

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

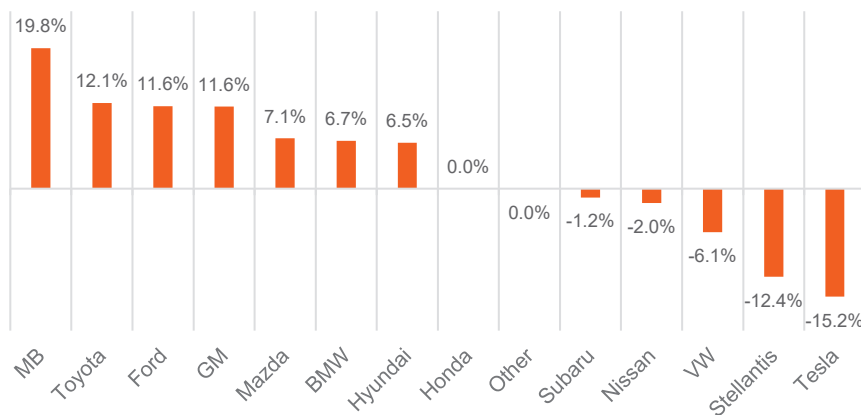
Data thru October 2025

San Diego County New Retail Car and Light Truck Registrations

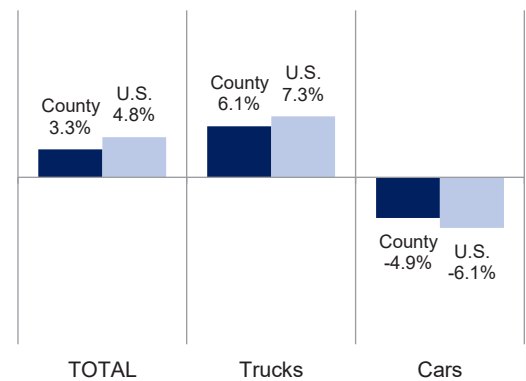
	Most Recent Two Months			YTD thru Oct.			YTD Market Share		
	9/24 & 10/24	9/25 & 10/25	% change	YTD '24	YTD '25	% change	YTD '24	YTD '25	change
Industry Total	24,520	26,262	7.1%	120,720	124,738	3.3%			
Cars	6,417	5,928	-7.6%	30,547	29,055	-4.9%	25.3	23.3	-2.0
Light Trucks	18,103	20,334	12.3%	90,173	95,683	6.1%	74.7	76.7	2.0

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

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



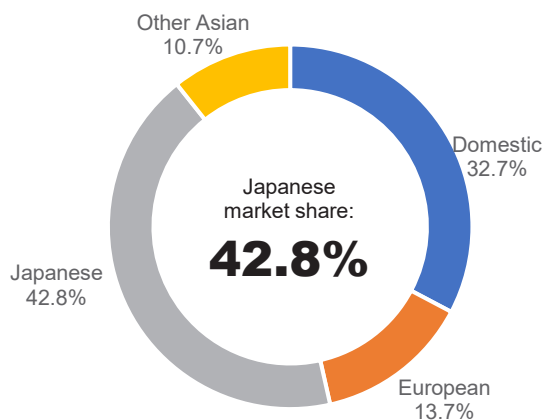
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD 2025 thru Oct. vs. YTD 2024



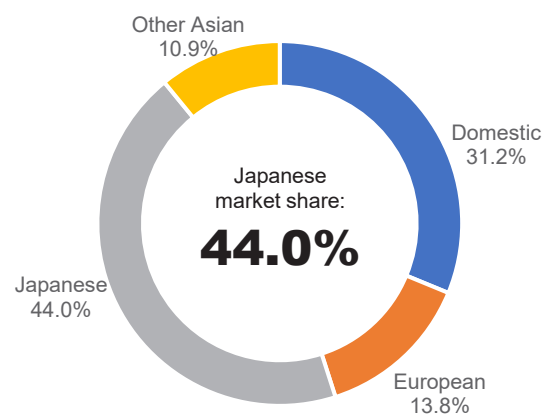
The graph above shows the percent change in new car and light truck registrations by manufacturer during the first ten months of this year versus the same period a year earlier. Data sourced from Experian Automotive. Note: MB is Mercedes-Benz.

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.

San Diego County Market Shares YTD '24 thru Oct.



San Diego County Market Shares YTD '25 thru Oct.



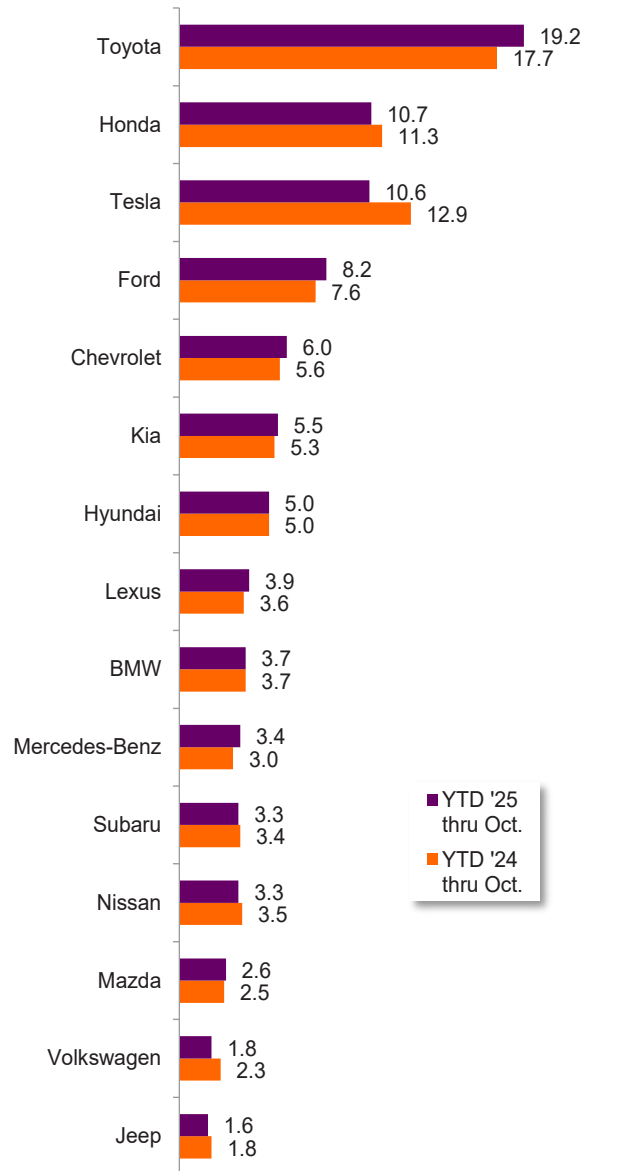
Data Information

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 Oct.	YTD '25 thru Oct.	% change	YTD '24 thru Oct.	YTD '25 thru Oct.
Acura	603	817	35%	0.5%	0.7%
Alfa Romeo	59	46	-22%	0.0%	0.0%
Audi	1,924	2,023	5%	1.6%	1.6%
BMW	4,413	4,663	6%	3.7%	3.7%
Buick	225	230	2%	0.2%	0.2%
Cadillac	737	915	24%	0.6%	0.7%
Chevrolet	6,722	7,427	10%	5.6%	6.0%
Chrysler	204	153	-25%	0.2%	0.1%
Dodge	436	202	-54%	0.4%	0.2%
Ford	9,129	10,243	12%	7.6%	8.2%
Genesis	397	419	6%	0.3%	0.3%
GMC	1,760	1,967	12%	1.5%	1.6%
Honda	13,595	13,385	-2%	11.3%	10.7%
Hyundai	5,978	6,226	4%	5.0%	5.0%
Ineos	140	85	-39%	0.1%	0.1%
Infiniti	277	217	-22%	0.2%	0.2%
Jeep	2,149	2,013	-6%	1.8%	1.6%
Kia	6,368	6,921	9%	5.3%	5.5%
Land Rover	1,004	1,147	14%	0.8%	0.9%
Lexus	4,378	4,848	11%	3.6%	3.9%
Lincoln	288	268	-7%	0.2%	0.2%
Lucid	185	247	34%	0.2%	0.2%
Mazda	3,060	3,277	7%	2.5%	2.6%
Mercedes-Benz	3,567	4,273	20%	3.0%	3.4%
MINI	305	372	22%	0.3%	0.3%
Mitsubishi	128	159	24%	0.1%	0.1%
Nissan	4,197	4,167	-1%	3.5%	3.3%
Polestar	181	98	-46%	0.1%	0.1%
Porsche	926	989	7%	0.8%	0.8%
Ram	1,038	987	-5%	0.9%	0.8%
Rivian	1,018	1,110	9%	0.8%	0.9%
Subaru	4,144	4,093	-1%	3.4%	3.3%
Tesla	15,540	13,174	-15%	12.9%	10.6%
Toyota	21,331	23,959	12%	17.7%	19.2%
Volkswagen	2,794	2,287	-18%	2.3%	1.8%
Volvo	883	973	10%	0.7%	0.8%
Other	637	358	-44%	0.5%	0.3%



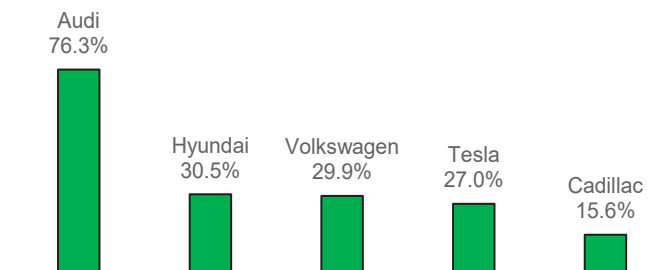
**County Market Share for
Top 15 Selling Brands
YTD '25 thru October vs. YTD '24**



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



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