

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

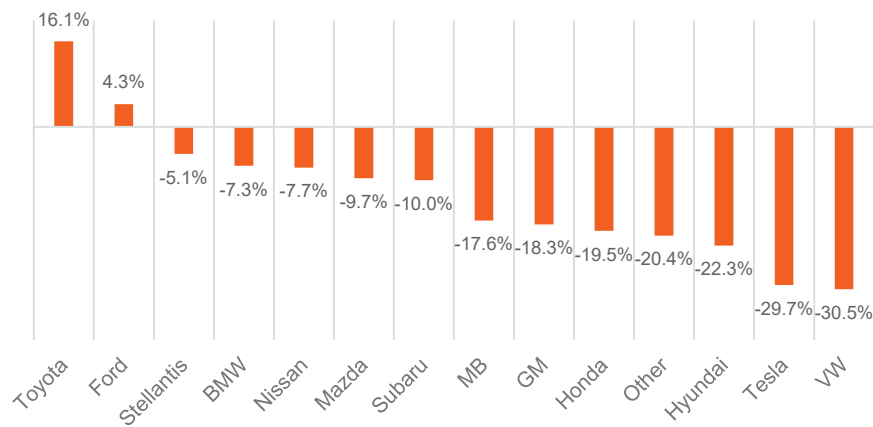
Data thru February 2026

San Diego County New Retail Car and Light Truck Registrations

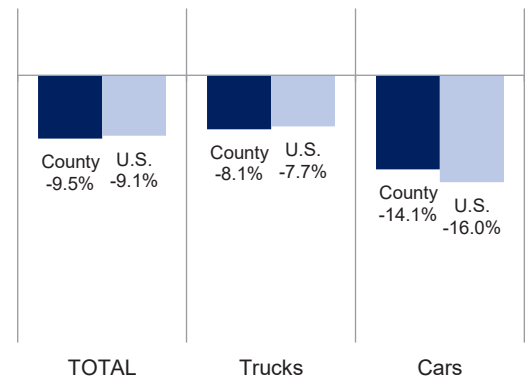
	Feb.			YTD thru Feb.			YTD Market Share		
	Feb-25	Feb-26	% change	YTD '25	YTD '26	% change	YTD '25	YTD '26	change
Industry Total	10,316	9,698	-6.0%	25,672	23,241	-9.5%			
Cars	2,461	2,269	-7.8%	5,998	5,154	-14.1%	23.4	22.2	-1.2
Light Trucks	7,855	7,429	-5.4%	19,674	18,087	-8.1%	76.6	77.8	1.2

Data sourced from Experian Automotive. Figures for February 2026 are partially estimated.

Percent Change in County Registrations by Manufacturer YTD 2026 thru Feb. vs. YTD 2025



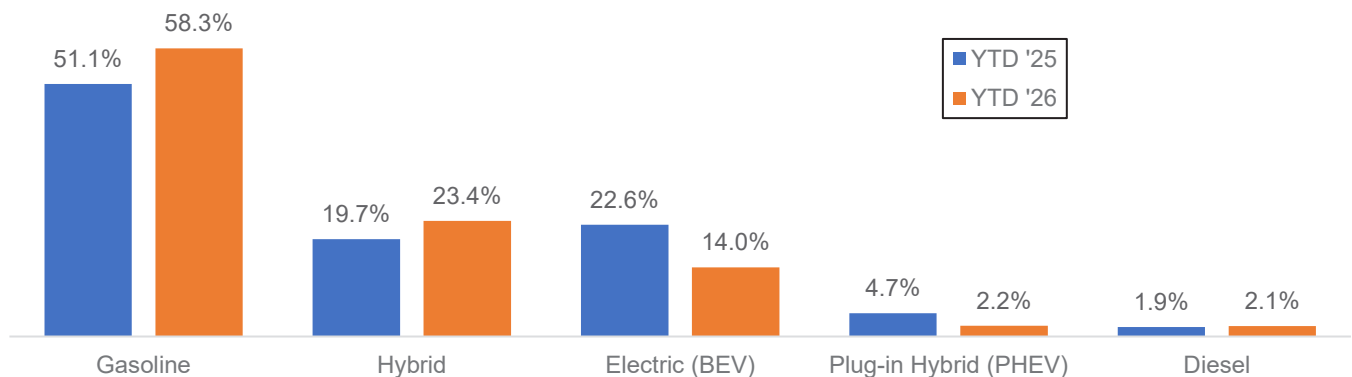
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD 2026 thru Feb. vs. YTD 2025



The graph above shows the percent change in new car and light truck registrations by manufacturer during the first two 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 by Powertrain Type YTD 2025 and YTD 2026, thru February



The graph above shows market share by type of powertrain. Hybrid vehicle market share excludes mild hybrids. Data sourced from Experian Automotive.

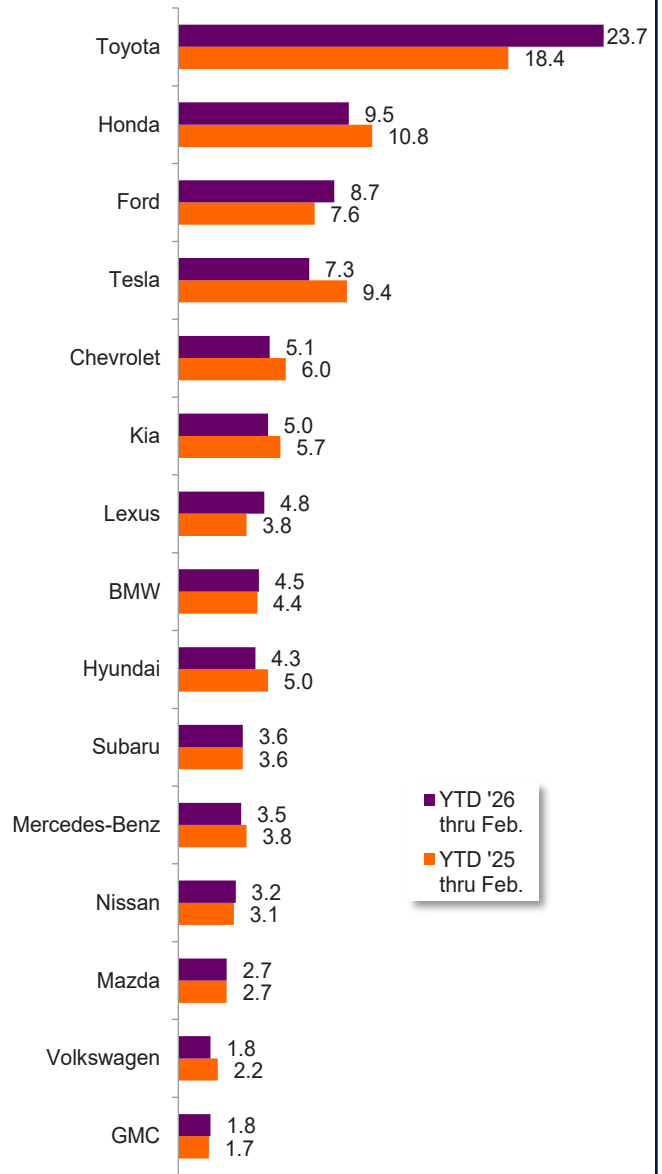
Data Information

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 '25 thru Feb.	YTD '26 thru Feb.	% change	YTD '25 thru Feb.	YTD '26 thru Feb.
Acura	162	144	-11%	0.6%	0.6%
Alfa Romeo	10	6	-40%	0.0%	0.0%
Audi	447	300	-33%	1.7%	1.3%
BMW	1,129	1,045	-7%	4.4%	4.5%
Buick	61	46	-25%	0.2%	0.2%
Cadillac	189	139	-26%	0.7%	0.6%
Chevrolet	1,528	1,193	-22%	6.0%	5.1%
Chrysler	34	28	-18%	0.1%	0.1%
Dodge	36	27	-25%	0.1%	0.1%
Ford	1,948	2,020	4%	7.6%	8.7%
Genesis	109	54	-50%	0.4%	0.2%
GMC	425	423	0%	1.7%	1.8%
Honda	2,760	2,207	-20%	10.8%	9.5%
Hyundai	1,277	1,001	-22%	5.0%	4.3%
Ineos	27	21	-22%	0.1%	0.1%
Infiniti	57	47	-18%	0.2%	0.2%
Jeep	403	348	-14%	1.6%	1.5%
Kia	1,474	1,167	-21%	5.7%	5.0%
Land Rover	327	188	-43%	1.3%	0.8%
Lexus	981	1,117	14%	3.8%	4.8%
Lincoln	45	58	29%	0.2%	0.2%
Lucid	49	114	133%	0.2%	0.5%
Mazda	683	617	-10%	2.7%	2.7%
Mercedes-Benz	983	810	-18%	3.8%	3.5%
MINI	81	76	-6%	0.3%	0.3%
Mitsubishi	30	12	-60%	0.1%	0.1%
Nissan	805	749	-7%	3.1%	3.2%
Polestar	16	6	-63%	0.1%	0.0%
Porsche	251	177	-29%	1.0%	0.8%
Ram	206	247	20%	0.8%	1.1%
Rivian	187	171	-9%	0.7%	0.7%
Subaru	930	837	-10%	3.6%	3.6%
Tesla	2,411	1,695	-30%	9.4%	7.3%
Toyota	4,718	5,497	17%	18.4%	23.7%
Volkswagen	575	408	-29%	2.2%	1.8%
Volvo	230	171	-26%	0.9%	0.7%
Other	88	75	-15%	0.3%	0.3%



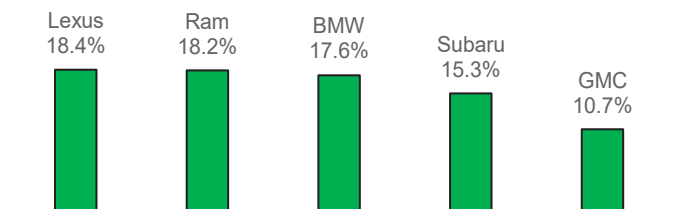
County Market Share for Top 15 Selling Brands YTD '26 thru February vs. Year Earlier



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 (Dec '25 thru Feb '26) vs. preceding 3 months (Sep '25 thru Nov '25) Among top 20 selling brands in past three months



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