

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

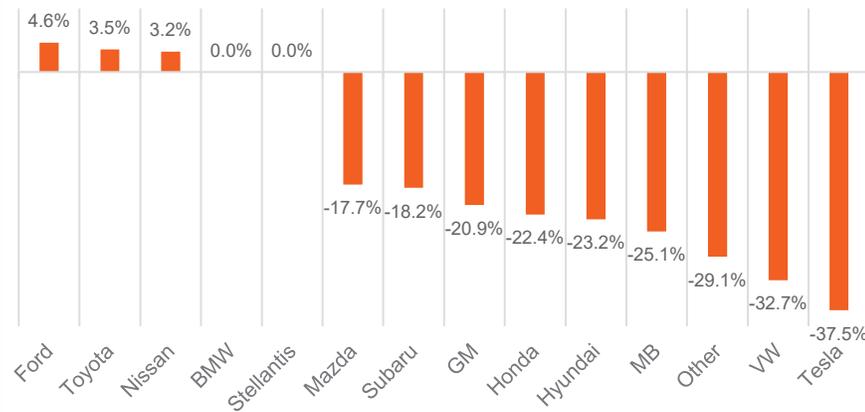
Data thru January 2026

San Diego County New Retail Car and Light Truck Registrations

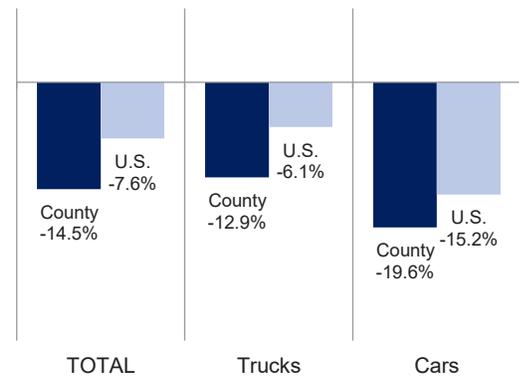
	Most Recent Two Months			Annual Totals			Annual Market Share		
	12/24 & 1/25	12/25 & 1/26	% change	2024	2025	% change	2024	2025	change
Industry Total	26,818	22,940	-14.5%	142,467	143,219	0.5%			
Cars	6,255	5,026	-19.6%	35,859	33,369	-6.9%	25.2	23.3	-1.9
Light Trucks	20,563	17,914	-12.9%	106,608	109,850	3.0%	74.8	76.7	1.9

Data sourced from Experian Automotive. January '26 figures partially estimated.

**Percent Change in County Registrations by Manufacturer
Dec. '25 & Jan. '26 vs. Year Earlier**



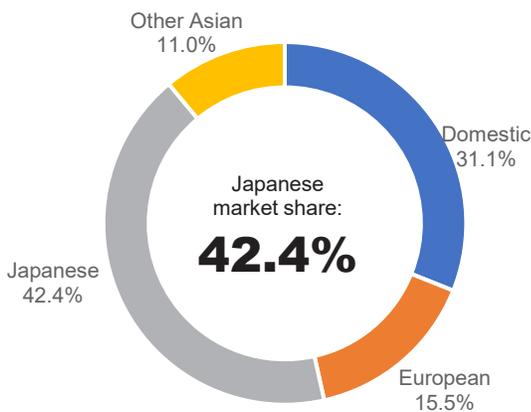
**Percent Change in County and U.S.
New Retail Light Vehicle Markets
Dec. '25 & Jan. '26 vs. Year Earlier**



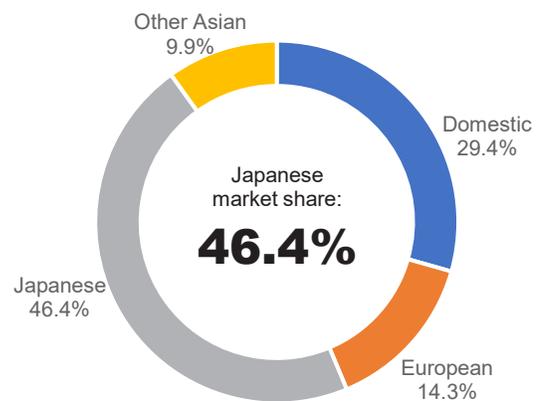
The graph above shows the percent change in new car and light truck registrations by manufacturer in December of 2025 and January of this year versus the same period a year earlier. Data sourced from Experian Automotive. Note: MB is Mercedes-Benz.

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
Dec. '24 & Jan. '25**



**San Diego County Market Shares
Dec. '25 & Jan. '26**



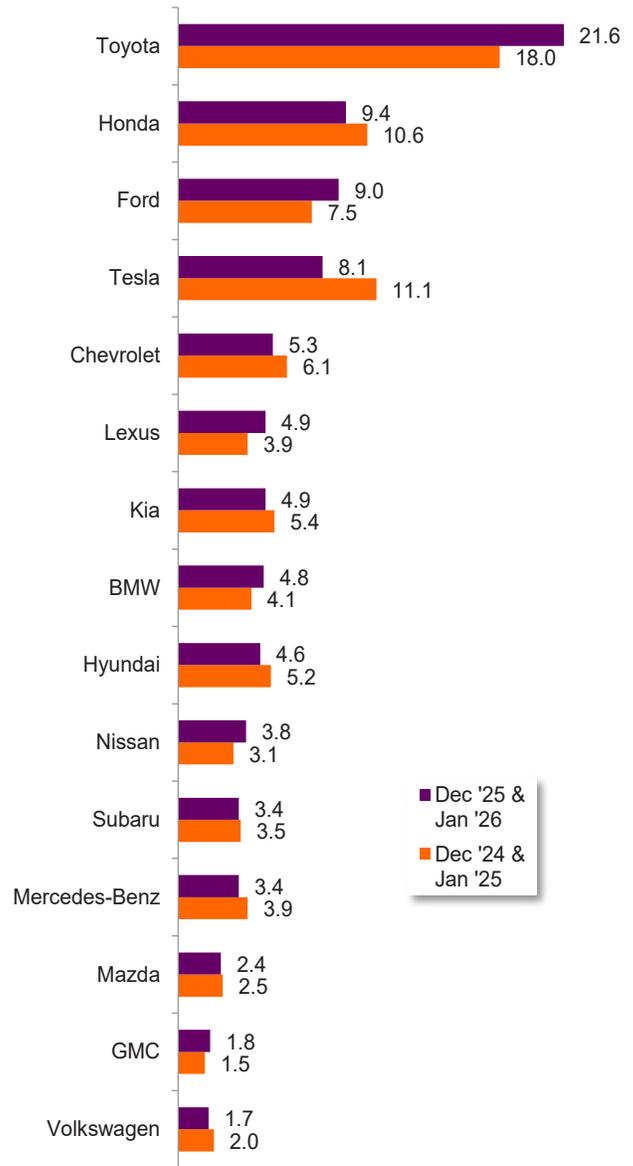
Data Information

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		
	Dec '24 & Jan '25	Dec '25 & Jan '26	% change	Dec '24 & Jan '25	Dec '25 & Jan '26	
Acura	147	152	3%	0.5%	0.7%	
Alfa Romeo	10	2	-80%	0.0%	0.0%	
Audi	426	291	-32%	1.6%	1.3%	
BMW	1,089	1,097	1%	4.1%	4.8%	
Buick	71	32	-55%	0.3%	0.1%	
Cadillac	170	142	-16%	0.6%	0.6%	
Chevrolet	1,627	1,217	-25%	6.1%	5.3%	
Chrysler	22	23	5%	0.1%	0.1%	
Dodge	35	23	-34%	0.1%	0.1%	
Ford	2,003	2,076	4%	7.5%	9.0%	
Genesis	97	68	-30%	0.4%	0.3%	
GMC	410	410	0%	1.5%	1.8%	
Honda	2,830	2,157	-24%	10.6%	9.4%	
Hyundai	1,390	1,055	-24%	5.2%	4.6%	
Ineos	27	20	-26%	0.1%	0.1%	
Infiniti	72	62	-14%	0.3%	0.3%	
Jeep	424	383	-10%	1.6%	1.7%	
Kia	1,452	1,135	-22%	5.4%	4.9%	
Land Rover	295	196	-34%	1.1%	0.9%	
Lexus	1,036	1,120	8%	3.9%	4.9%	
Lincoln	41	62	51%	0.2%	0.3%	
Lucid	52	53	2%	0.2%	0.2%	
Mazda	661	544	-18%	2.5%	2.4%	
Mercedes-Benz	1,033	774	-25%	3.9%	3.4%	
MINI	84	76	-10%	0.3%	0.3%	
Mitsubishi	30	9	-70%	0.1%	0.0%	
Nissan	826	865	5%	3.1%	3.8%	
Polestar	17	5	-71%	0.1%	0.0%	
Porsche	292	163	-44%	1.1%	0.7%	
Ram	210	271	29%	0.8%	1.2%	
Rivian	277	187	-32%	1.0%	0.8%	
Subaru	943	771	-18%	3.5%	3.4%	
Tesla	2,984	1,865	-38%	11.1%	8.1%	
Toyota	4,839	4,963	3%	18.0%	21.6%	
Volkswagen	528	384	-27%	2.0%	1.7%	
Volvo	252	207	-18%	0.9%	0.9%	
Other	116	80	-31%	0.4%	0.3%	



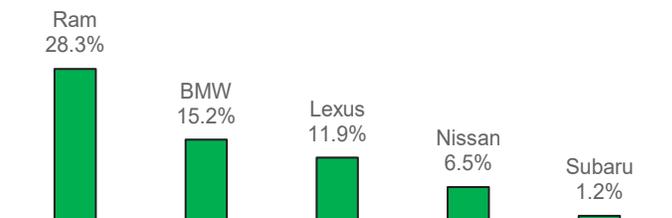
County Market Share for Top 15 Selling Brands Dec '25 and Jan '26 vs. Year Earlier



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 (Nov '25 thru Jan '26) vs. preceding 3 months (Aug '25 thru Oct '25) Among top 20 selling brands in past three months



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