

San Diego Outlook

Released by:
**New Car
Dealers Association
San Diego County**

Covering the San Diego County automotive market

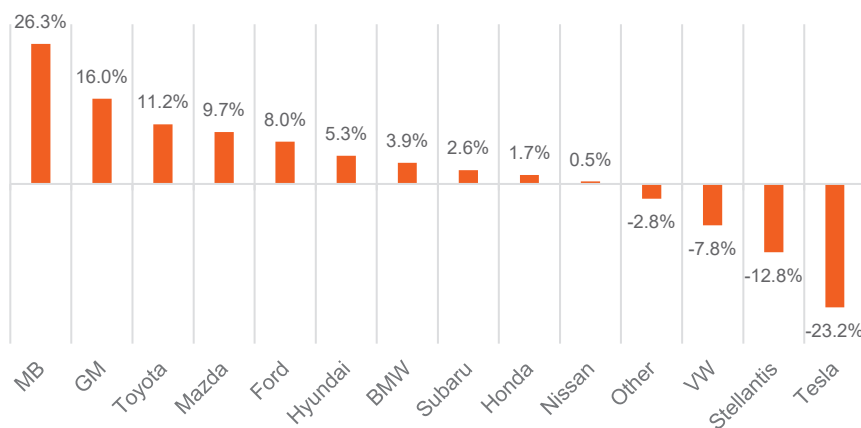
Data thru August 2025

San Diego County New Retail Car and Light Truck Registrations

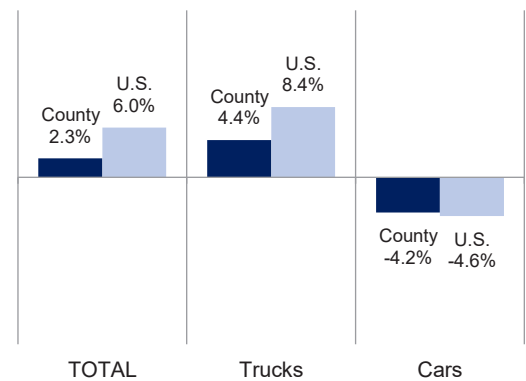
	Most Recent Two Months			YTD thru Aug.			YTD Market Share		
	7/24 & 8/24	7/25 & 8/25	% change	YTD '24	YTD '25	% change	YTD '24	YTD '25	change
Industry Total	23,736	23,990	1.1%	96,207	98,390	2.3%			
Cars	5,857	5,298	-9.5%	24,132	23,111	-4.2%	25.1	23.5	-1.6
Light Trucks	17,879	18,692	4.5%	72,075	75,279	4.4%	74.9	76.5	1.6

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

Percent Change in County Registrations by Manufacturer YTD 2025 thru Aug. vs. YTD 2024



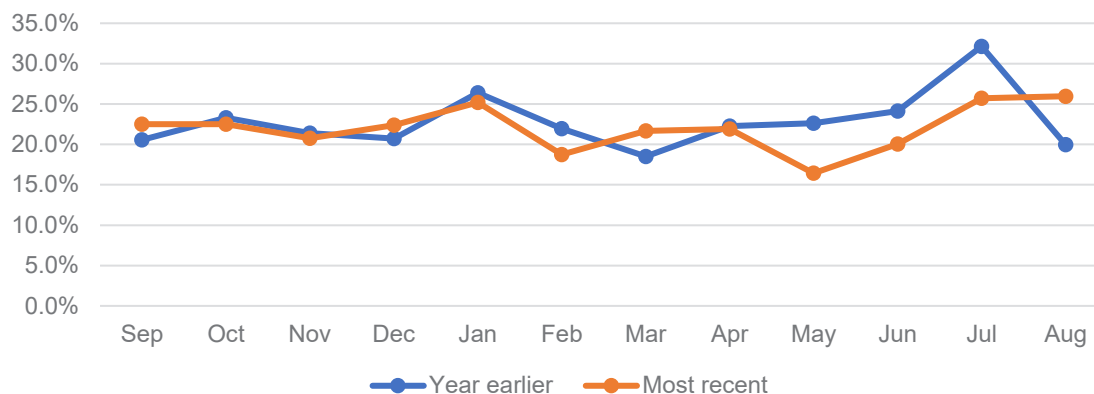
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD 2025 thru Aug. vs. YTD 2024



The graph above shows the percent change in new car and light truck registrations by manufacturer during the first eight months of this year versus the same period a year earlier. Data sourced from Experian Automotive. Note: MB is Mercedes-Benz.

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.

BEV Share of San Diego County New Retail Light Vehicle Registrations Year earlier period (blue line): Sep-23 thru Aug-24 Most recent period (orange line): Sep-24 thru Aug-25



Monthly BEV Market Share

Aug-25	26.0%
Jul-25	25.7%
Aug-24	20.0%

The graph above show 24 months of history for BEV (battery electric vehicle) market share in San Diego County. The most recent 12 months are shown by the orange line, and the year-earlier 12 month period is shown by the blue line. Data sourced from Experian Automotive.

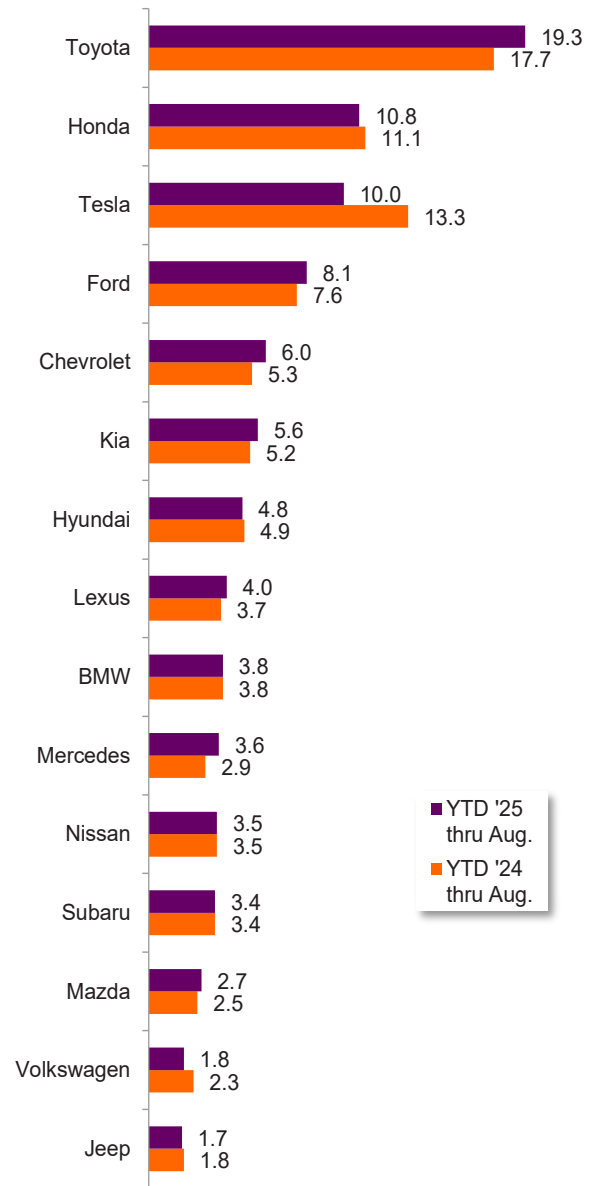
Data Information

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 Aug.	YTD '25 thru Aug.	% change	YTD '24 thru Aug.	YTD '25 thru Aug.
Acura	494	711	44%	0.5%	0.7%
Alfa Romeo	46	33	-28%	0.0%	0.0%
Audi	1,550	1,519	-2%	1.6%	1.5%
BMW	3,625	3,752	4%	3.8%	3.8%
Buick	159	186	17%	0.2%	0.2%
Cadillac	605	686	13%	0.6%	0.7%
Chevrolet	5,057	5,894	17%	5.3%	6.0%
Chrysler	172	124	-28%	0.2%	0.1%
Dodge	384	136	-65%	0.4%	0.1%
Ford	7,352	8,003	9%	7.6%	8.1%
Genesis	313	337	8%	0.3%	0.3%
GMC	1,369	1,575	15%	1.4%	1.6%
Honda	10,698	10,666	0%	11.1%	10.8%
Hyundai	4,719	4,719	0%	4.9%	4.8%
Infiniti	215	176	-18%	0.2%	0.2%
Jaguar	90	44	-51%	0.1%	0.0%
Jeep	1,706	1,643	-4%	1.8%	1.7%
Kia	4,979	5,482	10%	5.2%	5.6%
Land Rover	805	940	17%	0.8%	1.0%
Lexus	3,588	3,947	10%	3.7%	4.0%
Lincoln	251	206	-18%	0.3%	0.2%
Maserati	39	25	-36%	0.0%	0.0%
Mazda	2,402	2,636	10%	2.5%	2.7%
Mercedes	2,774	3,504	26%	2.9%	3.6%
MINI	260	286	10%	0.3%	0.3%
Mitsubishi	98	118	20%	0.1%	0.1%
Nissan	3,340	3,396	2%	3.5%	3.5%
Polestar	153	82	-46%	0.2%	0.1%
Porsche	696	792	14%	0.7%	0.8%
Ram	811	778	-4%	0.8%	0.8%
Rivian	806	807	0%	0.8%	0.8%
Subaru	3,267	3,352	3%	3.4%	3.4%
Tesla	12,810	9,839	-23%	13.3%	10.0%
Toyota	16,999	18,948	11%	17.7%	19.3%
Volkswagen	2,234	1,820	-19%	2.3%	1.8%
Volvo	723	773	7%	0.8%	0.8%
Other	618	455	-26%	0.6%	0.5%

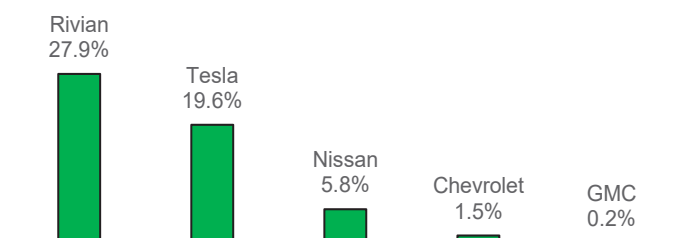
Top ten ranked brands in each percent change category are shaded gray. Data sourced from Experian Automotive.

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



Brands On the Move

**Largest % increase in registrations
during past 3 months (Jun '25 thru Aug '25) vs.
preceding 3 months (Mar '25 thru May '25)
Among top 20 selling brands in past three months**



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