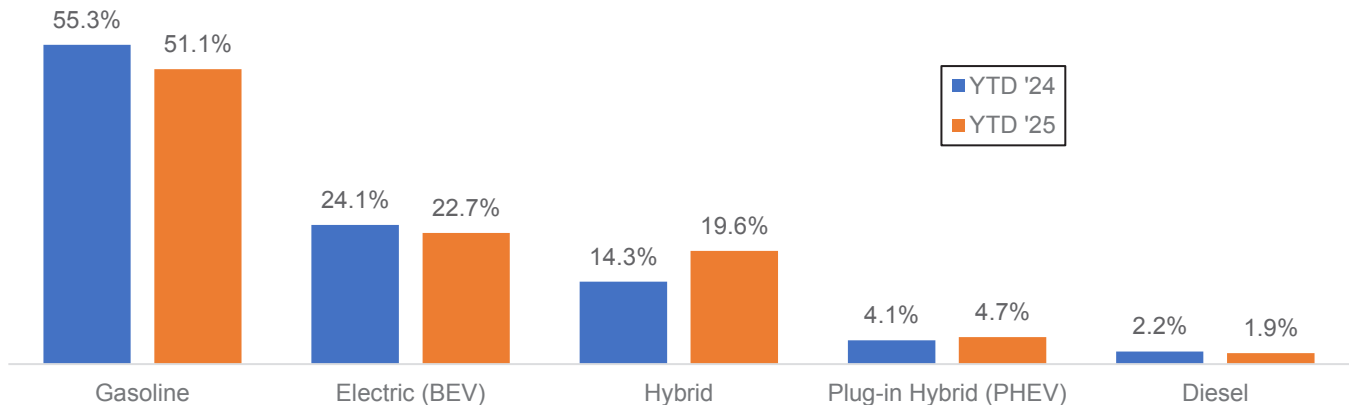
The graph above shows the year-over-year percent change in the three month moving average of new vehicle registrations. Data sourced from Experian Automotive.

**Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '25 thru February 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 by Powertrain Type YTD 2024 and YTD 2025, thru February**



The graph above shows market share by type of powertrain. Hybrid vehicle market share excludes mild hybrids. Data sourced from Experian Automotive.

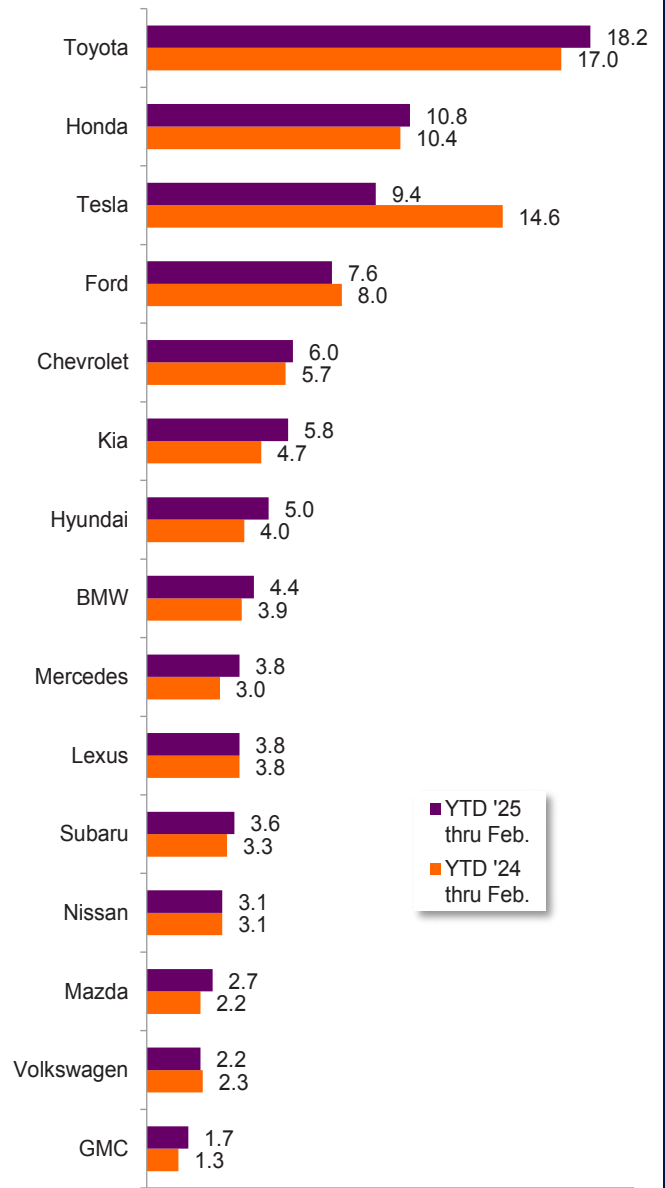
## Data Information

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 '24 thru Feb.	YTD '25 thru Feb.	% change	YTD '24 thru Feb.	YTD '25 thru Feb.
Acura	153	162	6%	0.6%	0.6%
Alfa Romeo	18	10	-44%	0.1%	0.0%
Audi	471	447	-5%	1.9%	1.7%
BMW	988	1,130	14%	3.9%	4.4%
Buick	27	58	115%	0.1%	0.2%
Cadillac	158	187	18%	0.6%	0.7%
Chevrolet	1,441	1,529	6%	5.7%	6.0%
Chrysler	57	33	-42%	0.2%	0.1%
Dodge	98	36	-63%	0.4%	0.1%
Ford	2,021	1,933	-4%	8.0%	7.6%
Genesis	86	108	26%	0.3%	0.4%
GMC	331	424	28%	1.3%	1.7%
Honda	2,626	2,760	5%	10.4%	10.8%
Hyundai	1,009	1,276	26%	4.0%	5.0%
Infiniti	59	57	-3%	0.2%	0.2%
Jaguar	22	14	-36%	0.1%	0.1%
Jeep	530	404	-24%	2.1%	1.6%
Kia	1,198	1,473	23%	4.7%	5.8%
Land Rover	230	327	42%	0.9%	1.3%
Lexus	966	981	2%	3.8%	3.8%
Lincoln	54	45	-17%	0.2%	0.2%
Maserati	6	7	17%	0.0%	0.0%
Mazda	553	683	24%	2.2%	2.7%
Mercedes	756	984	30%	3.0%	3.8%
MINI	89	81	-9%	0.4%	0.3%
Mitsubishi	25	30	20%	0.1%	0.1%
Nissan	775	802	3%	3.1%	3.1%
Polestar	40	16	-60%	0.2%	0.1%
Porsche	192	251	31%	0.8%	1.0%
Ram	273	205	-25%	1.1%	0.8%
Rivian	220	187	-15%	0.9%	0.7%
Subaru	838	931	11%	3.3%	3.6%
Tesla	3,687	2,410	-35%	14.6%	9.4%
Toyota	4,291	4,654	8%	17.0%	18.2%
Volkswagen	577	574	-1%	2.3%	2.2%
Volvo	207	230	11%	0.8%	0.9%
Other	177	142	-20%	0.7%	0.6%



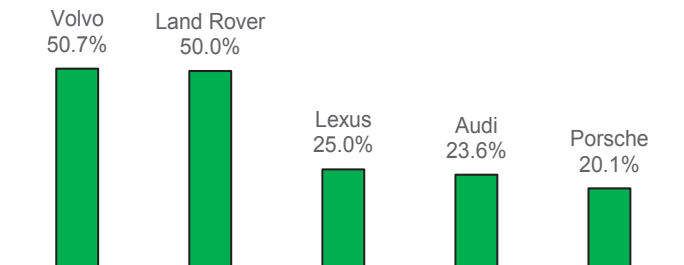
County Market Share for Top 15 Selling Brands YTD '25 thru February vs. Year Earlier



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 (Dec '24 thru Feb '25) vs. preceding 3 months (Sep '24 thru Nov '24) Among top 20 selling brands in past three months



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