

San Diego Auto Outlook

Comprehensive information on the San Diego County new vehicle market



NEW CAR
DEALERS ASSOCIATION
SAN DIEGO COUNTY

FORECAST

New Vehicle Registrations Predicted to Decline Next Year



Year-to-date results in county market

County new retail light vehicle registrations increased 2.5% during the first nine months of this year versus a year earlier, below the 6.1% improvement in the nation. Third quarter registrations were up 2.1% compared to 3Q '24, surpassing expectations. (See below for more details).



Factors steering the new vehicle market

At the start of this year, the outlook was relatively straightforward. Vehicle affordability was an obstacle hindering sales, while pent-up demand was a positive offset. The consensus forecast was for slow growth in new vehicle sales. However, a wildcard emerged when tariffs were imposed and the rules governing global trade policy underwent a complete overhaul. This magnitude of change lacks historical precedence and introduced several key unknowns. How quickly would manufacturers increase vehicle prices due to tariffs? How much pull-ahead demand would occur by shoppers trying to buy in advance of these anticipated price increases? How long would it take for the inflationary impacts of tariffs to circulate through the economy? And what would actual tariff rates end up being? Higher tariffs will eventually pull sales lower, but pinpointing the timing has been elusive due to the uncertainty in being able to answer these questions. Up until now, manufacturers have largely avoided price increases and many shoppers have entered the market prematurely in the expectation of higher prices in the future, contributing to stronger than expected results. But higher tariffs will eventually be a headwind for new vehicle sales.



Forecast for rest of this year and 2026

New retail light vehicle registrations in the fourth quarter of this year are predicted to decline 4.1% versus the year earlier. The market is expected to increase by less than 1% for the entire year. At this point, it looks like new vehicle sales are likely to decline in 2026. More details on next year's outlook in the 1Q '26 release.



Tracking alternative powertrain sales

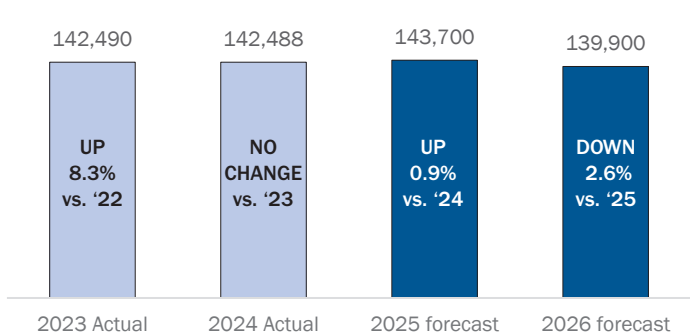
The September 30, 2025 expiration of federal government BEV incentives gave a boost to electric vehicle sales in the third quarter of this year. Combined BEV/PHEV share increased to 30.5% in 3Q '25, up from 23.7% in 2Q. BEV share will almost certainly move lower at the end of this year. Hybrid vehicle sales continue to post gains, with registrations increasing 38% during the first nine months of this year versus the year earlier.



Monitoring brand sales performance

County new vehicle registrations for Mercedes, Land Rover, Chevrolet, GMC, Toyota, and Porsche increased by more than 10% so far this year versus year earlier. Rivian, Mercedes, and Mazda fared better in the county than in the Nation (see page 4). Registrations increased by more than 47% for seven brands over the past five years: Genesis, Tesla, Cadillac, GMC, Lexus, Hyundai, and Kia.

Forecast for County New Retail Light Vehicle Registrations



The graph above shows annual new retail light vehicle registrations in 2023 and 2024, and Auto Outlook's projections for 2025 and 2026. Historical data sourced from Experian Automotive.

Market Summary

	YTD '24 thru Sept.	YTD '25 thru Sept.	% Chg. '24 to '25	Mkt. Share YTD '25
TOTAL	107,020	109,680	2.5%	
Car	26,968	25,617	-5.0%	23.4%
Light Truck	80,052	84,063	5.0%	76.6%
Domestic	35,159	33,753	-4.0%	30.8%
European	14,769	15,273	3.4%	13.9%
Japanese	45,784	48,783	6.6%	44.5%
Other Asian	11,308	11,871	5.0%	10.8%

Domestics consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa Romeo and FIAT), Tesla, Rivian, and Lucid. Other Asian includes Genesis, Hyundai, Kia, and VinFast.
Data sourced from Experian Automotive.

KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



COUNTY MARKET VS. U.S.

% Change In
New Retail Market
YTD '25 thru Sept.
vs.
YTD '24

San Diego County
UP 2.5%

California
UP 3.6%

U.S.
UP 6.1%

New retail light vehicle registrations in the county increased 2.5% during the first nine months of this year. State market increased 3.6%, while U.S. was up 6.1%.

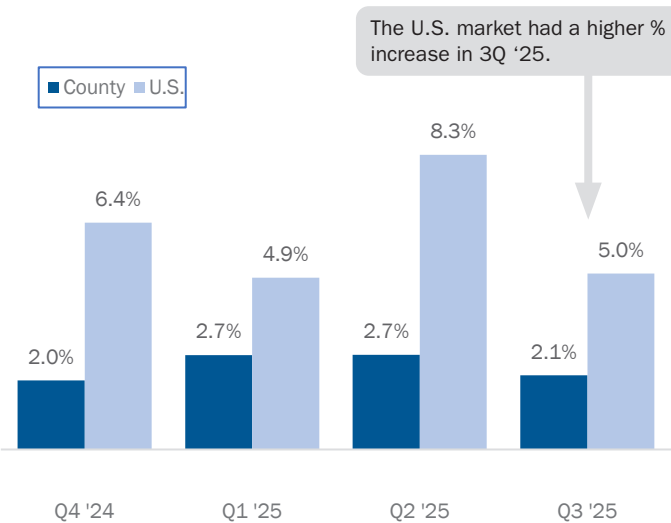
Data sourced from Experian Automotive.



QUARTERLY RESULTS

QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



Data sourced from Experian Automotive.

QUARTERLY PERSPECTIVE

3Q '25 Registrations Versus Average for Previous Five Years



San Diego Auto Outlook

Published by:
Auto Outlook, Inc.
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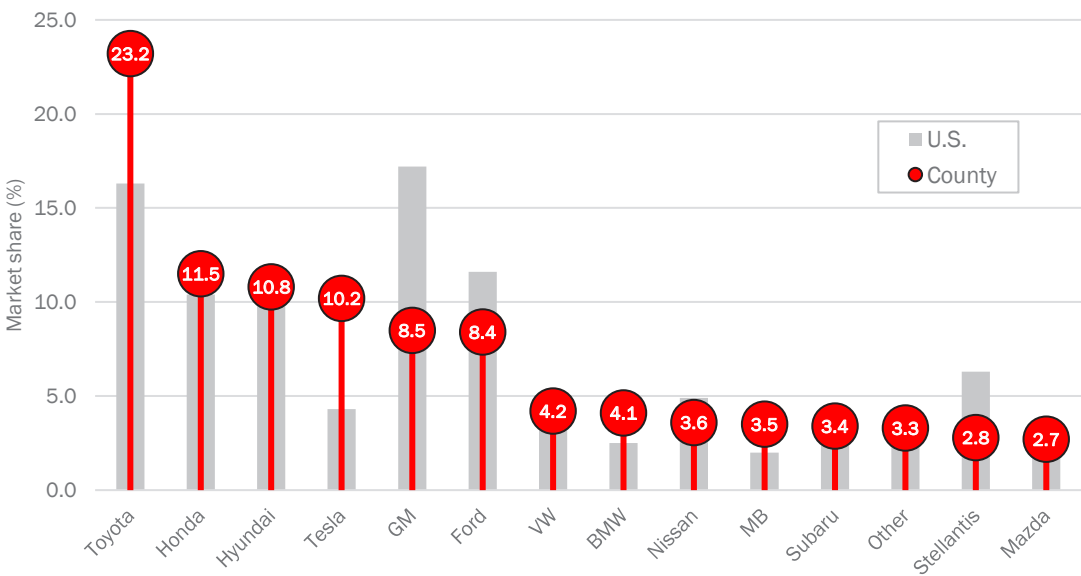
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KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



MANUFACTURER MARKET SHARES

San Diego County and U.S. Manufacturer Market Shares - YTD 2025 thru September



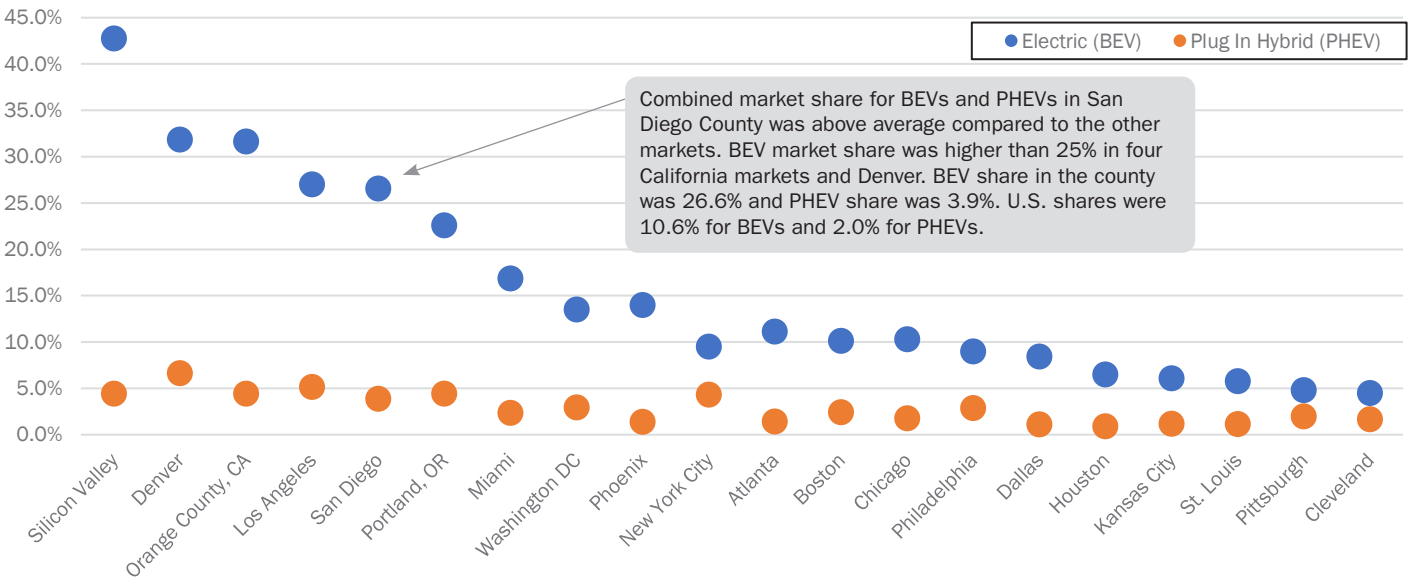
The graph on the left shows manufacturer market shares in the San Diego County and U.S. markets during the first nine months of this year. Toyota, Honda, Hyundai, Tesla, and GM were top five in the county. Toyota market share in the county was higher than U.S. (23.2% vs. 16.3%). Tesla county share also exceeded national levels. Note: MB is Mercedes- Benz and Hyundai includes Hyundai, Kia, and Genesis.

Data sourced from Experian Automotive.



COMPARISON OF METRO AREA MARKETS

BEV and PHEV Share in Selected Metro Area Markets - Third Quarter, 2025



Markets are shown from left (highest) to right (lowest) based on combined BEV and PHEV market share. Data sourced from Experian Automotive.

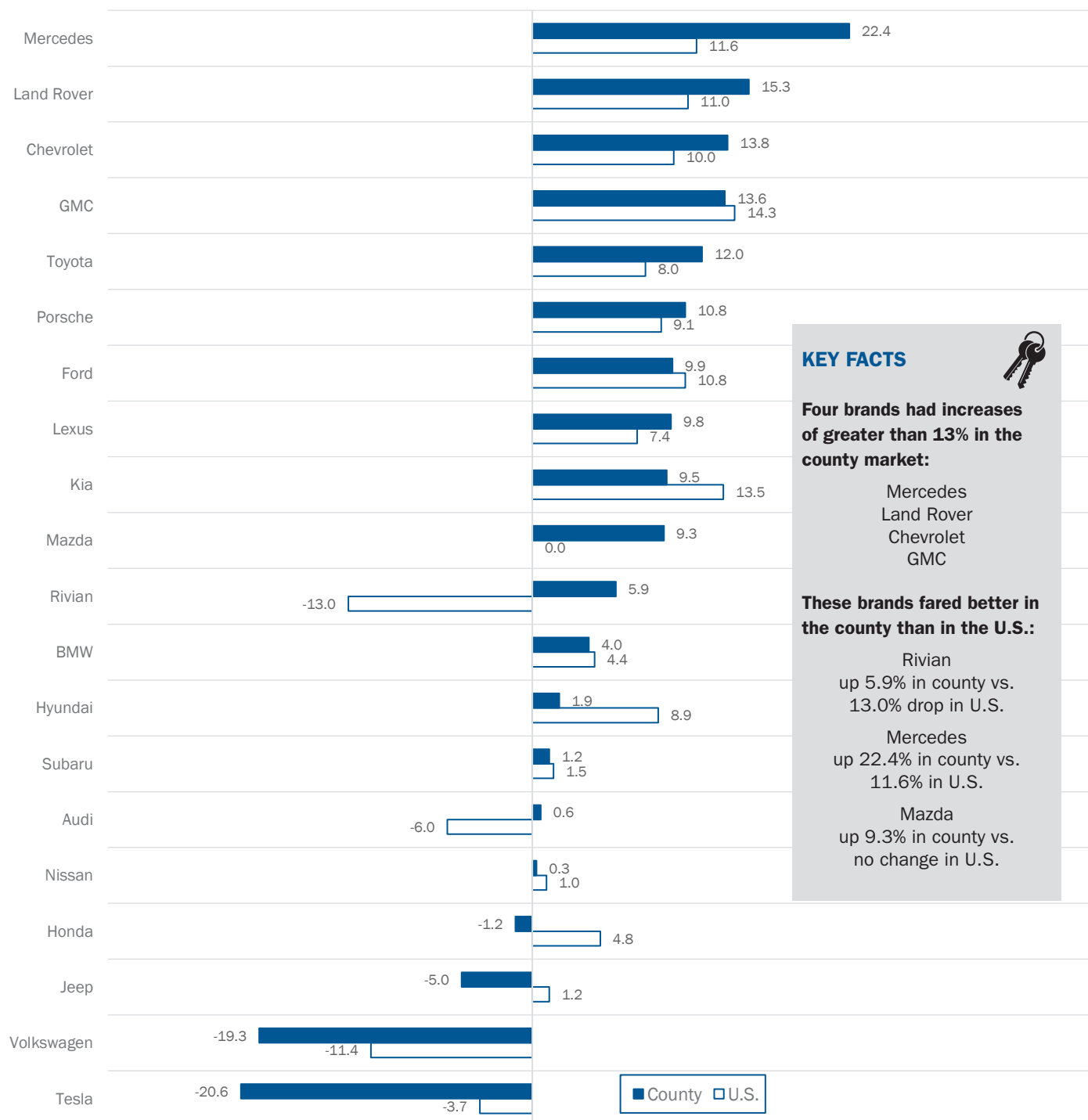
BRANDS AND MODELS



WINNERS AND LOSERS

The graph below shows the percent change in new retail light vehicle registrations during the first nine months of this year versus the same period a year earlier in both the county (solid blue bars) and U.S. (blue outlined bars). Brands are shown from top to bottom based on the change in county registrations.

**Percent Change in San Diego County and U.S. New Retail Light Vehicle Registrations (Top 20 Selling Brands in County)
YTD 2025 thru September vs. YTD 2024**



Data sourced from Experian Automotive.

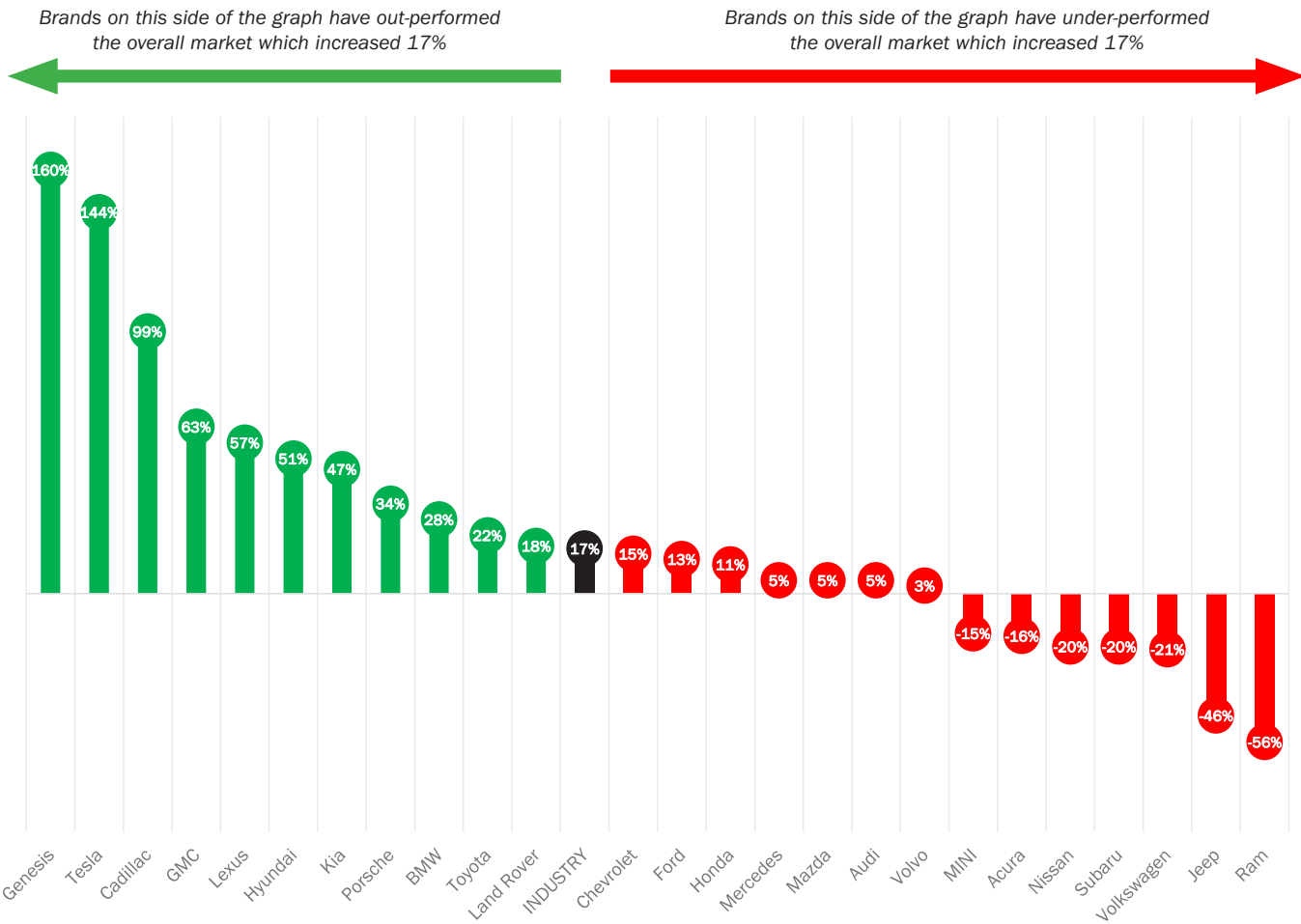
BRANDS AND MODELS



LONG TERM TRENDS

The graph below shows the percent change in new vehicle registrations during a five year period (ytd 2025 thru September vs. the same period in 2020). This five year stretch was one of the most tumultuous periods the industry has ever faced. A global pandemic ensued in early 2020, followed by a sharp economic downturn, a surge in new vehicle sales, microchip shortage and supply chain issues which slashed production, rising inflation and high interest rates that dented affordability, and beginning this year, changing global trade policies. In addition, BEV sales increased and Tesla became a high-volume selling brand. The challenges were formidable, and as demonstrated below, some brands weathered the storm better than others. Data sourced from Experian Automotive.

Five Year Percent Change in San Diego County New Retail Light Vehicle Registrations for Top 25 Selling Brands
YTD 2025 thru September vs. YTD 2020



TOP SELLING MODELS

Top 20 Selling Models during YTD '25 thru Sept. - Market Share and % Change in Registrations vs. YTD '24

Rank	Model	County Share %	% chg. '24 to '25	Rank	Model	County Share %	% chg. '24 to '25
1	Tesla Model Y	6.1	-28.3	11	Chevrolet Equinox	1.5	274.0
2	Toyota RAV4	4.2	-6.8	12	Toyota Tundra	1.3	5.9
3	Tesla Model 3	3.3	11.9	13	Honda Accord	1.2	-19.1
4	Honda CR-V	3.2	-0.1	14	Ford Maverick	1.1	-0.7
5	Toyota Tacoma	3.2	76.4	15	Honda HR-V	1.1	-21.5
6	Honda Civic	3.0	-3.8	16	Subaru Crosstrek	1.1	-0.7
7	Toyota Camry	2.8	15.2	17	Hyundai Tucson	1.1	15.3
8	Ford F-Series	2.1	20.7	18	Lexus NX	1.1	7.2
9	Toyota Corolla	2.0	0.1	19	Kia Sportage	1.0	17.5
10	Chevrolet Silverado	1.8	-8.7	20	Hyundai Ioniq 5	1.0	18.9

Table on the left presents the top 20 selling models in the county during the first nine months of 2025. Share of industry registrations and the percent change versus the same period in 2024 are also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

BRANDS AND MODELS

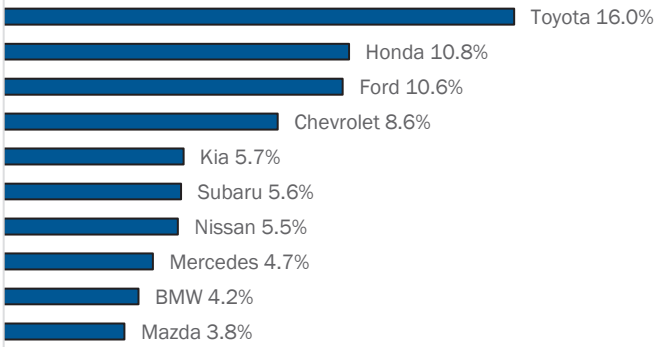


TOP TEN RANKINGS IN COUNTY MARKET - YTD 2025 THRU SEPTEMBER

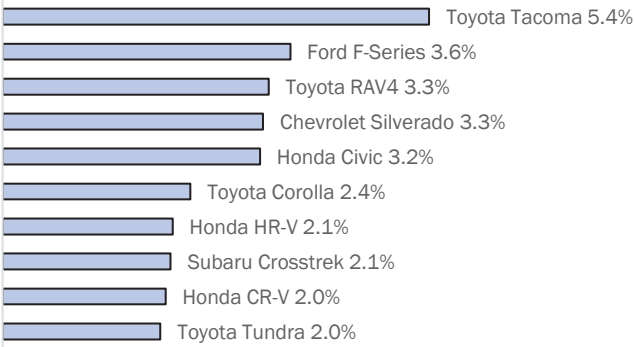
The graphs below show top ten selling brands and models during the first nine months of this year for three powertrain classifications - ICE (internal combustion engines), Hybrids (including plug-in hybrids), and BEVs (battery electric vehicles). Toyota was the top selling brand for ICE vehicles and Tacoma was the number one model. Toyota and Camry were leaders for hybrids. Tesla and Model Y were the top-sellers for BEVs.

ICE VEHICLES (includes gasoline and diesel engines)

Market Share for Top 10 Brands

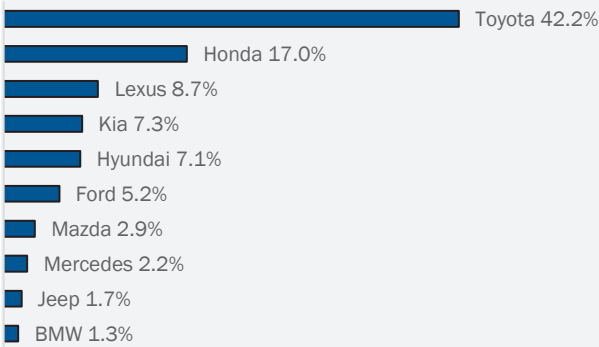


Market Share for Top 10 Models

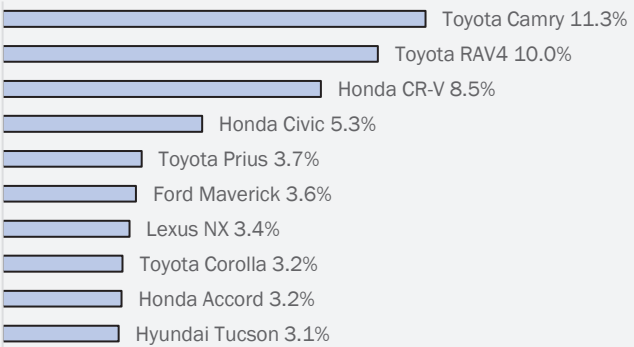


HYBRID VEHICLES (includes plug-ins and excludes mild hybrids)

Market Share for Top 10 Brands

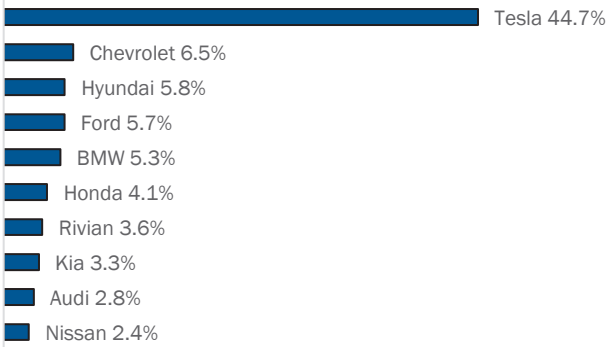


Market Share for Top 10 Models

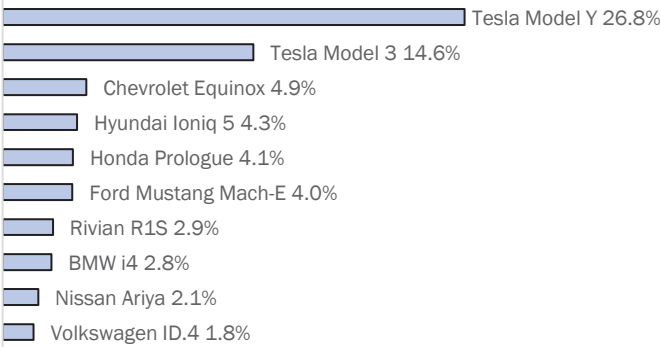


BATTERY ELECTRIC VEHICLES

Market Share for Top 10 Brands



Market Share for Top 10 Models



Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

ALTERNATIVE POWERTRAIN MARKET

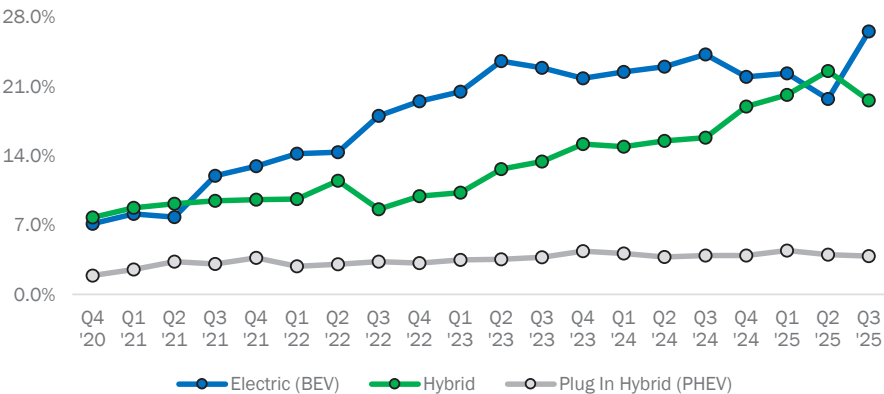
FIVE KEY TRENDS

1. BEV share was 26.6% in 3Q '25, up vs. year-earlier and up sharply from 2Q '25.
2. Hybrid vehicles continued to post gains. Hybrid share was 20.8% so far this year, up 5.4 points vs. year earlier.
3. The graph below shows ICE, hybrid (excluding plug-ins), and combined BEV and PHEV share for eight main segments
4. Hybrids accounted for more than 39% of registrations in the Non Luxury Car and Van segments.
5. BEV and PHEV share was highest in luxury segments (right side of the graph).



BEV, PHEV, AND HYBRID MARKET SHARE

Percent Share of Industry Registrations by Powertrain Type



YTD thru September		
	YTD '24	YTD '25
Electric (BEV)	23.2%	22.8% ↓
Hybrid	15.4%	20.8% ↑
Plug In Hybrid (PHEV)	3.9%	4.1% ↑

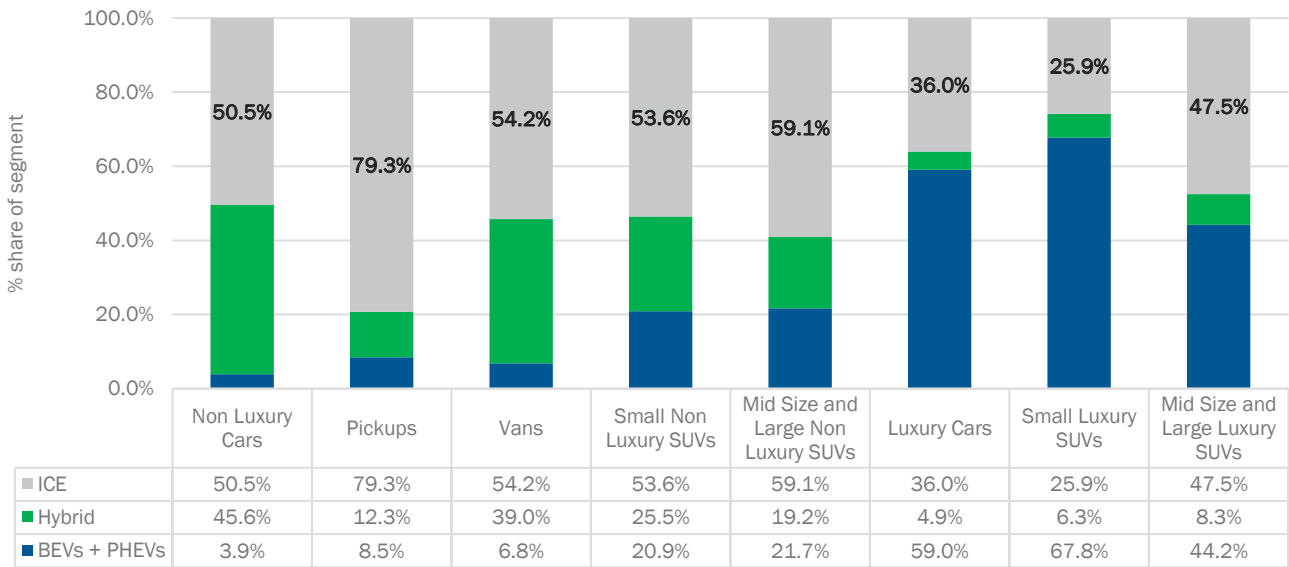
Quarterly		
	2Q '25	3Q '25
Electric (BEV)	19.7%	26.6% ↑
Hybrid	22.6%	19.6% ↓
Plug In Hybrid (PHEV)	4.0%	3.9% ↓

Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.



POWERTRAIN SHARES FOR VEHICLE SEGMENTS

Percent Share of Segment Registrations by Powertrain Type - YTD 2025 thru September



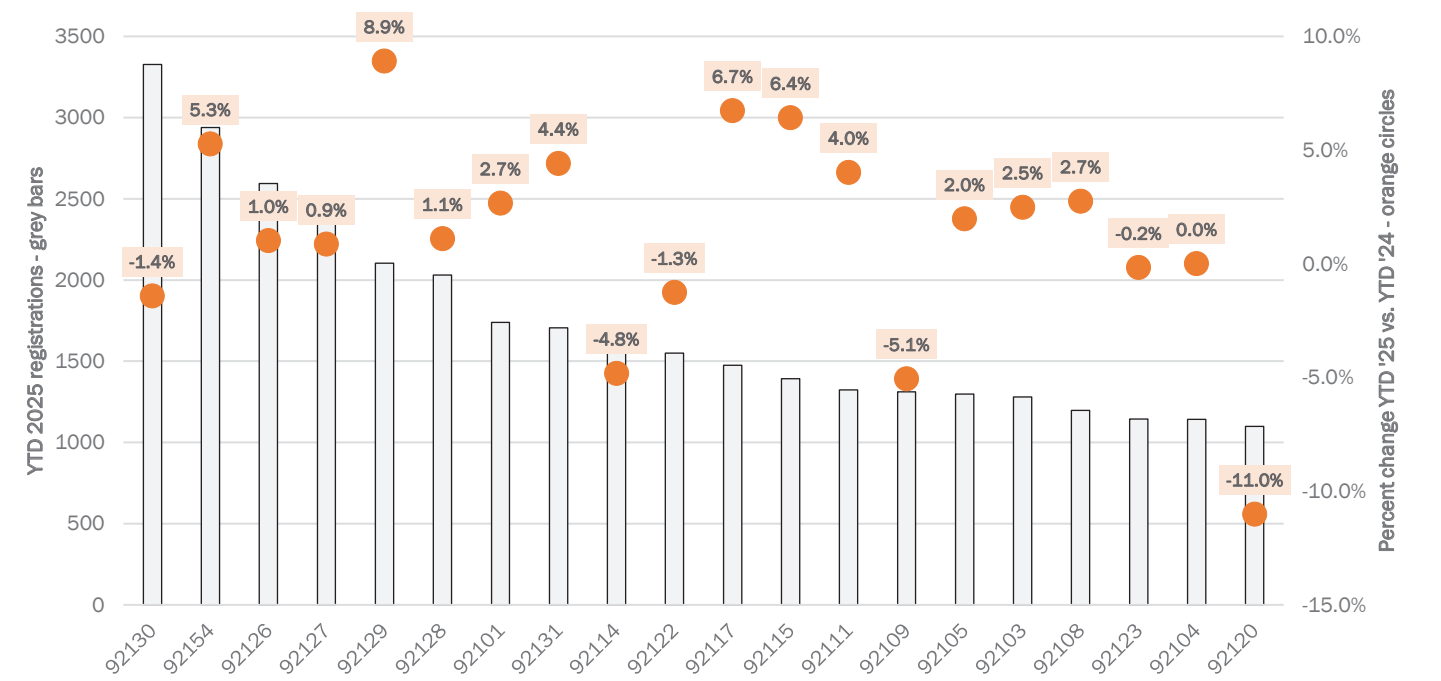
The graph above shows market share by powertrain type for eight vehicle segments. Gray bars show ICE market share, green is hybrids, and blue is combined share for BEVs and PHEVs. Luxury segments are shown on the right side of the graph. BEV/PHEV share exceeded 59% for Luxury Cars and Small Luxury SUVs. Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

Registrations in Zip Code 92129 Increased 8.9% So Far This Year

The graphs and tables on these two pages show specific data on the top 20 zip code markets in San Diego. The figures represent new vehicles registered to retail customers residing in each of the zip codes, and includes both purchase and lease transactions.

Zip Code New Retail Light Vehicle Registrations in San Diego - YTD 2025 thru Sept. and Percent Change vs. YTD 2024



The graph above shows new vehicle registrations during the first nine months of this year (grey bars and left axis) and percent change vs. the same period in 2024 (orange circles with labels and right axis). Data sourced from Experian Automotive.

ZIP CODE MARKETS REVIEW									
	Industry Registrations			Battery Electric Vehicle Market Share (%)			Luxury Brand Market Share (%)		
	YTD '24 thru Sept.	YTD '25 thru Sept.	% change '25 vs. '24	YTD '24 thru Sept.	YTD '25 thru Sept.	change '25 vs. '24	YTD '24 thru Sept.	YTD '25 thru Sept.	change '25 vs. '24
92101	1,694	1,739	2.7%	31.1	29.0	-2.1	47.5	44.2	-3.3
92103	1,249	1,280	2.5%	28.0	27.9	-0.1	39.5	35.0	-4.5
92104	1,142	1,142	0.0%	21.2	19.3	-1.9	22.9	19.1	-3.8
92105	1,273	1,298	2.0%	13.0	12.9	-0.1	14.8	14.5	-0.3
92108	1,166	1,198	2.7%	26.1	28.0	1.9	38.0	34.7	-3.3
92109	1,382	1,312	-5.1%	22.5	21.6	-0.9	32.1	30.4	-1.7
92111	1,272	1,323	4.0%	21.4	19.6	-1.8	24.5	21.4	-3.1
92114	1,638	1,559	-4.8%	13.7	14.8	1.1	16.9	17.6	0.7
92115	1,309	1,393	6.4%	18.9	18.7	-0.2	20.2	18.4	-1.8
92117	1,383	1,476	6.7%	25.0	21.7	-3.3	28.8	23.5	-5.3
92120	1,234	1,098	-11.0%	25.4	21.3	-4.1	31.3	28.2	-3.1
92122	1,570	1,550	-1.3%	32.2	29.9	-2.3	39.6	38.2	-1.4
92123	1,147	1,145	-0.2%	22.7	21.0	-1.7	28.6	26.9	-1.7
92126	2,569	2,595	1.0%	29.0	28.7	-0.3	35.2	30.1	-5.1
92127	2,462	2,483	0.9%	41.2	37.6	-3.6	54.3	51.6	-2.7
92128	2,008	2,030	1.1%	31.4	30.5	-0.9	38.9	36.4	-2.5
92129	1,931	2,103	8.9%	36.3	32.3	-4.0	41.2	36.2	-5.0
92130	3,375	3,327	-1.4%	41.7	41.4	-0.3	58.2	56.4	-1.8
92131	1,634	1,706	4.4%	33.8	34.9	1.1	44.0	42.2	-1.8
92154	2,792	2,939	5.3%	14.8	14.5	-0.3	17.9	17.5	-0.4

Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

Honda Market Share Exceeded 17% in Zip Code 92114

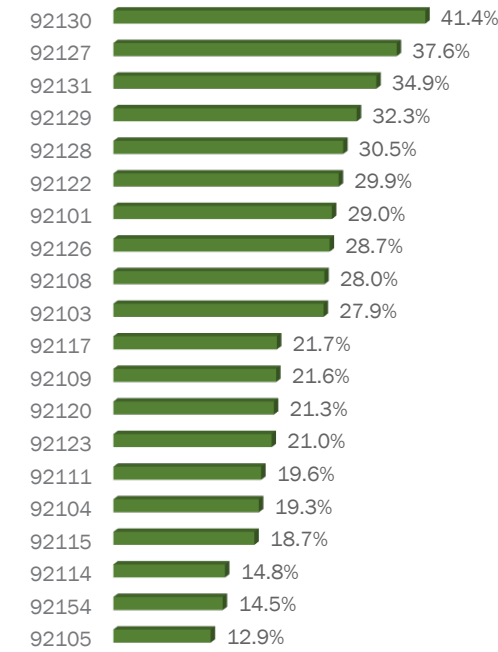
Brand Market Share - YTD 2025 thru Sept. (for top 10 selling brands in county market)

Zip Code	Toyota	Tesla	Honda	Ford	Hyundai	Kia	Chevrolet	Lexus	BMW	Mercedes
92101	12.4	14.5	8.6	7.5	3.4	4.6	4.3	3.9	6.8	5.9
92103	15.8	8.2	8.9	6.3	8.0	4.8	2.9	2.7	6.5	4.3
92104	21.5	4.6	15.5	5.1	6.5	6.0	3.8	3.3	3.2	1.6
92105	34.6	6.1	17.3	5.3	3.8	4.4	5.5	3.5	1.3	1.3
92108	16.4	14.2	9.8	8.1	4.5	6.3	4.6	3.2	5.2	4.3
92109	19.2	10.0	7.3	11.0	3.8	4.6	5.0	3.9	3.5	3.0
92111	23.5	7.6	11.2	8.4	5.1	5.5	6.4	4.0	1.9	2.8
92114	26.7	8.1	17.4	5.5	4.5	6.0	6.2	4.0	1.5	1.6
92115	26.6	7.1	15.8	6.2	5.5	6.7	5.2	3.4	1.9	1.4
92117	21.5	8.7	10.3	8.0	5.8	6.2	5.6	3.3	3.3	2.2
92120	20.5	7.6	9.3	8.9	7.0	5.6	6.0	4.0	4.5	3.4
92122	19.1	16.6	9.9	4.0	6.2	5.4	3.2	4.6	4.7	3.6
92123	20.0	10.5	10.6	7.9	5.2	5.3	8.3	3.4	3.4	3.9
92126	23.9	15.8	14.8	5.1	5.9	4.8	4.5	4.8	2.2	2.4
92127	11.3	17.8	7.6	4.6	5.5	4.4	4.6	5.8	7.5	5.2
92128	16.2	14.4	11.6	5.2	7.1	5.3	4.5	7.2	4.1	3.4
92129	19.4	18.2	12.1	4.4	6.8	5.2	3.7	5.9	3.5	2.6
92130	11.5	20.8	5.8	3.9	4.1	3.7	3.4	6.0	8.7	5.6
92131	14.5	14.5	10.0	5.0	7.1	4.4	5.1	5.7	6.0	5.0
92154	21.4	7.2	13.2	8.5	3.8	7.3	6.2	2.2	2.4	2.3

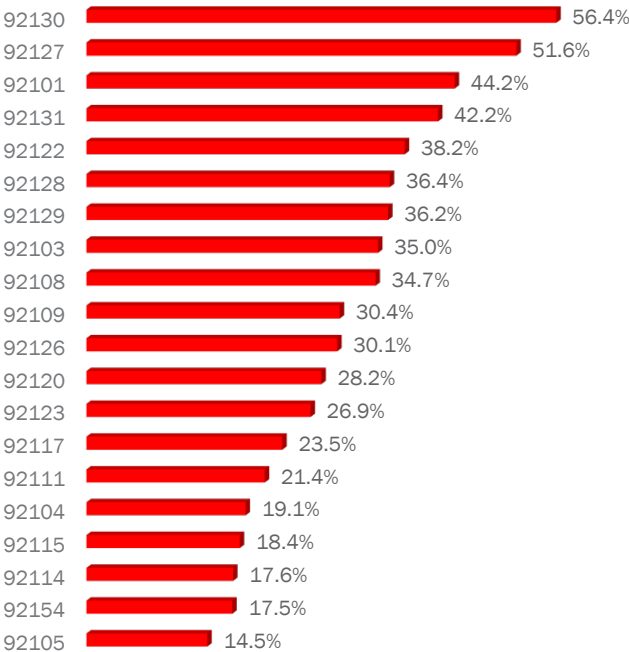
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



Battery Electric Vehicle Market Share
in San Diego Zip Codes
YTD 2025 thru Sept.



Luxury Brand Market Share
in San Diego Zip Codes
YTD 2025 thru Sept.

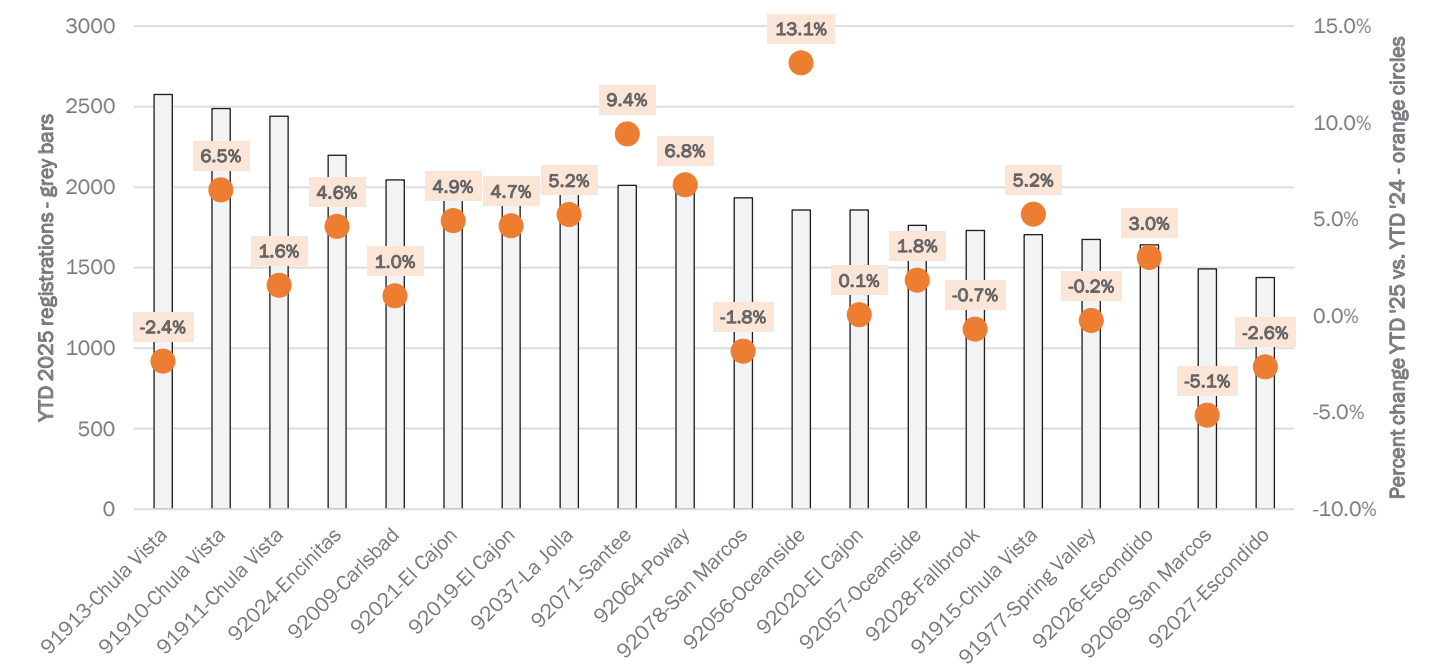


ZIP CODE MARKETS OUTSIDE SAN DIEGO

92056 (Oceanside) Had Largest % Gain During First Nine Months of 2025

The graphs and tables on these two pages show specific data on the top 20 San Diego County zip code markets that are outside of San Diego. The figures represent new vehicles registered to retail customers residing in each of the zip codes, and includes both purchase and lease transactions.

Zip Code New Retail Light Vehicle Registrations for Zips Outside of San Diego
YTD 2025 thru Sept. and Percent Change vs. YTD 2024



The graph above shows new vehicle registrations during the first nine months of 2025 (grey bars and left axis) and percent change vs. the same period in 2024 (orange circles with labels and right axis). Data sourced from Experian Automotive.

ZIP CODE MARKETS REVIEW									
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91910-Chula Vista	2,336	2,488	6.5%	16.2	17.2	1.0	20.5	19.7	-0.8
91911-Chula Vista	2,403	2,441	1.6%	10.5	14.3	3.8	13.2	13.5	0.3
91913-Chula Vista	2,638	2,576	-2.4%	26.5	26.6	0.1	33.9	32.1	-1.8
91915-Chula Vista	1,620	1,705	5.2%	28.1	26.9	-1.2	35.7	33.8	-1.9
91977-Spring Valley	1,680	1,676	-0.2%	16.4	16.1	-0.3	18.9	15.6	-3.3
92009-Carlsbad	2,024	2,045	1.0%	32.8	30.8	-2.0	47.9	46.7	-1.2
92019-El Cajon	1,930	2,020	4.7%	23.1	22.8	-0.3	35.0	32.0	-3.0
92020-El Cajon	1,857	1,858	0.1%	16.4	16.7	0.3	22.0	19.9	-2.1
92021-El Cajon	1,932	2,027	4.9%	14.6	16.2	1.6	18.4	16.8	-1.6
92024-Encinitas	2,101	2,198	4.6%	29.3	29.3	0.0	42.6	43.4	0.8
92026-Escondido	1,593	1,641	3.0%	20.8	20.7	-0.1	25.3	25.0	-0.3
92027-Escondido	1,477	1,438	-2.6%	16.9	15.9	-1.0	18.8	17.5	-1.3
92028-Fallbrook	1,742	1,730	-0.7%	22.0	20.9	-1.1	29.4	26.8	-2.6
92037-La Jolla	1,913	2,013	5.2%	33.9	27.9	-6.0	58.9	57.6	-1.3
92056-Oceanside	1,644	1,859	13.1%	19.8	20.3	0.5	24.8	24.0	-0.8
92057-Oceanside	1,731	1,763	1.8%	21.1	21.3	0.2	25.4	23.3	-2.1
92064-Poway	1,847	1,972	6.8%	26.0	24.7	-1.3	32.8	29.9	-2.9
92069-San Marcos	1,574	1,493	-5.1%	22.1	20.1	-2.0	25.5	22.0	-3.5
92071-Santee	1,838	2,011	9.4%	18.9	16.1	-2.8	23.9	18.2	-5.7
92078-San Marcos	1,969	1,933	-1.8%	30.8	29.7	-1.1	37.3	35.5	-1.8

Data sourced from Experian Automotive.

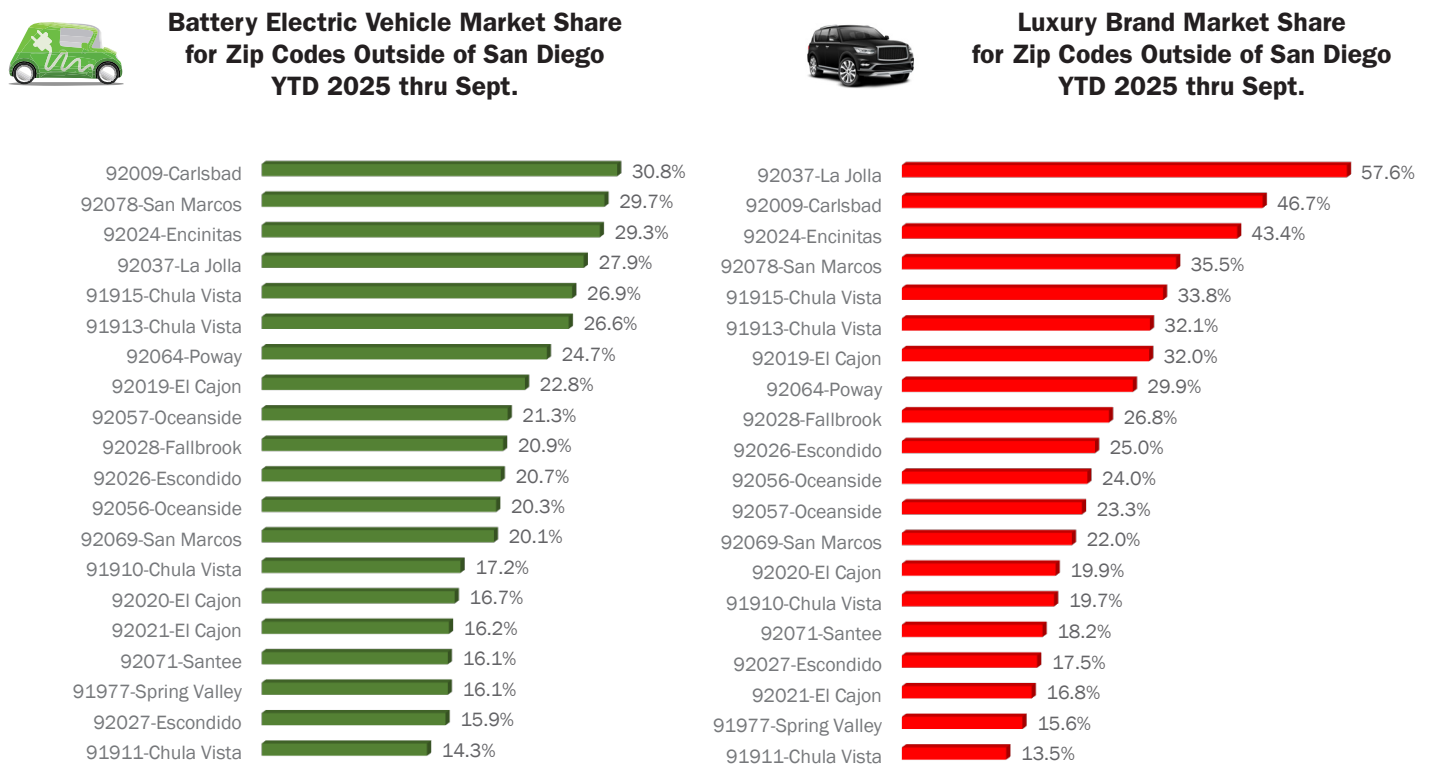
ZIP CODE MARKETS OUTSIDE SAN DIEGO

Ford Market Share Exceeded 11% in Zip Code 92071

Brand Market Share - YTD 2025 thru Sept. (for top 10 selling brands in county market)

Zip Code	Toyota	Honda	Tesla	Ford	Chevrolet	Kia	Hyundai	Lexus	Nissan	Mercedes
91910-Chula Vista	20.1	13.1	7.7	8.4	6.6	6.4	4.7	2.8	5.4	2.7
91911-Chula Vista	22.8	15.0	7.2	8.1	7.5	8.1	3.4	1.4	6.5	1.8
91913-Chula Vista	17.7	12.4	14.2	6.4	4.7	6.3	4.2	3.7	4.0	3.9
91915-Chula Vista	16.4	11.4	15.8	5.7	4.3	7.8	3.9	3.6	4.2	4.1
91977-Spring Valley	23.1	14.2	6.0	9.4	8.3	7.4	4.8	2.4	4.8	2.1
92009-Carlsbad	14.5	6.4	13.6	7.3	3.2	4.7	4.5	5.6	1.3	5.1
92019-El Cajon	20.1	8.9	7.3	6.3	10.5	4.2	3.5	4.8	3.6	7.0
92020-El Cajon	23.1	13.5	5.6	9.5	8.9	5.9	4.0	2.7	3.9	4.5
92021-El Cajon	22.4	13.1	5.0	10.3	11.2	5.8	4.6	2.9	4.6	3.0
92024-Encinitas	15.4	6.0	12.3	8.6	3.5	4.3	4.6	4.4	1.1	4.3
92026-Escondido	21.5	10.9	9.4	8.2	6.8	5.8	5.2	5.0	4.2	2.4
92027-Escondido	26.6	13.2	6.8	9.0	7.6	5.7	4.2	3.7	4.5	1.7
92028-Fallbrook	20.3	8.3	10.3	10.0	7.7	4.3	6.0	4.3	3.5	3.9
92037-La Jolla	11.3	4.5	11.4	5.6	1.6	3.9	3.5	5.1	0.9	9.1
92056-Oceanside	21.1	10.4	9.3	8.7	6.9	6.1	5.5	4.1	5.1	2.9
92057-Oceanside	22.5	10.6	9.4	8.2	6.7	5.8	4.8	4.1	4.9	2.2
92064-Poway	17.4	10.5	10.5	9.1	6.0	4.5	7.1	5.4	3.6	3.2
92069-San Marcos	22.6	10.4	9.1	9.1	7.0	5.8	5.6	4.4	4.8	1.9
92071-Santee	19.1	12.4	7.0	11.3	10.1	6.5	6.1	2.5	2.8	2.2
92078-San Marcos	14.9	8.9	13.6	8.8	5.1	5.5	5.1	4.9	2.6	3.7

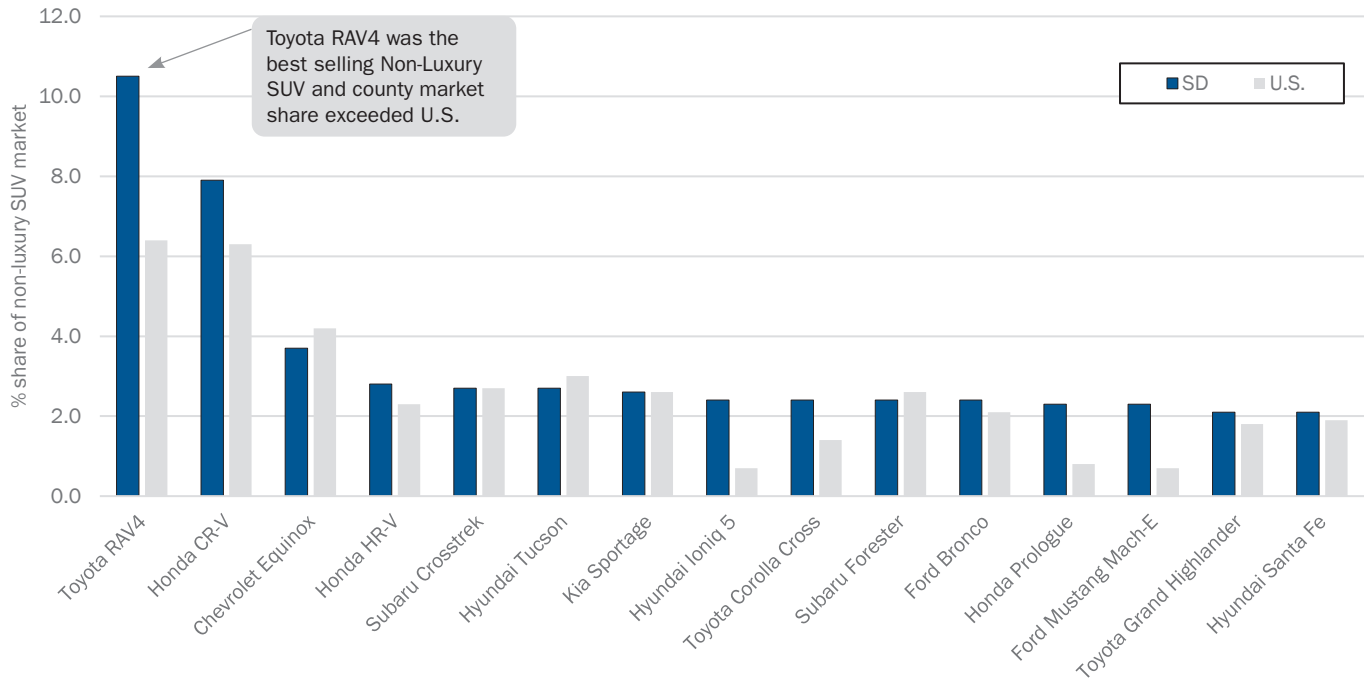
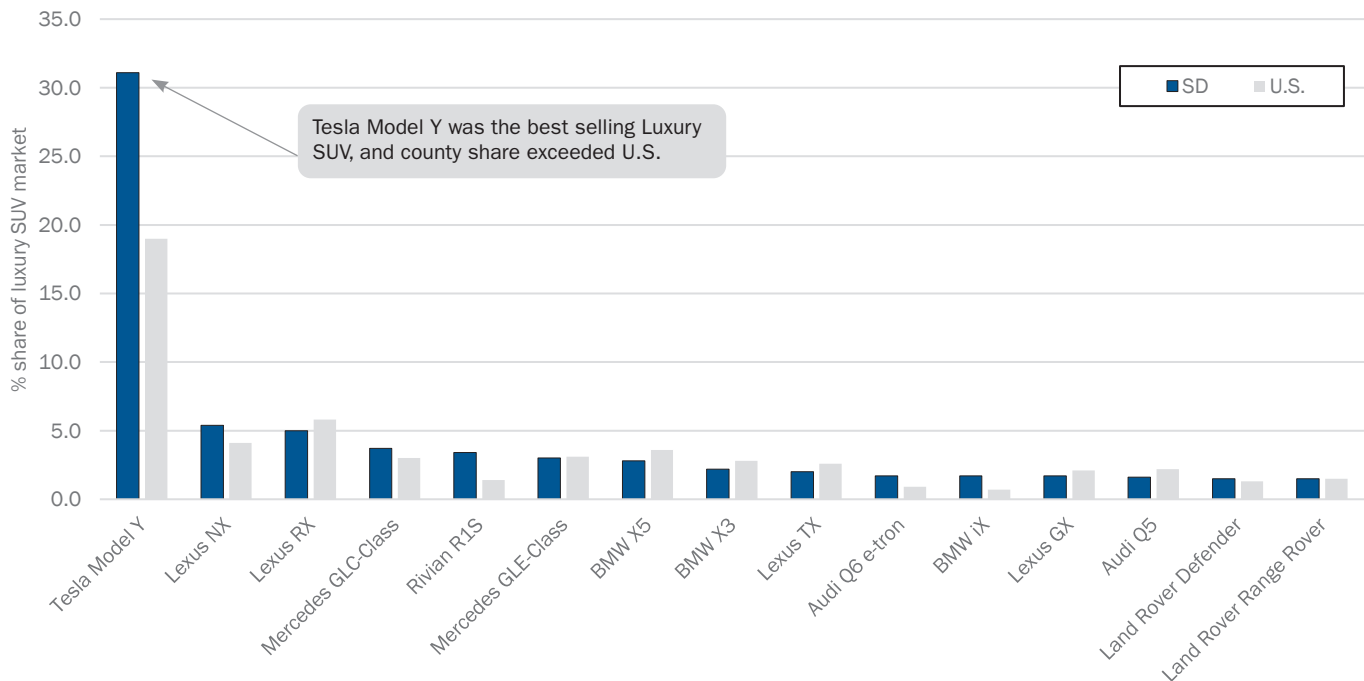
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



SUV MARKET SHARES

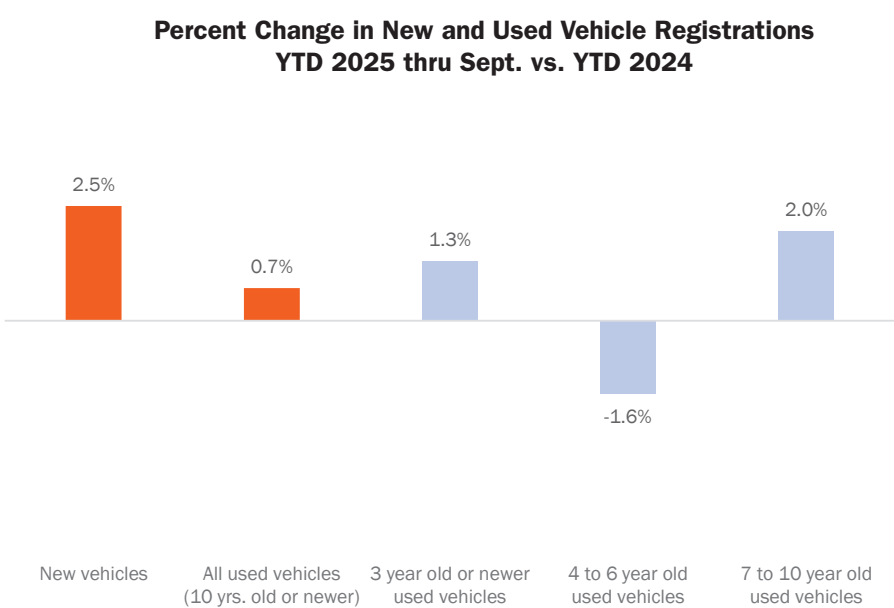
RAV4 is On Top for Non-Luxury SUVs; Model Y Has Lead in Luxury Segment

The two graphs below show market share in the San Diego County and National Non-Luxury and Luxury SUV markets during the first nine months of this year. Includes the top 15 selling models in the county market. (Note: following significant price reductions, some industry sources now classify the Tesla Model Y as a non-luxury SUV. However, it's likely that average Model Y transaction prices still exceed \$50,000, which is closer to luxury SUVs, such as the BMW X3 and Audi Q5 than it is to non-luxury models, such as the RAV4 and CR-V.)

Market Share for Top 15 Selling Non Luxury SUVs - County and U.S. Market, YTD 2025 thru September**Market Share for Top 15 Selling Luxury SUVs - County and U.S. Market, YTD 2025 thru September**

SAN DIEGO COUNTY USED VEHICLE MARKET

Used Vehicle Market Posts Small Increase So Far This Year



THREE KEY TRENDS IN
USED VEHICLE MARKET

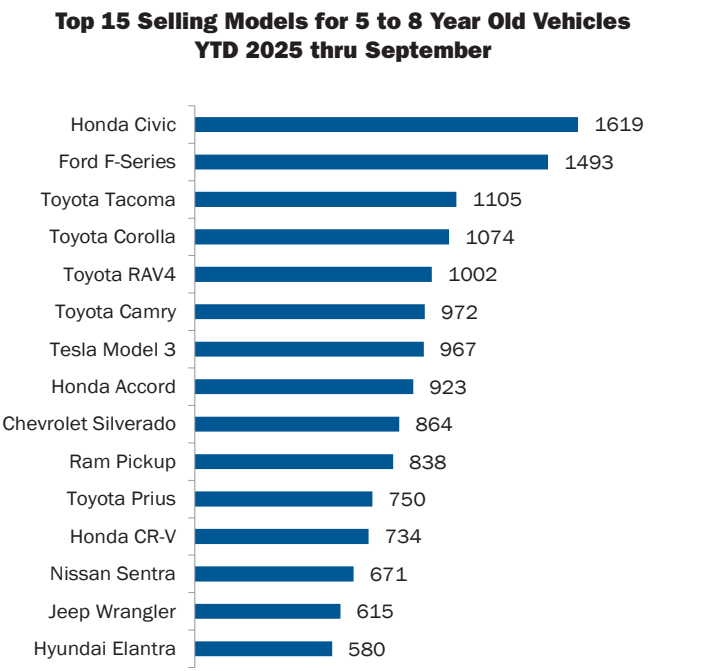
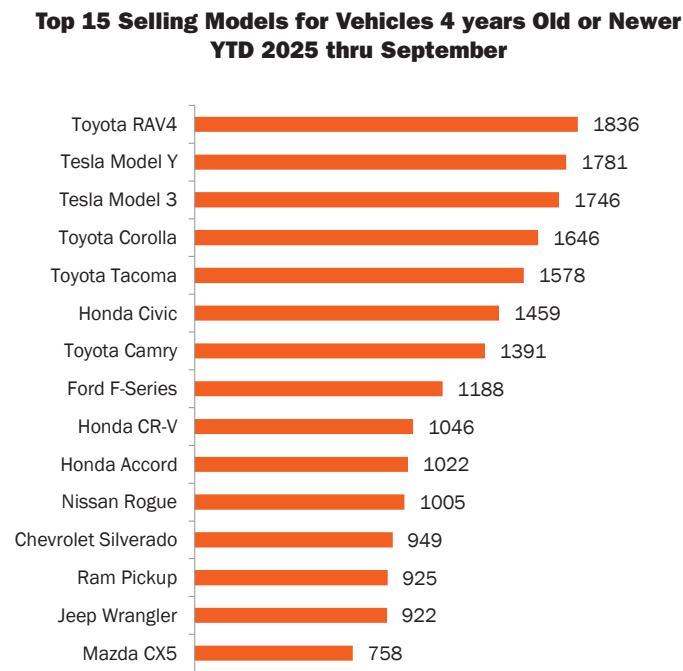
01. The San Diego County used vehicle market increased a slim 0.7% during the first nine months of this year versus year earlier. The new vehicle market was up 2.5%.
02. As shown on the graph to the left, registrations for three year old or newer vehicles increased 1.3% so far this year. The 4 to 6 year old market declined 1.6%.
03. Toyota RAV4, Tesla Model Y, and Tesla Model 3 were the top three sellers among 4 year old or newer vehicles. Honda Civic, Ford F-Series, and Toyota Tacoma led in the 5 to 8 year old category.

Data sourced from Experian Automotive.

TOP SELLING MODELS IN USED VEHICLE MARKET

RAV4 and Civic Are Top Sellers in County Used Vehicle Market

The two graphs below show the top 15 selling models in San Diego County for two age classifications: vehicles 4 years old or newer, and 5 to 8 year old vehicles.



Data sourced from Experian Automotive.

Brand Registrations Report												
San Diego County New Retail Car and Light Truck Registrations												
	Third Quarter						Year to date thru September					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	3Q '24	3Q '25	% change	3Q '24	3Q '25	Change	YTD '24	YTD '25	% change	YTD '24	YTD '25	Change
TOTAL	34,553	35,277	2.1				107,020	109,680	2.5			
Cars	8,696	7,803	-10.3	25.2	22.1	-3.1	26,968	25,617	-5.0	25.2	23.4	-1.8
Light Trucks	25,857	27,474	6.3	74.8	77.9	3.1	80,052	84,063	5.0	74.8	76.6	1.8
Domestic Brands	11,442	11,732	2.5	33.1	33.3	0.2	35,159	33,753	-4.0	32.8	30.8	-2.0
European Brands	4,708	4,590	-2.5	13.6	13.0	-0.6	14,769	15,273	3.4	13.8	13.9	0.1
Japanese Brands	14,580	15,147	3.9	42.2	42.9	0.7	45,784	48,783	6.6	42.8	44.5	1.7
Other Asian Brands	3,823	3,808	-0.4	11.1	10.8	-0.3	11,308	11,871	5.0	10.6	10.8	0.2
Acura	166	210	26.5	0.5	0.6	0.1	538	761	41.4	0.5	0.7	0.2
Alfa Romeo	15	14	-6.7	0.0	0.0	0.0	54	41	-24.1	0.1	0.0	-0.1
Audi	458	588	28.4	1.3	1.7	0.4	1,711	1,721	0.6	1.6	1.6	0.0
BMW	1,235	1,151	-6.8	3.6	3.3	-0.3	3,969	4,126	4.0	3.7	3.8	0.1
Buick	68	70	2.9	0.2	0.2	0.0	192	209	8.9	0.2	0.2	0.0
Cadillac	211	241	14.2	0.6	0.7	0.1	657	771	17.4	0.6	0.7	0.1
Chevrolet	2,021	2,148	6.3	5.8	6.1	0.3	5,790	6,588	13.8	5.4	6.0	0.6
Chrysler	51	50	-2.0	0.1	0.1	0.0	188	141	-25.0	0.2	0.1	-0.1
Dodge	69	37	-46.4	0.2	0.1	-0.1	406	158	-61.1	0.4	0.1	-0.3
Ford	2,499	2,921	16.9	7.2	8.3	1.1	8,146	8,949	9.9	7.6	8.2	0.6
Genesis	120	109	-9.2	0.3	0.3	0.0	351	368	4.8	0.3	0.3	0.0
GMC	508	571	12.4	1.5	1.6	0.1	1,535	1,744	13.6	1.4	1.6	0.2
Honda	3,897	3,601	-7.6	11.3	10.2	-1.1	12,028	11,880	-1.2	11.2	10.8	-0.4
Hyundai	1,779	1,896	6.6	5.1	5.4	0.3	5,313	5,414	1.9	5.0	4.9	-0.1
Infiniti	83	52	-37.3	0.2	0.1	-0.1	251	197	-21.5	0.2	0.2	0.0
Jaguar	32	12	-62.5	0.1	0.0	-0.1	95	48	-49.5	0.1	0.0	-0.1
Jeep	525	553	5.3	1.5	1.6	0.1	1,898	1,804	-5.0	1.8	1.6	-0.2
Kia	1,883	1,797	-4.6	5.4	5.1	-0.3	5,530	6,055	9.5	5.2	5.5	0.3
Land Rover	259	297	14.7	0.7	0.8	0.1	894	1,031	15.3	0.8	0.9	0.1
Lexus	1,281	1,332	4.0	3.7	3.8	0.1	3,957	4,346	9.8	3.7	4.0	0.3
Lincoln	75	79	5.3	0.2	0.2	0.0	266	229	-13.9	0.2	0.2	0.0
Mazda	948	999	5.4	2.7	2.8	0.1	2,709	2,961	9.3	2.5	2.7	0.2
Mercedes	1,063	1,145	7.7	3.1	3.2	0.1	3,127	3,827	22.4	2.9	3.5	0.6
MINI	62	105	69.4	0.2	0.3	0.1	275	334	21.5	0.3	0.3	0.0
Mitsubishi	33	27	-18.2	0.1	0.1	0.0	108	129	19.4	0.1	0.1	0.0
Nissan	1,232	1,198	-2.8	3.6	3.4	-0.2	3,720	3,731	0.3	3.5	3.4	-0.1
Polestar	86	23	-73.3	0.2	0.1	-0.1	171	88	-48.5	0.2	0.1	-0.1
Porsche	292	273	-6.5	0.8	0.8	0.0	793	879	10.8	0.7	0.8	0.1
Ram	267	273	2.2	0.8	0.8	0.0	912	870	-4.6	0.9	0.8	-0.1
Rivian	216	361	67.1	0.6	1.0	0.4	858	909	5.9	0.8	0.8	0.0
Subaru	1,154	1,017	-11.9	3.3	2.9	-0.4	3,669	3,714	1.2	3.4	3.4	0.0
Tesla	4,884	4,362	-10.7	14.1	12.4	-1.7	14,074	11,177	-20.6	13.2	10.2	-3.0
Toyota	5,786	6,711	16.0	16.7	19.0	2.3	18,804	21,064	12.0	17.6	19.2	1.6
Volkswagen	837	652	-22.1	2.4	1.8	-0.6	2,496	2,015	-19.3	2.3	1.8	-0.5
Volvo	254	247	-2.8	0.7	0.7	0.0	800	857	7.1	0.7	0.8	0.1
Other	204	155	-24.0	1.2	0.5	-0.7	735	544	-26.0	0.7	0.7	0.0

Data sourced from Experian Automotive. Other Asian Brands includes Genesis, Hyundai, Kia, and VinFast.

The table shows new retail light vehicle (car and light truck) registrations in the San Diego County market. Figures are shown for the Third Quarters of '24 and '25, and year to date totals. The top ten ranked brands in each change category are shaded yellow. Vehicle registrations are recorded based on when the vehicle title information is processed, which occurs after the vehicle is sold.