

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

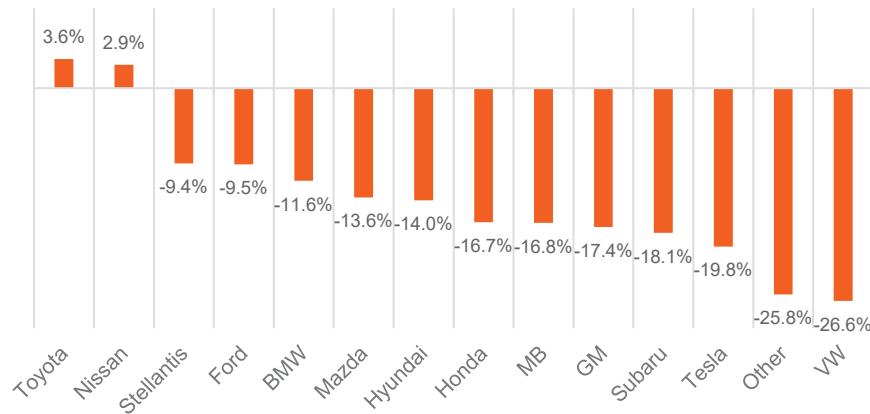
Data thru May 2026

San Diego County New Retail Car and Light Truck Registrations

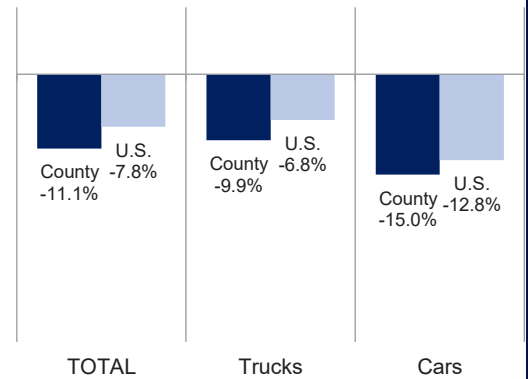
	Most Recent Two Months			YTD thru May			YTD Market Share		
	4/25 & 5/25	4/26 & 5/26	% change	YTD '25	YTD '26	% change	YTD '25	YTD '26	change
Industry Total	26,903	23,660	-12.1%	63,400	56,367	-11.1%			
Cars	6,653	5,622	-15.5%	15,128	12,858	-15.0%	23.9	22.8	-1.1
Light Trucks	20,250	18,038	-10.9%	48,272	43,509	-9.9%	76.1	77.2	1.1

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

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



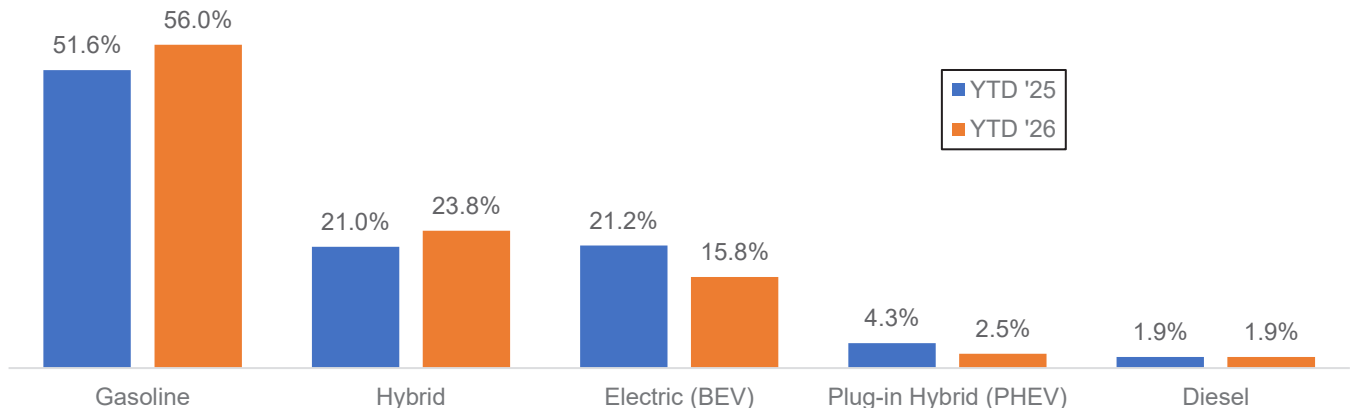
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD 2026 thru May vs. YTD 2025



The graph above shows the percent change in new car and light truck registrations by manufacturer during the first five 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 May



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

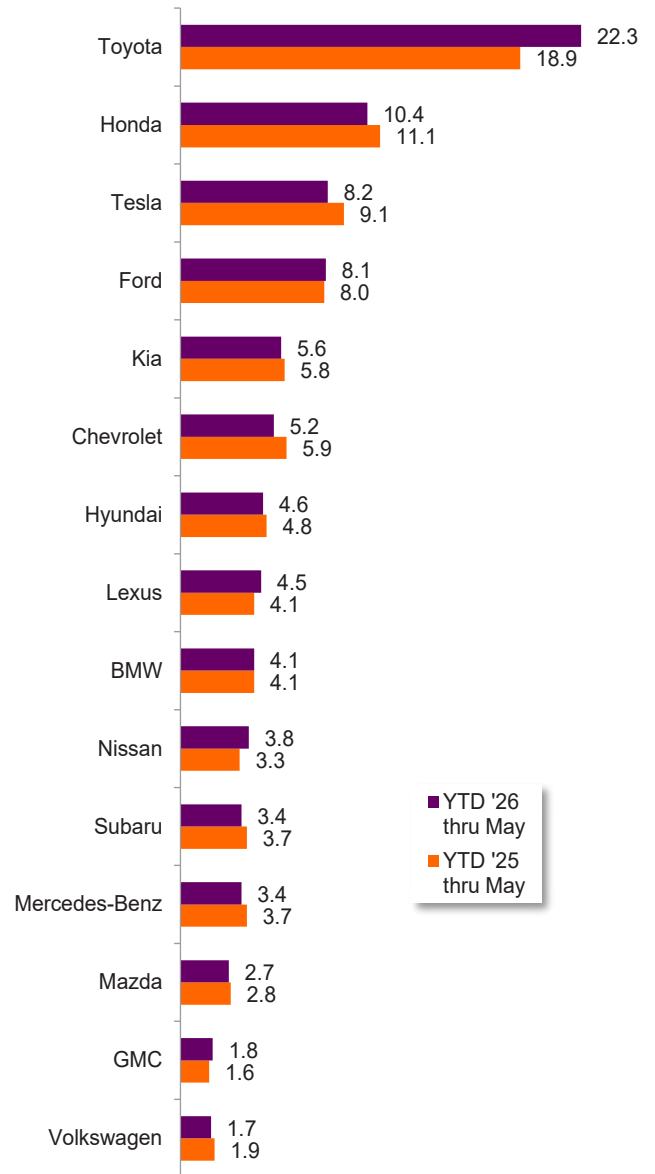
Data Information

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 May	YTD '26 thru May	% change	YTD '25 thru May	YTD '26 thru May	
Acura	453	390	-14%	0.7%	0.7%	
Alfa Romeo	26	17	-35%	0.0%	0.0%	
Audi	1,024	679	-34%	1.6%	1.2%	
BMW	2,599	2,291	-12%	4.1%	4.1%	
Buick	116	94	-19%	0.2%	0.2%	
Cadillac	437	363	-17%	0.7%	0.6%	
Chevrolet	3,723	2,927	-21%	5.9%	5.2%	
Chrysler	82	50	-39%	0.1%	0.1%	
Dodge	108	71	-34%	0.2%	0.1%	
Ford	5,050	4,548	-10%	8.0%	8.1%	
Genesis	236	194	-18%	0.4%	0.3%	
GMC	1,009	987	-2%	1.6%	1.8%	
Honda	7,059	5,864	-17%	11.1%	10.4%	
Hyundai	3,056	2,614	-14%	4.8%	4.6%	
Ineos	51	40	-22%	0.1%	0.1%	
Infiniti	120	101	-16%	0.2%	0.2%	
Jeep	1,045	885	-15%	1.6%	1.6%	
Kia	3,650	3,160	-13%	5.8%	5.6%	
Land Rover	653	458	-30%	1.0%	0.8%	
Lexus	2,594	2,543	-2%	4.1%	4.5%	
Lincoln	114	125	10%	0.2%	0.2%	
Lucid	123	176	43%	0.2%	0.3%	
Mazda	1,767	1,526	-14%	2.8%	2.7%	
Mercedes-Benz	2,336	1,943	-17%	3.7%	3.4%	
MINI	196	176	-10%	0.3%	0.3%	
Mitsubishi	82	31	-62%	0.1%	0.1%	
Nissan	2,064	2,147	4%	3.3%	3.8%	
Polestar	52	35	-33%	0.1%	0.1%	
Porsche	531	402	-24%	0.8%	0.7%	
Ram	510	583	14%	0.8%	1.0%	
Rivian	459	359	-22%	0.7%	0.6%	
Subaru	2,331	1,910	-18%	3.7%	3.4%	
Tesla	5,793	4,646	-20%	9.1%	8.2%	
Toyota	11,981	12,562	5%	18.9%	22.3%	
Volkswagen	1,217	954	-22%	1.9%	1.7%	
Volvo	545	361	-34%	0.9%	0.6%	
Other	208	155	-25%	0.3%	0.3%	



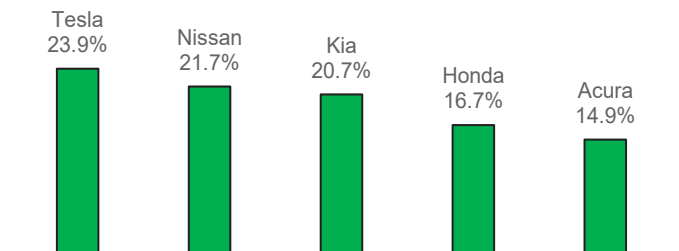
County Market Share for Top 15 Selling Brands YTD '26 thru May vs. Year Earlier



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



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