

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

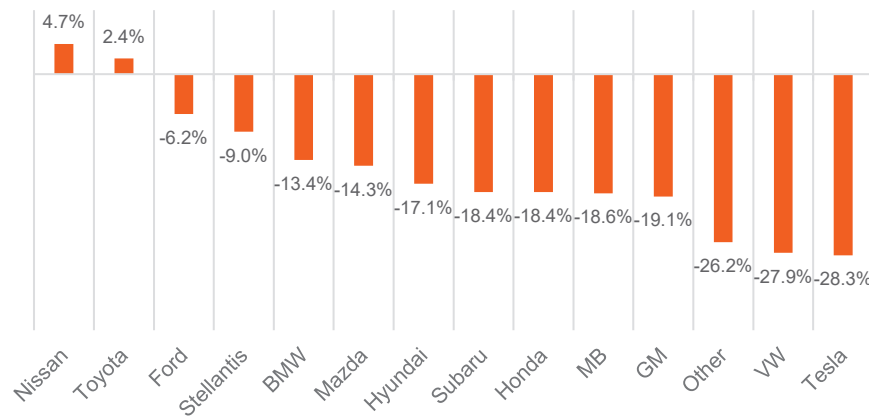
Data thru April 2026

San Diego County New Retail Car and Light Truck Registrations

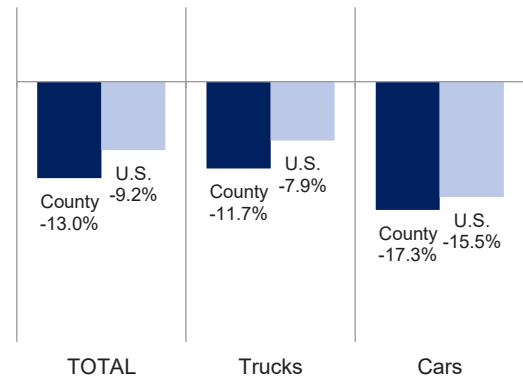
| | Most Recent Two Months | | | YTD thru Apr. | | | YTD Market Share | | |
|----------------|------------------------|-------------|----------|---------------|---------|----------|------------------|---------|--------|
| | 3/25 & 4/25 | 3/26 & 4/26 | % change | YTD '25 | YTD '26 | % change | YTD '25 | YTD '26 | change |
| Industry Total | 26,527 | 22,101 | -16.7% | 52,197 | 45,423 | -13.0% | | | |
| Cars | 6,339 | 5,025 | -20.7% | 12,335 | 10,207 | -17.3% | 23.6 | 22.5 | -1.1 |
| Light Trucks | 20,188 | 17,076 | -15.4% | 39,862 | 35,216 | -11.7% | 76.4 | 77.5 | 1.1 |

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

Percent Change in County Registrations by Manufacturer YTD '26 thru Apr. vs. YTD '25



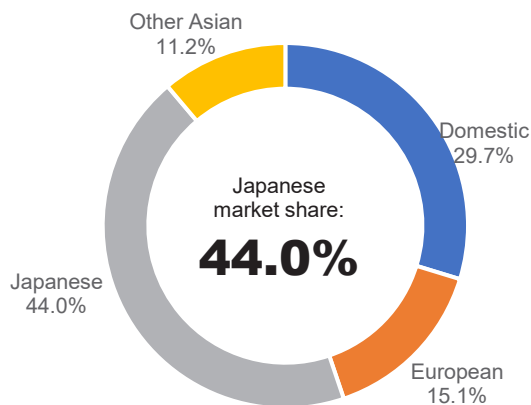
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '26 thru Apr. vs. YTD '25



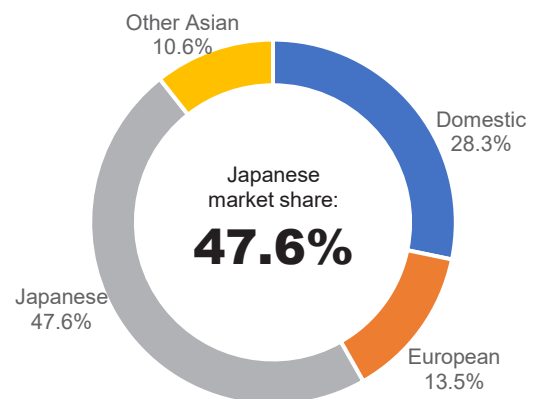
The graph above shows the percent change in new car and light truck registrations by manufacturer during the first four months of this year versus the same period a year earlier. Data sourced from Experian Automotive. Note: MB is Mercedes-Benz.

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 '25 thru Apr.



San Diego County Market Shares YTD '26 thru Apr.



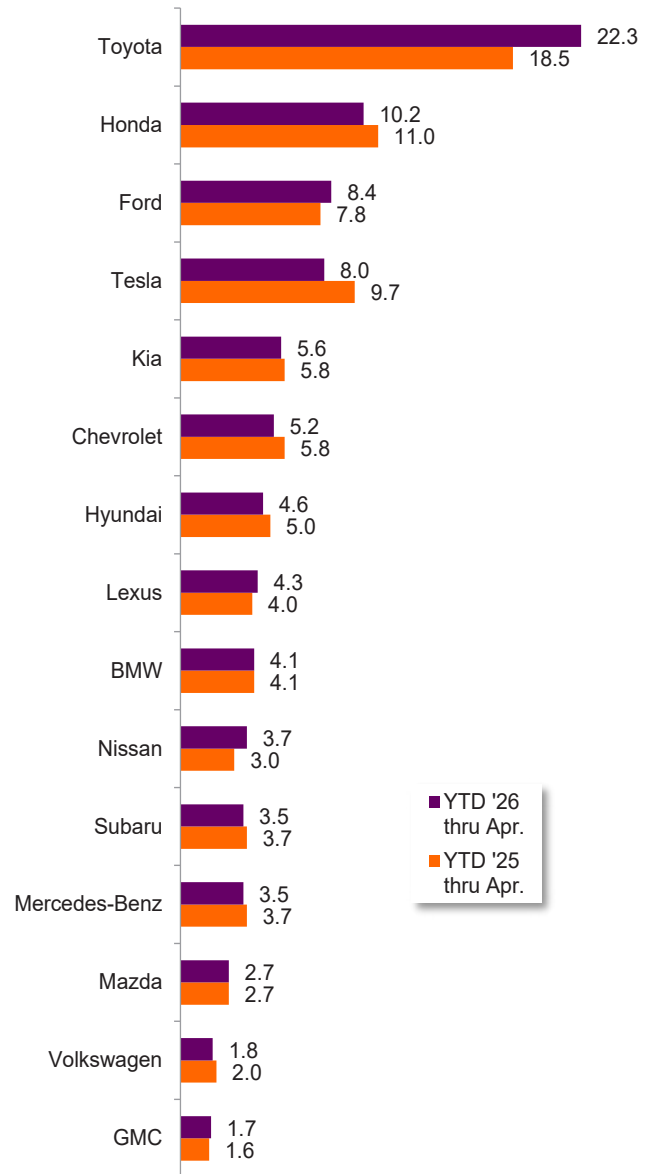
Data Information

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 Apr. | YTD '26 thru Apr. | % change | YTD '25 thru Apr. | YTD '26 thru Apr. | |
| Acura | 354 | 314 | -11% | 0.7% | 0.7% | |
| Alfa Romeo | 25 | 11 | -56% | 0.0% | 0.0% | |
| Audi | 879 | 576 | -34% | 1.7% | 1.3% | |
| BMW | 2,154 | 1,853 | -14% | 4.1% | 4.1% | |
| Buick | 98 | 79 | -19% | 0.2% | 0.2% | |
| Cadillac | 363 | 271 | -25% | 0.7% | 0.6% | |
| Chevrolet | 3,039 | 2,376 | -22% | 5.8% | 5.2% | |
| Chrysler | 77 | 46 | -40% | 0.1% | 0.1% | |
| Dodge | 84 | 57 | -32% | 0.2% | 0.1% | |
| Ford | 4,089 | 3,806 | -7% | 7.8% | 8.4% | |
| Genesis | 196 | 162 | -17% | 0.4% | 0.4% | |
| GMC | 839 | 785 | -6% | 1.6% | 1.7% | |
| Honda | 5,734 | 4,652 | -19% | 11.0% | 10.2% | |
| Hyundai | 2,594 | 2,095 | -19% | 5.0% | 4.6% | |
| Ineos | 43 | 30 | -30% | 0.1% | 0.1% | |
| Infiniti | 100 | 81 | -19% | 0.2% | 0.2% | |
| Jeep | 852 | 749 | -12% | 1.6% | 1.6% | |
| Kia | 3,018 | 2,556 | -15% | 5.8% | 5.6% | |
| Land Rover | 545 | 372 | -32% | 1.0% | 0.8% | |
| Lexus | 2,075 | 1,932 | -7% | 4.0% | 4.3% | |
| Lincoln | 88 | 110 | 25% | 0.2% | 0.2% | |
| Lucid | 108 | 165 | 53% | 0.2% | 0.4% | |
| Mazda | 1,432 | 1,227 | -14% | 2.7% | 2.7% | |
| Mercedes-Benz | 1,946 | 1,584 | -19% | 3.7% | 3.5% | |
| MINI | 149 | 139 | -7% | 0.3% | 0.3% | |
| Mitsubishi | 68 | 24 | -65% | 0.1% | 0.1% | |
| Nissan | 1,592 | 1,691 | 6% | 3.0% | 3.7% | |
| Polestar | 40 | 22 | -45% | 0.1% | 0.0% | |
| Porsche | 450 | 337 | -25% | 0.9% | 0.7% | |
| Ram | 425 | 470 | 11% | 0.8% | 1.0% | |
| Rivian | 411 | 305 | -26% | 0.8% | 0.7% | |
| Subaru | 1,939 | 1,582 | -18% | 3.7% | 3.5% | |
| Tesla | 5,041 | 3,615 | -28% | 9.7% | 8.0% | |
| Toyota | 9,681 | 10,111 | 4% | 18.5% | 22.3% | |
| Volkswagen | 1,041 | 796 | -24% | 2.0% | 1.8% | |
| Volvo | 458 | 302 | -34% | 0.9% | 0.7% | |
| Other | 170 | 140 | -18% | 0.3% | 0.3% | |



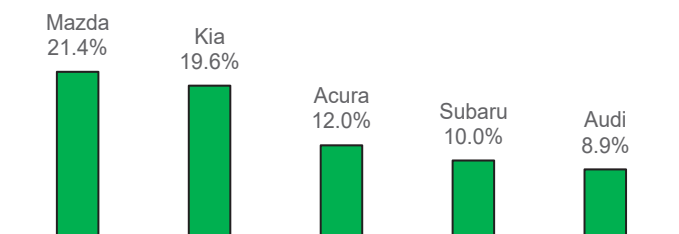
County Market Share for Top 15 Selling Brands YTD '26 thru April vs. YTD '25



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



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