

# 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 3.4% in 2026



#### Key factors boosting new vehicle sales

**Pent up demand.** New vehicle sales since the onset of the pandemic have been below average. And the Great Recession of 2009 was called great for a reason: it took nearly seven years for sales to return to normal levels. Due to this extended period of below-average sales, the vehicle fleet is aging (see below). Vehicle purchases have been postponed, which will provide support to the market.

**Consumers have incentive to upgrade.** Average age of vehicles in operation has reached an all-time high. No question, modern vehicles are built better and last longer, but today's models offer many upgraded features vs. the average 12.5-year-old car. Passive and active safety technology, advanced infotainment options, and alternative powertrains are just a few examples. Many vehicle owners have a strong incentive to upgrade.

**Declining interest rates?** Prior to the Iran war, the prospects were good for interest rates to fall during 2026. But the war and subsequent increases in oil and gasoline prices have brought that into question. Lower finance rates are critical for improving affordability, which is the primary negative for the market.



#### Key factors holding back new vehicle sales

**New vehicle affordability.** Finance costs remain elevated due to high interest rates, vehicle transaction prices are hovering around \$50,000, and income growth is barely keeping pace with inflation. Manufacturers can alleviate price pressures by reducing content levels and offering more affordable models, but these adjustments take time.

**Tariffs.** Higher tariffs will negatively impact new vehicle sales in 2026. Up until now, manufacturers and dealers have largely absorbed the costs, but eventually, consumers will feel the effects. Tariffs also lead to increasing inflation in the economy, which reduces disposable household income.

**Uncertainty.** Forecasting auto sales is always challenging, but the past 15 months have been particularly unpredictable. Unforeseen events like fluctuating tariff rates, the phase-out of BEV tax credits, the war in Iran, and rising gasoline prices have all thrown uncertainty into the outlook. Largely as a result of this ongoing tumult, consumer confidence has plummeted to near record-low levels. Heightened uncertainty makes people reluctant to make big-ticket purchases, like automobiles.

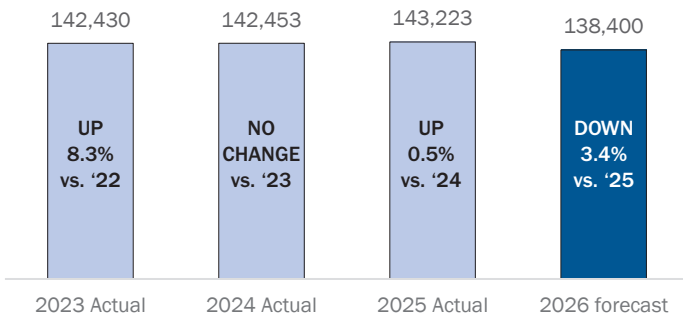
#### Key Trends in County Market



- » County new retail light vehicle registrations are predicted to decline 3.4% for all of this year versus 2025.
- » Registrations in the first quarter of 2026 slipped to 32,584 units, off by 10.7% from a year earlier and below the previous five year average (see page 2). The U.S. market declined 8.8%.
- » BEV and PHEV registrations fell by more than 43% in the first quarter of this year (see page 6). BEV market share fell to 14.1%
- » Among top 25 sellers, Toyota, Lexus, Lucid, Ram, and Ford were the only brands to have increases in registrations so far this year (see page 5).
- » Tesla Model 3 and Lexus NX are relatively strong performers in the county market (see page 7).

### Forecast for County New Retail Light Vehicle Registrations

### Market Summary



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.

	YTD '25 thru Mar.	YTD '26 thru Mar.	% Chg. '25 to '26	Mkt. Share YTD '26
TOTAL	36,503	32,584	-10.7%	
Car	8,477	7,198	-15.1%	22.1%
Light Truck	28,026	25,386	-9.4%	77.9%
Domestic	10,746	9,039	-15.9%	27.7%
European	5,669	4,546	-19.8%	14.0%
Japanese	15,991	15,674	-2.0%	48.1%
Other Asian	4,097	3,325	-18.8%	10.2%

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 2026 thru Mar.  
vs. YTD 2025**

**San Diego County**

**DOWN 10.7%**

**California**

**DOWN 10.6%**

**U.S.**

**DOWN 8.5%**

New retail light vehicle registrations in the county declined 10.7% during the first three months of this year versus year earlier. State market was off 10.6%, while U.S. was down 8.5%.

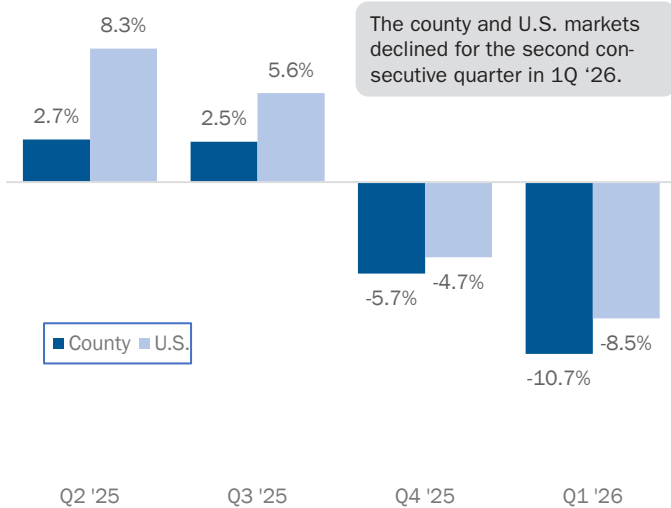
Data sourced from Experian Automotive.



## QUARTERLY RESULTS

### QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



Data sourced from Experian Automotive.

### QUARTERLY PERSPECTIVE

1Q '26 Registrations Versus 1Q Average for Previous Five Years



### San Diego Auto Outlook

Published by:

Auto Outlook, Inc.

PO Box 390, Exton, PA 19341

Phone: 610-640-1233 EMail: autooutlook@icloud.com

Editor: Jeffrey A. Foltz

Information quoted must be attributed to *San Diego Auto Outlook*, published by Auto Outlook, Inc. on behalf of the New Car Dealers Association San Diego County and must also include the statement: "Data sourced from Experian Automotive."

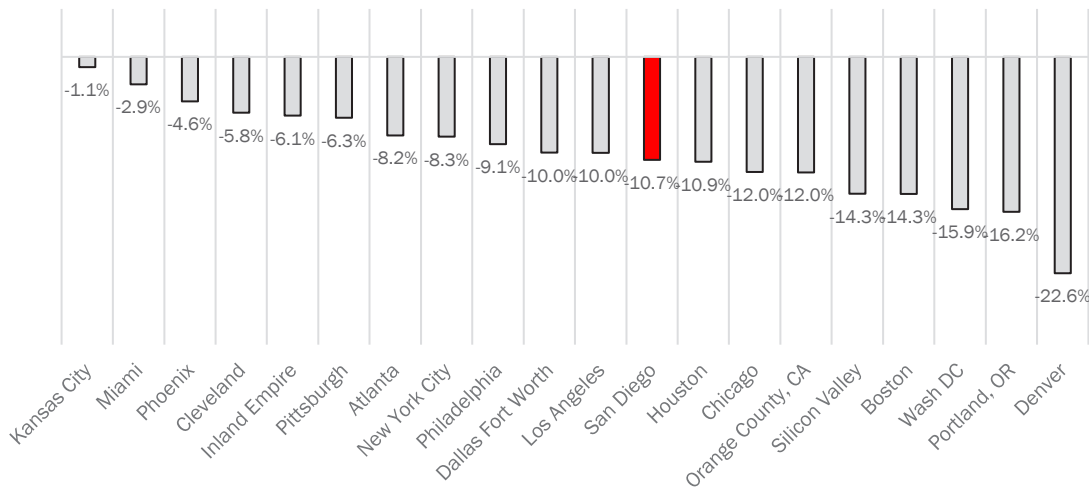
At Auto Outlook, we strive to provide sound and accurate analyses and forecasts based upon the data available to us. However, our forecasts are derived from third-party data and contain a number of assumptions made by Auto Outlook and its management, including, without limitation, the accuracy of the data compiled. As a result, Auto Outlook can make no representation or warranty with respect to the accuracy or completeness of the data we provide or the forecasts or projections that we make based upon such data. Auto Outlook expressly disclaims any such warranties, and undue reliance should not be placed on any such data, forecasts, projections, or predictions. Auto Outlook undertakes no obligation to update or revise any predictions or forecasts, whether as a result of any new data, the occurrence of future events, or otherwise.

# COMPARISON OF METRO AREA MARKETS



## INDUSTRY RESULTS IN FIRST QUARTER 2026

Percent Change in New Retail Light Vehicle Registrations - 1Q 2026 vs. 1Q 2025



The graph on the left shows the percent change in new retail light vehicle registrations during the first three months of this year versus year earlier in 20 selected metro areas. San Diego county registrations fell 10.7% in the first quarter of this year, slightly below average compared to other markets. The Kansas City market had the smallest decline, off 1.1%.

Data sourced from Experian Automotive.



## MARKET SHARE BY BRAND CATEGORY

Market Share by Brand Type in 20 Selected Metro Area Markets - YTD 2026 thru March

Rank	Domestic Brands		European Brands		Japanese Brands		Other Asian Brands	
	Area	% share	Area	% share	Area	% share	Area	% share
1	Cleveland	44.5	Los Angeles	18.1	Portland, OR	52.4	Chicago	14.7
2	Dallas Fort Worth	41.3	Miami	18.1	Inland Empire, CA	49.3	Cleveland	14.7
3	Kansas City	40.8	Orange County, CA	16.9	Boston	48.8	Atlanta	14.0
4	Houston	40.5	New York City	16.7	Wash DC	48.2	Miami	14.0
5	Pittsburgh	39.8	Silicon Valley	14.3	San Diego	48.1	Phoenix	14.0
6	Phoenix	36.7	San Diego	14.0	Los Angeles	47.8	Wash DC	13.2
7	Atlanta	35.1	Wash DC	13.5	New York City	45.7	Philadelphia	13.0
8	Silicon Valley	34.3	Boston	13.4	Orange County, CA	44.5	Pittsburgh	13.0
9	Chicago	32.7	Philadelphia	13.3	Philadelphia	44.3	Kansas City	12.4
10	Denver	31.5	Denver	12.7	Denver	44.2	Inland Empire, CA	11.7
11	Inland Empire, CA	29.9	Chicago	12.0	Silicon Valley	42.4	Denver	11.6
12	Philadelphia	29.4	Phoenix	10.4	Atlanta	40.9	New York City	11.6
13	Miami	29.0	Houston	10.3	Chicago	40.6	Dallas Fort Worth	11.3
14	Boston	28.5	Atlanta	10.0	Pittsburgh	40.5	Portland, OR	10.9
15	Orange County, CA	28.2	Portland, OR	9.8	Miami	38.9	Los Angeles	10.8
16	San Diego	27.7	Dallas Fort Worth	9.7	Phoenix	38.9	Houston	10.5
17	Portland, OR	26.9	Inland Empire, CA	9.1	Houston	38.7	Orange County, CA	10.4
18	New York City	26.0	Kansas City	9.0	Kansas City	37.8	San Diego	10.2
19	Wash DC	25.1	Pittsburgh	6.7	Dallas Fort Worth	37.7	Boston	9.3
20	Los Angeles	23.3	Cleveland	6.4	Cleveland	34.4	Silicon Valley	9.0

The table above shows percent market share for Domestic, European, Japanese, and Other Asian brands in 20 selected metro area markets in the first quarter of this year. Other Asian brands include Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.

# BRANDS



## TOP SELLING BRANDS IN 7 PRIMARY SEGMENTS

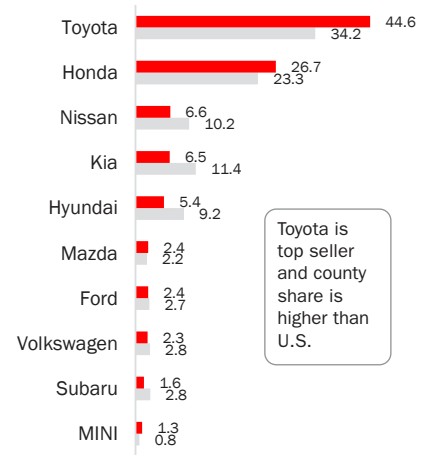
The seven graphs on this page show brand market share in seven key segments during the first three months of 2026 in both the San Diego County and U.S. markets. County percent share is depicted by the red bars, U.S. share is light gray. Top ten brands in each segment are ranked from top to bottom based on San Diego County share.

Segments were defined based on model classifications instead of overall brand positioning. For instance, Chevrolet appears on the Luxury and Sports cars graph because of the Corvette. Small SUVs consists of both Sub Compact and Compact models.

### Legend for all graphs

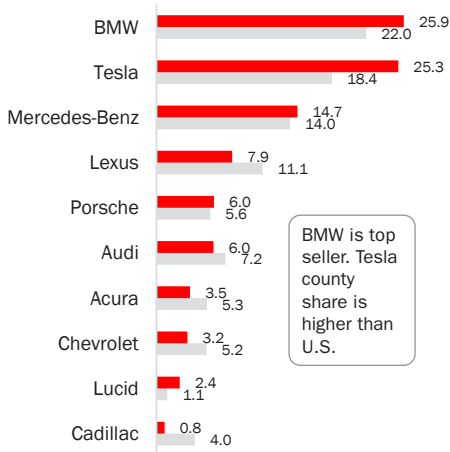


### Mainstream Cars



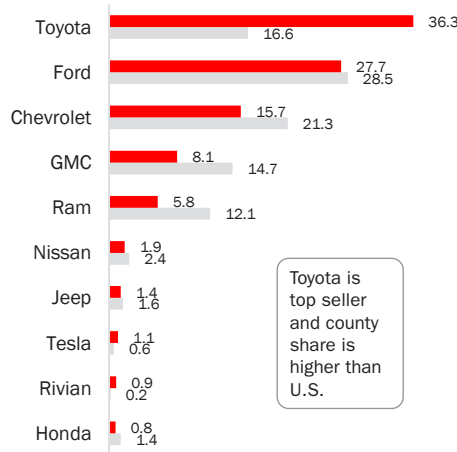
Toyota is top seller and county share is higher than U.S.

### Luxury and Sports Cars



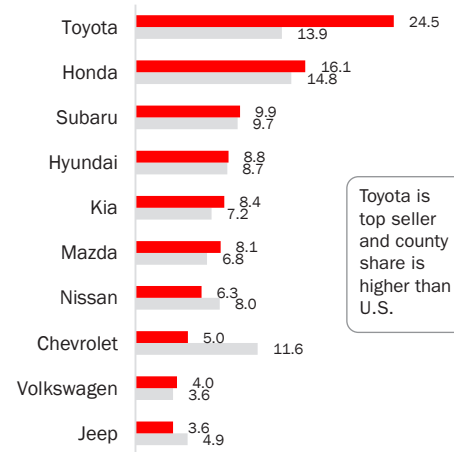
BMW is top seller. Tesla county share is higher than U.S.

### Pickups



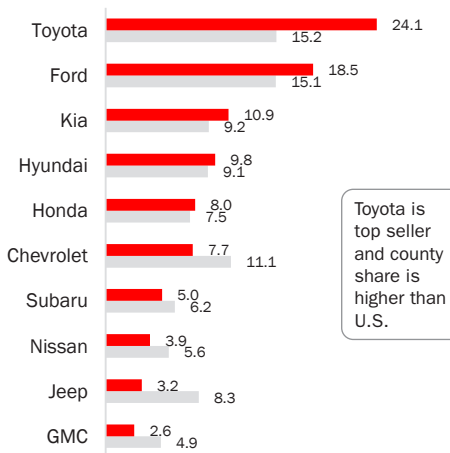
Toyota is top seller and county share is higher than U.S.

### Small Mainstream SUVs



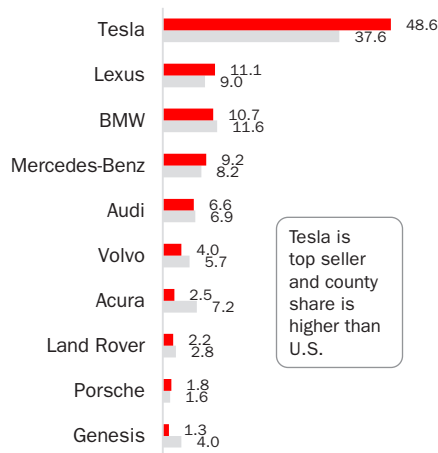
Toyota is top seller and county share is higher than U.S.

### Mid and Full Size Mainstream SUVs



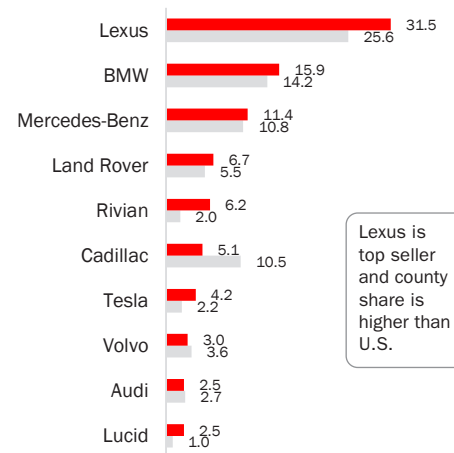
Toyota is top seller and county share is higher than U.S.

### Small Luxury SUVs



Tesla is top seller and county share is higher than U.S.

### Mid and Full Size Luxury SUVs



Lexus is top seller and county share is higher than U.S.

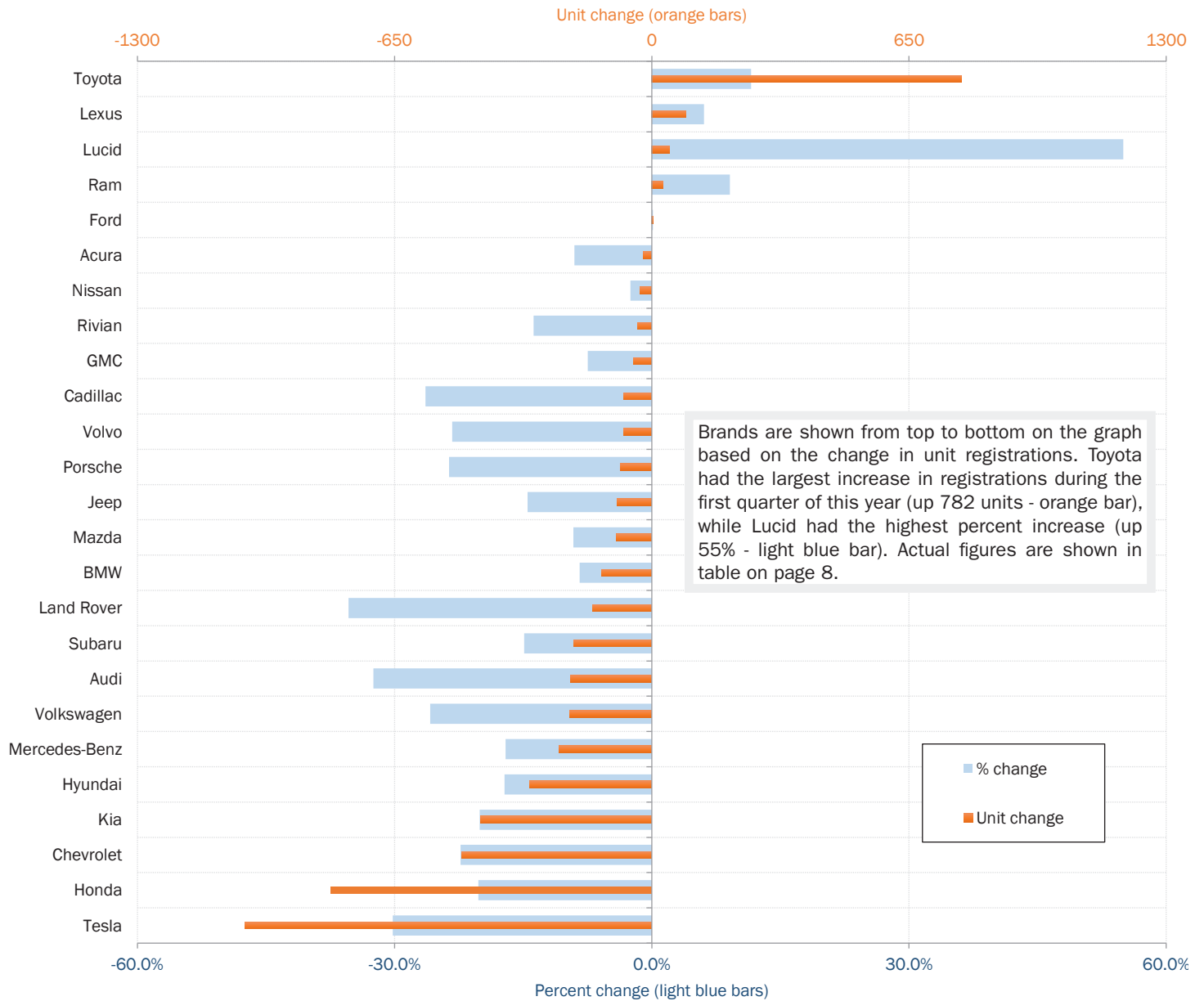
# BRANDS



## WINNERS AND LOSERS

The graph below shows both the percent and unit change in registrations during the first quarter of this year versus year earlier for the top 25 selling brands in the San Diego County market.

**Percent and Unit Change in New Retail Light Vehicle Registrations for Top 25 Selling Brands - YTD '26 thru Mar. vs. YTD '25**



# POWERTRAINS

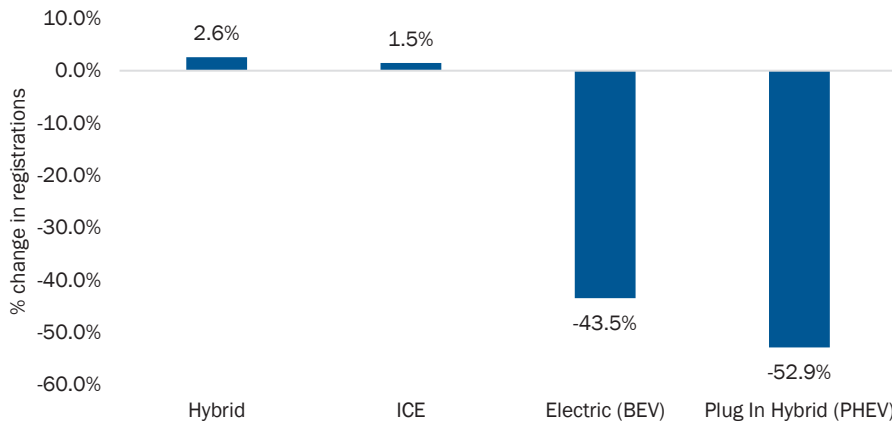
## FIVE KEY TRENDS

- 1.** BEV registrations declined 43.5% during the first three months of 2026 vs. year earlier.
- 2.** BEV market share fell to 14.1% in 1Q '26, down from 22.3% in 1Q '25.
- 3.** Hybrid vehicle registrations increased 2.6% so far this year vs. the 10.7% drop in the overall market.
- 4.** Plug-in-hybrids had the largest percentage decline in 1Q '26 versus year earlier.
- 5.** BEV/PHEV market share was highest in the Small Luxury SUV segment (see graph below).



## ICE, BEV, PHEV, AND HYBRID MARKET SHARE

**% Change in Registrations by Powertrain Type YTD '26 thru Mar. vs YTD '25**



**% Share of Industry Registrations by Powertrain Type**

	YTD thru March		
	YTD '25	YTD '26	
Hybrid	20.1%	23.1%	↑
Electric (BEV)	22.3%	14.1%	↓
Plug In Hybrid (PHEV)	4.4%	2.3%	↓

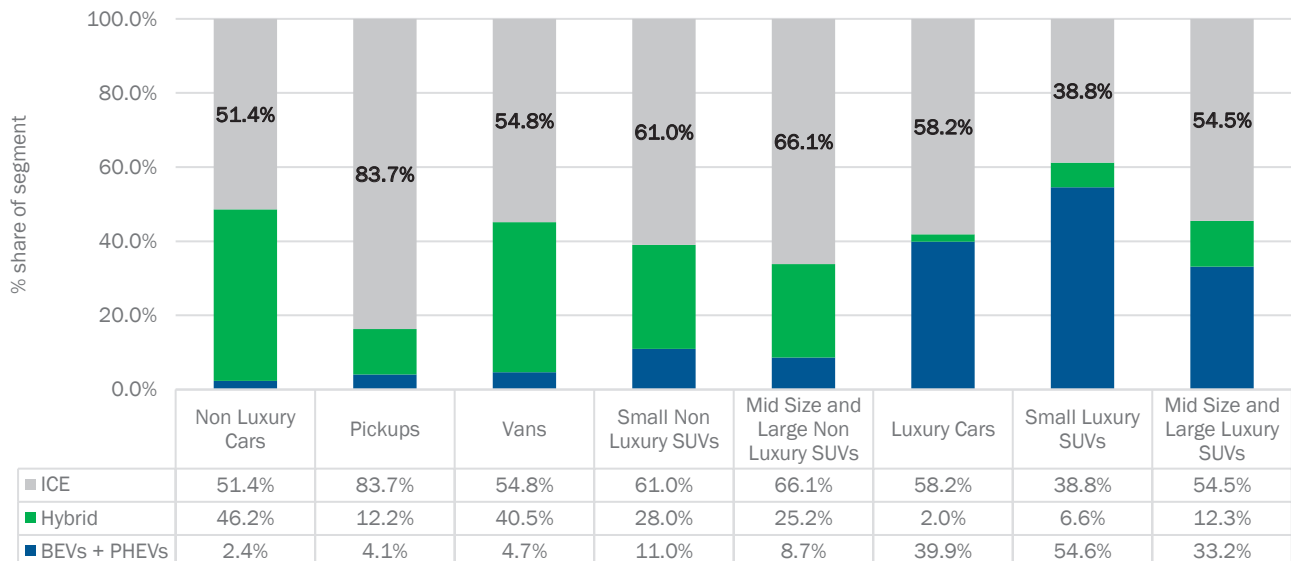
	Quarterly		
	4Q '25	1Q '26	
Hybrid	21.5%	23.1%	↑
Electric (BEV)	21.0%	14.1%	↓
Plug In Hybrid (PHEV)	2.7%	2.3%	↓

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



## POWERTRAIN SHARES FOR VEHICLE SEGMENTS

**Percent Share of Segment Registrations by Powertrain Type - YTD 2026 thru March**



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 39% for Luxury Cars and Small Luxury SUVs. Hybrids accounted for 46.2% of the Non Luxury Car segment. Data sourced from Experian Automotive.

# MODELS



## COMPARISON OF TOP-SELLING MODELS IN COUNTY AND U.S. MARKETS

The table below shows rankings in the San Diego County and U.S. markets for the top 30 sellers in the county. Models are shown from top to bottom based on county registrations. The bars on the right of the table show the difference between county and U.S. rankings. Tesla Model Y was the best-selling model in San Diego County and sixth in the Nation. Lexus NX was a relatively strong performer in the county, with county ranking exceeding U.S. by 35 positions.

San Diego County and U.S. Rankings for Top 30 Selling Models in County - YTD 2026 thru March

Model	County Rank	U.S. Rank	Difference in county and U.S. rankings	
			Positive # = higher rank in county. Negative # = lower rank in county	
Tesla Model Y	1	6	5	
Toyota Tacoma	2	8	6	
Toyota RAV4	3	4	1	
Toyota Camry	4	9	5	
Honda CR-V	5	3	-2	
Honda Civic	6	11	5	
Toyota Corolla	7	12	5	
Ford F-Series	8	1	-7	
Chevrolet Silverado	9	2	-7	
Lexus RX	10	32	22	
Toyota Corolla Cross	11	38	27	
Toyota Tundra	12	19	7	
Tesla Model 3	13	52	39	
Toyota 4Runner	14	26	12	
Honda Accord	15	22	7	
Subaru Crosstrek	16	18	2	
Kia Sportage	17	17	0	
Ford Bronco	18	23	5	
Subaru Forester	19	15	-4	
Hyundai Tucson	20	13	-7	
Ford Maverick	21	39	18	
Toyota Grand Highlander	22	24	2	
Lexus NX	23	58	35	
GMC Sierra	24	5	-19	
Honda HR-V	25	28	3	
Nissan Rogue	26	14	-12	
Ram Pickup	27	7	-20	
Mazda CX-5	28	27	-1	
Mazda CX-50	29	48	19	
Toyota Sienna	30	47	17	

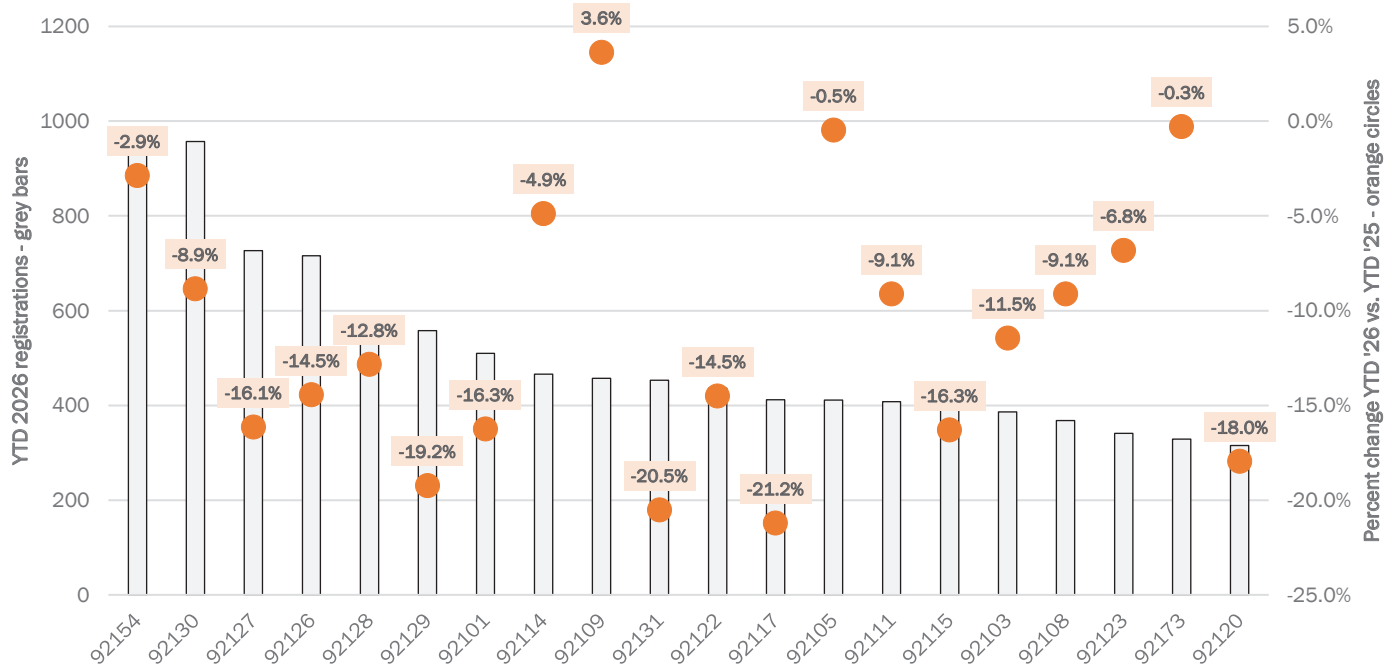
Data sourced from Experian Automotive.

**ZIP CODE MARKETS IN SAN DIEGO**

**Registrations Increased in Just One of Top 20 Zip Codes**

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 2026 thru March and Percent Change vs. YTD 2025**



The graph above shows new vehicle registrations during the first three months of this year (grey bars and left axis) and percent change vs. year earlier (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 '25 thru March	YTD '26 thru March	% change '26 vs. '25	YTD '25 thru March	YTD '26 thru March	change '26 vs. '25	YTD '25 thru March	YTD '26 thru March	change '26 vs. '25
92101	609	510	-16.3%	27.8	22.7	-5.1	41.7	42.0	0.3
92103	436	386	-11.5%	27.3	19.2	-8.1	36.0	35.5	-0.5
92105	413	411	-0.5%	12.1	8.8	-3.3	14.5	12.2	-2.3
92108	405	368	-9.1%	28.9	16.8	-12.1	35.1	33.2	-1.9
92109	441	457	3.6%	22.0	12.5	-9.5	31.7	27.8	-3.9
92111	449	408	-9.1%	19.4	11.5	-7.9	20.3	18.1	-2.2
92114	490	466	-4.9%	15.3	9.4	-5.9	16.3	12.2	-4.1
92115	466	390	-16.3%	19.7	10.8	-8.9	17.4	16.4	-1.0
92117	523	412	-21.2%	22.8	16.7	-6.1	21.6	25.7	4.1
92120	384	315	-18.0%	19.0	15.2	-3.8	25.3	27.0	1.7
92122	510	436	-14.5%	28.2	20.9	-7.3	37.1	35.6	-1.5
92123	366	341	-6.8%	21.3	10.6	-10.7	26.8	17.3	-9.5
92126	837	716	-14.5%	27.4	16.9	-10.5	27.8	24.9	-2.9
92127	867	727	-16.1%	38.2	27.9	-10.3	54.7	52.0	-2.7
92128	646	563	-12.8%	27.7	19.5	-8.2	34.1	34.5	0.4
92129	691	558	-19.2%	28.9	25.3	-3.6	33.3	31.7	-1.6
92130	1,050	957	-8.9%	40.4	29.2	-11.2	58.0	57.9	-0.1
92131	570	453	-20.5%	32.3	26.9	-5.4	43.9	41.9	-2.0
92154	1,005	976	-2.9%	14.0	8.3	-5.7	17.3	15.1	-2.2
92173	330	329	-0.3%	10.6	4.6	-6.0	10.0	12.5	2.5

Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

# Lexus Market Share Exceeded 10% in Zip Code 92131

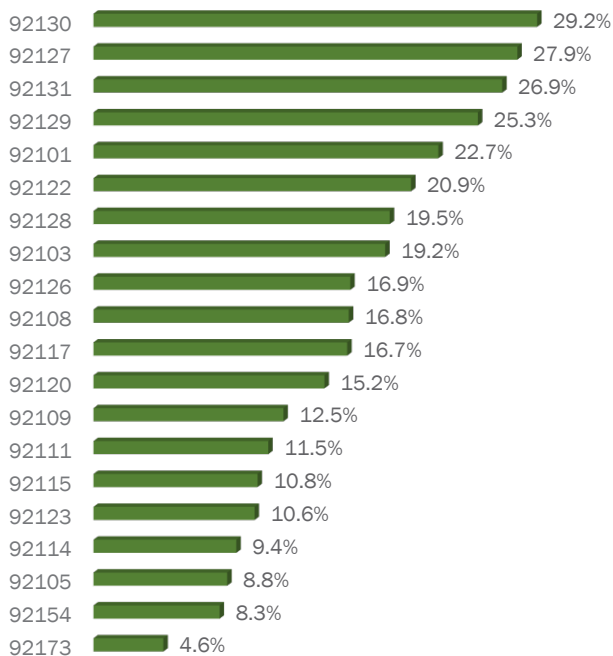
Brand Market Share - YTD 2026 thru March (for top 10 selling brands in county market)

Zip Code	Toyota	Honda	Tesla	Ford	Lexus	Kia	Hyundai	BMW	Chevrolet	Mercedes-Benz
92101	14.3	7.3	11.4	7.1	3.3	5.7	3.1	8.2	3.9	6.9
92103	16.3	8.3	8.8	6.2	3.1	6.7	5.4	6.0	1.6	4.1
92105	41.8	13.6	3.6	6.8	4.9	4.4	3.4	0.7	4.9	0.7
92108	22.8	8.2	7.9	5.7	5.2	6.5	3.5	6.8	4.1	4.9
92109	21.9	6.3	7.7	10.1	6.1	6.8	3.5	3.3	3.3	2.8
92111	27.5	8.1	4.9	7.6	2.9	5.4	8.6	2.5	5.4	2.0
92114	31.5	20.2	5.6	5.6	2.8	5.4	3.2	1.1	6.0	0.9
92115	31.8	11.8	4.6	4.6	3.6	6.7	6.2	3.3	4.4	1.3
92117	23.5	7.8	9.5	8.5	5.3	7.0	5.6	3.9	5.3	2.2
92120	21.9	12.1	5.7	6.0	7.3	4.1	6.0	4.4	6.3	3.8
92122	19.5	9.6	10.8	6.7	6.7	3.9	6.4	4.8	2.5	4.6
92123	21.4	9.1	4.7	18.5	3.5	5.6	4.4	2.6	7.3	2.6
92126	29.9	14.9	10.3	5.4	5.2	5.4	5.0	2.7	3.5	2.4
92127	14.2	7.6	16.6	4.7	8.8	3.3	4.5	7.4	1.8	4.4
92128	18.3	12.4	12.1	4.4	6.4	5.5	7.3	3.9	2.1	4.8
92129	22.2	10.0	15.6	6.1	5.9	5.4	6.8	3.0	2.3	1.6
92130	12.3	6.5	19.2	3.4	7.9	2.7	4.0	9.2	1.9	5.3
92131	16.3	8.6	13.5	6.0	10.2	2.9	7.7	5.7	4.0	4.0
92154	26.0	13.1	3.5	9.8	2.4	5.0	3.1	3.7	6.7	2.3
92173	25.5	12.8	2.7	9.4	0.9	8.8	2.1	2.7	5.2	3.6

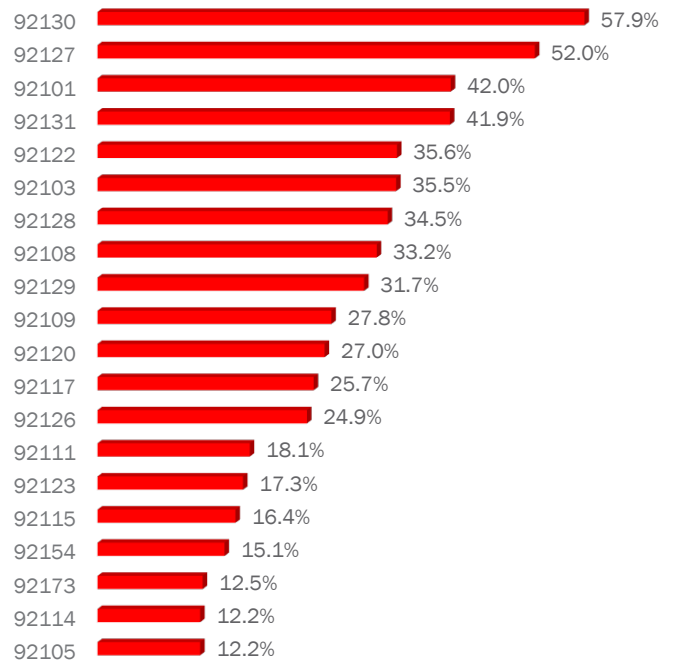
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



### Battery Electric Vehicle Market Share in San Diego Zip Codes YTD 2026 thru March



### Luxury Brand Market Share in San Diego Zip Codes YTD 2026 thru March



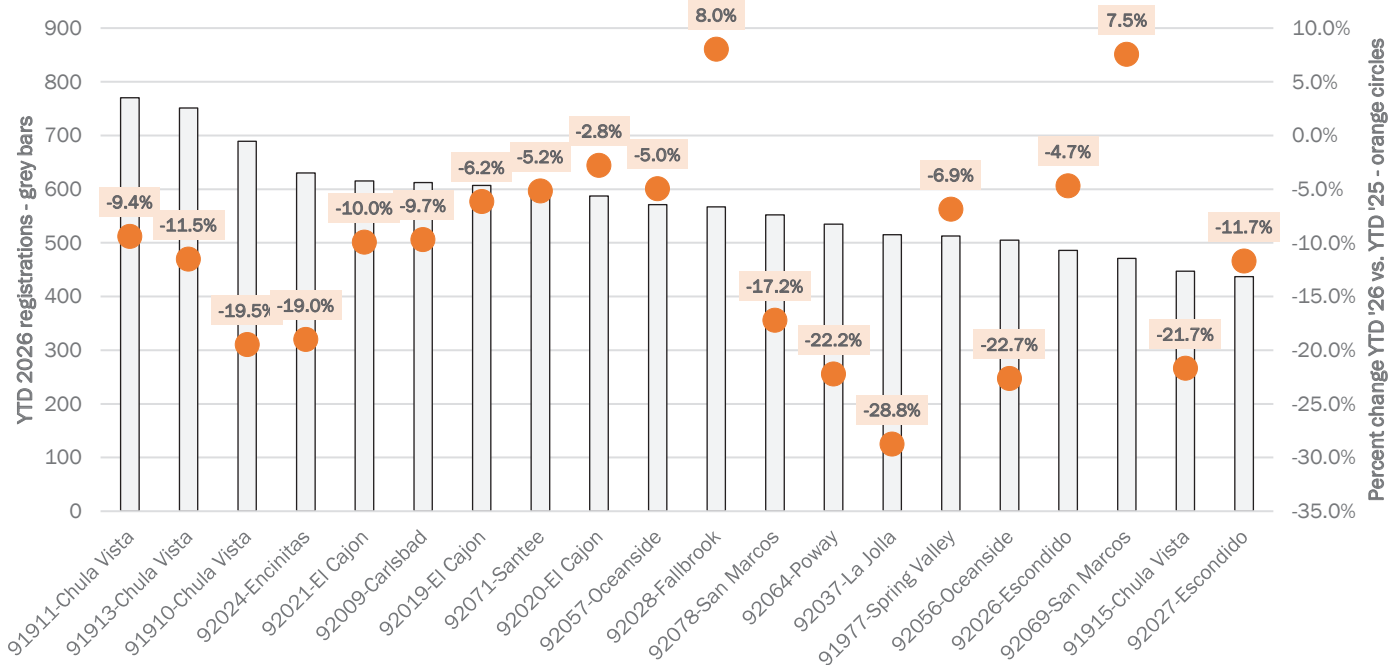
Data sourced from Experian Automotive.

**ZIP CODE MARKETS OUTSIDE SAN DIEGO**

**92028 (Fallbrook) Had Largest Percentage Gain in First Quarter of 2026**

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 2026 thru March and Percent Change YTD 2025**



The graph above shows new vehicle registrations during the first three months of this year (grey bars and left axis) and percent change vs. year earlier (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 '25 thru March	YTD '26 thru March	% change '26 vs. '25	YTD '25 thru March	YTD '26 thru March	change '26 vs. '25	YTD '25 thru March	YTD '26 thru March	change '26 vs. '25
91910-Chula Vista	856	689	-19.5%	17.3	8.0	-9.3	19.2	19.0	-0.2
91911-Chula Vista	850	770	-9.4%	14.5	7.5	-7.0	13.1	14.3	1.2
91913-Chula Vista	849	751	-11.5%	25.9	13.3	-12.6	33.0	28.6	-4.4
91915-Chula Vista	571	447	-21.7%	25.7	15.4	-10.3	34.3	33.3	-1.0
91977-Spring Valley	551	513	-6.9%	16.9	9.4	-7.5	16.9	14.8	-2.1
92009-Carlsbad	678	612	-9.7%	29.1	20.3	-8.8	47.6	43.3	-4.3
92019-El Cajon	647	607	-6.2%	19.9	10.4	-9.5	33.4	28.5	-4.9
92020-El Cajon	604	587	-2.8%	14.6	7.3	-7.3	20.0	17.0	-3.0
92021-El Cajon	683	615	-10.0%	16.3	8.1	-8.2	17.3	14.6	-2.7
92024-Encinitas	778	630	-19.0%	28.3	20.6	-7.7	44.9	40.5	-4.4
92026-Escondido	510	486	-4.7%	20.2	14.2	-6.0	21.4	22.0	0.6
92027-Escondido	495	437	-11.7%	16.4	7.3	-9.1	19.4	13.3	-6.1
92028-Fallbrook	525	567	8.0%	20.4	10.9	-9.5	27.8	22.0	-5.8
92037-La Jolla	723	515	-28.8%	27.2	20.2	-7.0	62.1	55.9	-6.2
92056-Oceanside	653	505	-22.7%	19.8	10.1	-9.7	22.7	19.0	-3.7
92057-Oceanside	601	571	-5.0%	20.1	11.2	-8.9	22.3	20.1	-2.2
92064-Poway	688	535	-22.2%	23.1	17.0	-6.1	28.2	27.7	-0.5
92069-San Marcos	438	471	7.5%	18.3	13.4	-4.9	21.5	20.4	-1.1
92071-Santee	636	603	-5.2%	14.8	11.1	-3.7	17.6	19.2	1.6
92078-San Marcos	667	552	-17.2%	29.8	22.5	-7.3	37.3	32.6	-4.7

Data sourced from Experian Automotive.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

# Honda Market Share Exceeded 15% in Zip Code 91977

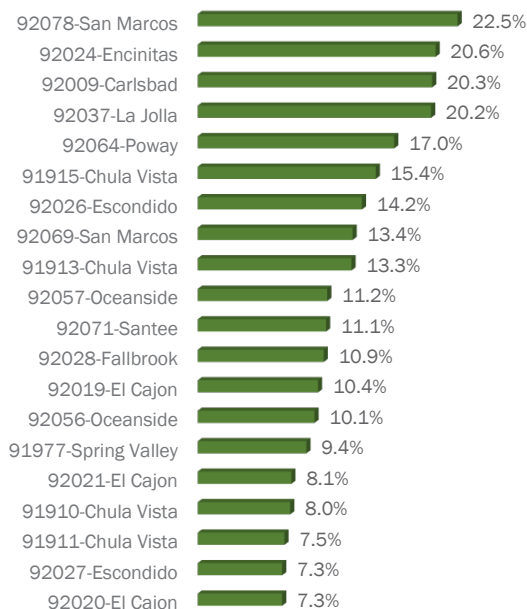
Brand Market Share - YTD 2026 thru March (for top 10 selling brands in county market)

Zip Code	Toyota	Honda	Ford	Tesla	Chevrolet	Kia	Hyundai	BMW	Lexus	cedes-Benz
91910-Chula Vista	24.4	11.2	9.0	3.2	5.8	6.5	2.6	4.2	4.5	2.8
91911-Chula Vista	25.3	12.1	9.2	3.5	5.5	6.5	3.2	3.4	2.3	2.7
91913-Chula Vista	24.2	8.8	6.1	7.5	4.9	6.0	3.1	5.7	5.2	3.7
91915-Chula Vista	27.3	7.8	4.3	9.4	3.1	6.5	2.9	7.8	4.5	4.5
91977-Spring Valley	25.0	15.6	10.9	4.1	6.2	7.2	4.9	2.3	2.7	3.1
92009-Carlsbad	15.5	8.0	7.8	11.8	3.8	4.1	4.6	8.0	5.4	3.6
92019-El Cajon	23.7	8.2	6.8	3.3	8.4	6.9	3.6	4.9	6.3	7.6
92020-El Cajon	25.6	13.6	9.7	1.7	7.8	7.2	5.1	2.4	3.4	4.6
92021-El Cajon	27.5	12.0	8.5	3.3	8.8	7.5	4.7	1.6	1.3	4.9
92024-Encinitas	20.6	4.1	9.2	9.7	2.7	4.9	3.3	6.5	5.7	3.7
92026-Escondido	28.6	10.9	8.4	6.6	7.6	4.9	4.9	3.7	6.0	2.1
92027-Escondido	27.9	13.7	9.4	2.5	8.2	4.3	5.5	1.8	3.4	1.4
92028-Fallbrook	21.0	8.1	12.3	5.3	6.9	5.6	4.2	3.2	3.7	4.4
92037-La Jolla	13.6	1.9	4.5	9.1	1.9	3.1	3.3	10.3	5.8	10.1
92056-Oceanside	25.9	11.3	12.3	5.7	3.8	5.3	5.5	3.2	3.0	3.0
92057-Oceanside	26.3	9.5	9.8	7.5	5.8	7.0	5.1	2.8	4.0	2.8
92064-Poway	21.7	9.3	10.7	9.7	5.8	2.8	6.9	3.0	5.4	3.7
92069-San Marcos	33.5	9.8	9.1	7.0	5.3	4.2	4.5	2.1	4.7	2.3
92071-Santee	20.4	9.6	12.3	4.1	10.3	6.5	6.6	3.5	3.6	2.7
92078-San Marcos	23.0	6.9	6.7	13.4	4.5	3.4	5.8	4.0	3.3	2.5

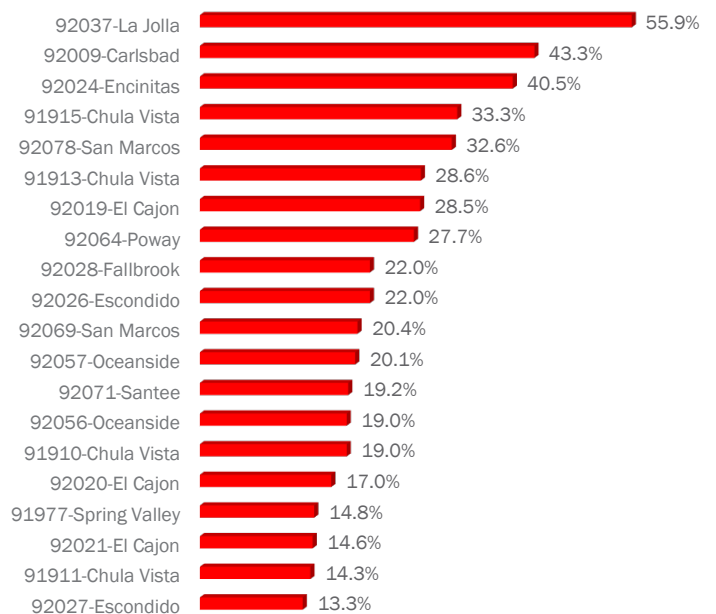
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



### Battery Electric Vehicle Market Share for Zip Codes Outside of San Diego YTD 2026 thru March



### Luxury Brand Market Share for Zip Codes Outside of San Diego YTD 2026 thru March



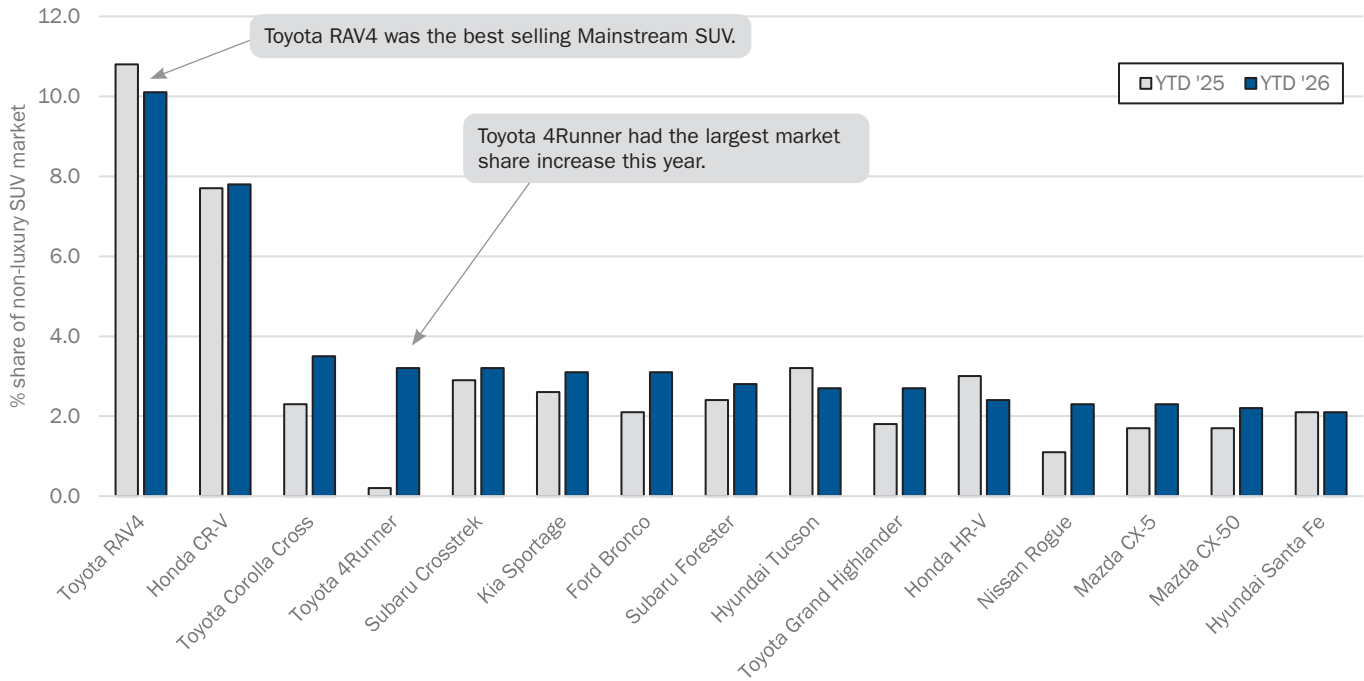
Data sourced from Experian Automotive.

SUV MARKET SHARES

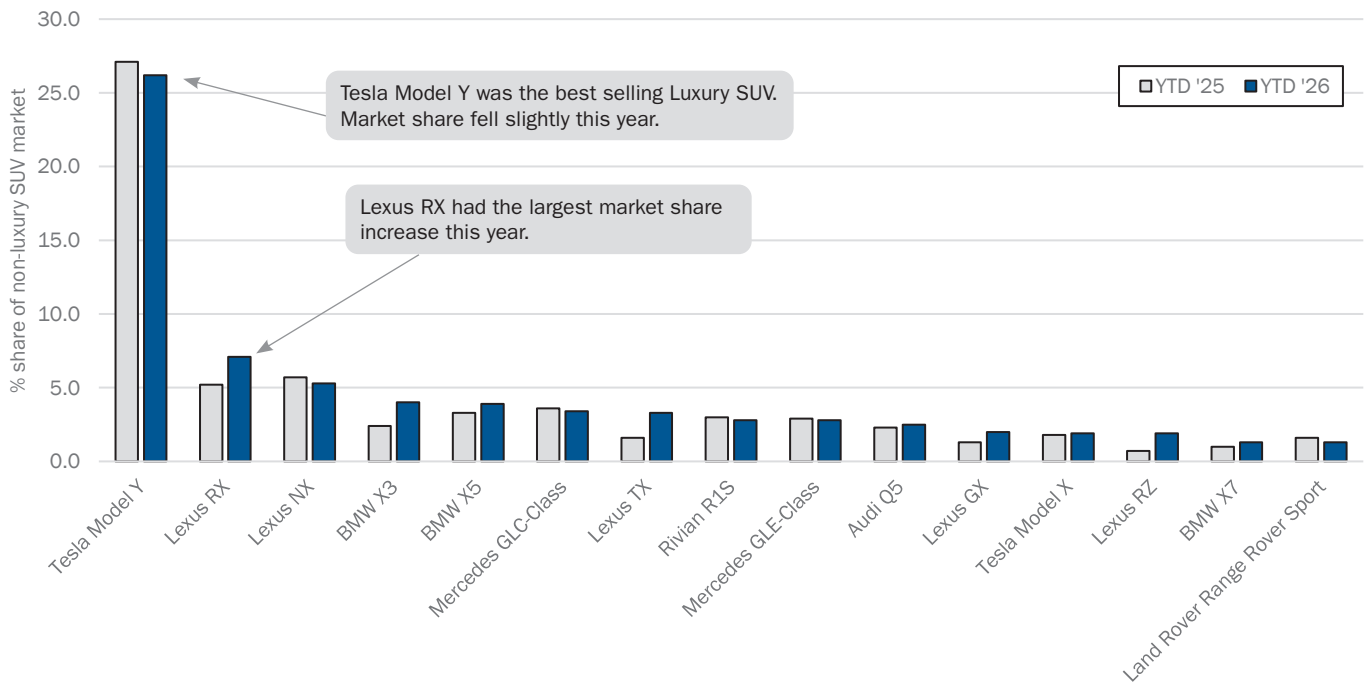
**RAV4 is On Top for Mainstream SUVs; Model Y Has Lead in Luxury Segment**

The two graphs below show market share in San Diego County during the first three months of 2025 and 2026 for the top 15 selling Mainstream and Luxury SUV models.

**Market Share for Top 15 Selling Mainstream SUVs - YTD 2025 and 2026 thru March**



**Market Share for Top 15 Selling Luxury SUVs - YTD 2025 and 2026 thru March**

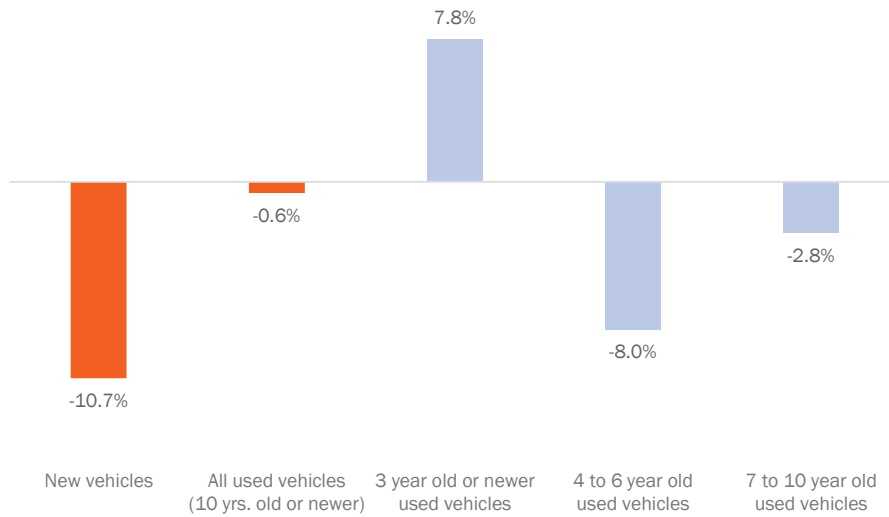


Data sourced from Experian Automotive.

**SAN DIEGO COUNTY USED VEHICLE MARKET**

**Used Vehicle Market Had Small Decline in First Quarter of This Year**

**Percent Change in New and Used Vehicle Registrations  
YTD 2026 thru March vs. YTD 2025**



**THREE KEY TRENDS IN USED VEHICLE MARKET**



- 01.** The San Diego County used vehicle market declined by less than 1% in the first quarter of this year versus year earlier, compared to the 10.7% drop in the new vehicle market.
- 02.** As shown on the graph to the left, registrations for three year old or newer vehicles increased 7.8% during the first three months of this year. The 4 to 6 year old market declined 8.0%.
- 03.** Hyundai and Chevrolet had the largest increases in the 4 year old or newer used vehicle market (see graph below).

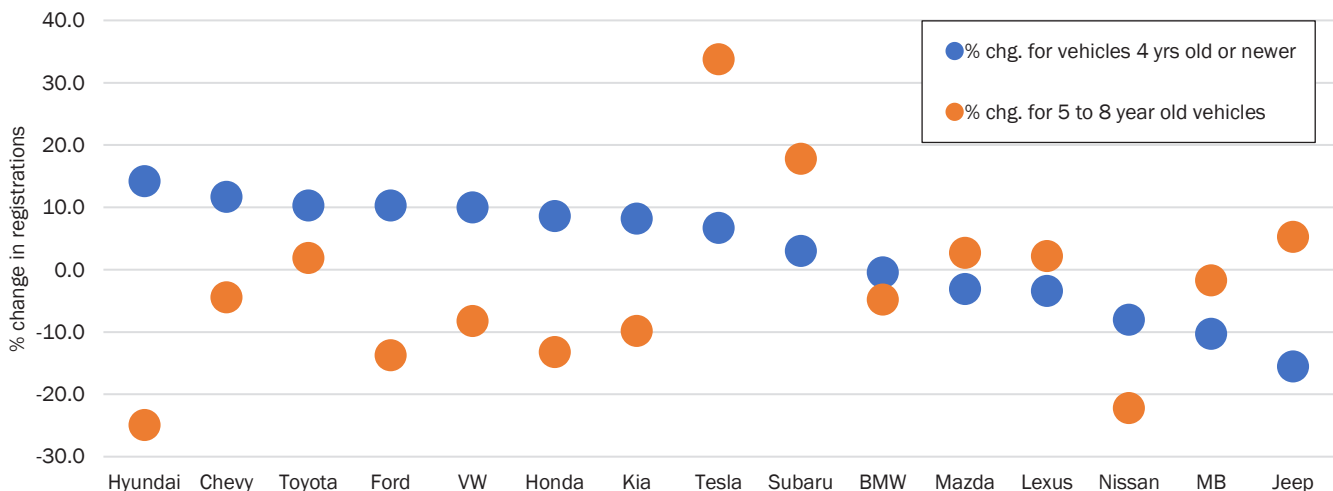
Data sourced from Experian Automotive.

**USED VEHICLE BRAND REGISTRATIONS**

**Hyundai and Tesla Had Largest Increases in Used Vehicle Market**

The graph above shows the percent change in used vehicle registrations during 1Q '26 vs. the year earlier for two vehicle age categories: vehicles 4 years old or newer and 5 to 8 year old vehicles. Brands are positioned from left to right based on the percent change for 4 year old or newer vehicles. Hyundai had the highest percent increase for newer vehicles - up 14.2%. Tesla had the largest increase for 5 to 8 year old vehicles - up 33.8%.

**Percent Change in Registrations for Top 15 Selling Used Vehicle Brands - 1Q 2026 vs. 1Q '25**



Data sourced from Experian Automotive.

Brand Registrations Report												
San Diego County New Retail Car and Light Truck Registrations												
	First Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	1Q '25	1Q '26	% change	1Q '25	1Q '26	Change	2024	2025	% change	2024	2025	Change
TOTAL	36,503	32,584	-10.7				142,453	143,223	0.5			
Cars	8,477	7,198	-15.1	23.2	22.1	-1.1	35,855	33,376	-6.9	25.2	23.3	-1.9
Light Trucks	28,026	25,386	-9.4	76.8	77.9	1.1	106,598	109,847	3.0	74.8	76.7	1.9
Domestic Brands	10,746	9,039	-15.9	29.5	27.7	-1.8	46,106	44,158	-4.2	32.4	30.8	-1.6
European Brands	5,669	4,546	-19.8	15.5	14.0	-1.5	19,800	19,741	-0.3	13.9	13.8	-0.1
Japanese Brands	15,991	15,674	-2.0	43.8	48.1	4.3	61,292	63,782	4.1	43.0	44.5	1.5
Other Asian Brands	4,097	3,325	-18.8	11.2	10.2	-1.0	15,255	15,542	1.9	10.7	10.9	0.2
Acura	244	222	-9.0	0.7	0.7	0.0	711	945	32.9	0.5	0.7	0.2
Alfa Romeo	16	8	-50.0	0.0	0.0	0.0	66	50	-24.2	0.0	0.0	0.0
Audi	631	426	-32.5	1.7	1.3	-0.4	2,210	2,200	-0.5	1.6	1.5	-0.1
BMW	1,496	1,370	-8.4	4.1	4.2	0.1	5,326	5,509	3.4	3.7	3.8	0.1
Buick	81	62	-23.5	0.2	0.2	0.0	285	254	-10.9	0.2	0.2	0.0
Cadillac	269	198	-26.4	0.7	0.6	-0.1	860	1,046	21.6	0.6	0.7	0.1
Chevrolet	2,150	1,670	-22.3	5.9	5.1	-0.8	8,097	8,453	4.4	5.7	5.9	0.2
Chrysler	49	41	-16.3	0.1	0.1	0.0	230	171	-25.7	0.2	0.1	-0.1
Dodge	59	40	-32.2	0.2	0.1	-0.1	475	223	-53.1	0.3	0.2	-0.1
Ford	2,805	2,809	0.1	7.7	8.6	0.9	10,924	11,925	9.2	7.7	8.3	0.6
Genesis	134	97	-27.6	0.4	0.3	-0.1	460	491	6.7	0.3	0.3	0.0
GMC	616	570	-7.5	1.7	1.7	0.0	2,073	2,283	10.1	1.5	1.6	0.1
Honda	4,008	3,197	-20.2	11.0	9.8	-1.2	16,009	15,306	-4.4	11.2	10.7	-0.5
Hyundai	1,792	1,484	-17.2	4.9	4.6	-0.3	7,027	7,100	1.0	4.9	5.0	0.1
Ineos	33	26	-21.2	0.1	0.1	0.0	157	108	-31.2	0.1	0.1	0.0
Infiniti	73	65	-11.0	0.2	0.2	0.0	326	265	-18.7	0.2	0.2	0.0
Jeep	600	513	-14.5	1.6	1.6	0.0	2,503	2,330	-6.9	1.8	1.6	-0.2
Kia	2,162	1,728	-20.1	5.9	5.3	-0.6	7,549	7,893	4.6	5.3	5.5	0.2
Land Rover	424	274	-35.4	1.2	0.8	-0.4	1,198	1,332	11.2	0.8	0.9	0.1
Lexus	1,394	1,479	6.1	3.8	4.5	0.7	5,162	5,612	8.7	3.6	3.9	0.3
Lincoln	60	74	23.3	0.2	0.2	0.0	323	316	-2.2	0.2	0.2	0.0
Lucid	80	124	55.0	0.2	0.4	0.2	210	300	42.9	0.1	0.2	0.1
Mazda	973	884	-9.1	2.7	2.7	0.0	3,569	3,725	4.4	2.5	2.6	0.1
Mercedes-Benz	1,378	1,143	-17.1	3.8	3.5	-0.3	4,414	4,856	10.0	3.1	3.4	0.3
MINI	111	106	-4.5	0.3	0.3	0.0	375	435	16.0	0.3	0.3	0.0
Mitsubishi	45	18	-60.0	0.1	0.1	0.0	146	167	14.4	0.1	0.1	0.0
Nissan	1,163	1,134	-2.5	3.2	3.5	0.3	4,886	4,913	0.6	3.4	3.4	0.0
Polestar	22	14	-36.4	0.1	0.0	-0.1	198	110	-44.4	0.1	0.1	0.0
Porsche	338	258	-23.7	0.9	0.8	-0.1	1,123	1,099	-2.1	0.8	0.8	0.0
Ram	308	336	9.1	0.8	1.0	0.2	1,208	1,199	-0.7	0.8	0.8	0.0
Rivian	261	225	-13.8	0.7	0.7	0.0	1,191	1,193	0.2	0.8	0.8	0.0
Subaru	1,330	1,132	-14.9	3.6	3.5	-0.1	4,927	4,698	-4.6	3.5	3.3	-0.2
Tesla	3,406	2,377	-30.2	9.3	7.3	-2.0	17,641	14,455	-18.1	12.4	10.1	-2.3
Toyota	6,761	7,543	11.6	18.5	23.1	4.6	25,556	28,151	10.2	17.9	19.7	1.8
Volkswagen	805	597	-25.8	2.2	1.8	-0.4	3,219	2,581	-19.8	2.3	1.8	-0.5
Volvo	305	234	-23.3	0.8	0.7	-0.1	1,066	1,100	3.2	0.7	0.8	0.1
Other	121	106	-12.4	0.3	0.3	0.0	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 first quarters of '25 and '26, and annual totals in 2024 and 2025. 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.