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San Diego Auto Outlook

Comprehensive information on the San Diego County new vehicle market

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FORECAST

County New Vehicle Market Expected to Drift Lower Over Next 15 Months

Below is a list of four primary questions and answers regarding the San Diego County new retail light vehicle market.

How has the county market performed so far this year? County new light vehicle registrations fell 5.9% during the first nine months of 2026 versus the same period a year earlier. The U.S. market was off 4.0%. County 3Q '26 registrations increased 0.4% versus 3Q '25, an improvement from the 7.3% drop in 2Q.

What's the outlook for new vehicle sales over the next 15 months? Registrations for all of this year are predicted to fall below 138,000 units and decline 3.8% from 2025. The market has a chance to increase in the fourth quarter of this year versus relatively weak year-earlier results. Preliminary outlook for 2027: most determinants are pointing to a small decline next year (see right), although a slight increase is not out of the question.

Which brands have posted gains? Among the top 20 brands in the county, new vehicle registrations increased for Ram, Nissan, Toyota, Lexus, and Kia so far this year. Ram, Lexus, and Rivian fared better in the county market than in the U.S. (see page 4).

What are recent trends in the alternative powertrain market? Expiration of the federal government BEV tax credits shifted demand from electric vehicles to hybrids. In addition, fuel prices have increased significantly since the start of the Iran war. Both are key factors boosting sales of hybrids. Hybrid market share increased to 26.1% in the third quarter of this year and year-to-date registrations were up 12% versus 2025. BEV market share declined from last year to the first nine months of this year, but recovered from the low-point in 1Q '26 (see page three).

Primary Factors Driving the San Diego County New Vehicle Market

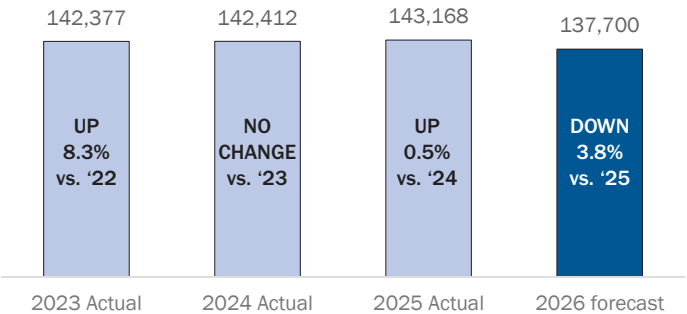
Affordability. Several key factors for affordability are moving in the wrong direction. Interest rates are increasing, tariffs are putting upward pressure on prices, and household incomes are not keeping pace with inflation. These issues are especially acute for lower-income consumers who own many of the older vehicles that are due for replacement. While higher-income households, buoyed by increasing net worth and stock market gains, have supported the market, any growth in new vehicle sales will be difficult to achieve when a significant portion of potential buyers are not actively in the market.

Consumer sentiment. Consumers are increasingly downbeat on economic conditions. Vehicle sales rarely improve when consumer attitudes are weak.

Economic growth and labor market. GDP growth has remained positive, employment gains have been respectable, and unemployment rates remain low, all of which are positive for the market.

Heightened uncertainty. Continually changing federal government policies and geopolitical events have unsettled the new vehicle market. More stability would provide added clarity to the outlook, but that seems unlikely.

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 Sep.	YTD '26 thru Sep.	% Chg. '25 to '26	Mkt. Share YTD '26
TOTAL	109,749	103,306	-5.9%	
Car	25,634	23,968	-6.5%	23.2%
Light Truck	84,115	79,338	-5.7%	76.8%
Domestic	33,770	28,988	-14.2%	28.0%
European	15,260	13,482	-11.7%	13.1%
Japanese	48,854	49,562	1.4%	48.0%
Other Asian	11,865	11,274	-5.0%	10.9%

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 '26 thru Sep. vs. YTD '25	San Diego County	California	U.S.
	DOWN 5.9%	DOWN 5.3%	DOWN 4.0%

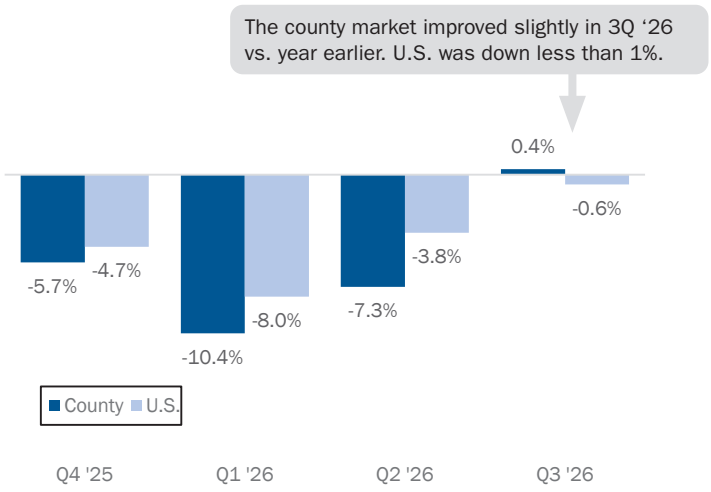
New retail light vehicle registrations in the county declined 5.9% during the first nine months of this year versus year earlier. State market was off 5.3%, while U.S. was down 4%.

Data sourced from Experian Automotive.

QUARTERLY RESULTS

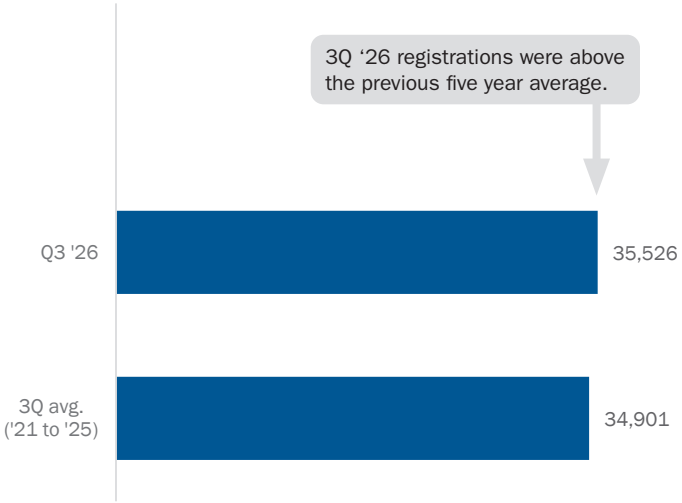
QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



QUARTERLY PERSPECTIVE

3Q '26 Registrations Versus 3Q Average for Previous Five Years



Data sourced from Experian Automotive.

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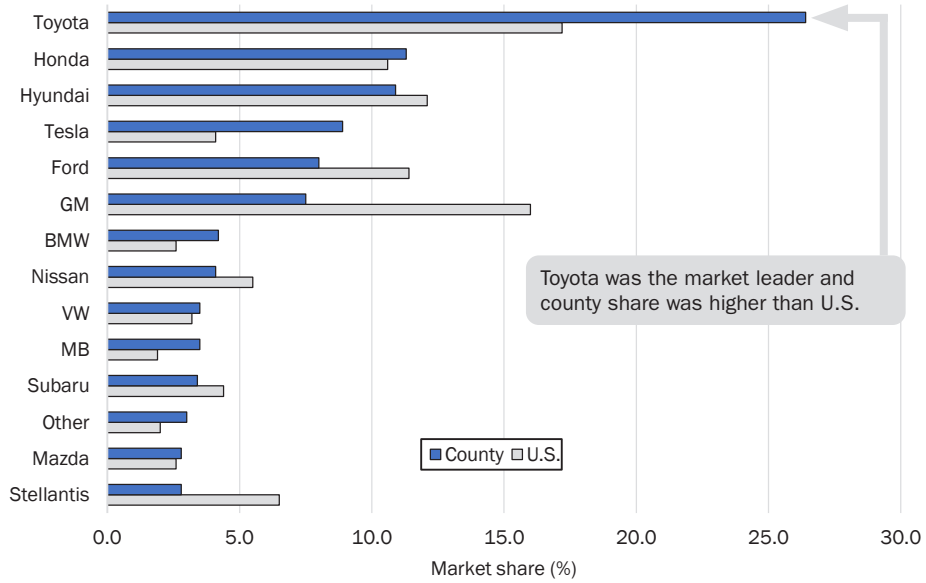
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KEY TRENDS IN SAN DIEGO COUNTY NEW VEHICLE MARKET



MANUFACTURER MARKET SHARES

San Diego County and U.S. Manufacturer Market Shares - YTD 2026 thru September



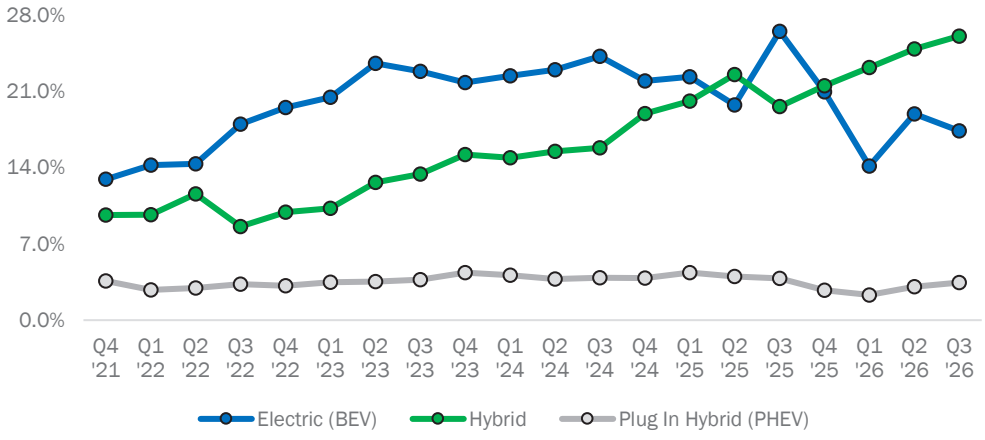
Manufacturer Market Share (%)			
Manufacturer	County Share	U.S. Share	County - U.S.
Toyota	26.4	17.2	9.2
Honda	11.3	10.6	0.7
Hyundai	10.9	12.1	-1.2
Tesla	8.9	4.1	4.8
Ford	8.0	11.4	-3.4
GM	7.5	16.0	-8.5
BMW	4.2	2.6	1.6
Nissan	4.1	5.5	-1.4
VW	3.5	3.2	0.3
MB	3.5	1.9	1.6
Subaru	3.4	4.4	-1.0
Other	3.0	2.0	1.0
Mazda	2.8	2.6	0.2
Stellantis	2.8	6.5	-3.7

The graph and table above show manufacturer market share in both the county and U.S. markets. Far right column in the table is county market share minus U.S. Top three manufacturers are shaded gray. MB is Mercedes-Benz. Data sourced from Experian Automotive.



POWERTRAINS

% Share of Industry Registrations by Powertrain Type



YTD thru September		
	YTD '25	YTD '26
ICE	52.3%	55.3% ↑
Hybrid	20.8%	24.8% ↑
Electric (BEV)	22.8%	16.9% ↓
Plug In Hybrid (PHEV)	4.1%	3.0% ↓

Quarterly		
	2Q '26	3Q '26
ICE	53.1%	53.0% ↓
Hybrid	24.9%	26.1% ↑
Electric (BEV)	18.9%	17.4% ↓
Plug In Hybrid (PHEV)	3.1%	3.5% ↑

BEV market share was **16.9%** during the first nine months of this year, down from **22.8%** a year earlier. BEV share declined from **18.9%** in 2Q of this year to **17.4%** in 3Q. Hybrid vehicles continued to post big gains, with market share reaching **26.1%** in 3Q '26.

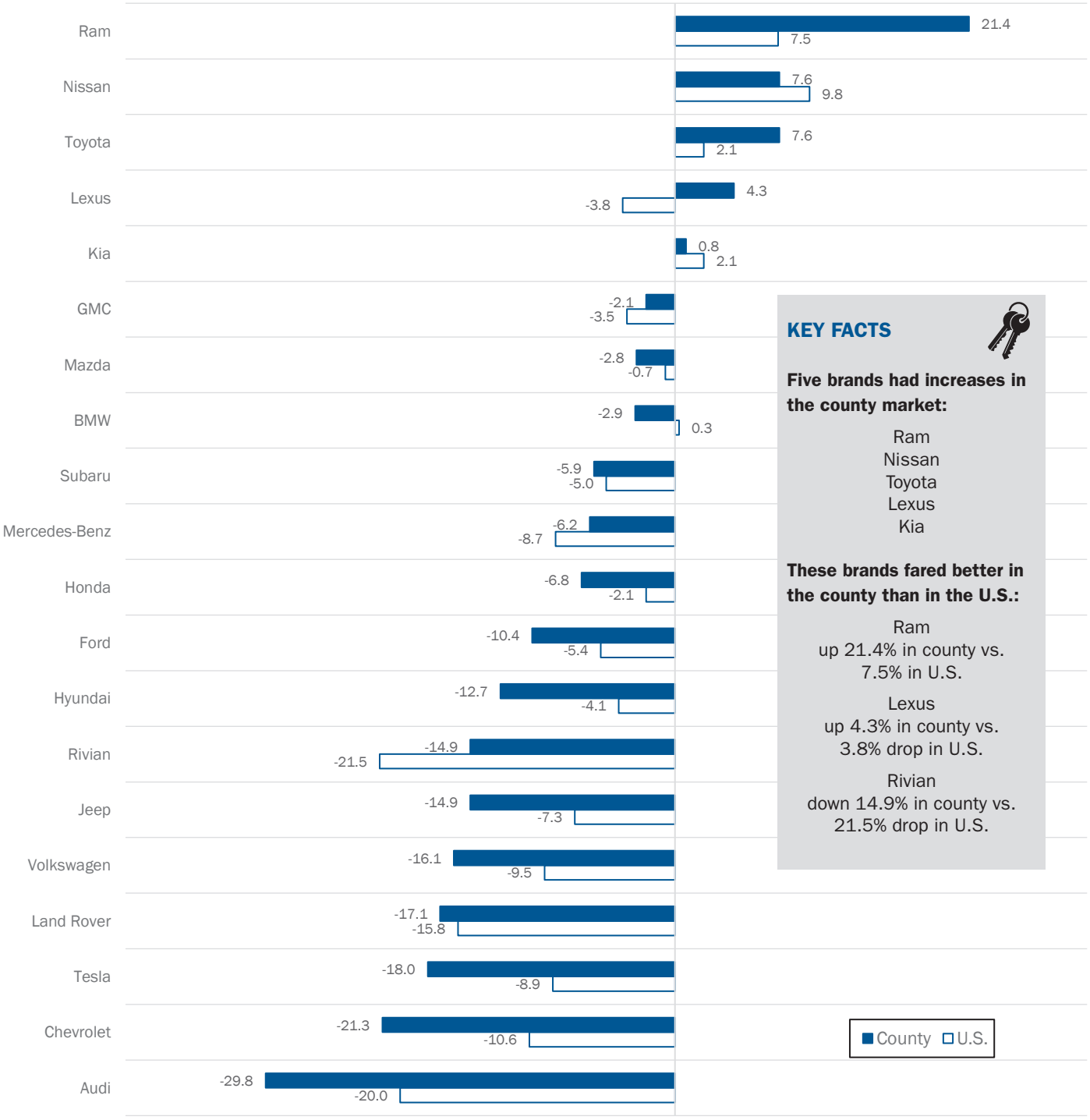
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

BRANDS AND MODELS

WINNERS AND LOSERS

The graph below shows the percent change in new retail light vehicle registrations during the first nine months of this year versus the same period a year earlier in both the San Diego County (solid blue bars) and U.S. (blue outlined bars). Brands are shown from top to bottom based on the change in county registrations.

Percent Change in San Diego County and U.S. New Retail Light Vehicle Registrations (Top 20 Selling Brands in County) YTD 2026 thru September vs. YTD 2025



KEY FACTS

Five brands had increases in the county market:

Ram
Nissan
Toyota
Lexus
Kia

These brands fared better in the county than in the U.S.:

Ram
up 21.4% in county vs.
7.5% in U.S.

Lexus
up 4.3% in county vs.
3.8% drop in U.S.

Rivian
down 14.9% in county vs.
21.5% drop in U.S.

Data sourced from Experian Automotive.

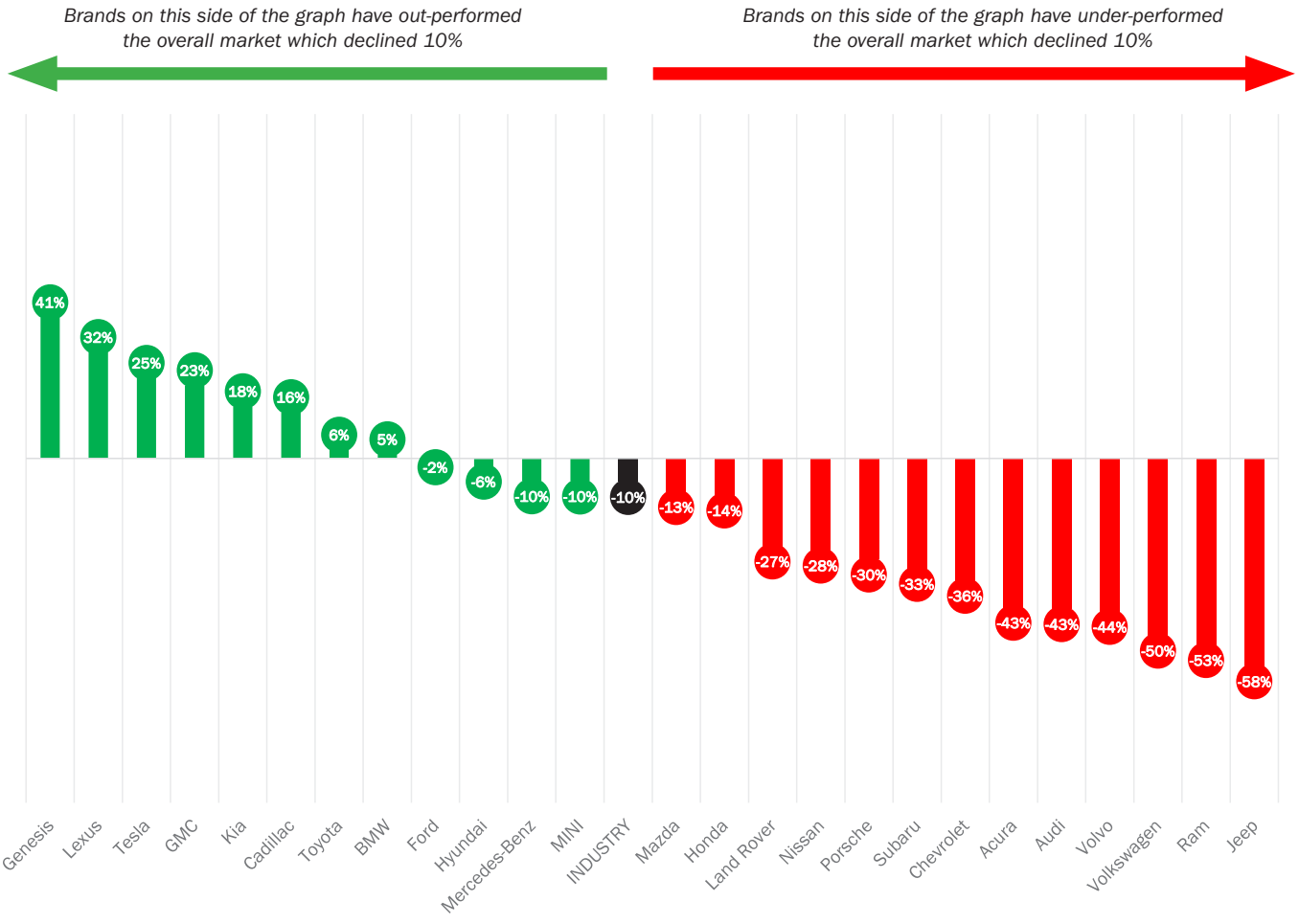
BRANDS AND MODELS

LONG TERM TRENDS

The graph below shows the percentage change in San Diego County new vehicle registrations during the first nine months of this year versus the same period five years earlier. New vehicle registrations in 2021 were relatively strong as the market recovered from lower sales levels during the pandemic. Industry registrations declined 10% over the five year period.

Data sourced from Experian Automotive.

Five Year Percent Change in San Diego County New Retail Light Vehicle Registrations for Top 25 Selling Brands YTD 2026 thru September vs. YTD 2021



TOP SELLING MODELS

Top 20 Selling Models during YTD '26 thru September - Market Share and % Change in Registrations vs. YTD '25

Rank	Model	County Share %	% chg. '25 to '26	Rank	Model	County Share %	% chg. '25 to '26
1	Tesla Model Y	6.3	-2.7	11	Honda Accord	1.4	3.8
2	Toyota Tacoma	3.8	14.4	12	Kia Sportage	1.3	17.4
3	Toyota RAV4	3.6	-19.6	13	Lexus RX	1.3	20.7
4	Toyota Camry	3.6	18.7	14	Ford Maverick	1.3	4.0
5	Honda CR-V	3.4	-0.4	15	Toyota Corolla Cross	1.2	17.4
6	Honda Civic	3.3	2.7	16	Toyota Tundra	1.2	-9.1
7	Toyota Corolla	2.5	16.9	17	Toyota 4Runner	1.2	100.0
8	Ford F-Series	2.1	-5.9	18	Subaru Crosstrek	1.2	-1.3
9	Tesla Model 3	1.9	-45.0	19	Toyota Grand Highlander	1.1	19.1
10	Chevrolet Silverado	1.7	-10.1	20	Ford Bronco	1.1	4.8

Table on the left shows the top 20 selling models so far 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.

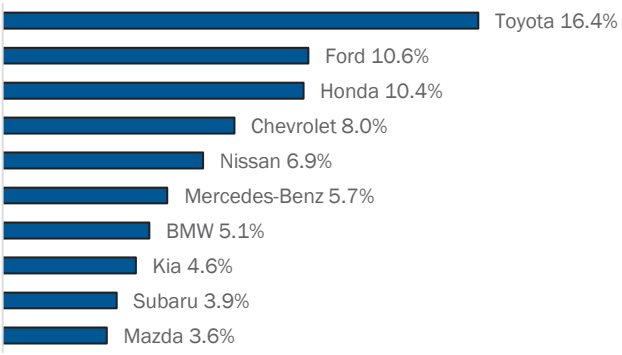
BRANDS AND MODELS

TOP TEN RANKINGS IN COUNTY MARKET - YTD 2026 THRU SEPTEMBER

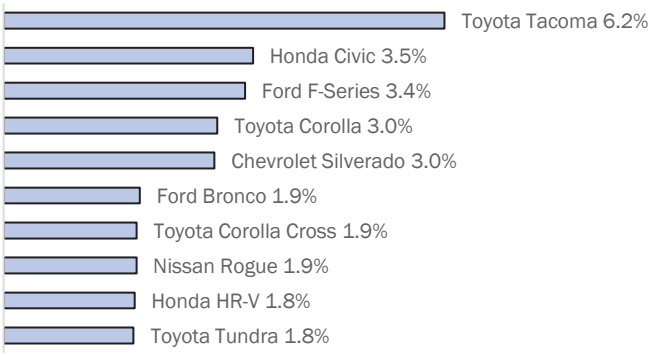
The graphs below show top ten selling brands and models during the first nine months of this year for three powertrain classifications - ICE (internal combustion engines), Hybrids (including plug-in hybrids), and BEVs (battery electric vehicles). Toyota was the top selling brand for ICE vehicles and Tacoma was the number one model. Toyota and Camry were leaders for hybrids. Tesla and Model Y were the top-sellers for BEVs.

ICE VEHICLES (includes gasoline and diesel engines)

Market Share for Top 10 Brands

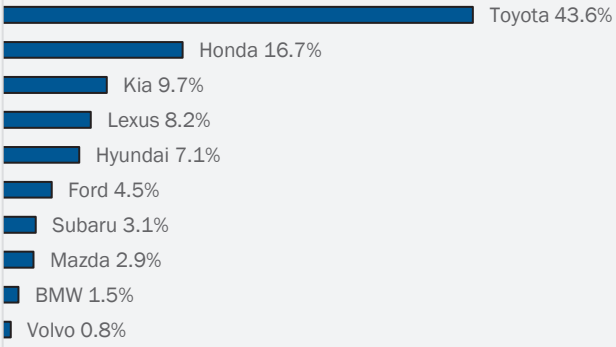


Market Share for Top 10 Models

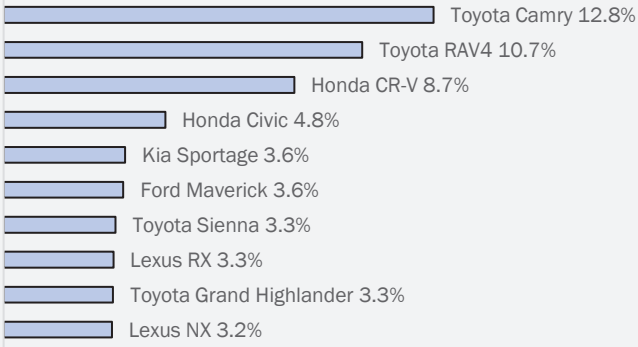


HYBRID VEHICLES (includes plug-ins and excludes mild hybrids)

Market Share for Top 10 Brands

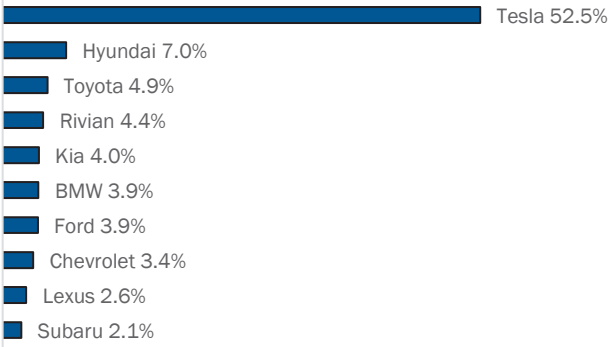


Market Share for Top 10 Models

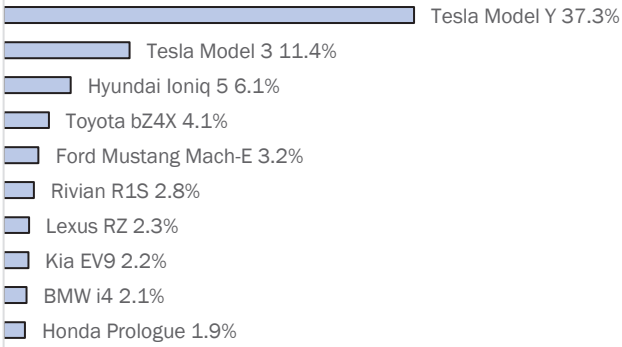


BATTERY ELECTRIC VEHICLES

Market Share for Top 10 Brands



Market Share for Top 10 Models



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

COMPARISON OF METRO AREA MARKETS

BRAND MARKET SHARE

The table below shows the top five selling brands in 24 selected metro area markets and the U.S. during the first nine months of this year.

Data sourced from Experian Automotive.

PRIMARY OBSERVATIONS

1. Toyota was the county market leader with a 22.0% share.
2. Toyota was number one in 18 of the 24 markets.
3. Tesla's county share was 8.9%, fifth highest share among the 24 markets.

Top Five Selling Brands in 24 Selected Metro Area Markets and U.S. - YTD '26 thru September

Atlanta		Boston		Charlotte		Chicago		Cleveland	
Make	Share	Make	Share	Make	Share	Make		Make	Share
Toyota	16.3	Toyota	16.4	Toyota	14.6	Honda	12.2	Chevrolet	12.9
Ford	9.5	Honda	12.9	Honda	12.5	Toyota	11.0	Honda	11.6
Honda	8.3	Ford	6.9	Ford	9.7	Chevrolet	8.8	Ford	10.4
Chevrolet	7.8	Subaru	6.6	Chevrolet	9.0	Ford	7.5	Kia	9.1
Kia	7.2	Chevrolet	5.3	Kia	6.9	Kia	7.1	Toyota	8.8

Dallas Fort Worth		Denver		Houston		Inland Empire, CA		Kansas City	
Make	Share	Make	Share	Make	Share	Make		Make	Share
Toyota	14.3	Toyota	17.4	Toyota	16.7	Toyota	23.0	Ford	13.2
Ford	11.5	Ford	9.8	Ford	12.7	Honda	11.7	Toyota	12.4
Chevrolet	10.3	Subaru	9.4	Chevrolet	9.2	Tesla	7.9	Chevrolet	10.2
Honda	7.8	Honda	6.4	Honda	8.0	Chevrolet	7.1	Honda	9.0
Nissan	6.3	Hyundai	6.0	Hyundai	5.7	Ford	7.1	Kia	7.7

Los Angeles		Miami		Minneap./St. Paul		New York City		Orange County, CA	
Make	Share	Make	Share	Make	Share	Make		Make	Share
Toyota	19.4	Toyota	14.7	Toyota	11.8	Honda	12.1	Toyota	19.6
Honda	13.2	Honda	9.4	Honda	11.7	Toyota	10.7	Tesla	13.6
Tesla	9.4	Chevrolet	7.4	Chevrolet	11.0	Nissan	7.1	Honda	10.2
Mercedes-Benz	5.8	Kia	6.7	Ford	10.4	Hyundai	6.2	Ford	5.9
Kia	5.2	Hyundai	6.7	Subaru	7.6	Chevrolet	5.2	Mercedes-Benz	5.6

Philadelphia		Phoenix		Pittsburgh		Portland, OR		San Diego	
Make	Share	Make	Share	Make	Share	Make		Make	Share
Toyota	12.3	Toyota	18.2	Chevrolet	11.1	Toyota	25.2	Toyota	22.0
Honda	10.7	Chevrolet	8.9	Toyota	10.2	Subaru	11.3	Honda	10.7
Ford	8.8	Ford	8.8	Ford	9.9	Ford	8.1	Tesla	8.9
Kia	6.6	Honda	8.4	Honda	9.1	Honda	7.5	Ford	7.8
Chevrolet	6.6	Kia	7.4	Subaru	8.4	Kia	6.6	Kia	5.9

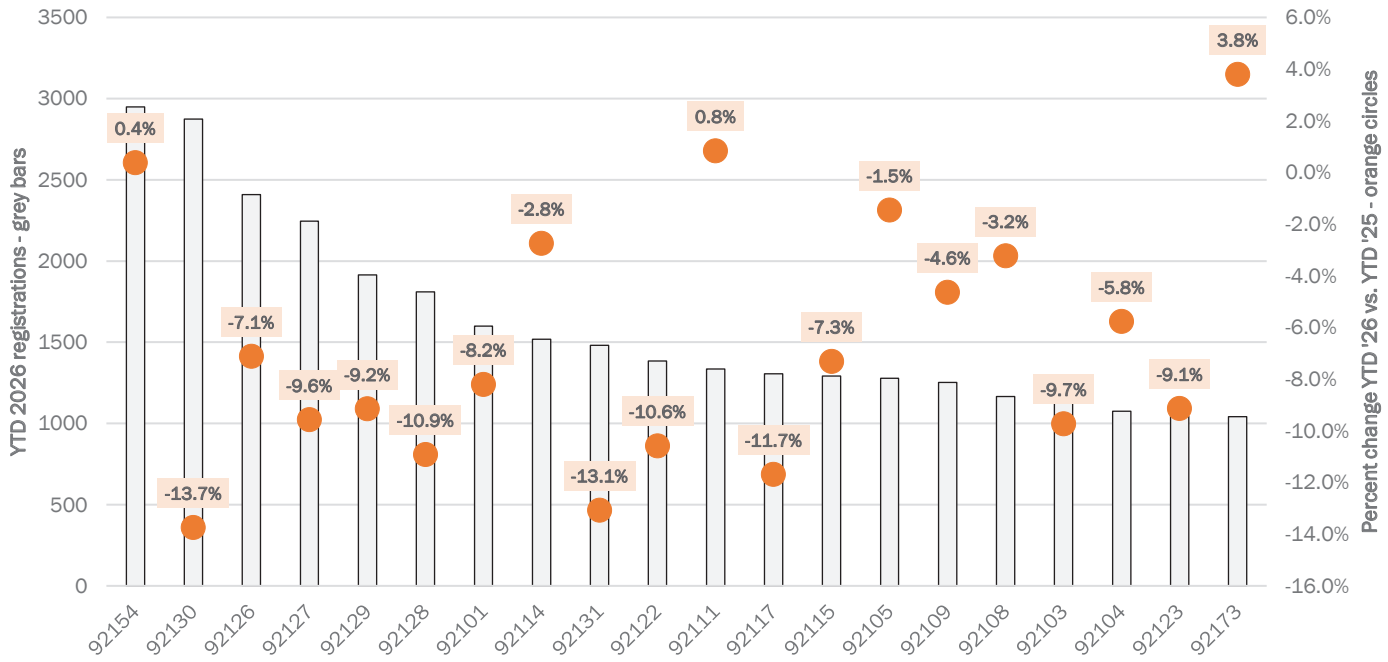
Seattle/Tacoma		Silicon Valley		Tampa/St. Pete		Washington, DC		U.S.	
Make	Share	Make	Share	Make	Share	Make		Make	Share
Toyota	18.7	Tesla	23.1	Toyota	16.4	Toyota	17.3	Toyota	14.6
Tesla	10.9	Toyota	19.2	Ford	10.1	Honda	13.9	Ford	10.7
Honda	10.4	Honda	10.6	Honda	9.3	Ford	7.4	Chevrolet	9.9
Subaru	7.7	Ford	4.8	Hyundai	7.3	Kia	6.6	Honda	9.7
Ford	7.3	Hyundai	4.7	Chevrolet	7.1	Hyundai	6.3	Kia	6.0

ZIP CODE MARKETS IN SAN DIEGO

Registrations Increased in Just Three 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 Sep. and Percent Change vs. YTD 2025



The graph above shows new vehicle registrations during the first nine 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 Sep.	YTD '26 thru Sep.	% change '26 vs. '25	YTD '25 thru Sep.	YTD '26 thru Sep.	change '26 vs. '25	YTD '25 thru Sep.	YTD '26 thru Sep.	change '26 vs. '25
92101	1,742	1,599	-8.2%	29.0	22.0	-7.0	44.0	43.2	-0.8
92103	1,284	1,159	-9.7%	27.9	20.3	-7.6	35.0	38.0	3.0
92104	1,142	1,076	-5.8%	19.3	16.0	-3.3	19.1	17.7	-1.4
92105	1,297	1,278	-1.5%	12.9	9.9	-3.0	14.5	13.2	-1.3
92108	1,205	1,166	-3.2%	27.9	18.6	-9.3	34.6	33.4	-1.2
92109	1,313	1,252	-4.6%	21.6	16.2	-5.4	30.4	28.8	-1.6
92111	1,324	1,335	0.8%	19.6	14.0	-5.6	21.4	21.8	0.4
92114	1,562	1,519	-2.8%	14.8	11.2	-3.6	17.5	13.8	-3.7
92115	1,394	1,292	-7.3%	18.7	14.2	-4.5	18.5	16.0	-2.5
92117	1,479	1,306	-11.7%	21.7	18.8	-2.9	23.5	24.3	0.8
92122	1,549	1,385	-10.6%	29.9	24.6	-5.3	38.2	37.1	-1.1
92123	1,148	1,043	-9.1%	20.9	15.9	-5.0	26.7	21.6	-5.1
92126	2,595	2,410	-7.1%	28.7	21.0	-7.7	30.1	27.3	-2.8
92127	2,484	2,246	-9.6%	37.7	30.9	-6.8	51.6	50.6	-1.0
92128	2,033	1,811	-10.9%	30.5	23.6	-6.9	36.4	35.3	-1.1
92129	2,107	1,914	-9.2%	32.3	28.1	-4.2	36.1	35.3	-0.8
92130	3,332	2,874	-13.7%	41.3	34.1	-7.2	56.3	56.2	-0.1
92131	1,705	1,482	-13.1%	35.0	28.3	-6.7	42.2	42.5	0.3
92154	2,938	2,949	0.4%	14.6	9.4	-5.2	17.5	15.5	-2.0
92173	1,003	1,041	3.8%	12.0	6.8	-5.2	12.6	12.4	-0.2

Data sourced from Experian Automotive.

ZIP CODE MARKETS IN SAN DIEGO

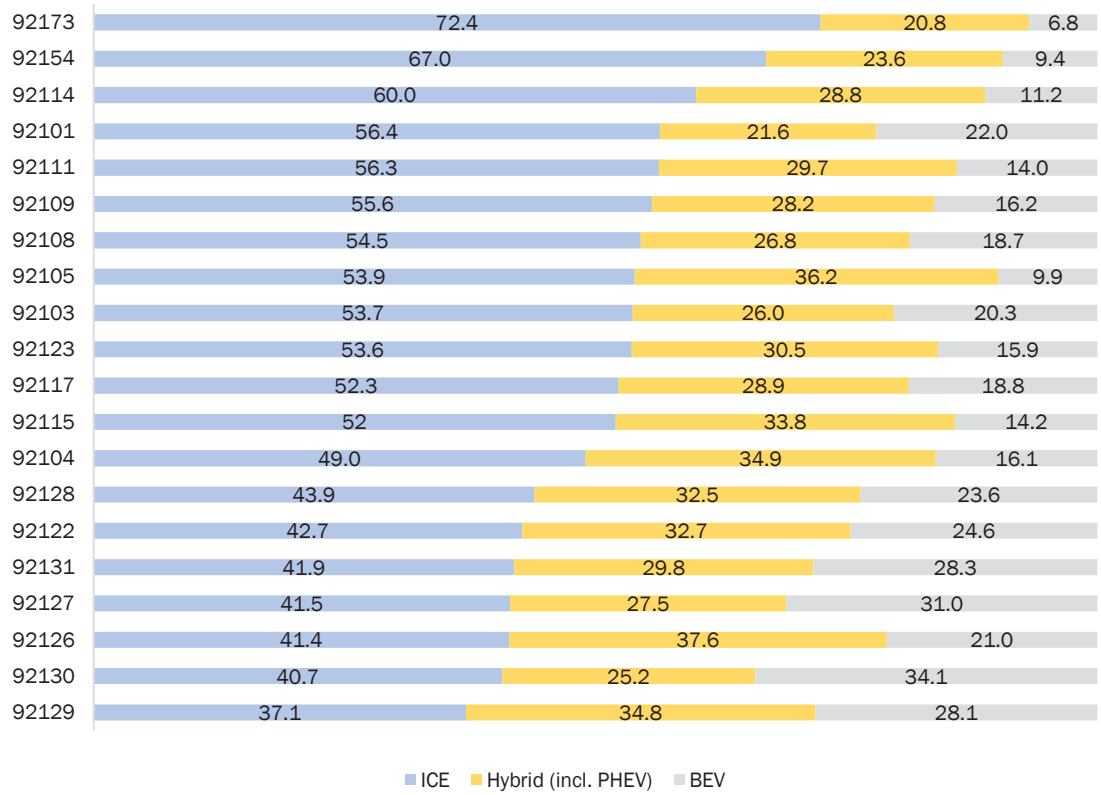
Kia Market Share Was 9.3% in Zip Code 92173

Brand Market Share - YTD 2026 thru September (for top 10 selling brands in San Diego zip codes)

Zip Code	Toyota	Tesla	Honda	Ford	Kia	Hyundai	Lexus	BMW	Chevrolet	Subaru
92101	13.6	12.1	8.3	5.9	5.8	3.9	3.9	8.6	3.1	2.8
92103	16.9	9.7	8.1	6.5	5.5	5.7	4.8	6.2	2.2	4.9
92104	23.9	4.9	13.8	5.9	7.2	6.0	3.4	2.9	4.3	7.5
92105	36.4	5.2	16.1	5.8	5.3	3.6	4.1	0.5	5.6	2.6
92108	22.5	9.9	8.9	5.3	6.3	4.1	4.4	5.7	3.8	2.7
92109	22.1	9.4	8.0	8.7	6.4	4.3	4.3	3.9	3.0	4.2
92111	25.8	7.3	10.8	8.5	5.2	5.6	4.0	2.5	5.6	3.4
92114	30.1	6.5	18.2	6.4	8.0	3.3	2.6	1.3	4.9	2.8
92115	30.0	5.3	15.4	5.7	7.2	5.2	3.3	2.2	4.0	4.2
92117	24.4	9.0	9.2	7.7	6.4	6.0	3.8	3.4	4.7	3.3
92122	21.2	14.0	10.4	4.2	4.8	6.3	6.4	5.3	2.2	3.8
92123	22.1	7.7	10.3	12.2	5.9	6.2	3.5	3.5	6.1	3.8
92126	28.9	12.9	14.1	4.2	5.4	5.8	5.4	2.6	3.2	2.9
92127	14.4	17.7	9.3	4.0	3.8	4.9	6.4	7.0	2.0	2.3
92128	18.4	13.1	10.2	4.4	6.3	8.2	7.0	3.8	2.7	3.6
92129	20.6	17.0	10.9	5.0	6.2	6.5	6.8	2.9	2.5	3.5
92130	12.7	21.8	5.7	3.8	3.5	4.9	6.4	8.3	1.9	3.6
92131	16.4	15.0	10.6	4.7	3.8	6.7	8.0	5.3	2.9	3.4
92154	25.9	4.9	12.6	8.4	7.0	3.3	1.9	3.5	6.0	2.4
92173	24.7	4.0	12.7	8.8	9.3	1.8	1.2	2.9	5.9	1.3

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.

Market Share (%) by Powertrain Type in San Diego Zip Codes - YTD 2026 thru Sep.



Highest ICE Market Share

92173: 72.4%

Highest Hybrid Market Share

92126: 37.6%

Highest BEV Market Share

92130: 34.1%

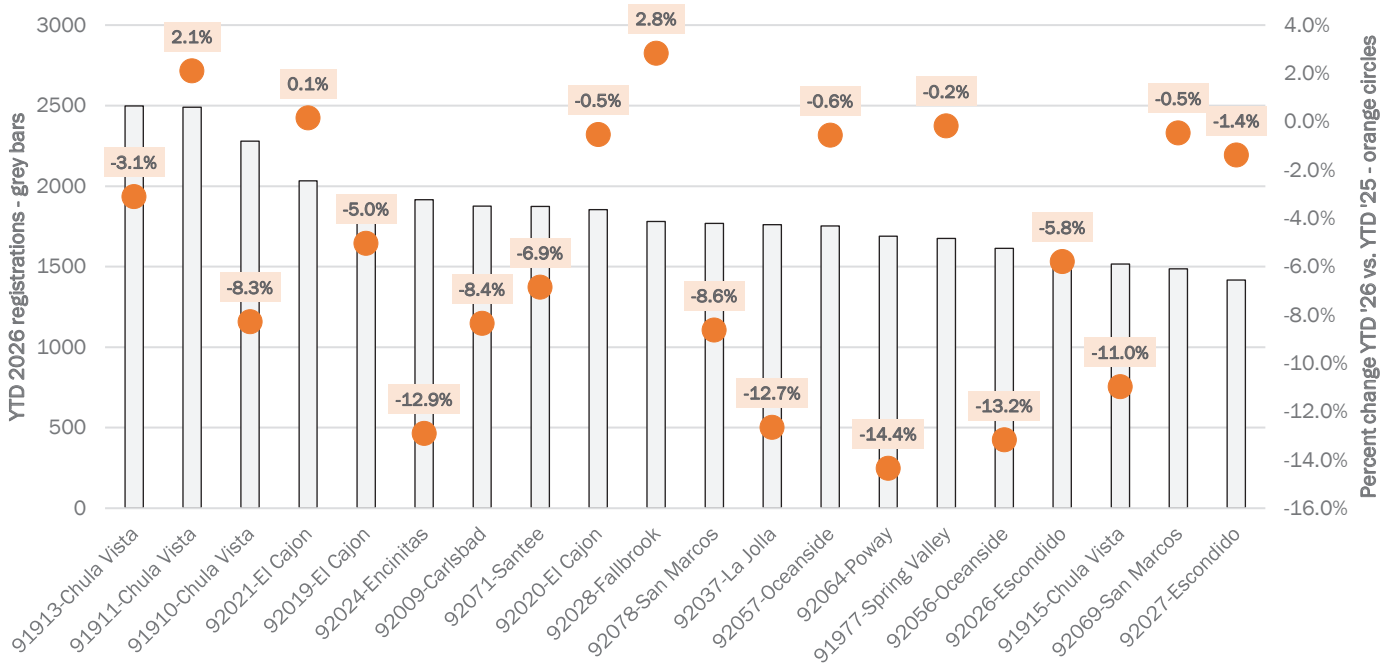
Data sourced from Experian Automotive. Fuel cell vehicles are included with BEVs.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

Registrations Declined in Most Zip Code Markets

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 September and Percent Change YTD 2025



The graph above shows new vehicle registrations during the first nine 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 Sep.	YTD '26 thru Sep.	% change '26 vs. '25	YTD '25 thru Sep.	YTD '26 thru Sep.	change '26 vs. '25	YTD '25 thru Sep.	YTD '26 thru Sep.	change '26 vs. '25
91910-Chula Vista	2,486	2,280	-8.3%	17.2	10.4	-6.8	19.7	17.7	-2.0
91911-Chula Vista	2,439	2,490	2.1%	14.3	8.5	-5.8	13.5	14.0	0.5
91913-Chula Vista	2,577	2,497	-3.1%	26.5	18.4	-8.1	32.1	30.7	-1.4
91915-Chula Vista	1,704	1,517	-11.0%	27.0	17.0	-10.0	33.9	30.9	-3.0
91977-Spring Valley	1,679	1,676	-0.2%	16.0	10.0	-6.0	15.5	15.2	-0.3
92009-Carlsbad	2,046	1,875	-8.4%	30.8	24.7	-6.1	46.6	44.9	-1.7
92019-El Cajon	2,024	1,922	-5.0%	23.1	12.7	-10.4	32.0	31.3	-0.7
92020-El Cajon	1,864	1,854	-0.5%	16.9	10.1	-6.8	19.8	19.1	-0.7
92021-El Cajon	2,030	2,033	0.1%	16.2	9.1	-7.1	16.7	16.4	-0.3
92024-Encinitas	2,199	1,915	-12.9%	29.3	23.9	-5.4	43.4	42.0	-1.4
92026-Escondido	1,637	1,542	-5.8%	20.7	15.7	-5.0	25.1	23.1	-2.0
92027-Escondido	1,437	1,417	-1.4%	15.9	13.2	-2.7	17.5	17.0	-0.5
92028-Fallbrook	1,731	1,780	2.8%	20.9	15.6	-5.3	26.8	24.9	-1.9
92037-La Jolla	2,015	1,760	-12.7%	28.0	25.9	-2.1	57.6	57.8	0.2
92056-Oceanside	1,859	1,614	-13.2%	20.3	14.9	-5.4	24.0	22.9	-1.1
92057-Oceanside	1,763	1,753	-0.6%	21.2	15.1	-6.1	23.2	21.2	-2.0
92064-Poway	1,972	1,689	-14.4%	24.7	20.9	-3.8	29.9	30.0	0.1
92069-San Marcos	1,493	1,486	-0.5%	20.2	16.0	-4.2	22.0	22.2	0.2
92071-Santee	2,012	1,874	-6.9%	16.1	13.0	-3.1	18.2	19.6	1.4
92078-San Marcos	1,935	1,768	-8.6%	29.7	25.1	-4.6	35.5	33.7	-1.8

Data sourced from Experian Automotive.

ZIP CODE MARKETS OUTSIDE SAN DIEGO

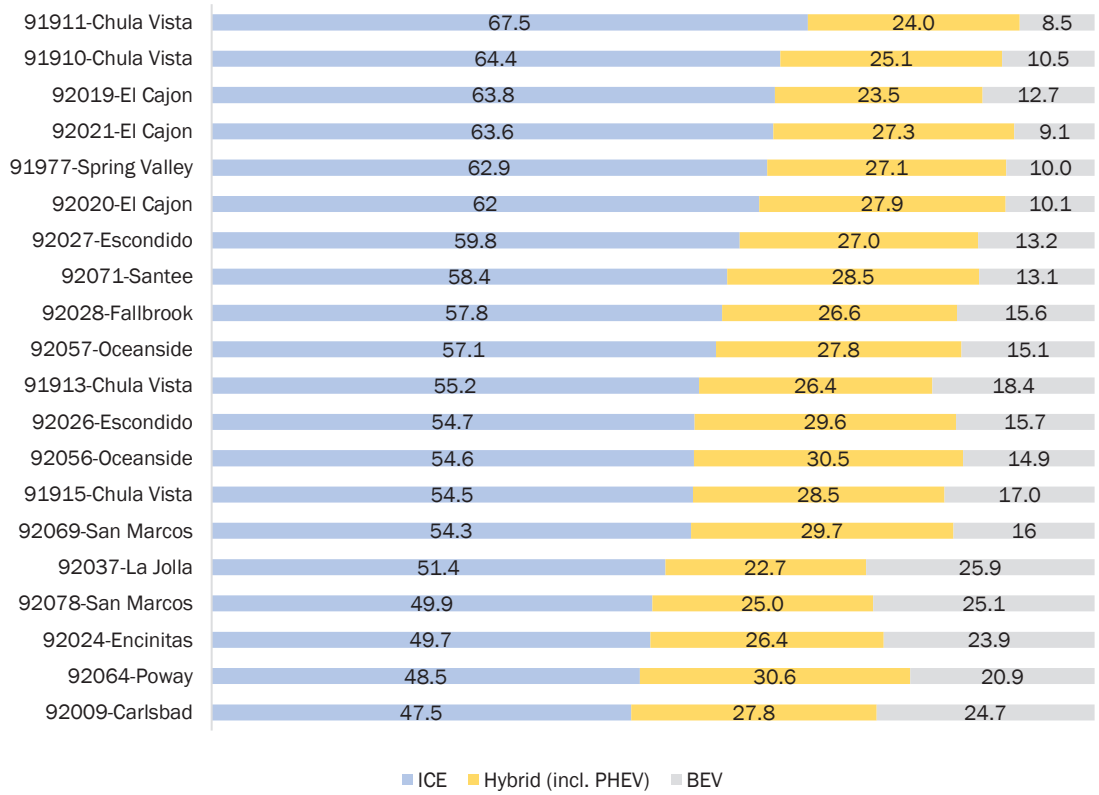
Honda Market Share Was 15.9% in Zip Code 91977 (Spring Valley)

Brand Market Share - YTD 2026 thru September (for top 10 selling brands outside San Diego)

Zip Code	Toyota	Honda	Tesla	Ford	Kia	Chevrolet	Hyundai	Nissan	Lexus	BMW
91910-Chula Vista	23.8	12.7	5.1	7.5	6.6	6.2	3.7	5.8	3.2	3.0
91911-Chula Vista	25.9	13.6	4.7	6.9	7.1	5.6	2.9	7.3	1.9	3.3
91913-Chula Vista	21.7	11.6	11.5	5.4	6.6	3.6	3.4	4.6	4.3	5.8
91915-Chula Vista	24.3	10.7	10.4	4.5	7.3	2.9	3.6	3.3	4.0	6.7
91977-Spring Valley	24.8	15.9	4.5	9.3	7.0	7.3	4.2	4.5	2.5	2.1
92009-Carlsbad	14.3	7.3	12.9	6.9	5.0	3.4	5.1	1.8	7.0	7.8
92019-El Cajon	20.9	10.9	4.8	6.4	6.1	7.2	3.4	3.3	4.4	4.9
92020-El Cajon	24.9	13.5	3.8	8.7	6.4	7.5	4.3	4.9	3.4	3.2
92021-El Cajon	26.8	12.0	4.0	9.3	7.1	7.7	5.0	5.0	2.5	2.3
92024-Encinitas	18.2	4.9	11.7	9.2	5.5	2.6	3.6	1.4	5.6	6.1
92026-Escondido	24.5	11.9	8.4	6.8	6.1	6.1	4.4	4.5	5.4	2.6
92027-Escondido	27.2	12.4	6.6	7.9	4.4	7.5	5.3	5.6	3.4	1.4
92028-Fallbrook	21.2	8.4	8.0	10.7	5.2	6.2	4.3	4.8	5.0	2.2
92037-La Jolla	11.9	3.7	13.8	4.8	3.8	1.9	3.6	1.3	5.4	8.9
92056-Oceanside	24.3	11.5	7.6	8.7	5.3	4.3	5.9	5.3	4.5	3.3
92057-Oceanside	25.6	11.4	8.6	8.1	5.4	5.8	4.6	5.6	4.4	2.1
92064-Poway	20.2	9.9	12.0	8.3	5.3	5.2	5.9	4.3	5.8	2.7
92069-San Marcos	27.8	11.2	8.4	9.7	5.6	4.3	4.3	4.2	4.8	1.9
92071-Santee	20.7	10.6	5.9	11.0	7.4	9.2	6.1	3.8	3.7	2.9
92078-San Marcos	19.6	8.0	13.9	6.6	5.9	4.6	5.1	3.1	5.0	3.7

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.

Market Share (%) by Powertrain Type in Zip Codes Outside San Diego - YTD 2026 thru September



Highest ICE Market Share

91911 (Chula Vista): 67.5%

Highest Hybrid Market Share

92064 (Poway): 30.6%

Highest BEV Market Share

92037 (La Jolla): 25.9%

Data sourced from Experian Automotive. Fuel cell vehicles are included with BEVs.

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 fourth in the Nation. Hyundai Ioniq 5 was a relatively strong performer in the county, with county ranking exceeding U.S. by 57 positions, the largest positive differential.

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

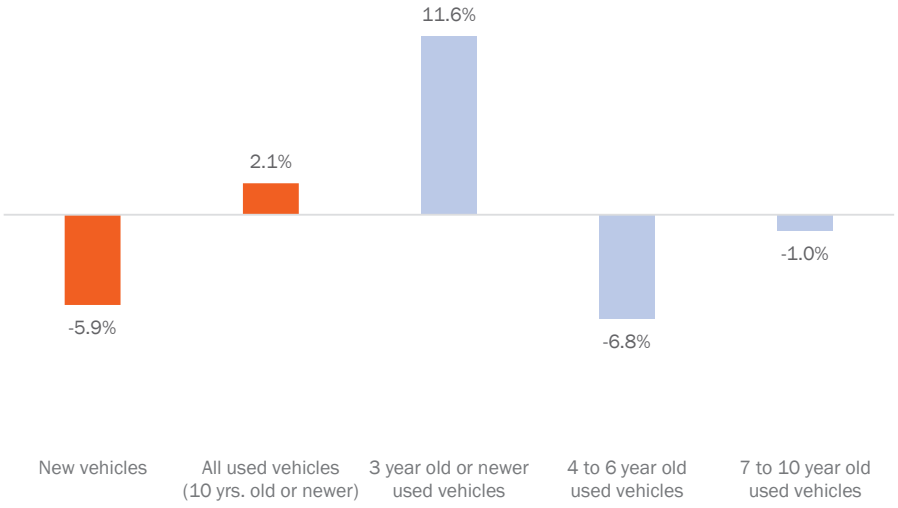
Model	County Rank	U.S. Rank	Difference in county and U.S. rankings Positive # = higher rank in county. Negative # = lower rank in county
Tesla Model Y	1	4	3
Toyota Tacoma	2	9	7
Toyota RAV4	3	6	3
Toyota Camry	4	8	4
Honda CR-V	5	2	-3
Honda Civic	6	10	4
Toyota Corolla	7	13	6
Ford F-Series	8	1	-7
Tesla Model 3	9	37	28
Chevrolet Silverado	10	3	-7
Honda Accord	11	20	9
Kia Sportage	12	16	4
Lexus RX	13	34	21
Ford Maverick	14	27	13
Toyota Corolla Cross	15	40	25
Toyota Tundra	16	22	6
Toyota 4Runner	17	28	11
Subaru Crosstrek	18	19	1
Toyota Grand Highlander	19	25	6
Ford Bronco	20	23	3
Lexus NX	21	62	41
Nissan Rogue	22	12	-10
Subaru Forester	23	15	-8
Hyundai Ioniq 5	24	81	57
Honda HR-V	25	24	-1
Kia Telluride	26	21	-5
Mazda CX-50	27	44	17
Toyota Sienna	28	47	19
Hyundai Tucson	29	14	-15
GMC Sierra	30	7	-23

Data sourced from Experian Automotive.

SAN DIEGO COUNTY USED VEHICLE MARKET

Used Vehicle Market Improved During First Nine Months of This Year

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



THREE KEY TRENDS IN USED VEHICLE MARKET

01. The San Diego County used vehicle market improved 2.1% during the first nine months of this year versus year earlier, compared to the 5.9% drop in the new vehicle market.

02. As shown on the graph to the left, registrations for three year old or newer vehicles increased 11.6% during the first nine months of this year. The 4 to 6 year old market declined 6.8%.

03. Hyundai and Kia had the largest increases in the 4 year old or newer used vehicle market (see graph below).

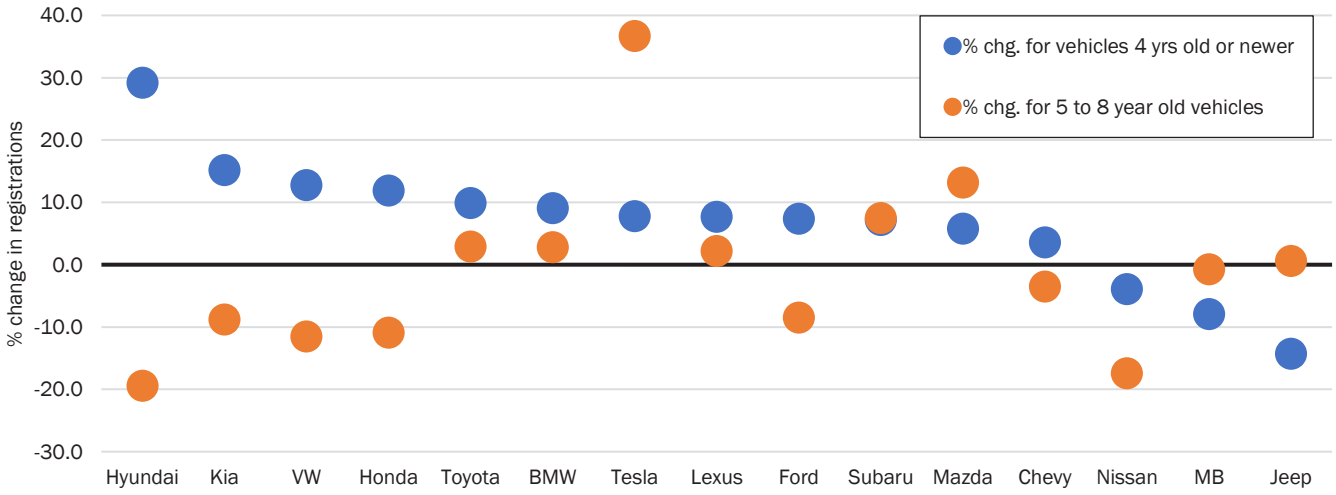
Data sourced from Experian Automotive.

USED VEHICLE BRAND REGISTRATIONS

Hyundai and Tesla Had Largest Increases in Used Vehicle Market

The graph below shows the percent change in used vehicle registrations during the first nine months of this year 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 29.9%. Tesla had the largest increase for 5 to 8 year old vehicles - up 37.8%.

Percent Change in Registrations for Top 15 Selling Used Vehicle Brands - YTD '26 thru Sep. vs. YTD '25



Data sourced from Experian Automotive.

Brand Registrations Report
San Diego County New Retail Car and Light Truck Registrations

	Third Quarter						Year to date thru September					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	3Q '25	3Q '26	% change	3Q '25	3Q '26	Change	YTD '25	YTD '26	% change	YTD '25	YTD '26	Change
TOTAL	35,395	35,526	0.4				109,749	103,306	-5.9			
Cars	7,835	8,398	7.2	22.1	23.6	1.5	25,634	23,968	-6.5	23.4	23.2	-0.2
Light Trucks	27,560	27,128	-1.6	77.9	76.4	-1.5	84,115	79,338	-5.7	76.6	76.8	0.2
Domestic Brands	11,766	9,735	-17.3	33.2	27.5	-5.7	33,770	28,988	-14.2	30.8	28.0	-2.8
European Brands	4,582	4,565	-0.4	12.9	12.8	-0.1	15,260	13,482	-11.7	13.9	13.1	-0.8
Japanese Brands	15,242	17,172	12.7	43.1	48.3	5.2	48,854	49,562	1.4	44.5	48.0	3.5
Other Asian Brands	3,805	4,054	6.5	10.8	11.4	0.6	11,865	11,274	-5.0	10.8	10.9	0.1
Acura	210	181	-13.8	0.6	0.5	-0.1	761	622	-18.3	0.7	0.6	-0.1
Alfa Romeo	14	8	-42.9	0.0	0.0	0.0	41	27	-34.1	0.0	0.0	0.0
Audi	588	401	-31.8	1.7	1.1	-0.6	1,720	1,207	-29.8	1.6	1.2	-0.4
BMW	1,150	1,291	12.3	3.2	3.6	0.4	4,123	4,003	-2.9	3.8	3.9	0.1
Buick	70	27	-61.4	0.2	0.1	-0.1	209	136	-34.9	0.2	0.1	-0.1
Cadillac	249	225	-9.6	0.7	0.6	-0.1	779	660	-15.3	0.7	0.6	-0.1
Chevrolet	2,156	1,647	-23.6	6.1	4.6	-1.5	6,586	5,180	-21.3	6.0	5.0	-1.0
Chrysler	50	22	-56.0	0.1	0.1	0.0	141	77	-45.4	0.1	0.1	0.0
Dodge	37	62	67.6	0.1	0.2	0.1	158	150	-5.1	0.1	0.1	0.0
Ferrari	15	15	0.0	0.0	0.0	0.0	31	51	64.5	0.0	0.0	0.0
Ford	2,928	2,632	-10.1	8.3	7.4	-0.9	8,954	8,020	-10.4	8.2	7.8	-0.4
Genesis	109	195	78.9	0.3	0.5	0.2	368	421	14.4	0.3	0.4	0.1
GMC	585	535	-8.5	1.7	1.5	-0.2	1,757	1,720	-2.1	1.6	1.7	0.1
Honda	3,603	3,945	9.5	10.2	11.1	0.9	11,872	11,063	-6.8	10.8	10.7	-0.1
Hyundai	1,894	1,604	-15.3	5.4	4.5	-0.9	5,412	4,723	-12.7	4.9	4.6	-0.3
Ineos	20	16	-20.0	0.1	0.0	-0.1	77	65	-15.6	0.1	0.1	0.0
Infiniti	52	53	1.9	0.1	0.1	0.0	197	169	-14.2	0.2	0.2	0.0
Jeep	554	491	-11.4	1.6	1.4	-0.2	1,803	1,535	-14.9	1.6	1.5	-0.1
Kia	1,796	2,247	25.1	5.1	6.3	1.2	6,051	6,100	0.8	5.5	5.9	0.4
Land Rover	297	307	3.4	0.8	0.9	0.1	1,031	855	-17.1	0.9	0.8	-0.1
Lexus	1,331	1,502	12.8	3.8	4.2	0.4	4,343	4,530	4.3	4.0	4.4	0.4
Lincoln	79	64	-19.0	0.2	0.2	0.0	229	216	-5.7	0.2	0.2	0.0
Lucid	64	100	56.3	0.2	0.3	0.1	200	298	49.0	0.2	0.3	0.1
Mazda	999	1,013	1.4	2.8	2.9	0.1	2,960	2,876	-2.8	2.7	2.8	0.1
Mercedes-Benz	1,143	1,274	11.5	3.2	3.6	0.4	3,824	3,586	-6.2	3.5	3.5	0.0
MINI	105	102	-2.9	0.3	0.3	0.0	334	309	-7.5	0.3	0.3	0.0
Mitsubishi	27	7	-74.1	0.1	0.0	-0.1	129	43	-66.7	0.1	0.0	-0.1
Nissan	1,199	1,394	16.3	3.4	3.9	0.5	3,731	4,016	7.6	3.4	3.9	0.5
Porsche	273	240	-12.1	0.8	0.7	-0.1	879	704	-19.9	0.8	0.7	-0.1
Ram	271	375	38.4	0.8	1.1	0.3	866	1,051	21.4	0.8	1.0	0.2
Rivian	361	334	-7.5	1.0	0.9	-0.1	909	774	-14.9	0.8	0.7	-0.1
Subaru	1,017	1,181	16.1	2.9	3.3	0.4	3,712	3,492	-5.9	3.4	3.4	0.0
Tesla	4,360	3,212	-26.3	12.3	9.0	-3.3	11,171	9,162	-18.0	10.2	8.9	-1.3
Toyota	6,804	7,896	16.0	19.2	22.2	3.0	21,149	22,751	7.6	19.3	22.0	2.7
Volkswagen	648	551	-15.0	1.8	1.6	-0.2	2,011	1,687	-16.1	1.8	1.6	-0.2
Volvo	247	249	0.8	0.7	0.7	0.0	856	702	-18.0	0.8	0.7	-0.1
Other	90	128	42.2	0.3	0.4	0.1	375	325	-13.3	0.3	0.3	0.0

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 third 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.