

# San Diego Auto Outlook



**NEW CAR DEALERS ASSOCIATION  
SAN DIEGO COUNTY**

**Comprehensive information on the San Diego County new vehicle market**

## FORECAST

### County New Vehicle Market Predicted to Decline Slightly in 2026

Below is a list of six primary questions and answers regarding the San Diego County new retail light vehicle market.

#### How did the county market perform in 2025?

County new light vehicle registrations have remained in a narrow range between 2023 and 2025. The market was unchanged in 2024 and was up by less than 1% last year.

#### What is the outlook for 2026?

Registrations for all of this year are predicted to approach 141,000 units and decline a slim 1.5% from 2025 (see graph below).

#### What are the key factors impacting new vehicle sales this year?

Transaction prices nearing \$50,000 make new vehicle purchases a stretch for many consumers. Additionally, tariffs will almost certainly lead to rising vehicle prices, the labor market is weakening, and household incomes are barely keeping pace with inflation. However, the news isn't entirely bleak. The average age of vehicles on the road is at a record high, partly due to postponed purchases since the pandemic (see page 3). This resulting pent-up demand, coupled with the prospects of lower interest rates, should limit any potential decline in sales this year.

#### Which brands posted gains during all of 2025 and which finished the year strong?

County new retail registrations for Land Rover, GMC, Toyota, Mercedes-Benz, Ford, and Lexus increased by more than 8% last year. Ram and BMW gained momentum as the year ended, with 4Q '25 registrations increasing by more than 20% from 3Q.

#### Based on a comparison to U.S. market share, which brands are strong performers in the county market?

The analysis on page 5 compares actual registrations in the county for each of the top 30 selling brands to a calculated target. The target equals county registrations required for the brand to attain the same county market share as in the Nation. Actual registrations significantly exceeded target for Tesla, Toyota, BMW, Mercedes-Benz, and Honda.

#### What are recent trends in the alternative powertrain vehicle market?

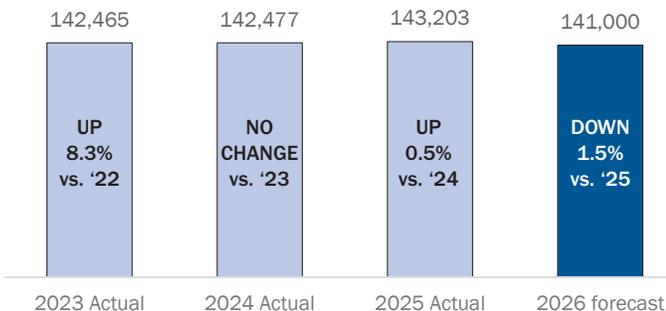
BEV share fell from 23.7% during January thru October of last year to just 13.5% in November and December, following expiration of federal tax credits on September 30 (see page 3). Hybrid vehicle registrations increased 29% from 2024 to 2025 and market share reached 21%.

#### Six Key facts for County New Vehicle Market



1. County market was up 0.5% in 2025. U.S. improved 3.3%
2. Total registrations exceeded 143,000 last year, well above the recent low of 131,508 in 2022.
3. Market was down 5.9% in 4Q '25 vs. year earlier compared to the 2.5% increase in 3Q.
4. Toyota, Honda, Tesla, Ford, and Chevrolet were market share leaders (see page 4).
5. Hybrid vehicles accounted for more than 40% of Toyota, Lexus, and Hyundai registrations in the Fourth Quarter of this year (see page 6).
6. Tesla Model Y, Toyota RAV4, and Toyota Tacoma were top three sellers in county market. Equinox had a large percentage increase from 2024 to 2025 (see page 5).

### Forecast for County New Retail Light Vehicle Registrations



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

### Market Summary

	2024 Annual	2025 Annual	% Chg. '24 to '25	Mkt. Share 2025
TOTAL	142,477	143,203	0.5%	
Car	35,861	33,370	-6.9%	23.3%
Light Truck	106,616	109,833	3.0%	76.7%
Domestic	46,116	44,150	-4.3%	30.8%
European	19,801	19,740	-0.3%	13.8%
Japanese	61,297	63,773	4.0%	44.5%
Other Asian	15,263	15,540	1.8%	10.9%

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  
2025 vs. 2024**

**San Diego County  
UP 0.5%**

**California  
UP 1.5%**

**U.S.  
UP 3.3%**

New retail light vehicle registrations in the county increased 0.5% from 2024 to 2025. State market increased 1.5%, while U.S. was up 3.3%.

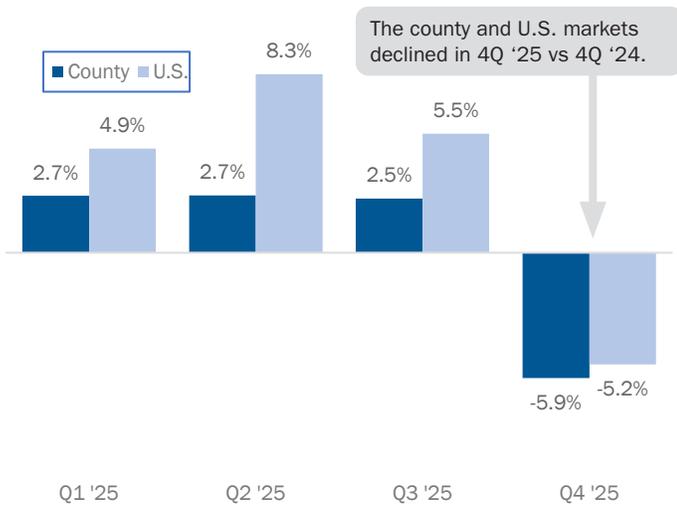
Data sourced from Experian Automotive.



## QUARTERLY RESULTS

### QUARTERLY TREND

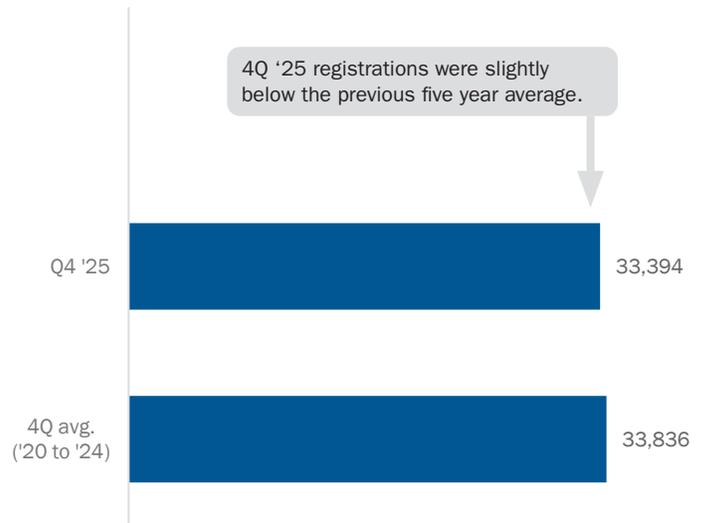
Percent Change in Registrations vs. Year Earlier



Data sourced from Experian Automotive.

### QUARTERLY PERSPECTIVE

4Q '25 Registrations Versus Average for Previous Five Years



### San Diego Auto Outlook

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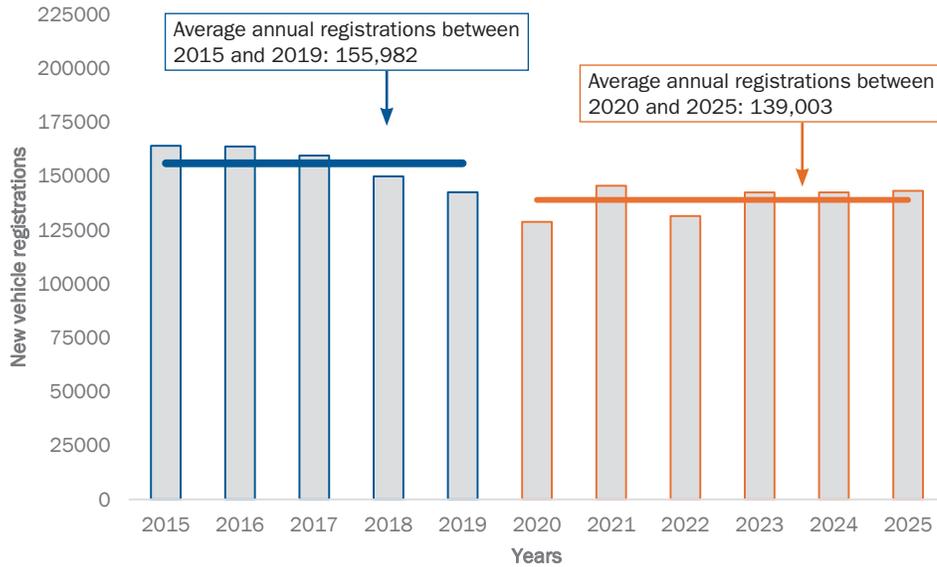
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# KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



## LONG TERM RESULTS

### Annual New Retail Light Vehicle Registrations in County Market - 2015 thru 2025



The graph on the left shows annual new retail light vehicle registrations from 2015 thru 2025. The grey bars show the actual totals in each year. The blue line represents average registrations between 2015 and 2019 and the orange line is the average between 2020 and 2025. The pandemic and subsequent supply chain issues in 2022 clearly took a toll on the market. Average registrations between 2020 and 2025 were 139,003 units, well below the previous five year average of 155,982. Postponed purchases that accrued during the past six years should provide some support for the market in 2026.

Data sourced from Experian Automotive.

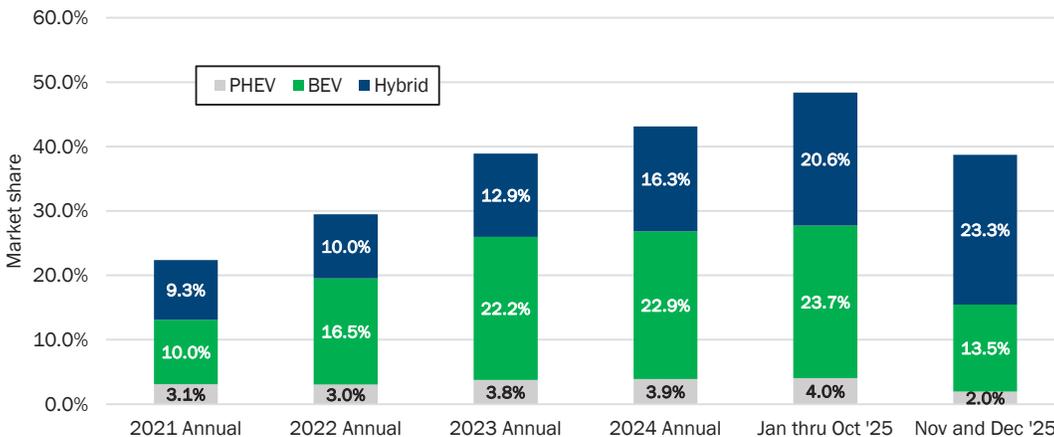


## ALTERNATIVE POWERTRAIN MARKET

### FIVE KEY TRENDS

1. BEV share fell from 23.7% during the first ten months of 2025 to just 13.5% in November and December.
2. BEV share during all of last year was 22.4%, down slightly from 22.9% in 2024.
3. Hybrid market share increased to 23.3% in Nov and Dec of last year, up from 20.6% during the preceding 10 months.
4. Plug in Hybrid vehicle market share fell to just 2.0% during the last two months of 2025.
5. ICE vehicles accounted for 52.9% of registrations for all of last year.

### Share of Industry Registrations for Alternative Powertrain Vehicles



Data sourced from Experian Automotive.

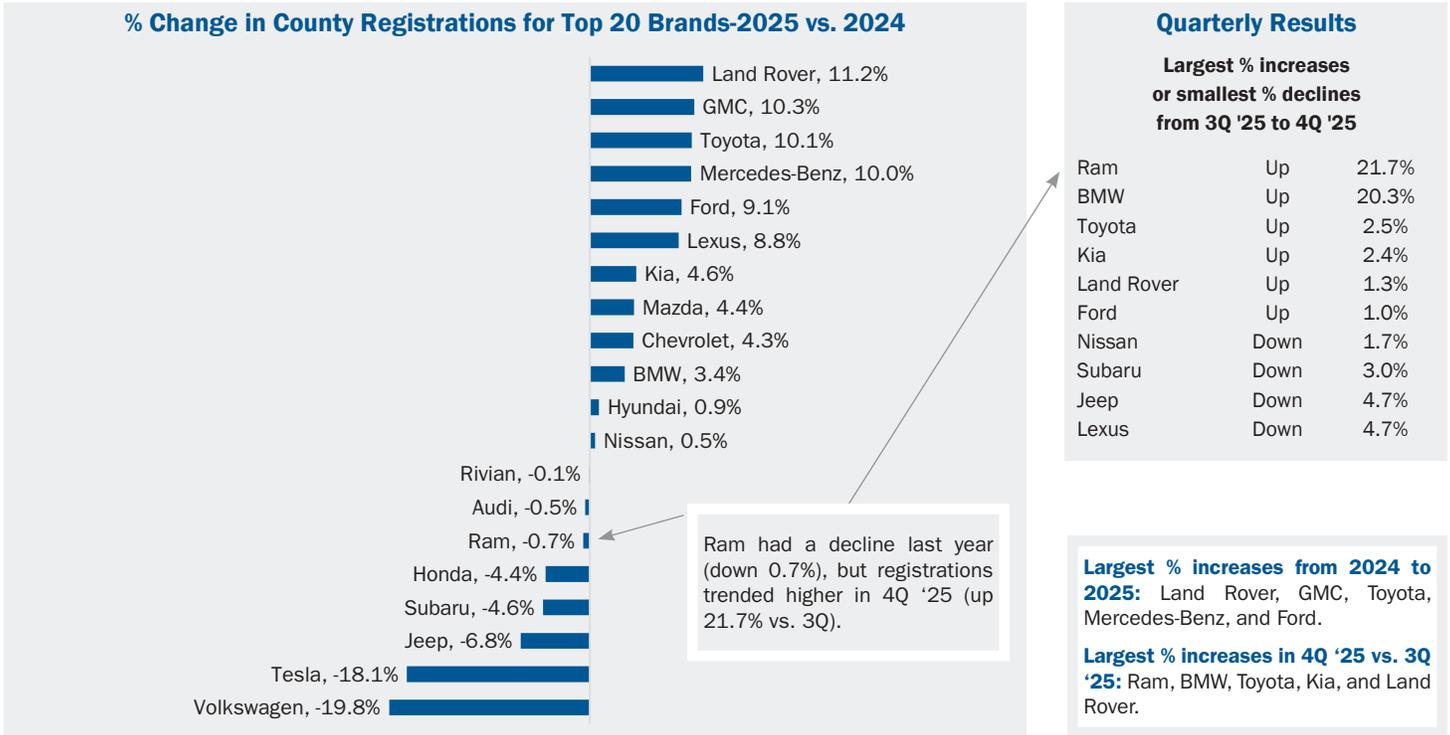
Due to customary processing delays, vehicle registration data lags the reporting of actual sales. This has impacted the measurement of BEV market share during the last few months of 2025. BEV sales were high in the second half of September due to the expiration of federal government tax credits, but many of these transactions were likely recorded as October registrations, inflating the measurement of BEV share in 4Q '25. BEV share for the entire fourth quarter (October through December) was 21.0% vs. 13.5% in November and December. The two-month figure is more reflective of BEV share following the expiration of the tax credits.

# BRANDS AND MODELS



## WINNERS AND LOSERS

The primary metric used to identify winning and losing brands is the percent change in registrations vs. year earlier, shown on the graph below. Land Rover and GMC were the biggest gainers last year among the top 20 brands. But this snapshot does not capture the shorter term trend in sales. Annual registrations for a brand may have declined, but if growth picked up during the most recent quarter, that's significant. The table to the right of the graph shows the ten brands with the largest increases, or smallest declines, from the third to the fourth quarters of last year. Data for all brands are shown on page 8.

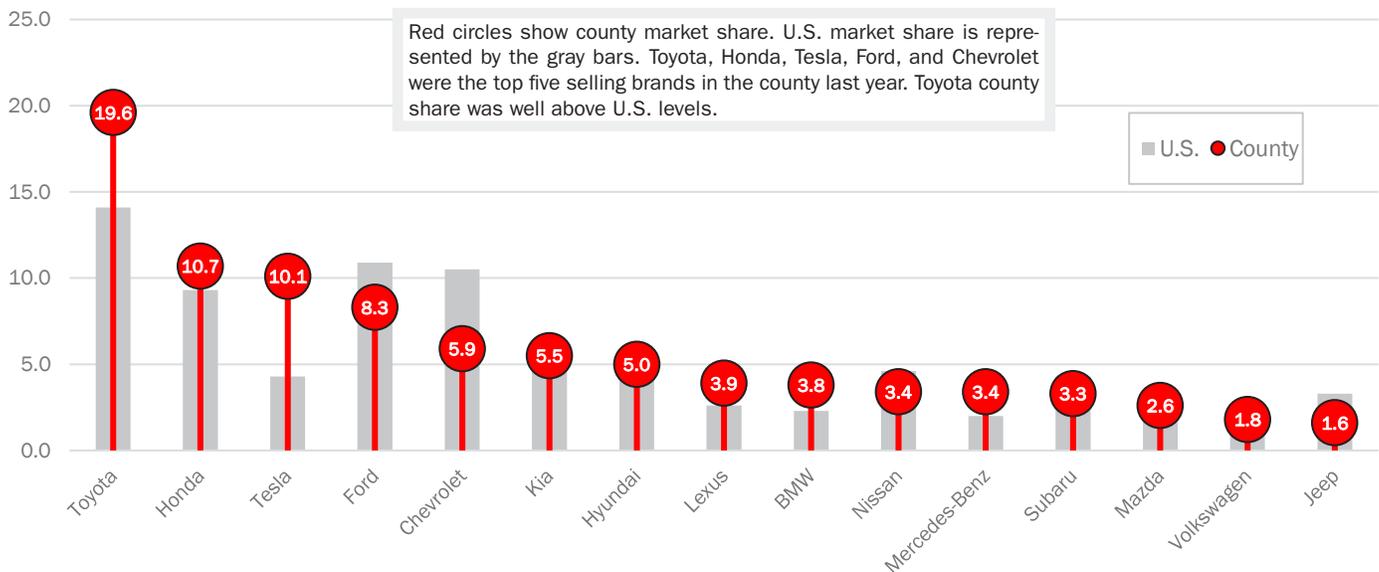


Data sourced from Experian Automotive.



## TOP SELLING BRANDS

### San Diego County and U.S. Market Shares for Top 15 Brands in County - 2025



Data sourced from Experian Automotive.

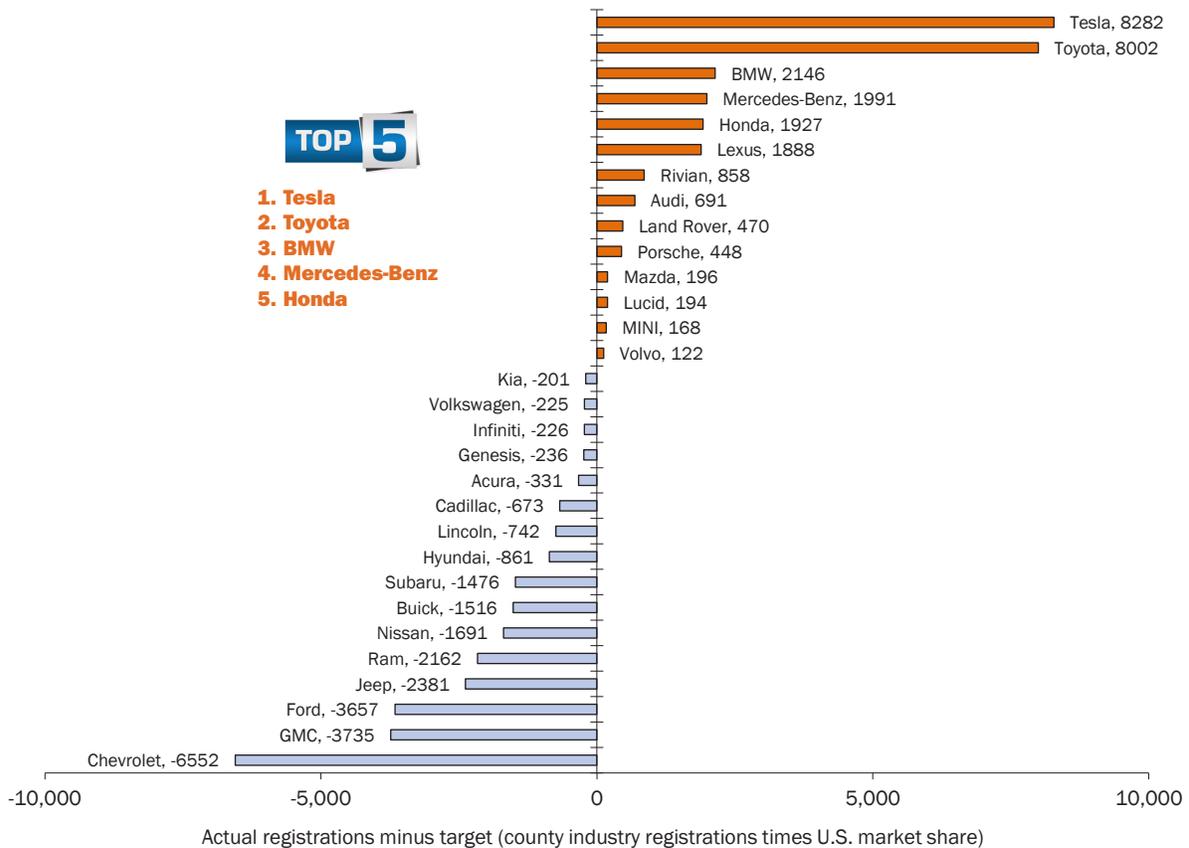
# BRANDS AND MODELS



## BRAND SALES PERFORMANCE

The graph below provides an indicator of brands that are popular in San Diego County (relative to the National standard), and those that are not. Here's how it works: For the top 30 selling brands, each brand's share of the U.S. market is multiplied by industry retail registrations in the county during 2025. This yields a "target" for the county market. Target registrations are subtracted from actual registrations to derive the measurement of sales performance. Brands at the top of the graph (i.e., Tesla, Toyota, BMW, Mercedes-Benz, and Honda) are relatively strong sellers in the county, with actual registrations exceeding calculated targets by large margins. For instance, Tesla registrations exceeded the target by 8,282 units.

**San Diego County Retail Market Performance based on registrations during 2025**  
**Actual registrations minus target (county industry registrations times U.S. market share)**



Data sourced from Experian Automotive.



## TOP SELLING MODELS

**Top 20 Selling Models during 2025 - Market Share and % Change in Registrations vs. 2024**

Rank	Model	County Share %	% chg. '24 to '25	Rank	Model	County Share %	% chg. '24 to '25
1	Tesla Model Y	6.3	-20.5	11	Chevrolet Equinox	1.5	134.7
2	Toyota RAV4	4.3	-6.0	12	Honda Accord	1.3	-16.4
3	Toyota Tacoma	3.4	56.6	13	Toyota Tundra	1.2	-3.1
4	Honda CR-V	3.1	-1.6	14	Honda HR-V	1.1	-21.5
5	Tesla Model 3	3.1	-1.8	15	Ford Maverick	1.1	-0.9
6	Honda Civic	3.0	-4.4	16	Subaru Crosstrek	1.1	-5.8
7	Toyota Camry	2.9	11.7	17	Kia Sportage	1.1	19.0
8	Ford F-Series	2.2	16.6	18	Hyundai Tucson	1.1	6.4
9	Toyota Corolla	2.2	2.4	19	Hyundai Ioniq 5	1.0	17.2
10	Chevrolet Silverado	1.8	-10.5	20	Lexus NX	1.0	4.4

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

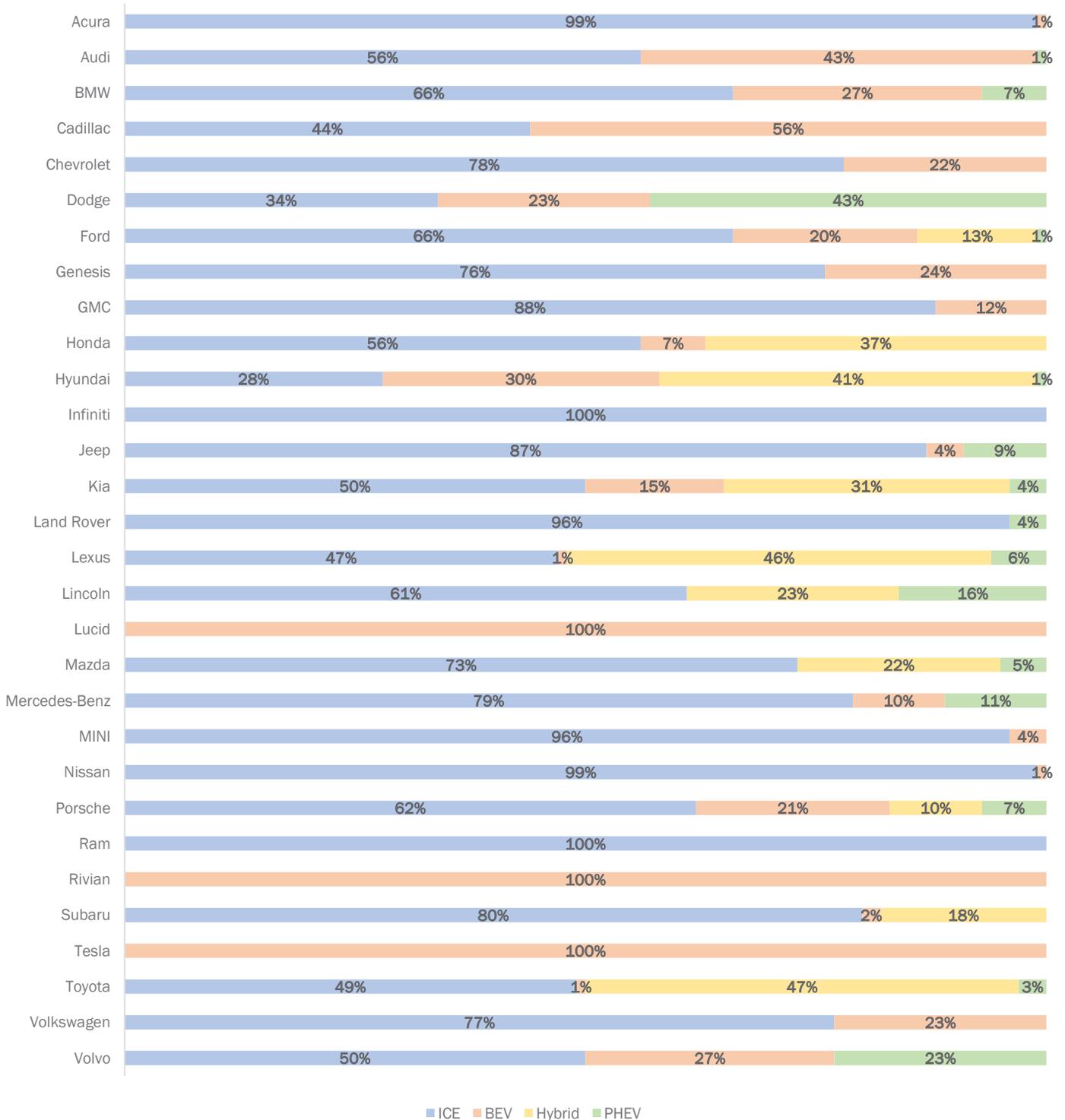
Data sourced from Experian Automotive.

# BRANDS AND MODELS



## POWERTRAIN MARKET SHARES

Share of Brand Registrations by Type of Powertrain - Fourth Quarter 2025 (top 30 brands)



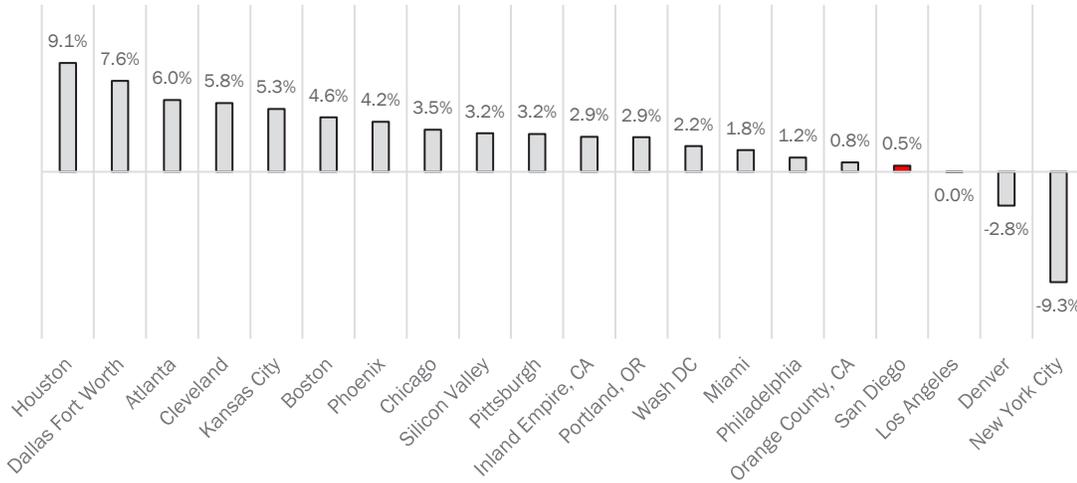
The graph above shows the breakdown of new vehicle registrations by powertrain type for each of the top 30 selling brands in the county during the fourth quarter of 2025. Data sourced from Experian Automotive.

# COMPARISON OF METRO AREA MARKETS



## INDUSTRY RESULTS IN 2025

Percent Change in New Retail Light Vehicle Registrations - 2025 vs. 2024



The graph on the left shows the percent change in new retail light vehicle registrations from 2024 to 2025 in 20 selected metro areas. San Diego County registrations increased 0.5% from 2024 to 2025, below average, but in-line with other California markets. The Houston market improved by 9.1% and the National market was up 3.3%.

Data sourced from Experian Automotive.



## POWERTRAIN MARKET SHARES

Market Share by Powertrain Type in 20 Selected Metro Area Markets - November and December 2025

Rank	ICE		Hybrid		BEV		PHEV	
	Area	% share						
1	Cleveland	84.9	Silicon Valley	29.2	Silicon Valley	23.0	Denver	2.7
2	Pittsburgh	83.1	Portland, OR	24.2	Orange County, CA	16.1	Portland, OR	2.6
3	New York City	81.6	San Diego	23.3	Los Angeles	13.5	Silicon Valley	2.6
4	Miami	80.5	Inland Empire, CA	22.5	San Diego	13.5	Los Angeles	2.1
5	Houston	79.8	Orange County, CA	22.2	Portland, OR	13.2	Orange County, CA	2.0
6	Kansas City	79.1	Los Angeles	22.1	Denver	11.8	San Diego	2.0
7	Dallas Fort Worth	77.2	Wash DC	21.1	Dallas Fort Worth	10.2	Wash DC	1.7
8	Philadelphia	76.9	Phoenix	17.2	Wash DC	9.8	Boston	1.6
9	Atlanta	75.7	Boston	17.1	Inland Empire, CA	9.5	New York City	1.4
10	Phoenix	75.6	Philadelphia	17.0	Atlanta	9.4	Philadelphia	1.4
11	Boston	75.3	Denver	16.7	Chicago	8.4	Chicago	1.2
12	Chicago	74.1	Chicago	16.3	Houston	8.2	Phoenix	1.2
13	Denver	68.8	Kansas City	14.7	Miami	8.1	Inland Empire, CA	1.1
14	Wash DC	67.4	Atlanta	13.9	Boston	6.0	Kansas City	1.1
15	Inland Empire, CA	66.9	Pittsburgh	13.9	Phoenix	6.0	Miami	1.1
16	Los Angeles	62.3	New York City	12.2	Kansas City	5.1	Atlanta	1.0
17	San Diego	61.2	Dallas Fort Worth	11.8	New York City	4.8	Cleveland	0.8
18	Portland, OR	60.0	Houston	11.3	Philadelphia	4.7	Dallas Fort Worth	0.8
19	Orange County, CA	59.7	Cleveland	10.7	Cleveland	3.6	Houston	0.7
20	Silicon Valley	45.2	Miami	10.3	Pittsburgh	2.3	Pittsburgh	0.7

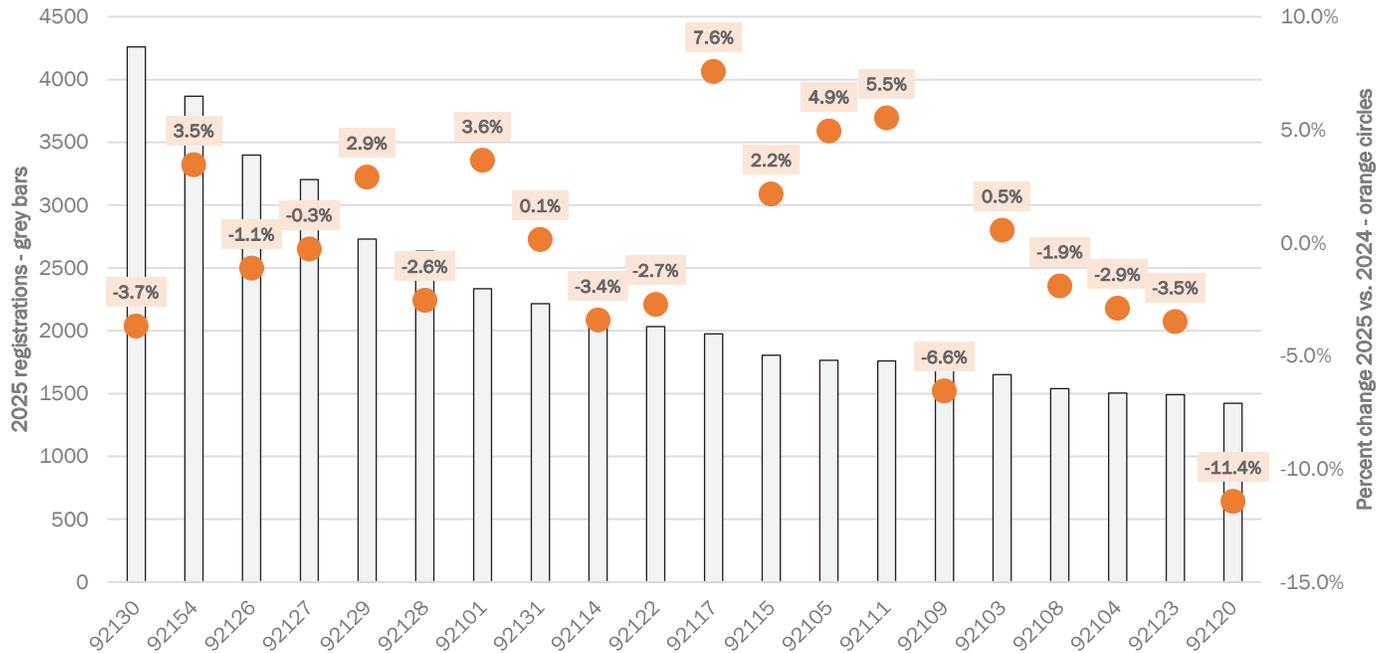
The table above shows percent market share by powertrain type (internal combustion, hybrids, battery electric, and plug in hybrids) for 20 selected metro area markets during November and December of 2025. Data sourced from Experian Automotive.

**ZIP CODE MARKETS IN SAN DIEGO**

**Registrations in Zip Code 92117 Increased 7.6% from 2024 to 2025**

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 - 2025 and Percent Change vs. 2024**



The graph above shows new vehicle registrations during 2025 (grey bars and left axis) and percent change vs. 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 (%)		
	2024 Annual	2025 Annual	% change '25 vs. '24	2024 Annual	2025 Annual	change '25 vs. '24	2024 Annual	2025 Annual	change '25 vs. '24
92101	2,254	2,336	3.6%	30.6	28.1	-2.5	46.9	44.0	-2.9
92103	1,641	1,650	0.5%	28.0	27.6	-0.4	38.8	35.4	-3.4
92104	1,549	1,504	-2.9%	20.9	20.0	-0.9	22.4	19.0	-3.4
92105	1,682	1,765	4.9%	13.6	12.5	-1.1	15.0	13.8	-1.2
92108	1,569	1,539	-1.9%	26.3	27.6	1.3	37.0	34.2	-2.8
92109	1,829	1,709	-6.6%	22.5	20.8	-1.7	31.7	30.0	-1.7
92111	1,668	1,760	5.5%	21.0	19.7	-1.3	23.6	21.5	-2.1
92114	2,161	2,087	-3.4%	13.9	14.2	0.3	16.4	16.7	0.3
92115	1,767	1,805	2.2%	18.4	18.3	-0.1	18.6	18.0	-0.6
92117	1,835	1,974	7.6%	24.4	21.5	-2.9	28.3	23.0	-5.3
92120	1,608	1,424	-11.4%	24.7	21.5	-3.2	30.8	27.9	-2.9
92122	2,091	2,034	-2.7%	30.5	29.7	-0.8	38.3	38.6	0.3
92123	1,545	1,491	-3.5%	22.9	20.4	-2.5	28.9	26.4	-2.5
92126	3,438	3,399	-1.1%	27.7	28.5	0.8	33.4	30.0	-3.4
92127	3,212	3,203	-0.3%	40.3	38.1	-2.2	53.1	51.3	-1.8
92128	2,704	2,635	-2.6%	31.3	30.2	-1.1	37.2	36.4	-0.8
92129	2,652	2,729	2.9%	35.6	33.2	-2.4	40.0	36.7	-3.3
92130	4,423	4,260	-3.7%	41.2	41.6	0.4	57.6	56.8	-0.8
92131	2,213	2,216	0.1%	33.4	34.6	1.2	42.8	41.9	-0.9
92154	3,738	3,867	3.5%	14.9	14.2	-0.7	17.7	17.7	0.0

Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

# Toyota Market Share Approached 36% in Zip Code 92105

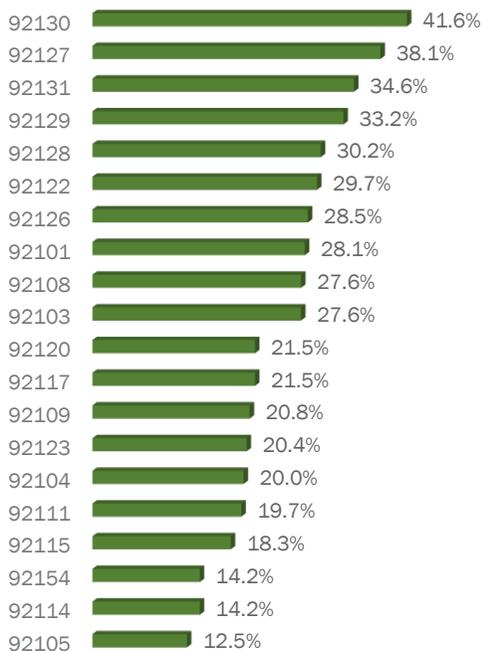
Brand Market Share - 2025 (for top 10 selling brands in county market)

Zip Code	Toyota	Tesla	Honda	Ford	Hyundai	Kia	Chevrolet	Lexus	BMW	Vedas-Benz
92101	12.3	13.6	8.6	7.8	3.9	4.8	4.1	4.2	7.3	5.8
92103	15.5	7.9	9.0	6.4	7.7	4.8	2.8	3.5	6.7	3.8
92104	21.4	5.3	14.5	5.7	7.6	6.4	3.7	3.1	2.8	1.6
92105	35.8	5.8	17.0	5.8	3.7	4.3	5.4	3.5	1.3	1.2
92108	17.7	14.2	9.6	8.6	4.6	6.0	4.4	3.5	5.5	4.0
92109	19.7	9.7	7.6	11.2	4.0	4.6	4.4	3.9	3.7	2.9
92111	23.8	7.8	10.9	8.8	5.3	5.6	6.4	3.9	2.1	2.6
92114	28.6	7.8	17.2	6.3	4.3	5.7	6.2	3.8	1.3	1.5
92115	28.0	7.1	15.5	5.8	5.7	6.5	5.2	3.1	1.7	1.4
92117	22.4	8.7	10.8	8.4	5.8	6.3	5.5	3.2	2.9	1.9
92120	21.1	7.2	9.9	8.6	6.7	6.4	5.6	3.9	4.8	3.6
92122	18.8	16.5	9.6	4.0	6.7	5.0	3.1	4.8	4.8	3.7
92123	20.4	10.1	10.5	8.1	5.2	5.6	7.8	3.3	3.2	3.7
92126	24.1	15.8	14.7	5.1	6.1	5.0	4.4	4.5	2.3	2.4
92127	11.9	18.1	7.4	4.9	5.6	4.4	4.3	5.4	7.5	4.9
92128	16.1	14.5	12.0	4.8	7.3	5.3	4.6	7.2	4.1	3.4
92129	19.5	18.0	11.2	4.9	6.9	4.9	3.9	6.0	3.6	2.7
92130	11.3	21.7	5.7	4.0	4.1	3.7	3.4	5.8	8.5	5.6
92131	14.4	15.1	10.5	5.1	6.9	4.6	5.1	5.7	6.0	4.5
92154	23.0	7.0	13.2	8.2	3.6	7.1	5.9	2.5	2.9	2.3

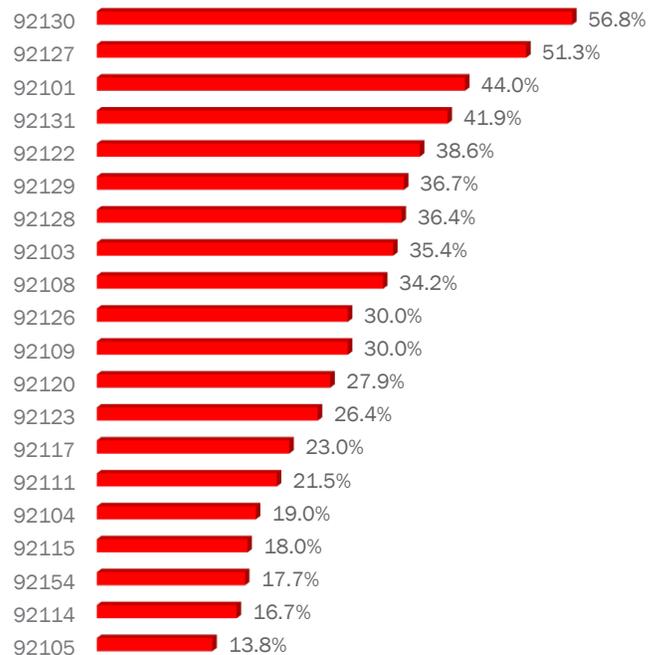
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



### Battery Electric Vehicle Market Share in San Diego Zip Codes 2025



### Luxury Brand Market Share in San Diego Zip Codes 2025



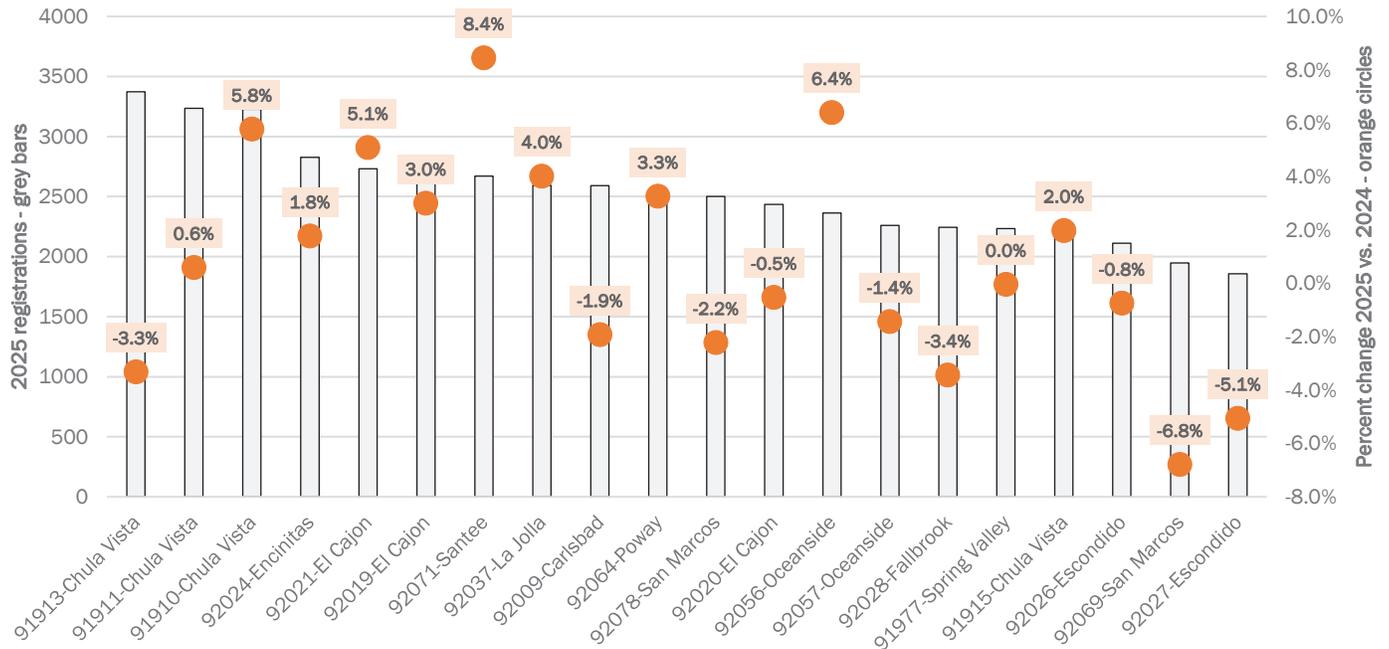
Data sourced from Experian Automotive.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

### 92071 (Santee) Had Largest Percentage Gain Last Year

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  
2025 and Percent Change 2024



The graph above shows new vehicle registrations during 2025 (grey bars and left axis) and percent change vs. 2024 (orange circles with labels and right axis). Data sourced from Experian Automotive.

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	2024 Annual	2025 Annual	% change '25 vs. '24	2024 Annual	2025 Annual	change '25 vs. '24	2024 Annual	2025 Annual	change '25 vs. '24
91910-Chula Vista	3,052	3,228	5.8%	16.4	16.3	-0.1	20.8	20.1	-0.7
91911-Chula Vista	3,215	3,234	0.6%	11.3	13.7	2.4	13.2	14.3	1.1
91913-Chula Vista	3,488	3,372	-3.3%	26.2	25.6	-0.6	33.4	32.3	-1.1
91915-Chula Vista	2,130	2,172	2.0%	26.7	25.8	-0.9	34.2	33.4	-0.8
91977-Spring Valley	2,236	2,235	0.0%	17.4	15.5	-1.9	17.7	15.5	-2.2
92009-Carlsbad	2,642	2,591	-1.9%	32.3	30.8	-1.5	47.9	45.7	-2.2
92019-El Cajon	2,603	2,681	3.0%	24.0	22.5	-1.5	34.9	32.1	-2.8
92020-El Cajon	2,448	2,435	-0.5%	15.7	16.2	0.5	21.3	19.2	-2.1
92021-El Cajon	2,600	2,732	5.1%	14.8	14.6	-0.2	17.5	15.8	-1.7
92024-Encinitas	2,779	2,828	1.8%	29.4	29.2	-0.2	42.4	43.7	1.3
92026-Escondido	2,128	2,112	-0.8%	20.4	20.5	0.1	24.5	24.2	-0.3
92027-Escondido	1,956	1,857	-5.1%	17.0	15.0	-2.0	18.3	16.6	-1.7
92028-Fallbrook	2,324	2,244	-3.4%	21.0	20.7	-0.3	28.7	26.6	-2.1
92037-La Jolla	2,493	2,593	4.0%	31.9	28.8	-3.1	58.2	57.5	-0.7
92056-Oceanside	2,222	2,364	6.4%	19.5	20.3	0.8	24.2	24.4	0.2
92057-Oceanside	2,293	2,260	-1.4%	20.5	20.7	0.2	23.5	22.9	-0.6
92064-Poway	2,461	2,541	3.3%	25.3	24.3	-1.0	32.2	30.4	-1.8
92069-San Marcos	2,089	1,947	-6.8%	21.7	20.2	-1.5	24.9	22.2	-2.7
92071-Santee	2,463	2,671	8.4%	18.6	16.2	-2.4	22.7	18.4	-4.3
92078-San Marcos	2,557	2,500	-2.2%	30.6	29.5	-1.1	37.3	34.9	-2.4

Data sourced from Experian Automotive.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

# BMW Market Share Approached 9% in Zip Code 92037

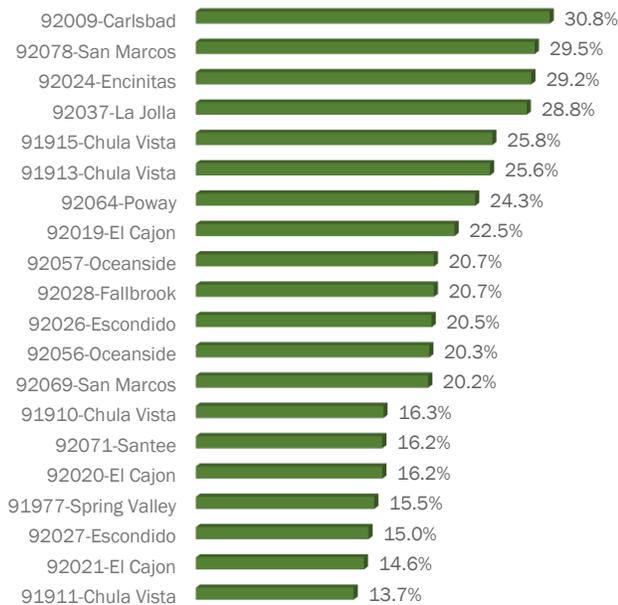
Brand Market Share - 2025 (for top 10 selling brands in county market)

Zip Code	Toyota	Honda	Tesla	Ford	Chevrolet	Kia	Hyundai	Nissan	Lexus	BMW
91910-Chula Vista	20.9	13.1	7.7	8.6	6.3	6.5	4.5	5.2	2.8	2.6
91911-Chula Vista	23.9	14.7	6.9	7.9	6.9	7.8	3.3	6.8	1.6	1.8
91913-Chula Vista	18.8	11.7	14.4	5.9	4.7	6.6	4.1	3.9	3.8	4.8
91915-Chula Vista	17.4	10.9	14.8	5.9	4.6	7.4	3.8	4.1	3.6	4.8
91977-Spring Valley	24.1	14.7	6.1	9.3	8.0	7.2	4.7	4.8	2.4	1.7
92009-Carlsbad	13.5	6.1	14.0	7.6	3.3	5.1	5.2	1.4	5.4	6.8
92019-El Cajon	21.3	8.4	6.9	7.0	9.7	4.5	2.9	3.6	4.6	6.8
92020-El Cajon	24.5	13.1	5.1	9.5	8.3	6.0	4.0	4.1	3.0	2.8
92021-El Cajon	23.9	12.6	4.7	10.4	10.2	6.2	4.8	4.9	2.6	2.2
92024-Encinitas	14.9	6.2	12.4	8.7	3.2	4.1	4.7	1.2	4.4	6.0
92026-Escondido	21.8	10.1	9.2	8.9	6.7	6.3	5.2	4.4	4.7	2.8
92027-Escondido	26.7	12.8	6.6	9.0	8.1	5.5	4.4	4.5	3.3	1.8
92028-Fallbrook	20.0	7.9	10.0	9.9	7.7	4.5	6.1	3.5	4.4	2.7
92037-La Jolla	11.6	4.8	12.1	5.6	1.5	3.8	3.4	0.9	5.2	8.9
92056-Oceanside	20.2	10.3	9.4	9.1	6.6	6.2	5.9	4.6	4.1	3.1
92057-Oceanside	22.3	10.7	9.5	8.5	6.8	5.8	4.6	5.1	4.1	2.8
92064-Poway	17.9	10.4	10.2	9.4	5.6	4.4	6.7	3.4	5.1	3.2
92069-San Marcos	22.7	10.4	9.5	9.1	7.0	5.4	5.8	4.9	4.1	2.1
92071-Santee	19.2	11.8	6.7	11.5	10.4	6.6	5.7	3.0	2.7	2.5
92078-San Marcos	15.3	9.0	13.4	8.9	5.3	5.6	5.1	2.5	4.6	3.6

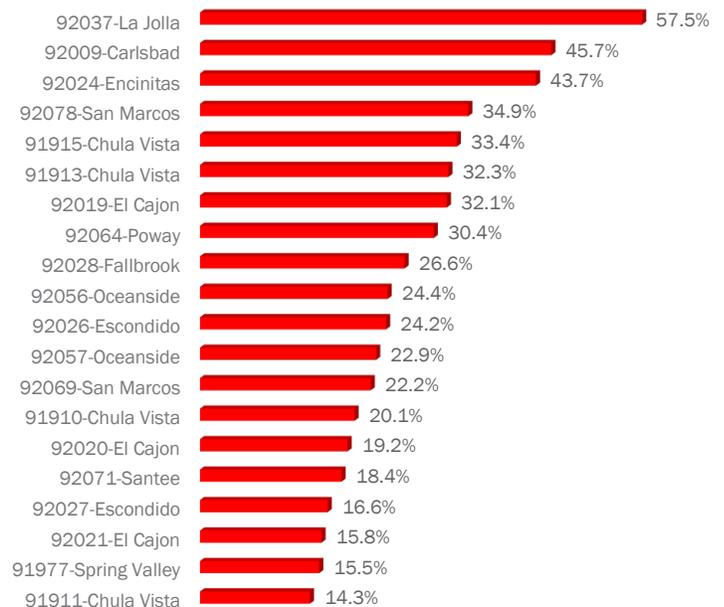
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



### Battery Electric Vehicle Market Share for Zip Codes Outside of San Diego 2025



### Luxury Brand Market Share for Zip Codes Outside of San Diego 2025



Data sourced from Experian Automotive.

**MODEL RANKINGS**

# Model Y and RAV4 Were Top Sellers in County Market

The table below shows the top five selling models in 2025 in 20 segments. In addition to unit registrations, it also shows each model's market share in its respective segment.



**BEST SELLERS IN PRIMARY SEGMENTS**

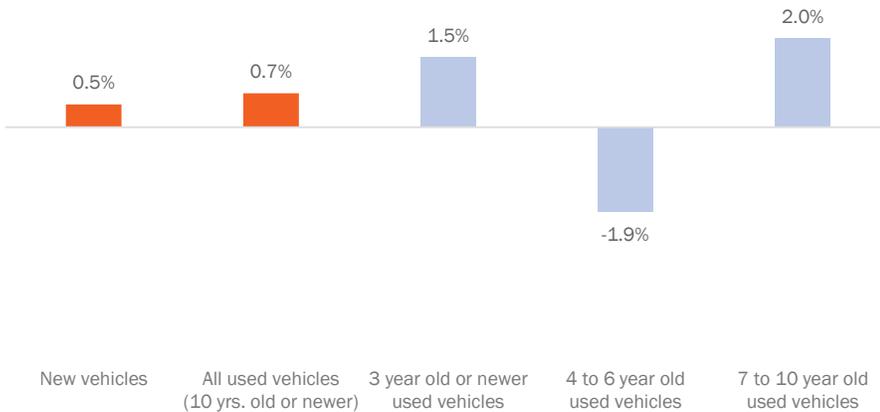
- Small Cars: Honda Civic
- Subcompact SUV: Honda HR-V
- Mid Size & Large Cars: Toyota Camry
- Compact SUV: Toyota RAV4
- Near Luxury Car: Tesla Model 3
- 2 Row Mid Size SUV: Mustang Mach-E
- Full Size Pickup: Ford F-Series
- Luxury Midsize SUV: Lexus RX

Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (2025)											
<b>Small Cars</b>			<b>Mid Size and Large Cars</b>				<b>Sports/Pony Cars</b>			<b>Near Luxury Cars</b>	
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda Civic	4288	32.5	Toyota Camry	4192	56.0	Ford Mustang	362	43.1	Tesla Model 3	4419	50.9
Toyota Corolla	3086	23.4	Honda Accord	1829	24.4	Toyota 86	173	20.6	BMW i4	889	10.2
Toyota Prius	1262	9.6	Kia K5	432	5.8	Mazda MX5	139	16.5	Lexus ES	722	8.3
Kia K4/Forte	1016	7.7	Hyundai Sonata	304	4.1	Nissan Z	57	6.8	BMW 3-Series	524	6.0
Nissan Sentra	929	7.0	Hyundai Ioniq 6	266	3.6	Subaru BRZ	54	6.4	Mercedes C-Class	374	4.3
<b>Luxury and High End Sports Cars</b>			<b>Compact/Mid Size Pickup</b>			<b>Full Size Pickup</b>			<b>Mini Van</b>		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
BMW i5	294	9.3	Toyota Tacoma	4799	53.2	Ford F-Series	3126	28.2	Toyota Sienna	997	38.1
Lucid Air	258	8.2	Ford Maverick	1594	17.7	Chevrolet Silverado	2548	23.0	Kia Carnival	797	30.4
Tesla Model S	227	7.2	Chevrolet Colorado	639	7.1	Toyota Tundra	1709	15.4	Honda Odyssey	523	20.0
Mercedes E-Class	218	6.9	Ford Ranger	620	6.9	GMC Sierra	1114	10.1	Chrysler Pacifica	141	5.4
BMW 5-Series	203	6.4	Nissan Frontier	398	4.4	Ram Pickup	982	8.9	Volkswagen ID.Buzz	133	5.1
<b>Large Van</b>			<b>Subcompact SUV</b>			<b>Compact SUV</b>			<b>2 Row Mid Size SUV</b>		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Mercedes Sprinter	640	42.0	Honda HR-V	1599	16.4	Toyota RAV4	6159	22.5	Ford Mustang Mach-E	1458	19.2
Ford Transit Connect	420	27.6	Subaru Crosstrek	1579	16.2	Honda CR-V	4442	16.3	Honda Prologue	1246	16.4
Ram Promaster	218	14.3	Toyota Corolla Cross	1394	14.3	Chevrolet Equinox	2108	7.7	Hyundai Santa Fe	1206	15.8
Chevrolet Express	106	7.0	Nissan Kicks	1008	10.4	Kia Sportage	1557	5.7	Toyota 4Runner	889	11.7
Ford E-Series	102	6.7	Chevrolet Trax	824	8.5	Hyundai Tucson	1539	5.6	Subaru Outback	885	11.6
<b>3 Row Mid Size SUV</b>			<b>Large SUV</b>			<b>Luxury Subcompact SUV</b>			<b>Luxury Compact SUV</b>		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Toyota Grand Highlan	1324	15.0	Ford Bronco	1397	35.9	Mercedes EQB	261	13.7	Tesla Model Y	8960	61.2
Kia Sorento	939	10.6	Toyota Land Cruiser	642	16.5	Audi Q3	231	12.2	Lexus NX	1474	10.1
Kia Telluride	911	10.3	Chevrolet Tahoe	440	11.3	BMW X1	230	12.1	Mercedes GLC-Class	999	6.8
Honda Pilot	861	9.8	Chevrolet Suburban	350	9.0	Audi Q4 E-Tron	208	11.0	BMW X3	713	4.9
Ford Explorer	767	8.7	Toyota Sequoia	206	5.3	Lexus UX	199	10.5	Audi Q5	439	3.0
<b>Luxury Mid Size SUV</b>			<b>Luxury Large SUV</b>			<b>Top Selling Passenger Cars</b>			<b>Top Selling Light Trucks</b>		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Lexus RX	1409	17.3	Rivian R1S	950	27.0	Tesla Model 3	4419	13.2	Tesla Model Y	8960	8.2
Mercedes GLE-Class	807	9.9	Lexus TX	642	18.3	Honda Civic	4288	12.8	Toyota RAV4	6159	5.6
BMW X5	790	9.7	Land Rover Range Ro	401	11.4	Toyota Camry	4192	12.6	Toyota Tacoma	4799	4.4
Audi Q6 e-tron	479	5.9	BMW X7	293	8.3	Toyota Corolla	3086	9.2	Honda CR-V	4442	4.0
Lexus GX	473	5.8	Cadillac Escalade	267	7.6	Honda Accord	1829	5.5	Ford F-Series	3126	2.8

**SAN DIEGO COUNTY USED VEHICLE MARKET**

**Used and New Vehicle Markets Had Similar Results Last Year**

**Percent Change in New and Used Vehicle Registrations  
2025 vs. 2024**



**THREE KEY TRENDS IN  
USED VEHICLE MARKET**



**01.**

The San Diego County used vehicle market increased a slim 0.7% from 2024 to 2025, almost identical to the new vehicle market.

**02.**

As shown on the graph to the left, registrations for three year old or newer vehicles increased 1.5% so far this year. The 4 to 6 year old market declined 1.9.

**03.**

Supplies of 4 and 6-year-old vehicles are likely to decline this year versus year earlier. Availability of 5-year-old vehicles should improve (see graph below).

Data sourced from Experian Automotive.

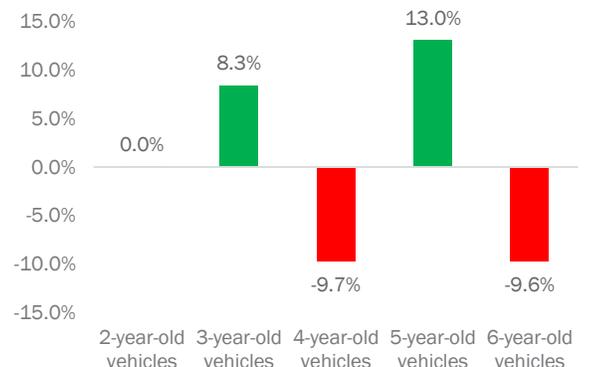
**TRACKING SUPPLY IN USED VEHICLE MARKET**

**Availability of 5-Year-Old Vehicles Should Improve This Year**

The table and graph above provide insight into available used vehicle supplies by model year for 2026. The logic is straightforward: availability of used vehicles is a function of historical new vehicle registrations. As shown in the table for instance, the supply of 3-year-old vehicles this year is based on new vehicle registrations three years earlier (2023). Supply of 3-year-old vehicles last year was new vehicle registrations in 2022. Comparing new vehicle registrations in 2022 and 2023 provides an indicator of how 3-year-old used vehicle availability will be changing from 2025 to 2026. As shown on the table and graph, 4 and 6-year-old vehicles will be harder to come by this year, while availability of 5-year-old vehicle should improve. Data sourced from Experian Automotive.

Tracking Used Vehicle Supply by Age of Vehicle for 2026			
<b>2-year-old vehicles</b>	Supply in 2025 =	Supply in 2026 =	% change
	new vehicle regs. in 2023:	new vehicle regs. in 2024:	
<b>3-year-old vehicles</b>	Supply in 2025 =	Supply in 2026 =	% change
	new vehicle regs. in 2022:	new vehicle regs. in 2023:	
<b>4-year-old vehicles</b>	Supply in 2025 =	Supply in 2026 =	% change
	new vehicle regs. in 2021:	new vehicle regs. in 2022:	
<b>5-year-old vehicles</b>	Supply in 2025 =	Supply in 2026 =	% change
	new vehicle regs. in 2020:	new vehicle regs. in 2021:	
<b>6-year-old vehicles</b>	Supply in 2025 =	Supply in 2026 =	% change
	new vehicle regs. in 2019:	new vehicle regs. in 2020:	

**Percent Change in Potential Vehicle Supply  
by Age of Vehicle - 2026 vs. 2025**



Brand Registrations Report												
San Diego County New Retail Car and Light Truck Registrations												
	Fourth Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	4Q '24	4Q '25	% change	4Q '24	4Q '25	Change	2024	2025	% change	2024	2025	Change
TOTAL	35,469	33,394	-5.9				142,477	143,203	0.5			
Cars	8,893	7,721	-13.2	25.1	23.1	-2.0	35,861	33,370	-6.9	25.2	23.3	-1.9
Light Trucks	26,576	25,673	-3.4	74.9	76.9	2.0	106,616	109,833	3.0	74.8	76.7	1.9
Domestic Brands	10,961	10,353	-5.5	30.9	31.0	0.1	46,116	44,150	-4.3	32.4	30.8	-1.6
European Brands	5,034	4,475	-11.1	14.2	13.4	-0.8	19,801	19,740	-0.3	13.9	13.8	-0.1
Japanese Brands	15,515	14,897	-4.0	43.7	44.6	0.9	61,297	63,773	4.0	43.0	44.5	1.5
Other Asian Brands	3,959	3,669	-7.3	11.2	11.0	-0.2	15,263	15,540	1.8	10.7	10.9	0.2
Acura	173	185	6.9	0.5	0.6	0.1	711	946	33.1	0.5	0.7	0.2
Alfa Romeo	12	9	-25.0	0.0	0.0	0.0	66	50	-24.2	0.0	0.0	0.0
Audi	499	480	-3.8	1.4	1.4	0.0	2,210	2,200	-0.5	1.6	1.5	-0.1
BMW	1,357	1,384	2.0	3.8	4.1	0.3	5,326	5,509	3.4	3.7	3.8	0.1
Buick	93	45	-51.6	0.3	0.1	-0.2	285	254	-10.9	0.2	0.2	0.0
Cadillac	203	263	29.6	0.6	0.8	0.2	860	1,045	21.5	0.6	0.7	0.1
Chevrolet	2,314	1,855	-19.8	6.5	5.6	-0.9	8,101	8,448	4.3	5.7	5.9	0.2
Chrysler	42	28	-33.3	0.1	0.1	0.0	230	169	-26.5	0.2	0.1	-0.1
Dodge	70	65	-7.1	0.2	0.2	0.0	475	223	-53.1	0.3	0.2	-0.1
Ford	2,779	2,959	6.5	7.8	8.9	1.1	10,925	11,916	9.1	7.7	8.3	0.6
Genesis	110	123	11.8	0.3	0.4	0.1	461	491	6.5	0.3	0.3	0.0
GMC	537	524	-2.4	1.5	1.6	0.1	2,073	2,287	10.3	1.5	1.6	0.1
Honda	3,984	3,431	-13.9	11.2	10.3	-0.9	16,010	15,311	-4.4	11.2	10.7	-0.5
Hyundai	1,720	1,681	-2.3	4.8	5.0	0.2	7,031	7,094	0.9	4.9	5.0	0.1
Ineos	25	31	24.0	0.1	0.1	0.0	157	108	-31.2	0.1	0.1	0.0
Infiniti	75	68	-9.3	0.2	0.2	0.0	326	265	-18.7	0.2	0.2	0.0
Jeep	605	528	-12.7	1.7	1.6	-0.1	2,503	2,332	-6.8	1.8	1.6	-0.2
Kia	2,024	1,841	-9.0	5.7	5.5	-0.2	7,552	7,897	4.6	5.3	5.5	0.2
Land Rover	304	301	-1.0	0.9	0.9	0.0	1,198	1,332	11.2	0.8	0.9	0.1
Lexus	1,204	1,269	5.4	3.4	3.8	0.4	5,162	5,615	8.8	3.6	3.9	0.3
Lincoln	58	88	51.7	0.2	0.3	0.1	324	317	-2.2	0.2	0.2	0.0
Lucid	53	100	88.7	0.1	0.3	0.2	210	300	42.9	0.1	0.2	0.1
Mazda	860	765	-11.0	2.4	2.3	-0.1	3,569	3,725	4.4	2.5	2.6	0.1
Mercedes-Benz	1,288	1,031	-20.0	3.6	3.1	-0.5	4,415	4,856	10.0	3.1	3.4	0.3
MINI	100	101	1.0	0.3	0.3	0.0	375	435	16.0	0.3	0.3	0.0
Mitsubishi	38	38	0.0	0.1	0.1	0.0	146	167	14.4	0.1	0.1	0.0
Nissan	1,166	1,179	1.1	3.3	3.5	0.2	4,886	4,911	0.5	3.4	3.4	0.0
Polestar	27	22	-18.5	0.1	0.1	0.0	198	110	-44.4	0.1	0.1	0.0
Porsche	330	219	-33.6	0.9	0.7	-0.2	1,123	1,098	-2.2	0.8	0.8	0.0
Ram	297	331	11.4	0.8	1.0	0.2	1,208	1,200	-0.7	0.8	0.8	0.0
Rivian	335	283	-15.5	0.9	0.8	-0.1	1,193	1,192	-0.1	0.8	0.8	0.0
Subaru	1,259	986	-21.7	3.5	3.0	-0.5	4,928	4,700	-4.6	3.5	3.3	-0.2
Tesla	3,572	3,282	-8.1	10.1	9.8	-0.3	17,643	14,457	-18.1	12.4	10.1	-2.3
Toyota	6,756	6,976	3.3	19.0	20.9	1.9	25,559	28,133	10.1	17.9	19.6	1.7
Volkswagen	724	568	-21.5	2.0	1.7	-0.3	3,219	2,581	-19.8	2.3	1.8	-0.5
Volvo	267	244	-8.6	0.8	0.7	-0.1	1,066	1,100	3.2	0.7	0.8	0.1
Other	209	111	-46.9	0.6	0.3	-0.3	753	429	-43.0	0.5	0.3	-0.2

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 fourth quarters of '24 and '25, and annual 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.