

San Diego Auto Outlook

Comprehensive information on the San Diego County new vehicle market



NEW CAR
DEALERS ASSOCIATION
SAN DIEGO COUNTY

FORECAST

County New Vehicle Market Predicted to Increase Slightly in 2nd Half of Year

Year-to-date results in county market

San Diego County new retail light vehicle registrations declined 8.9% during the first six months of this year versus a year earlier, steeper than the 6% drop in the nation. Second quarter registrations this year were off 7.5% compared to 2Q '25, an improvement from the 10.4% drop in the First Quarter.

Factors steering the new vehicle market

It might sound like a broken record because we have been emphasizing it for a long time, but pent-up demand resulting from delayed purchases during the pandemic will continue to support the market for the foreseeable future. The vehicle fleet continues to age, and as a result, replacement demand will place a floor on how low sales can go - which is a good thing because other key determinants are pointing to a softening market. Affordability issues continue to keep many prospective purchasers on the sidelines. Relatively high interest rates, elevated vehicle transaction prices, and stagnant real personal incomes have made a new vehicle purchase a stretch for many consumers. Increasing costs and inflationary pressures resulting from tariffs, higher gas prices, and an uncertain economy are other headwinds. It's a complicated forecast scenario, and there is heightened uncertainty due to changing federal government policies and geopolitical events, but it seems likely that the new vehicle market will drift lower this year, while avoiding a significant decline.

Forecast for rest of this year

New retail light vehicle registrations in the second half of this year are predicted to increase slightly versus year earlier. Third quarter results should be flat compared to 3Q '25, while an increase is possible in the fourth quarter. Annual registrations this year are predicted to approach 138,000 units and decline 3.8% from 2025.

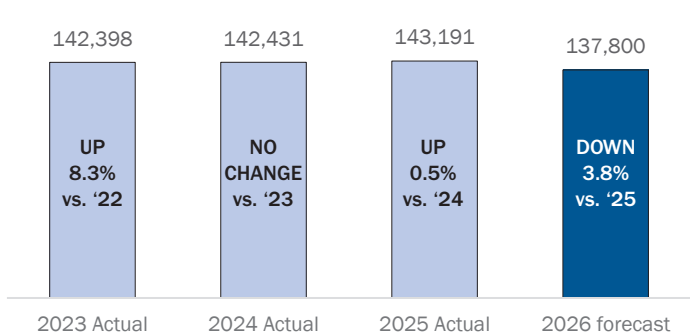
Tracking alternative powertrain sales

Battery electric vehicle registrations declined 28% during the first half of this year versus year earlier, but there were signs that the slide in BEV sales may be subsiding. BEV market share fell from 26.5% in 3Q '25 (before expiration of the federal government tax credits), to 14.2% in the first quarter of this year, but then increased to 18.9% in the second quarter. Hybrid vehicles continued to post gains, with registrations improving 3% in the first half of this year and market share reaching 24.1%.

Monitoring brand sales performance

County new vehicle registrations for Ram, Toyota, Nissan, GMC, and Lexus increased so far this year versus year earlier. Toyota, Honda, Tesla, Ford, and Kia were top selling brands (see page 4). Based on a comparison to U.S. market share, Toyota, Tesla, Lexus, BMW, and Mercedes-Benz are strong performing brands in the county market (see page 5).

Forecast for County New Retail Light Vehicle Registrations



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.

Market Summary

	YTD '25 thru June	YTD '26 thru June	% Chg. '25 to '26	Mkt. Share YTD '26
TOTAL	74,366	67,727	-8.9%	
Car	17,801	15,565	-12.6%	23.0%
Light Truck	56,565	52,162	-7.8%	77.0%
Domestic	22,011	19,245	-12.6%	28.3%
European	10,678	8,908	-16.6%	13.2%
Japanese	33,616	32,353	-3.8%	47.8%
Other Asian	8,061	7,221	-10.4%	10.7%

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 June
vs. YTD 2025

San Diego County
DOWN 8.9%

California
DOWN 8.5%

U.S.
DOWN 6.0%

New retail light vehicle registrations in the county declined 8.9% during the first six months of this year versus year earlier. State market was off 8.5%, while U.S. was down 6%.

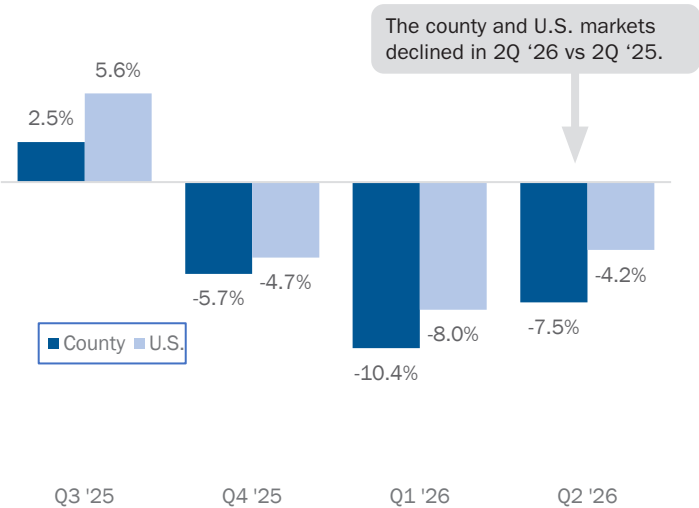
Data sourced from Experian Automotive.



QUARTERLY RESULTS

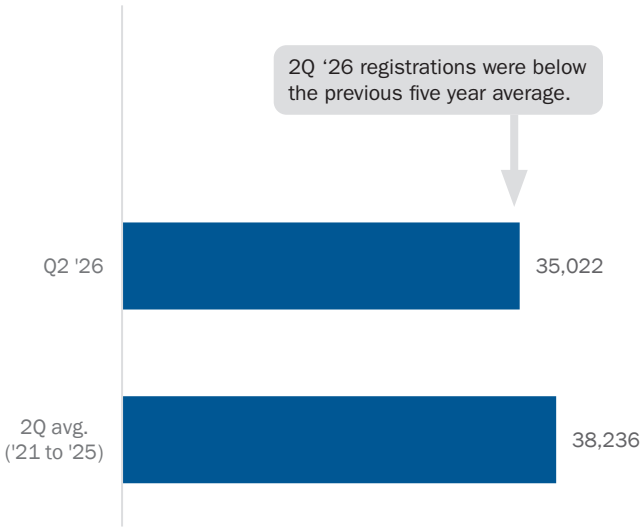
QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



QUARTERLY PERSPECTIVE

2Q '26 Registrations Versus 2Q Average for Previous Five Years



Data sourced from Experian Automotive.

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San Diego Auto Outlook

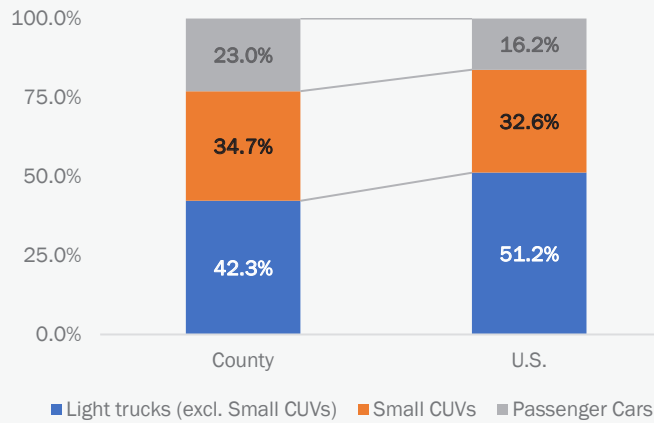
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PO Box 390, Exton, PA 19341
Phone: 610-640-1233 EMail: autooutlook@icloud.com
Editor: Jeffrey A. Foltz

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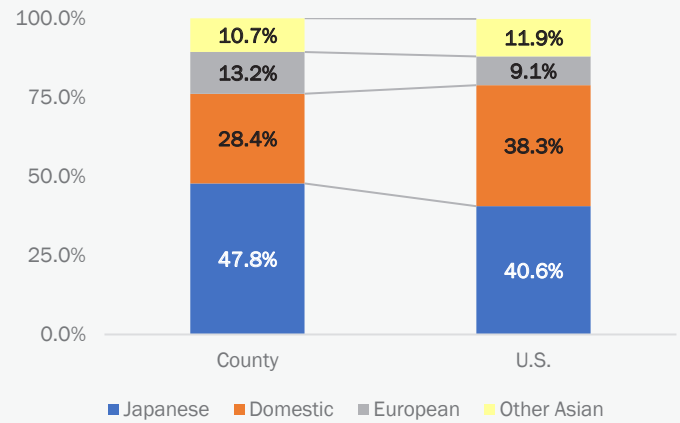
VEHICLE AND BRAND SEGMENTS - COUNTY AND U.S. (YTD '26 THRU JUNE)

Market Share by Type of Vehicle



Combining the blue and orange sections in the graph above corresponds to the standard industry definition of light trucks. Small cross-overs are broken out, however, since many are more similar to compact hatchbacks than to trucks. Small CUV share was **34.7%** during the first half of this year, higher than the **32.6%** share in the U.S. Data sourced from Experian Automotive.

Domestic, European, Japanese, & Other Asian Share



Japanese brand market share in the county was higher than U.S. levels: **47.8%** vs. **40.6%**. County Domestic brand share (which includes Tesla and Rivian) was **28.4%** in the first half of this year. European brands accounted for a higher share of the county market than in the Nation. Note: Other Asian includes Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.



COMPARE

COMPARISON OF METRO AREA MARKETS - SEGMENT MARKET SHARES

Market Share for Primary Segments in 20 Selected Metro Area Markets - YTD 2026 thru June

Market Share for Primary Segments in 20 Selected Metro Area Markets - YTD 2026 thru June										
	Mainstream Passenger Cars		Mainstream Small SUVs		Mainstream Mid and Full Size SUVs		Pickup Trucks		Luxury Segments	
Rank	Area	% share	Area	% share	Area	% share	Area	% share	Area	% share
1	Inland Empire, CA	23.1	Cleveland	37.9	Denver	22.4	Houston	23.6	Silicon Valley	43.0
2	Los Angeles	19.1	Pittsburgh	37.6	Kansas City	22.0	Dallas Fort Worth	22.1	Orange County, CA	36.1
3	San Diego	16.2	Boston	33.8	Pittsburgh	20.8	Kansas City	20.7	Los Angeles	33.5
4	Atlanta	15.7	Chicago	33.8	Philadelphia	20.2	Phoenix	19.8	Miami	31.1
5	Wash DC	15.5	Philadelphia	33.8	Cleveland	20.1	Pittsburgh	18.9	New York City	28.1
6	Orange County, CA	15.3	Portland, OR	33.3	New York City	19.9	Cleveland	17.6	San Diego	26.7
7	Phoenix	15.1	New York City	31.6	Atlanta	19.7	Atlanta	17.5	Wash DC	23.6
8	Silicon Valley	15.0	Denver	30.9	Chicago	19.4	Inland Empire, CA	17.3	Philadelphia	21.2
9	Miami	14.6	Kansas City	28.8	Houston	19.4	Denver	17.0	Phoenix	21.0
10	Dallas Fort Worth	13.4	Wash DC	28.6	Dallas Fort Worth	19.2	Portland, OR	16.0	Denver	20.8
11	Houston	13.2	Miami	26.4	Boston	19.0	San Diego	14.6	Inland Empire, CA	20.5
12	Chicago	12.7	San Diego	24.9	Portland, OR	18.8	Boston	13.3	Chicago	20.4
13	Cleveland	11.2	Atlanta	24.2	Phoenix	18.5	Orange County, CA	11.3	Boston	20.1
14	Kansas City	10.9	Los Angeles	23.3	Wash DC	18.3	Miami	10.9	Atlanta	19.9
15	Portland, OR	10.8	Dallas Fort Worth	23.1	Miami	14.9	Philadelphia	10.5	Dallas Fort Worth	19.9
16	Philadelphia	10.8	Phoenix	22.8	Inland Empire, CA	14.7	Wash DC	10.0	Houston	19.9
17	Boston	10.3	Inland Empire, CA	21.8	San Diego	14.4	Chicago	9.7	Portland, OR	16.9
18	Pittsburgh	9.1	Houston	21.7	Orange County, CA	13.1	Los Angeles	9.6	Kansas City	14.0
19	New York City	9.0	Orange County, CA	20.9	Los Angeles	11.9	Silicon Valley	7.3	Pittsburgh	11.0
20	Denver	6.0	Silicon Valley	20.4	Silicon Valley	10.6	New York City	6.9	Cleveland	10.0

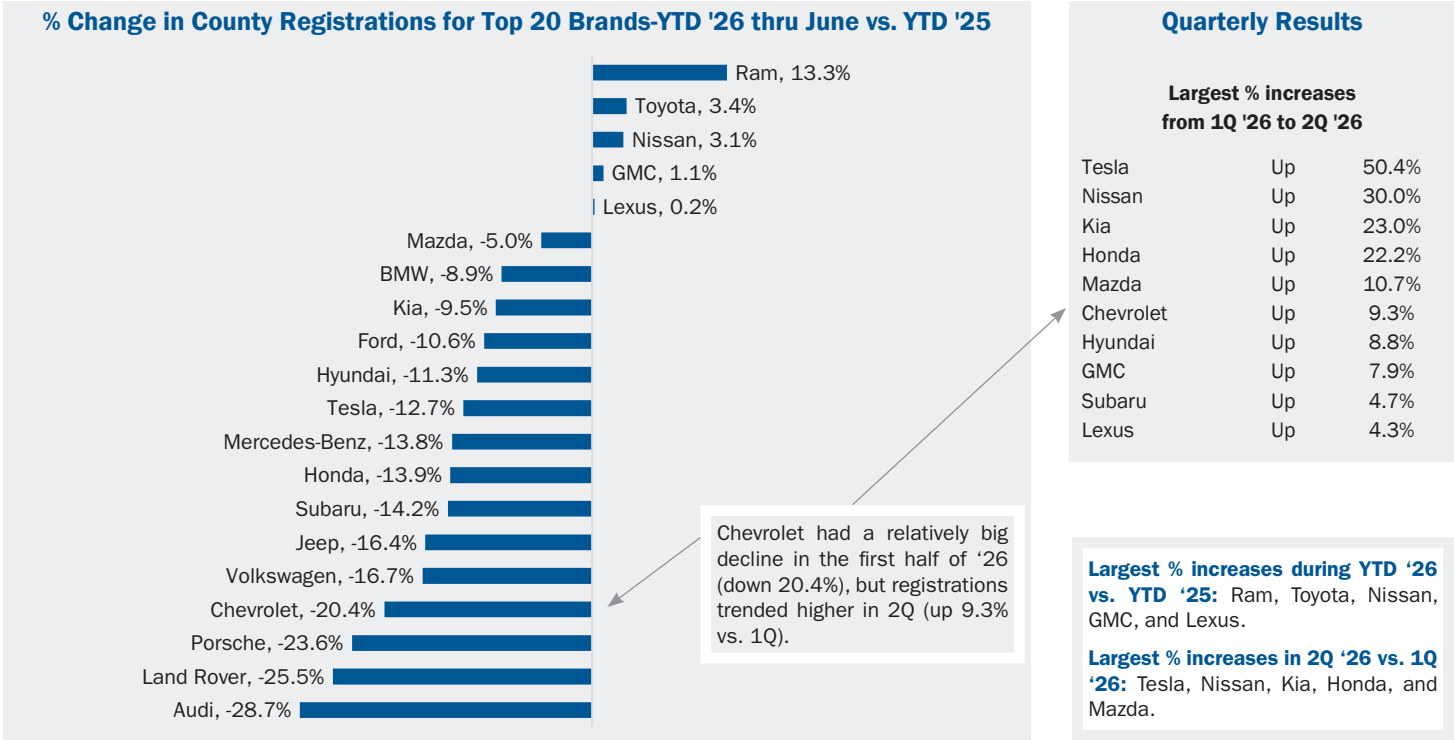
The table above shows percent market share for five primary segments in 20 selected metro county markets during the first half of this year. Data sourced from Experian Automotive.

BRANDS AND MODELS



WINNERS AND LOSERS

The primary metric used to identify winning and losing brands is the percent change in registrations vs. year earlier, shown on the graph below. Ram and Toyota were the biggest gainers so far this year among the top 20 brands. But this snapshot does not capture the shorter term trend in sales. Year to date registrations for a brand may have posted a decline, but if growth picked up during the most recent quarter, that’s significant. The table below shows the ten brands with the largest increases, or smallest declines, from the first to the second quarters of last year. Data for all brands are shown on page 8.

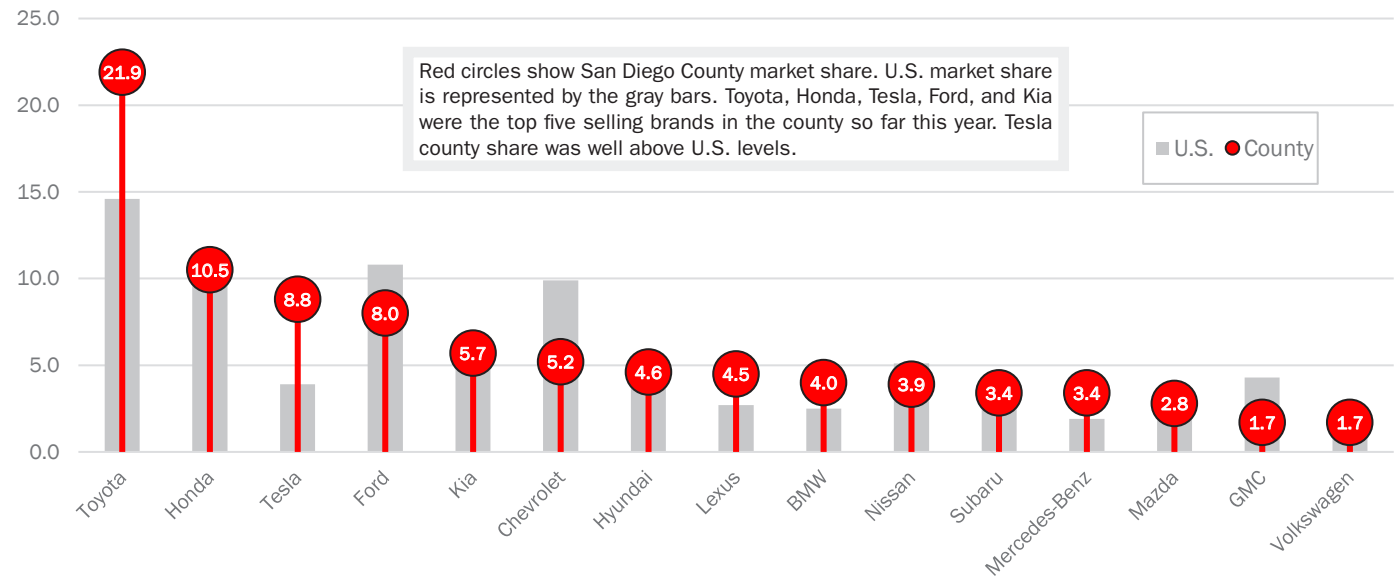


Data sourced from Experian Automotive.



TOP SELLING BRANDS

San Diego County and U.S. Market Shares for Top 15 Brands in County - YTD '26 thru June



Data sourced from Experian Automotive.

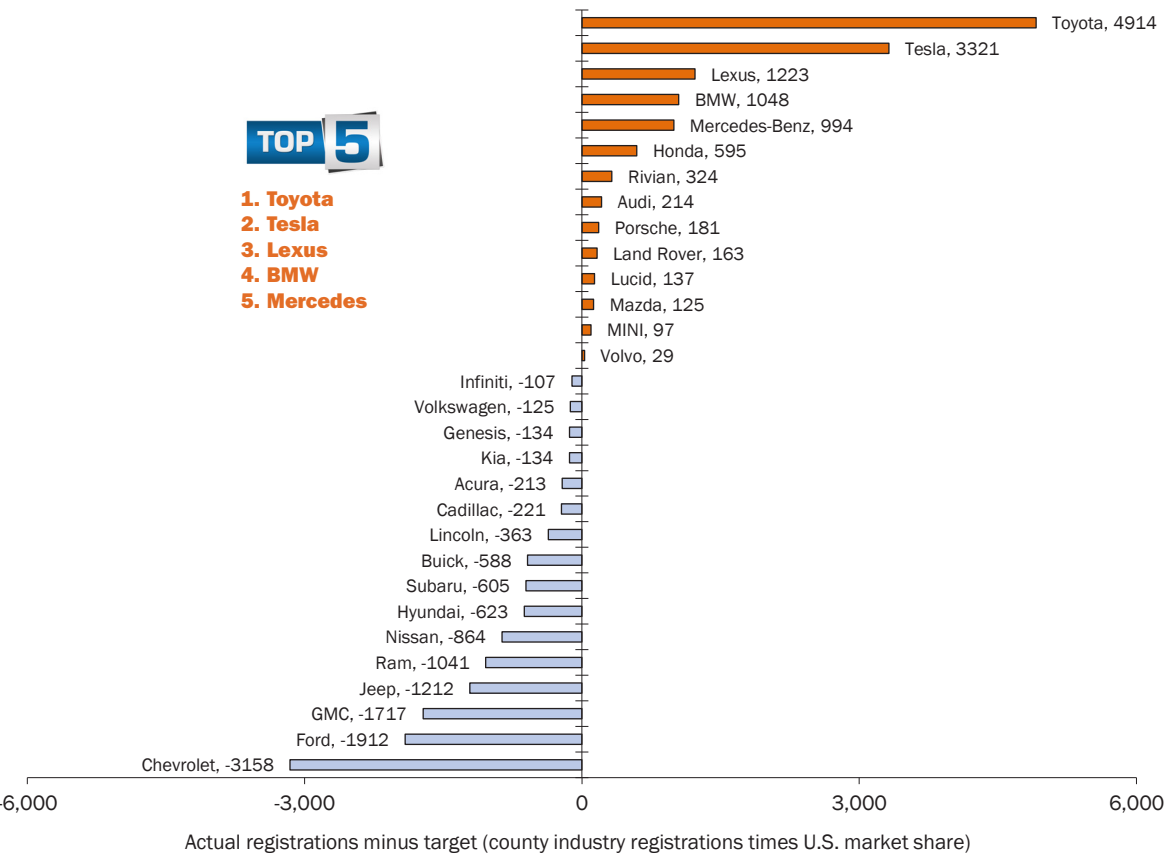
BRANDS AND MODELS



BRAND SALES PERFORMANCE

The graph below provides an indicator of brands that are popular in San Diego County (relative to the National standard), and those that are not. Here’s how it works: For the top 30 selling brands, each brand’s share of the U.S. market is multiplied by industry retail registrations in the county during the first six months of this year. This yields a “target” for the county market. Target registrations are subtracted from actual registrations to derive the measurement of sales performance. Brands at the top of the graph (i.e., Toyota, Tesla, Lexus, BMW, and Mercedes-Benz) are relatively strong sellers in the county, with actual registrations exceeding calculated targets by large margins. For instance, Toyota registrations exceeded the target by 4,914 units.

San Diego County Retail Market Performance based on registrations during YTD 2026 thru June
Actual registrations minus target (county industry registrations times U.S. market share)



Data sourced from Experian Automotive.



TOP SELLING MODELS

Top 20 Selling Models during YTD '26 thru June - Market Share and % Change in Registrations vs. YTD '25							
Rank	Model	County	% chg.	Rank	Model	County	% chg.
		Share %	'25 to '26			Share %	'25 to '26
1	Tesla Model Y	6.1	12.3	11	Lexus RX	1.3	15.9
2	Toyota Tacoma	3.9	19.2	12	Toyota Tundra	1.3	-12.4
3	Toyota Camry	3.4	12.3	13	Honda Accord	1.3	-4.6
4	Toyota RAV4	3.4	-28.7	14	Toyota Corolla Cross	1.3	13.8
5	Honda CR-V	3.3	-11.1	15	Kia Sportage	1.3	11.0
6	Honda Civic	3.2	-4.3	16	Toyota 4Runner	1.2	190.0
7	Toyota Corolla	2.5	10.4	17	Ford Maverick	1.2	-8.8
8	Ford F-Series	2.2	-3.6	18	Subaru Crosstrek	1.2	-7.0
9	Tesla Model 3	1.9	-49.9	19	Toyota Grand Highlander	1.1	25.6
10	Chevrolet Silverado	1.8	-10.6	20	Subaru Forester	1.1	-10.5

Table on the left presents the top 20 selling models in the county during the first six months of this year. Share of industry registrations and the percent change versus the same period a year earlier are also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

BRANDS AND MODELS



SEGMENT LEADERS

The table below shows the top five selling models during the first six months of this year in 20 segments. In addition to unit registrations, it also shows each model's market share in its respective segment.

**TOP
SELLER**

BEST SELLERS IN PRIMARY SEGMENTS

Small Cars: Honda Civic	Compact SUV: Toyota RAV4
Mid Size & Large Cars: Toyota Camry	3 Row Mid Size SUV: Grand Highlander
Full Size Pickup: Ford F-Series	Luxury Compact SUV: Tesla Model Y
Subcompact SUV: Corolla Cross	Luxury Midsize SUV: Lexus RX

Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (YTD '26 thru June)

Small Cars			Mid Size and Large Cars			Sports/Pony Cars			Near Luxury Cars		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda Civic	2199	32.8	Toyota Camry	2326	61.5	Ford Mustang	260	51.3	Tesla Model 3	1269	40.8
Toyota Corolla	1691	25.2	Honda Accord	892	23.6	Toyota 86	64	12.6	BMW 3-Series	316	10.2
Nissan Sentra	562	8.4	Kia K5	202	5.3	Mazda MX5	55	10.8	Lexus IS	245	7.9
Kia K4	514	7.7	Hyundai Sonata	138	3.6	Toyota Supra	36	7.1	BMW i4	211	6.8
Toyota Prius	454	6.8	Nissan Altima	109	2.9	Honda Prelude	36	7.1	Mercedes C-Class	208	6.7
Luxury and High End Sports Cars			Compact/Mid Size Pickup			Full Size Pickup			Mini Van		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Tesla Model S	174	11.9	Toyota Tacoma	2652	55.6	Ford F-Series	1464	28.5	Toyota Sienna	600	45.6
Porsche 911	154	10.5	Ford Maverick	804	16.9	Chevrolet Silverado	1199	23.4	Kia Carnival	405	30.8
Chevrolet Corvette	145	9.9	Ford Ranger	344	7.2	Toyota Tundra	894	17.4	Honda Odyssey	197	15.0
Mercedes E-Class	127	8.7	Chevrolet Colorado	325	6.8	GMC Sierra	625	12.2	Volkswagen ID.Buzz	60	4.6
BMW 5-Series	120	8.2	Nissan Frontier	235	4.9	Ram Pickup	557	10.9	Chrysler Pacifica	47	3.6
Large Van			Subcompact SUV			Compact SUV			2 Row Mid Size SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Mercedes Sprinter	340	40.4	Toyota Corolla Cross	883	19.7	Toyota RAV4	2285	18.5	Toyota 4Runner	812	26.8
Ford Transit Connect	264	31.4	Subaru Crosstrek	792	17.6	Honda CR-V	2253	18.2	Hyundai Santa Fe	494	16.3
Ram Promaster	108	12.8	Honda HR-V	646	14.4	Kia Sportage	876	7.1	Ford Mustang Mach-E	393	13.0
Chevrolet Express	65	7.7	Nissan Kicks	453	10.1	Subaru Forester	739	6.0	Subaru Outback	340	11.2
Ford E-Series	37	4.4	Chevrolet Trax	355	7.9	Nissan Rogue	708	5.7	Honda Prologue	203	6.7
3 Row Mid Size SUV			Large SUV			Luxury Subcompact SUV			Luxury Compact SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Toyota Grand Highlan	750	15.6	Ford Bronco	713	37.5	BMW X1	168	20.9	Tesla Model Y	4131	59.5
Kia Telluride	650	13.5	Toyota Land Cruiser	267	14.1	Audi Q3	130	16.2	Lexus NX	701	10.1
Kia Sorento	431	9.0	Chevrolet Tahoe	211	11.1	Lexus UX	127	15.8	Mercedes GLC-Class	489	7.0
Honda Pilot	430	8.9	Chevrolet Suburban	163	8.6	Acura ADX	97	12.1	BMW X3	466	6.7
Ford Explorer	415	8.6	Ford Expedition	117	6.2	Mercedes GLA-Class	95	11.8	Audi Q5	283	4.1
Luxury Mid Size SUV			Luxury Large SUV			Top Selling Passenger Cars			Top Selling Light Trucks		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Lexus RX	911	22.2	Lexus TX	435	26.2	Toyota Camry	2326	14.9	Tesla Model Y	4131	7.9
BMW X5	477	11.6	Rivian R1S	350	21.0	Honda Civic	2199	14.1	Toyota Tacoma	2652	5.1
Mercedes GLE-Class	357	8.7	Land Rover Range Ro	158	9.5	Toyota Corolla	1691	10.9	Toyota RAV4	2285	4.4
Lexus RZ	288	7.0	BMW X7	143	8.6	Tesla Model 3	1269	8.2	Honda CR-V	2253	4.3
Tesla Model X	242	5.9	Cadillac Escalade	129	7.8	Honda Accord	892	5.7	Ford F-Series	1464	2.8

POWERTRAINS

FIVE
KEY
TRENDS

1.

BEV registrations declined 27.9% during the first six months of 2026 vs. year earlier.
2.

BEV market share was 18.9% in 2Q '26, up from 14.2% in the first quarter.
3.

Hybrid vehicle registrations increased 2.6% so far this year vs. the 8.9% drop in the overall market.
4.

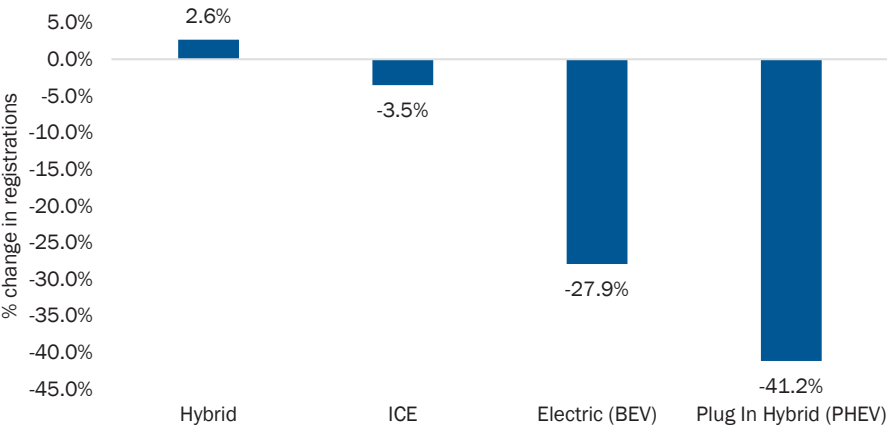
ICE vehicle market share increased from 53.4% in the first half of 2025 to 56.6% this year.
5.

Franchised dealerships accounted for 77.5% of alternative powertrain sales so far this year (see below).



ICE, BEV, PHEV, AND HYBRID MARKET SHARE

% Change in Registrations by Powertrain Type
YTD '26 thru June vs YTD '25



% Share of Industry Registrations
by Powertrain Type

YTD thru June			
	YTD '25	YTD '26	
ICE	53.4%	56.6%	↑
Hybrid	21.4%	24.1%	↑
Electric (BEV)	21.0%	16.6%	↓
Plug In Hybrid (PHEV)	4.2%	2.7%	↓

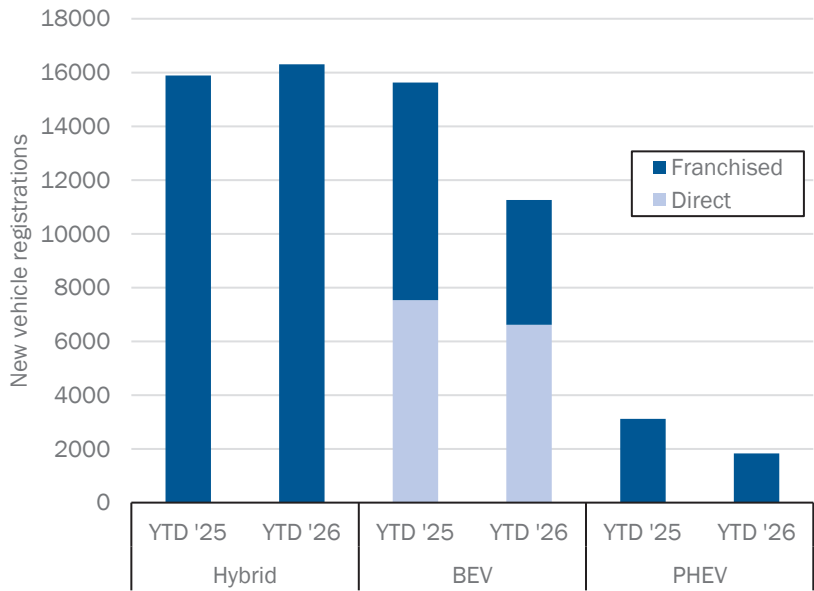
Quarterly			
	1Q '26	2Q '26	
ICE	60.3%	53.1%	↓
Hybrid	23.2%	24.9%	↑
Electric (BEV)	14.2%	18.9%	↑
Plug In Hybrid (PHEV)	2.3%	3.1%	↑

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



FRANCHISED DEALERSHIPS AND DIRECT SELLERS

New Hybrid, BEV, and PHEV Registrations in San Diego County
by Type of Selling Dealership



Registrations and Market Share		
	Franchised Dealerships	Direct Sellers
YTD '25 thru June		
Hybrid registrations	15,888	0
BEV registrations	8,105	7,527
PHEV registrations	3,112	0
TOTAL	27,105	7,527
YTD '25 Share of total	78.3%	21.7%
YTD '26 thru June		
Hybrid registrations	16,309	0
BEV registrations	4,647	6,611
PHEV registrations	1,830	0
TOTAL	22,786	6,611
YTD '26 Share of total	77.5%	22.5%

The dark blue areas in the graph show sales by powertrain type for franchised dealerships. Sum of the dark blue areas in YTD '26 is 22,786 units, 77.5% of the overall total, down slightly from 78.3% during the same period in 2025.

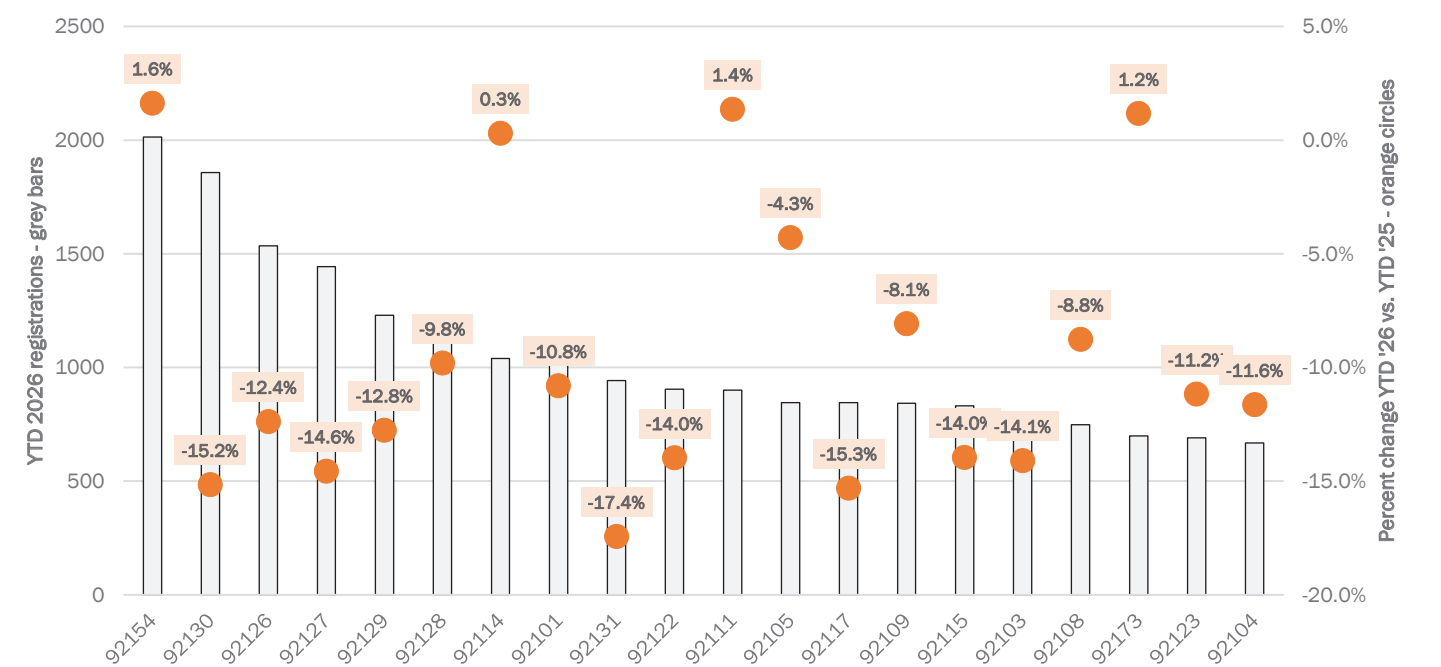
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

ZIP CODE MARKETS IN SAN DIEGO

Registrations Increased in Four 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 June and Percent Change vs. YTD 2025



The graph above shows new vehicle registrations during the first six 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 June	YTD '26 thru June	% change '26 vs. '25	YTD '25 thru June	YTD '26 thru June	change '26 vs. '25	YTD '25 thru June	YTD '26 thru June	change '26 vs. '25
92101	1,147	1,023	-10.8%	27.4	22.8	-4.6	43.8	42.2	-1.6
92103	879	755	-14.1%	25.1	19.2	-5.9	35.3	37.9	2.6
92104	756	668	-11.6%	18.3	14.8	-3.5	18.5	16.8	-1.7
92105	884	846	-4.3%	11.7	10.5	-1.2	12.9	13.9	1.0
92108	821	749	-8.8%	26.6	17.6	-9.0	33.9	31.4	-2.5
92109	916	842	-8.1%	20.5	14.4	-6.1	29.3	29.0	-0.3
92111	888	900	1.4%	18.1	13.3	-4.8	20.9	20.2	-0.7
92114	1,037	1,040	0.3%	13.9	11.3	-2.6	17.4	13.8	-3.6
92115	967	832	-14.0%	17.5	13.1	-4.4	17.2	16.1	-1.1
92117	999	846	-15.3%	21.4	19.5	-1.9	22.9	24.5	1.6
92122	1,051	904	-14.0%	27.0	24.1	-2.9	36.7	35.8	-0.9
92123	778	691	-11.2%	19.5	15.3	-4.2	27.0	20.1	-6.9
92126	1,752	1,535	-12.4%	26.2	21.2	-5.0	28.9	27.6	-1.3
92127	1,689	1,443	-14.6%	35.1	30.8	-4.3	51.9	52.4	0.5
92128	1,334	1,203	-9.8%	25.3	22.3	-3.0	34.1	34.1	0.0
92129	1,410	1,230	-12.8%	28.8	27.0	-1.8	34.4	34.7	0.3
92130	2,190	1,858	-15.2%	38.2	33.9	-4.3	55.6	57.2	1.6
92131	1,141	942	-17.4%	32.8	28.9	-3.9	42.2	44.3	2.1
92154	1,981	2,013	1.6%	13.6	9.7	-3.9	17.3	16.1	-1.2
92173	691	699	1.2%	10.7	6.4	-4.3	11.6	12.4	0.8

Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

Honda Market Share Was 18.5% in Zip Code 92114

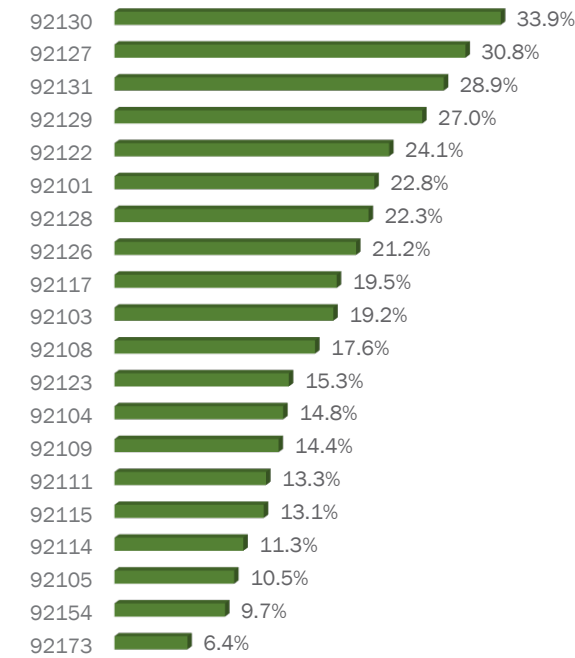
Brand Market Share - YTD 2026 thru June (for top 10 selling brands in county market)

Zip Code	Toyota	Tesla	Honda	Ford	Kia	Hyundai	Lexus	BMW	Chevrolet	Subaru
92101	13.1	12.6	8.4	5.9	5.6	4.0	3.7	8.4	3.5	2.6
92103	15.5	9.4	8.6	6.8	5.8	5.8	4.2	6.1	1.7	5.3
92104	23.2	5.1	14.4	6.1	6.4	5.2	3.7	2.8	4.5	8.1
92105	37.0	5.1	15.8	5.6	4.7	3.8	4.6	0.6	5.3	2.2
92108	23.5	8.7	8.9	4.5	6.3	4.5	4.7	5.3	4.7	2.4
92109	21.1	8.7	7.6	8.9	6.5	5.3	4.9	4.6	3.0	4.3
92111	25.4	6.3	10.8	8.6	5.6	5.8	4.1	2.9	6.0	3.3
92114	29.1	6.5	18.5	6.4	7.5	2.7	2.1	1.1	4.9	3.1
92115	31.0	5.3	14.1	5.3	6.7	5.3	3.5	2.2	4.0	4.1
92117	24.2	9.6	8.6	7.2	6.5	6.3	4.4	3.4	4.8	3.5
92122	21.3	13.3	10.7	5.0	4.5	6.3	5.8	5.5	2.1	4.6
92123	20.7	6.9	10.7	13.5	6.7	6.1	3.6	3.5	7.4	3.3
92126	27.8	13.9	14.0	4.6	5.3	6.1	5.5	2.2	3.5	2.7
92127	13.5	18.2	9.0	3.8	3.5	4.6	6.9	7.5	1.9	2.3
92128	18.6	12.9	10.6	4.6	5.9	8.1	6.7	3.5	2.7	3.7
92129	19.6	16.1	11.1	5.5	6.4	6.7	7.5	3.3	2.6	3.3
92130	11.2	21.4	5.5	3.7	3.4	4.9	6.9	9.1	2.4	3.6
92131	15.7	15.6	8.8	4.9	3.4	7.2	9.0	5.7	3.6	3.6
92154	24.9	5.1	12.2	8.7	6.8	3.4	2.0	3.4	6.4	2.5
92173	24.3	4.1	12.2	9.3	9.2	1.7	1.0	2.6	5.3	2.0

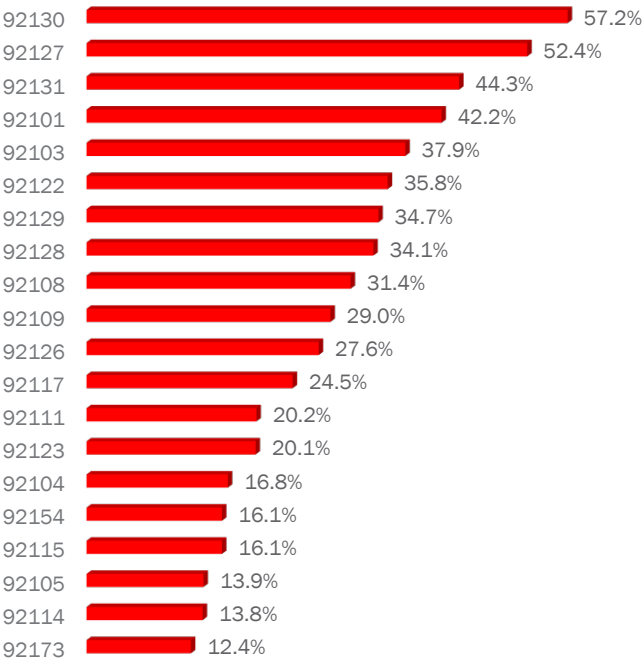
The table above shows brand market shares in each of the top 20 zip code markets. (Includes top ten selling brands in the county.) Three highest market shares for each brand are shaded grey. Data sourced from Experian Automotive.



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



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

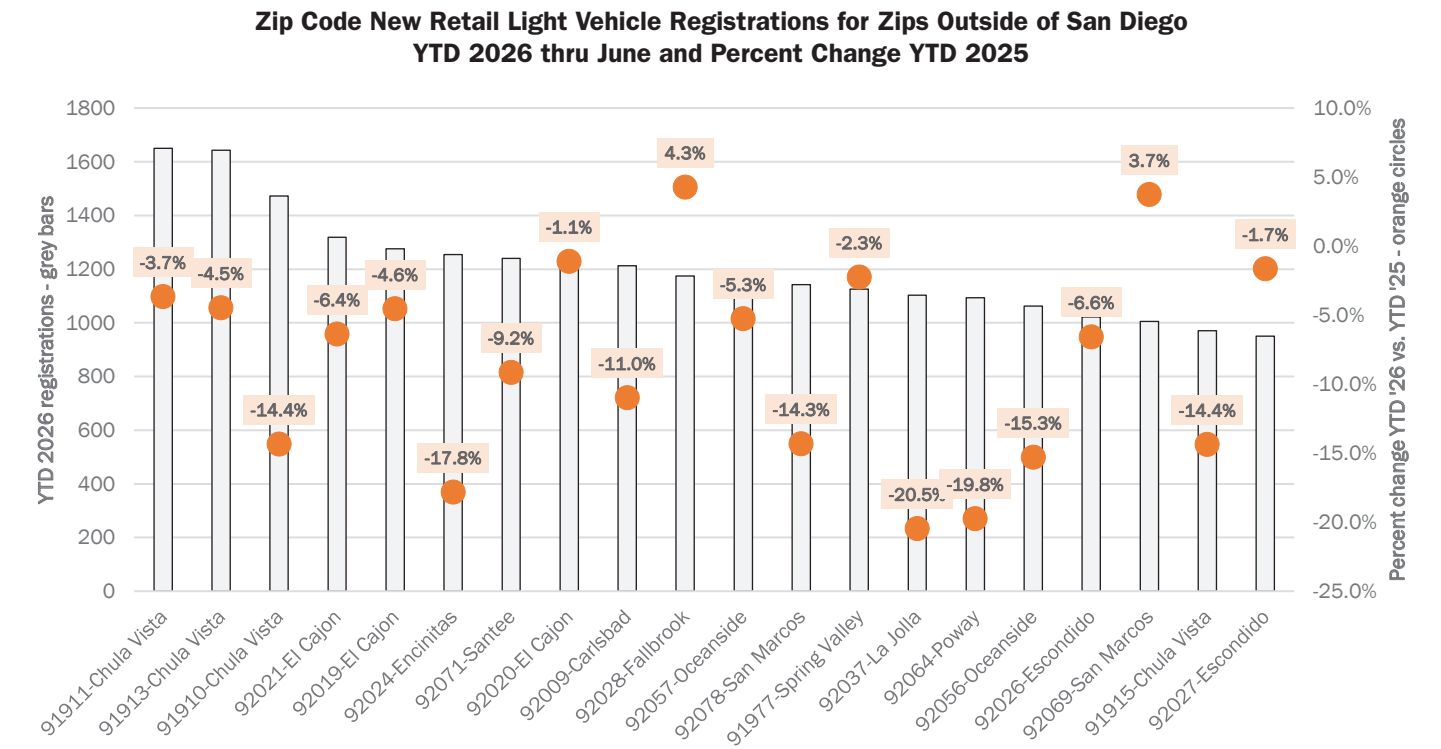


Data sourced from Experian Automotive.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

Registrations Increased in 92028 (Fallbrook) and 92069 (San Marcos)

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.



The graph above shows new vehicle registrations during the first six 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 June	YTD '26 thru June	% change '26 vs. '25	YTD '25 thru June	YTD '26 thru June	change '26 vs. '25	YTD '25 thru June	YTD '26 thru June	change '26 vs. '25
91910-Chula Vista	1,720	1,473	-14.4%	15.9	10.2	-5.7	19.7	19.9	0.2
91911-Chula Vista	1,713	1,650	-3.7%	13.5	8.9	-4.6	12.6	14.8	2.2
91913-Chula Vista	1,720	1,643	-4.5%	24.2	19.2	-5.0	31.2	31.9	0.7
91915-Chula Vista	1,133	970	-14.4%	25.4	16.7	-8.7	34.0	31.5	-2.5
91977-Spring Valley	1,151	1,125	-2.3%	15.1	9.9	-5.2	16.2	14.6	-1.6
92009-Carlsbad	1,363	1,213	-11.0%	28.1	23.1	-5.0	46.3	44.8	-1.5
92019-El Cajon	1,337	1,276	-4.6%	21.8	13.5	-8.3	32.7	29.3	-3.4
92020-El Cajon	1,249	1,235	-1.1%	15.7	10.0	-5.7	19.6	18.7	-0.9
92021-El Cajon	1,409	1,319	-6.4%	15.6	9.5	-6.1	17.1	16.1	-1.0
92024-Encinitas	1,526	1,254	-17.8%	27.7	23.0	-4.7	44.0	40.9	-3.1
92026-Escondido	1,094	1,022	-6.6%	18.3	15.4	-2.9	23.9	22.8	-1.1
92027-Escondido	966	950	-1.7%	15.0	12.1	-2.9	17.3	16.7	-0.6
92028-Fallbrook	1,127	1,175	4.3%	18.6	16.3	-2.3	27.0	25.7	-1.3
92037-La Jolla	1,387	1,103	-20.5%	27.0	24.9	-2.1	58.9	57.6	-1.3
92056-Oceanside	1,254	1,062	-15.3%	19.2	14.3	-4.9	23.8	22.1	-1.7
92057-Oceanside	1,212	1,148	-5.3%	18.9	15.2	-3.7	21.5	22.1	0.6
92064-Poway	1,362	1,093	-19.8%	22.5	21.2	-1.3	28.9	30.6	1.7
92069-San Marcos	969	1,005	3.7%	17.0	16.3	-0.7	20.4	22.2	1.8
92071-Santee	1,365	1,240	-9.2%	14.0	13.1	-0.9	17.4	20.2	2.8
92078-San Marcos	1,333	1,142	-14.3%	27.6	25.1	-2.5	35.3	33.7	-1.6

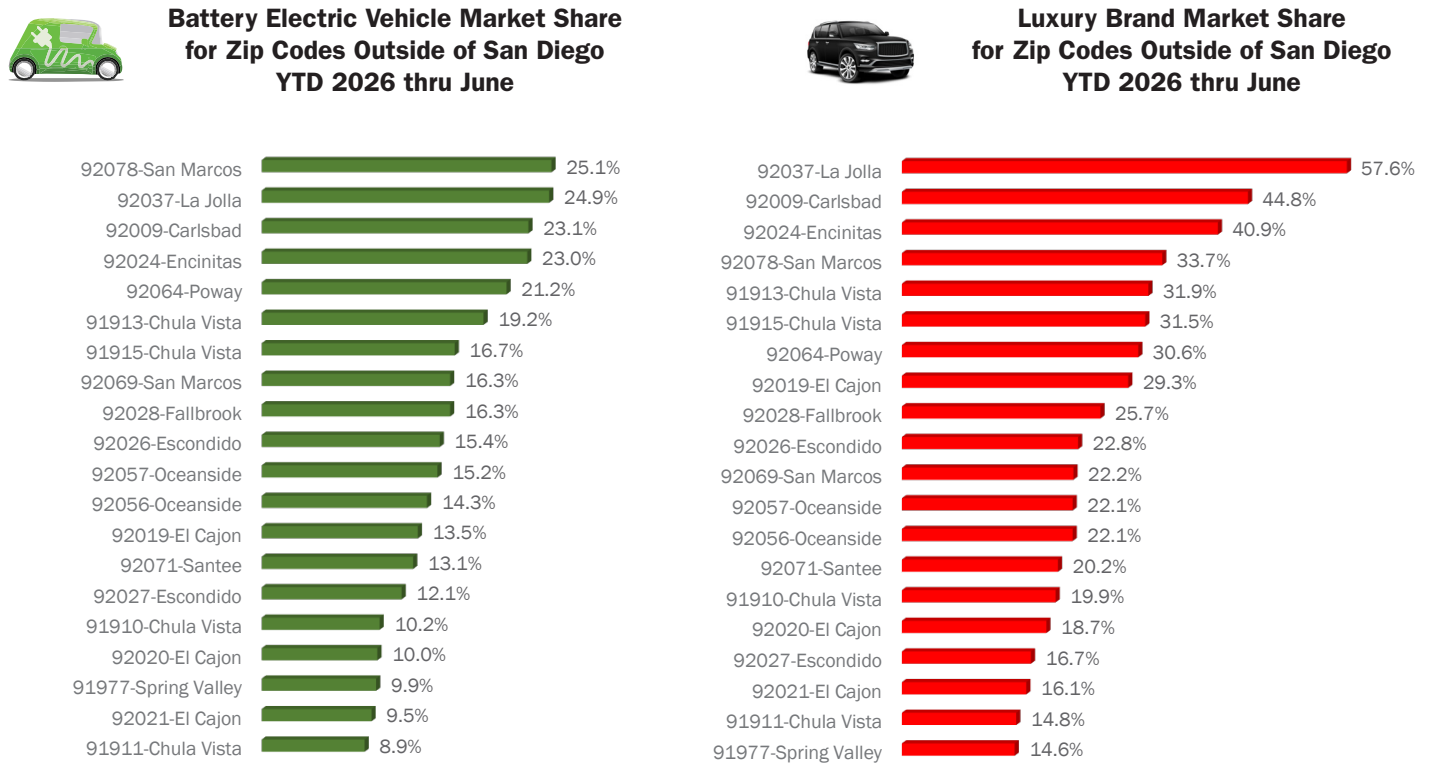
ZIP CODE MARKETS OUTSIDE SAN DIEGO

Ford Market Share Was 11.9% in Zip Code 92071 (Santee)

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

Zip Code	Toyota	Honda	Tesla	Ford	Chevrolet	Kia	Hyundai	Nissan	Lexus	BMW
91910-Chula Vista	22.4	12.4	5.0	8.0	6.7	6.3	3.0	5.8	3.8	3.8
91911-Chula Vista	25.3	13.3	5.0	7.6	5.5	6.4	3.0	7.3	1.7	3.6
91913-Chula Vista	21.5	10.2	12.2	5.2	3.8	6.3	3.2	4.7	4.6	5.1
91915-Chula Vista	24.9	9.9	10.5	4.2	3.0	6.4	3.7	3.8	3.5	7.3
91977-Spring Valley	24.8	15.7	4.7	9.4	7.5	6.8	4.6	4.8	2.2	2.0
92009-Carlsbad	14.3	7.3	12.8	6.8	4.0	4.6	4.9	1.8	6.5	8.0
92019-El Cajon	21.7	11.2	4.6	6.1	7.6	6.5	3.4	3.5	4.5	5.1
92020-El Cajon	25.7	12.6	3.7	8.8	7.7	6.4	4.6	4.1	3.2	2.8
92021-El Cajon	25.8	12.4	4.6	9.9	8.0	7.1	4.5	4.6	2.0	1.7
92024-Encinitas	19.3	4.5	11.5	9.3	2.4	5.5	3.5	1.5	5.8	6.0
92026-Escondido	25.4	12.1	8.2	7.6	6.9	5.7	4.5	3.6	5.9	2.7
92027-Escondido	27.1	12.3	6.0	7.9	8.3	4.8	5.6	5.3	3.7	1.8
92028-Fallbrook	19.8	8.1	8.6	11.7	6.2	4.9	4.1	4.9	4.6	2.7
92037-La Jolla	12.9	2.9	14.4	4.7	2.1	2.8	3.2	1.6	5.4	9.2
92056-Oceanside	24.9	11.3	7.5	9.3	4.2	5.0	5.6	5.6	4.3	3.5
92057-Oceanside	24.5	10.7	8.5	8.0	6.1	5.3	5.1	6.2	4.7	2.4
92064-Poway	19.9	9.4	12.4	9.2	5.4	4.7	6.5	3.9	5.9	2.4
92069-San Marcos	28.8	11.2	8.7	9.0	5.0	4.5	4.6	3.7	4.8	2.2
92071-Santee	19.2	10.3	5.9	11.9	9.6	7.3	6.5	4.0	4.0	3.0
92078-San Marcos	20.5	7.4	14.7	7.4	4.3	5.4	5.2	2.8	5.3	3.9

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.

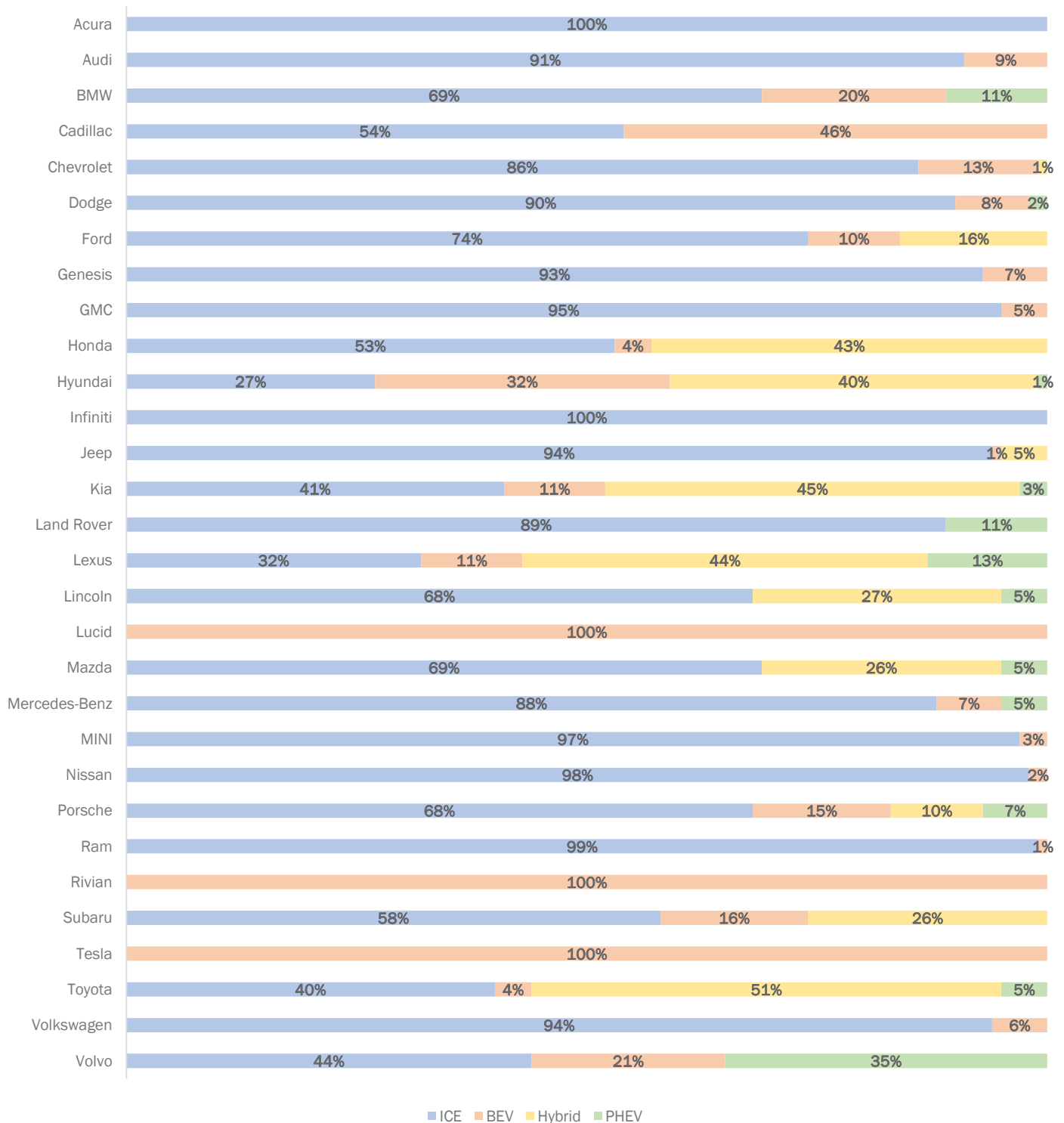


POWERTRAINS



POWERTRAIN MARKET SHARES

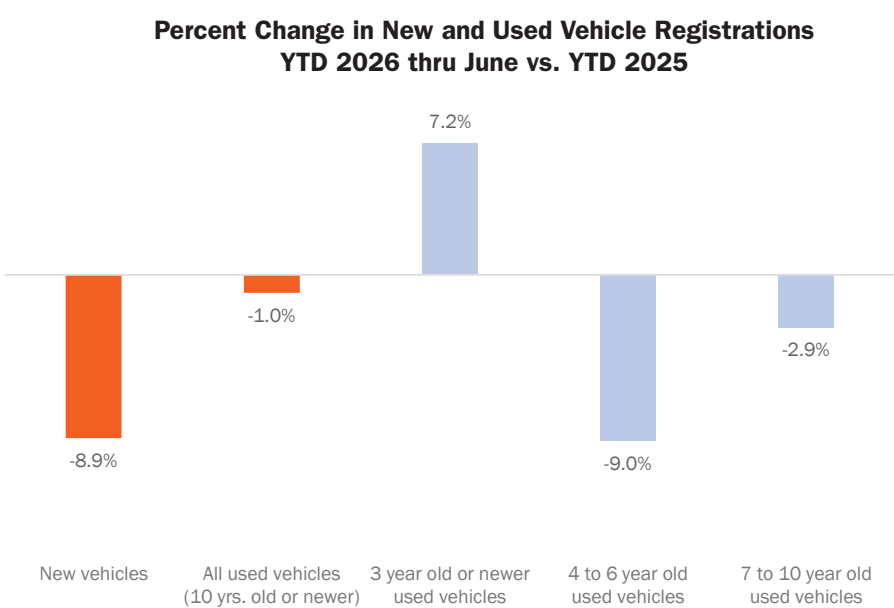
Share of Brand Registrations by Type of Powertrain - Second Quarter 2026 (top 30 brands)



The graph above shows the breakdown of new vehicle registrations by powertrain type for each of the top 30 selling brands in the county during the second quarter of 2026. Data sourced from Experian Automotive.

SAN DIEGO COUNTY USED VEHICLE MARKET

Used Vehicle Market Fell by Just 1% in First Half of This Year



THREE KEY TRENDS IN
USED VEHICLE MARKET

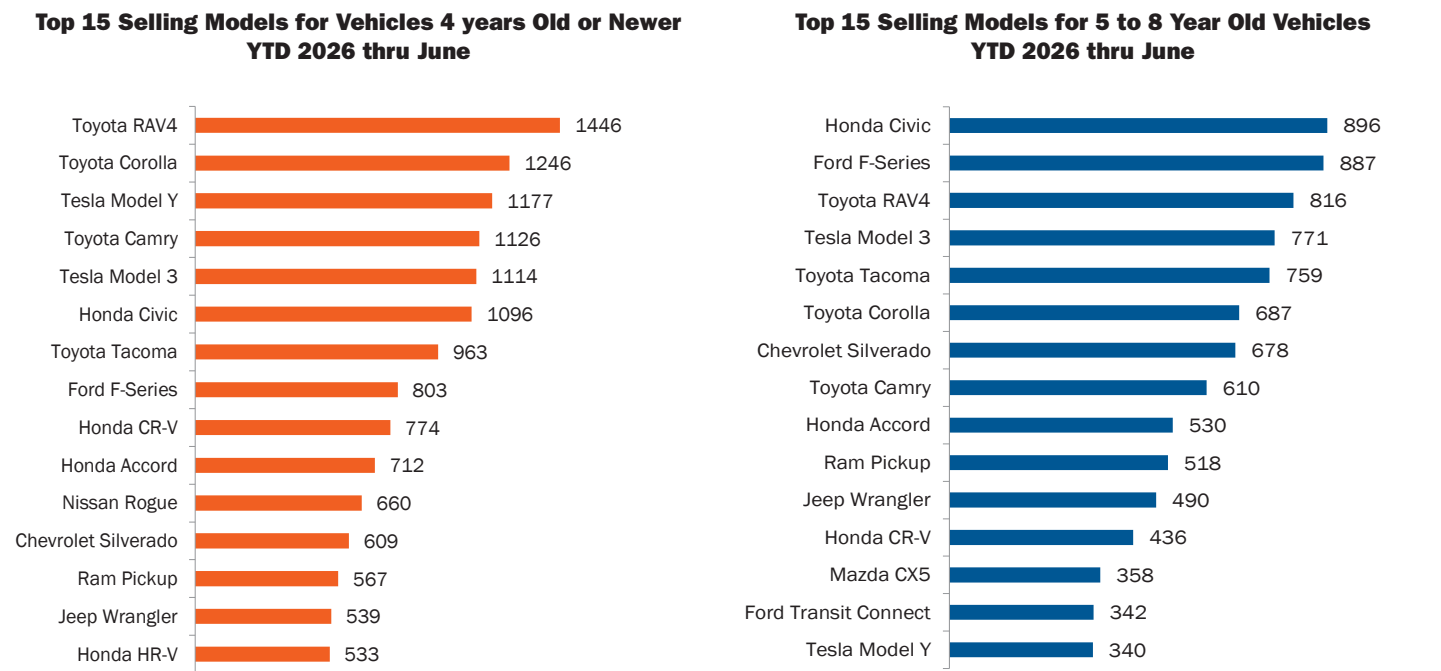
01.
- The San Diego County used vehicle market declined by a slim 1% in the first half of this year versus year earlier, compared to the 8.9% drop in the new vehicle market.
02.
- As shown on the graph to the left, registrations for three year old or newer vehicles increased 7.2% during the first six months of this year. The 4 to 6 year old market declined 9%.
03.
- Toyota RAV4 was the best-seller among 4 year old or newer vehicles. Honda Civic led for 5 to 8 year old models (see graph below).

Data sourced from Experian Automotive.

TOP SELLING MODELS IN USED VEHICLE MARKET

RAV4 and Civic Are Top Sellers in County Used Vehicle Market

The two graphs below show the top 15 selling models in San Diego County for two age classifications: vehicles 4 years old or newer, and 5 to 8 year old vehicles.



Data sourced from Experian Automotive.

Brand Registrations Report												
San Diego County New Retail Car and Light Truck Registrations												
	Second Quarter						Year to date thru June					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	2Q '25	2Q '26	% change	2Q '25	2Q '26	Change	YTD '25	YTD '26	% change	YTD '25	YTD '26	Change
TOTAL	37,868	35,022	-7.5				74,366	67,727	-8.9			
Cars	9,326	8,330	-10.7	24.6	23.8	-0.8	17,801	15,565	-12.6	23.9	23.0	-0.9
Light Trucks	28,542	26,692	-6.5	75.4	76.2	0.8	56,565	52,162	-7.8	76.1	77.0	0.9
Domestic Brands	11,266	10,176	-9.7	29.7	29.1	-0.6	22,011	19,245	-12.6	29.6	28.3	-1.3
European Brands	5,010	4,359	-13.0	13.2	12.4	-0.8	10,678	8,908	-16.6	14.4	13.2	-1.2
Japanese Brands	17,628	16,601	-5.8	46.6	47.4	0.8	33,616	32,353	-3.8	45.2	47.8	2.6
Other Asian Brands	3,964	3,886	-2.0	10.5	11.1	0.6	8,061	7,221	-10.4	10.8	10.7	-0.1
Acura	307	222	-27.7	0.8	0.6	-0.2	551	445	-19.2	0.7	0.7	0.0
Alfa Romeo	11	9	-18.2	0.0	0.0	0.0	27	19	-29.6	0.0	0.0	0.0
Audi	501	381	-24.0	1.3	1.1	-0.2	1,132	807	-28.7	1.5	1.2	-0.3
BMW	1,478	1,337	-9.5	3.9	3.8	-0.1	2,973	2,708	-8.9	4.0	4.0	0.0
Buick	58	46	-20.7	0.2	0.1	-0.1	139	108	-22.3	0.2	0.2	0.0
Cadillac	261	233	-10.7	0.7	0.7	0.0	530	433	-18.3	0.7	0.6	-0.1
Chevrolet	2,284	1,843	-19.3	6.0	5.3	-0.7	4,434	3,529	-20.4	6.0	5.2	-0.8
Chrysler	42	12	-71.4	0.1	0.0	-0.1	91	54	-40.7	0.1	0.1	0.0
Dodge	62	49	-21.0	0.2	0.1	-0.1	121	89	-26.4	0.2	0.1	-0.1
Ferrari	9	20	122.2	0.0	0.1	0.1	16	33	106.3	0.0	0.0	0.0
Ford	3,222	2,567	-20.3	8.5	7.3	-1.2	6,026	5,387	-10.6	8.1	8.0	-0.1
Genesis	125	129	3.2	0.3	0.4	0.1	259	226	-12.7	0.3	0.3	0.0
GMC	556	615	10.6	1.5	1.8	0.3	1,172	1,185	1.1	1.6	1.7	0.1
Honda	4,265	3,915	-8.2	11.3	11.2	-0.1	8,271	7,118	-13.9	11.1	10.5	-0.6
Hyundai	1,726	1,626	-5.8	4.6	4.6	0.0	3,518	3,120	-11.3	4.7	4.6	-0.1
Ineos	24	23	-4.2	0.1	0.1	0.0	57	49	-14.0	0.1	0.1	0.0
Infiniti	72	51	-29.2	0.2	0.1	-0.1	145	116	-20.0	0.2	0.2	0.0
Jeep	649	531	-18.2	1.7	1.5	-0.2	1,249	1,044	-16.4	1.7	1.5	-0.2
Kia	2,094	2,125	1.5	5.5	6.1	0.6	4,256	3,853	-9.5	5.7	5.7	0.0
Land Rover	310	273	-11.9	0.8	0.8	0.0	734	547	-25.5	1.0	0.8	-0.2
Lexus	1,618	1,542	-4.7	4.3	4.4	0.1	3,013	3,020	0.2	4.1	4.5	0.4
Lincoln	90	78	-13.3	0.2	0.2	0.0	150	152	1.3	0.2	0.2	0.0
Lucid	56	74	32.1	0.1	0.2	0.1	136	198	45.6	0.2	0.3	0.1
Mazda	988	979	-0.9	2.6	2.8	0.2	1,961	1,863	-5.0	2.6	2.8	0.2
Mercedes-Benz	1,303	1,168	-10.4	3.4	3.3	-0.1	2,681	2,312	-13.8	3.6	3.4	-0.2
MINI	118	101	-14.4	0.3	0.3	0.0	229	207	-9.6	0.3	0.3	0.0
Mitsubishi	57	18	-68.4	0.2	0.1	-0.1	102	36	-64.7	0.1	0.1	0.0
Nissan	1,370	1,476	7.7	3.6	4.2	0.6	2,533	2,611	3.1	3.4	3.9	0.5
Porsche	268	205	-23.5	0.7	0.6	-0.1	606	463	-23.6	0.8	0.7	-0.1
Ram	288	339	17.7	0.8	1.0	0.2	596	675	13.3	0.8	1.0	0.2
Rivian	287	215	-25.1	0.8	0.6	-0.2	548	440	-19.7	0.7	0.6	-0.1
Subaru	1,366	1,183	-13.4	3.6	3.4	-0.2	2,695	2,313	-14.2	3.6	3.4	-0.2
Tesla	3,407	3,574	4.9	9.0	10.2	1.2	6,813	5,951	-12.7	9.2	8.8	-0.4
Toyota	7,585	7,215	-4.9	20.0	20.6	0.6	14,345	14,831	3.4	19.3	21.9	2.6
Volkswagen	558	540	-3.2	1.5	1.5	0.0	1,363	1,136	-16.7	1.8	1.7	-0.1
Volvo	304	218	-28.3	0.8	0.6	-0.2	609	452	-25.8	0.8	0.7	-0.1
Other	149	90	-39.6	0.4	0.3	-0.1	285	197	-30.9	0.4	0.3	-0.1

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 second quarters of '25 and '26 and year to date totals. 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.