

California Auto Outlook™

Comprehensive Information on the California Vehicle Market

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Covering Second Quarter 2025

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New Vehicle Registrations Predicted to Decline in Second Half of '25

KEY TRENDS IN NEW VEHICLE MARKET



Market got off to a strong start in first half of this year

State new light vehicle registrations increased 6.6 percent during the first six months of this year versus a year earlier, identical to the U.S. market.

New vehicle sales outlook expected to take a turn

The prospects of higher tariffs will likely lead to rising vehicle prices, and at least in the short run, increasing inflation, lower economic growth, and stagnant household disposable income, all negatives for new vehicle sales. In addition, sales were pulled ahead this year as shoppers advanced purchases due to the anticipation of higher vehicle prices resulting from tariffs.

Registrations expected to decline in second half of 2025

New vehicle registrations in the second half of the year are projected to decline by about nine percent from the year earlier. Annual total is projected to fall just short of the 1.75 million units in 2024.

There is heightened uncertainty with the new vehicle sales outlook

At present, this forecast is a worst case scenario. Baseline assumption is that there will be a measurable increase in tariffs that will remain in place for an extended period. If tariffs revert to levels at the beginning of this year, state registrations could exceed 1.8 million units

Hybrid vehicles post big gains; ZEV share continues to slide

Hybrid vehicle registrations increased 54 percent in the first half of this year and accounted for 19.2 percent of the market. ZEV share in 2Q '25 fell to 18.2 percent, but is likely to increase in 3Q as consumers purchase vehicles before federal government incentives expire at the of September.

ANNUAL TRENDS



California Annual New Light Vehicle Registrations - 2010 thru 2025



Historical Data sourced from Experian Automotive. *2025 forecast by Auto Outlook. Projections do not reflect potential sales reductions due to non-economic regulatory impacts. Historical figures have been updated since the previous release.

California and U.S. New Light Vehicle Registrations
Year to date 2024 and 2025 thru June

	California			U.S.		
	YTD '24	YTD '25	Change	YTD '24	YTD '25	Change
Registrations						
TOTAL	886,492	944,834	6.6%	7,730,864	8,240,579	6.6%
Car	245,231	249,010	1.5%	1,475,524	1,448,691	-1.8%
Light Truck	641,261	695,824	8.5%	6,255,340	6,791,888	8.6%
Domestic	294,654	304,007	3.2%	3,219,946	3,441,745	6.9%
European	131,748	134,257	1.9%	788,862	807,849	2.4%
Japanese	375,255	409,547	9.1%	2,924,754	3,091,737	5.7%
Other Asian	84,835	97,023	14.4%	797,302	899,248	12.8%
Market Share						
Car	27.7	26.4	-1.3	19.1	17.6	-1.5
Light Truck	72.3	73.6	1.3	80.9	82.4	1.5
Domestic	33.2	32.2	-1.0	41.7	41.8	0.1
European	14.9	14.2	-0.7	10.2	9.8	-0.4
Japanese	42.4	43.3	0.9	37.8	37.5	-0.3
Other Asian	9.6	10.3	0.7	10.3	10.9	0.6

TWO YEAR PERSPECTIVE

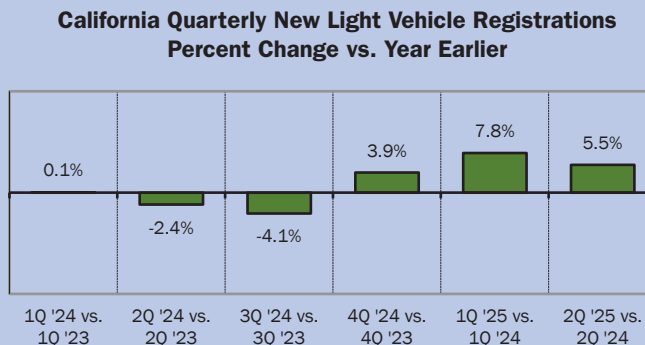


Data sourced from Experian Automotive. Other Asian brands includes Genesis, Hyundai, Kia, and VinFast.

QUARTERLY RESULTS



% change vs. year earlier



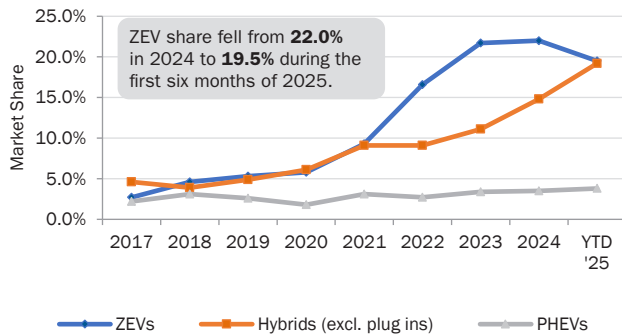
Data sourced from Experian Automotive.

Vehicle Powertrain Dashboard

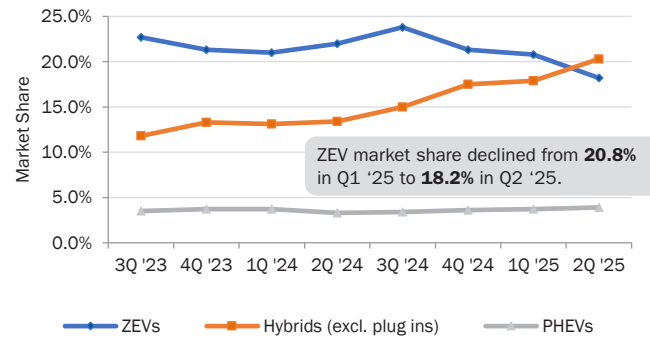


Electric and Hybrid Vehicle Market Share

Annual



Quarterly

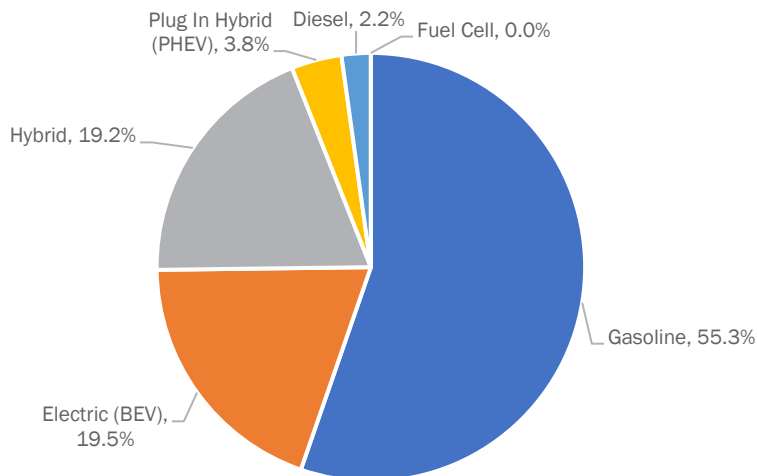


Annual Registrations and Market Share					
	2021	2022	2023	2024	YTD '25
ZEV registrations	164521	262317	382481	385907	184234
ZEV share	9.3%	16.6%	21.7%	22.0%	19.5%
Hybrid regs. (excl. plug ins)	160033	144413	196245	258467	181192
Hybrid share (excl. plug ins)	9.1%	9.1%	11.1%	14.8%	19.2%
PHEV regs.	54265	42473	60685	61305	36266
PHEV share	3.1%	2.7%	3.4%	3.5%	3.8%

Quarterly Registrations and Market Share					
	2Q '24	3Q '24	4Q '24	1Q '25	2Q '25
ZEV registrations	101170	101544	93406	96015	88219
ZEV share	22.0%	23.8%	21.3%	20.8%	18.2%
Hybrid regs. (excl. plug ins)	61696	64071	76684	82700	98492
Hybrid share (excl. plug ins)	13.4%	15.0%	17.5%	17.9%	20.3%
PHEV regs.	15001	14732	15672	17269	18997
PHEV share	3.3%	3.4%	3.6%	3.7%	3.9%

Data sourced from Experian Automotive. ZEVs are full battery electric vehicles and include fuel cell vehicles. PHEVs are plug in hybrids. Hybrid vehicle registrations and market share excludes mild hybrids.

Market Share for all Powertrain Types - YTD 2025 thru June



- Gasoline powered vehicles accounted for 55.3 percent of state new vehicle registrations during the first six months of this year.
- ICE market share (including gasoline and diesel vehicles) was 57.5 so far this year, down from 61.7 percent in the first half of 2024 and 88.4 percent in 2018.
- Combined share for BEVs, PHEVs, hybrids, and fuel cell vehicles was 42.5 percent in the first half of 2025, up from just 11.6 percent in 2018.

Data sourced from Experian Automotive.

California and U.S. Markets

19.5%

California
ZEV market share
YTD 2025



7.8%

U.S.
ZEV market share
YTD 2025



28.6%

California share of
U.S. ZEV registrations
YTD 2025



Data sourced from Experian Automotive.

Vehicle Powertrain Dashboard



Make and Model Registrations for Hybrids, ZEVs, and PHEVs in California

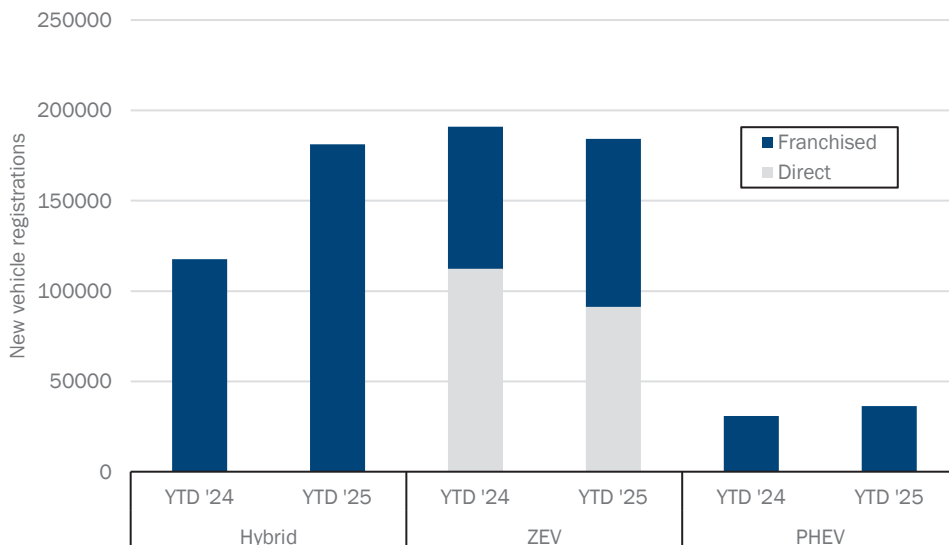
	Registrations			Market Share (%)		
	YTD '24	YTD '25	% Change	YTD '24	YTD '25	Change
TOTAL	190,957	184,234	-3.5			
Acura	18	3,321	-	0.0	1.8	1.8
Audi	5,584	4,774	-14.5	2.9	2.6	-0.3
BMW	9,710	10,662	9.8	5.1	5.8	0.7
Cadillac	2,398	3,580	49.3	1.3	1.9	0.6
Chevrolet	5,592	10,096	80.5	2.9	5.5	2.6
Dodge	0	405	-	0.0	0.2	0.2
Ford	8,636	9,164	6.1	4.5	5.0	0.5
Genesis	957	947	-1.0	0.5	0.5	0.0
GMC	772	1,923	149.1	0.4	1.0	0.6
Honda	277	6,000	-	0.1	3.3	3.2
Hyundai	10,885	10,439	-4.1	5.7	5.7	0.0
Jaguar	823	670	-18.6	0.4	0.4	0.0
Jeep	0	586	-	0.0	0.3	0.3
Kia	7,337	4,459	-39.2	3.8	2.4	-1.4
Lexus	2,338	1,570	-32.8	1.2	0.9	-0.3
Maserati	0	4	-	0.0	0.0	0.0
Mazda	3	2	-33.3	0.0	0.0	0.0
Mercedes	9,111	6,813	-25.2	4.8	3.7	-1.1
MINI	525	409	-22.1	0.3	0.2	-0.1
Nissan	2,760	4,358	57.9	1.4	2.4	1.0
Other	3,497	2,500	-28.5	1.8	1.4	-0.4
Polestar	974	690	-29.2	0.5	0.4	-0.1
Porsche	1,026	2,636	156.9	0.5	1.4	0.9
Ram	3	4	33.3	0.0	0.0	0.0
Rivian	6,899	5,551	-19.5	3.6	3.0	-0.6
Subaru	1,130	1,670	47.8	0.6	0.9	0.3
Tesla	101,991	83,375	-18.3	53.4	45.3	-8.1
Toyota	3,278	2,928	-10.7	1.7	1.6	-0.1
Volkswagen	3,905	3,306	-15.3	2.0	1.8	-0.2
Volvo	528	1,392	163.6	0.3	0.8	0.5

Top 25 Selling Hybrid, ZEV, and PHEV Models - YTD 2025 thru June

Rank	Model	Type	Regs.
1	Tesla Model Y	ZEV	44,112
2	Tesla Model 3	ZEV	31,394
3	Toyota Camry	Hybrid	30,464
4	Honda CR-V	Hybrid	20,075
5	Toyota RAV4	Hybrid	16,683
6	Honda Civic	Hybrid	10,685
7	Honda Accord	Hybrid	9,592
8	Toyota Corolla	Hybrid	8,211
9	Hyundai Ioniq 5	ZEV	7,498
10	Toyota Sienna	Hybrid	7,259
11	Toyota Prius	Hybrid	7,081
12	Ford Maverick	Hybrid	6,024
13	Honda Prologue	ZEV	5,931
14	Ford Mustang Mach-E	ZEV	5,594
15	Chevrolet Equinox	ZEV	5,584
16	BMW i4	ZEV	5,396
17	Hyundai Tucson	Hybrid	4,698
18	Lexus NX	Hybrid	4,487
19	Lexus RX	Hybrid	4,427
20	Toyota Grand Highlander	Hybrid	4,416
21	Jeep Wrangler	PHEV	4,322
22	Rivian R1S	ZEV	4,071
23	Nissan Ariya	ZEV	3,798
24	Hyundai Santa Fe	Hybrid	3,750
25	Tesla Cybertruck	ZEV	3,622

ZEVs are full battery electric vehicles (BEVs) and fuel cell vehicles. PHEVs are plug in hybrids. Data sourced from Experian Automotive.

Alternative Powertrain Sales by Type of Selling Dealership - YTD '24 and '25, thru June



Data sourced from Experian Automotive.

- ❑ The graph on the left shows new vehicle registrations for Hybrids, ZEVs, and PHEVs broken down by type of selling dealership. Franchised dealerships accounted for more than **77 percent** of combined sales for all three alternative powertrain types.
- ❑ Franchised dealership share of the ZEV only market increased to **50.5 percent** so far this year, up from **41.2 percent** a year earlier.
- ❑ Sales of ZEVs at franchised dealerships increased **18.3 percent** so far this year, compared to the **18.8 percent** drop for direct sellers.

MODEL RANKINGS

Tesla Model Y and Toyota RAV4 are Top-Sellers in California New Vehicle Market

The table below shows the top five selling models during the first six months of 2025 in 18 segments. In addition to unit registrations, it also shows each model's market share in its respective segment.



BEST SELLERS IN PRIMARY SEGMENTS

Small Cars: Honda Civic	Full Size Pickup: Ford F-Series
Mid-Size and Large Cars: Toyota Camry	Compact SUV: Toyota RAV4
Near Luxury Cars: Tesla Model 3	2 Row Mid-Size SUV: Hyundai Santa Fe
Comp./Mid Size Pickup: Toyota Tacoma	Luxury Mid-Size SUV: Lexus RX

Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (YTD '25 thru June)

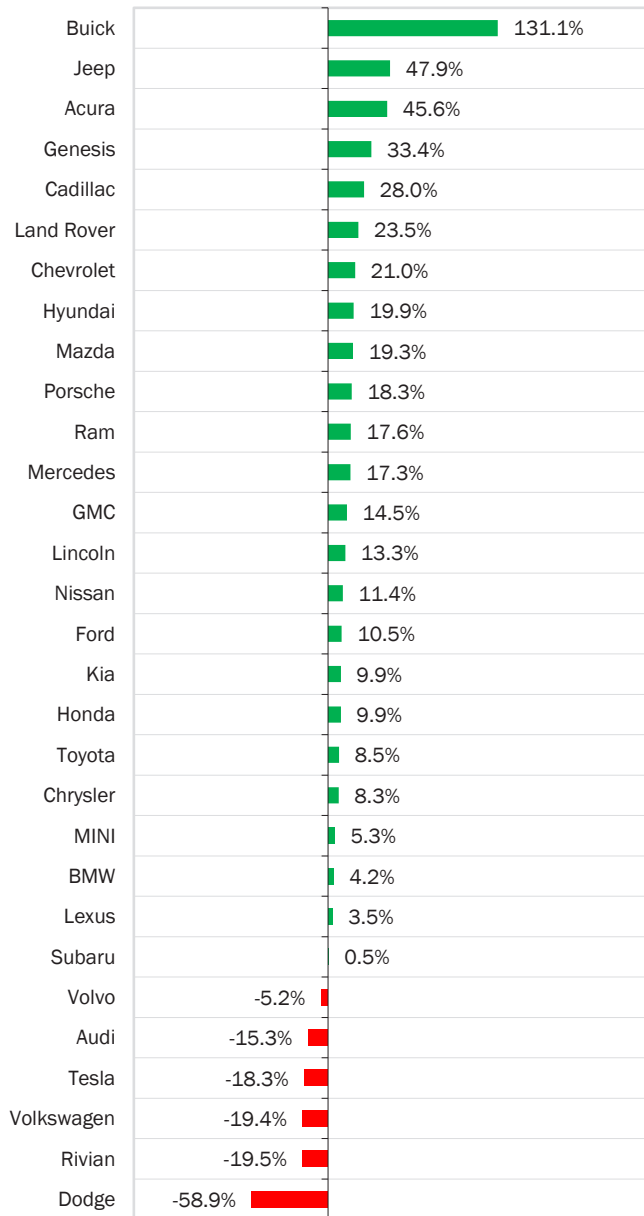
Small Cars			Mid Size and Large Cars			Sports/Pony Cars			Near Luxury Cars		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda Civic	28531	30.4	Toyota Camry	30490	47.3	Ford Mustang	2227	43.7	Tesla Model 3	31394	50.6
Toyota Corolla	19384	20.6	Honda Accord	14476	22.5	Toyota 86	1138	22.3	BMW i4	5396	8.7
Toyota Prius	9280	9.9	Nissan Altima	6532	10.1	Mazda MX5	699	13.7	Lexus ES	5233	8.4
Kia K4/Forte	8475	9.0	Hyundai Sonata	4579	7.1	Subaru BRZ	373	7.3	Mercedes C-Class	3816	6.2
Nissan Sentra	7448	7.9	Kia K5	3854	6.0	Nissan Z	323	6.3	BMW 3-Series	3001	4.8
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
Lucid Air	1898	8.1	Toyota Tacoma	21845	49.5	Ford F-Series	20346	26.3	Toyota Sienna	7259	38.0
Mercedes CLE-Class	1857	7.9	Ford Maverick	7917	18.0	Chevrolet Silverado	17985	23.2	Honda Odyssey	4457	23.3
BMW 5-Series	1835	7.8	Chevrolet Colorado	3504	7.9	Ram Pickup	10350	13.4	Kia Carnival	4156	21.7
Mercedes E-Class	1812	7.7	Ford Ranger	2827	6.4	GMC Sierra	10289	13.3	Chrysler Pacifica	2498	13.1
BMW i5	1696	7.2	Nissan Frontier	2161	4.9	Toyota Tundra	8614	11.1	Volkswagen ID.Buzz	568	3.0
Large Van			Subcompact SUV			Compact SUV			2 Row Mid Size SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Ford Transit Connect	4602	35.2	Honda HR-V	10667	16.0	Toyota RAV4	33960	20.0	Hyundai Santa Fe	6433	15.2
Mercedes Sprinter	3083	23.6	Subaru Crosstrek	9568	14.4	Honda CR-V	29618	17.4	Subaru Outback	6169	14.5
Ram Promaster	1614	12.3	Chevrolet Trax	8669	13.0	Chevrolet Equinox	10580	6.2	Honda Prologue	5931	14.0
Ford E-Series	1373	10.5	Toyota Corolla Cross	8013	12.0	Hyundai Tucson	9070	5.3	Ford Mustang Mach-E	5594	13.2
Chevrolet Express	1104	8.4	Nissan Kicks	4493	6.7	Jeep Wrangler	8516	5.0	Jeep Grand Cherokee	3853	9.1
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
Ford Explorer	7158	12.1	Ford Bronco	6867	26.2	Mercedes EQB	2604	18.3	Tesla Model Y	44112	52.2
Toyota Grand Highlan	7117	12.0	Chevrolet Tahoe	4165	15.9	Audi Q3	2045	14.4	Lexus NX	8340	9.9
Honda Pilot	6910	11.7	Toyota Land Cruiser	3583	13.7	Mercedes GLA-Class	2027	14.3	Mercedes GLC-Class	7207	8.5
Kia Sorento	5516	9.3	Chevrolet Suburban	3114	11.9	BMW X1	1553	10.9	BMW X3	4044	4.8
Kia Telluride	5075	8.6	Ford Expedition	1933	7.4	Lexus UX	1385	9.8	Porsche Macan	3644	4.3
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	9153	16.0	Rivian R1S	4071	18.5	Tesla Model 3	31394	12.6	Tesla Model Y	44112	6.3
Mercedes GLE-Class	5695	9.9	Lexus TX	3158	14.4	Toyota Camry	30490	12.2	Toyota RAV4	33960	4.9
BMW X5	5206	9.1	Land Rover Range Rover	2770	12.6	Honda Civic	28531	11.5	Honda CR-V	29618	4.3
Acura ZDX	3321	5.8	Cadillac Escalade	2751	12.5	Toyota Corolla	19384	7.8	Toyota Tacoma	21845	3.1
BMW iX	2847	5.0	BMW X7	1927	8.8	Honda Accord	14476	5.8	Ford F-Series	20346	2.9

Data sourced from Experian Automotive. Figures for Prius include Prius Prime.

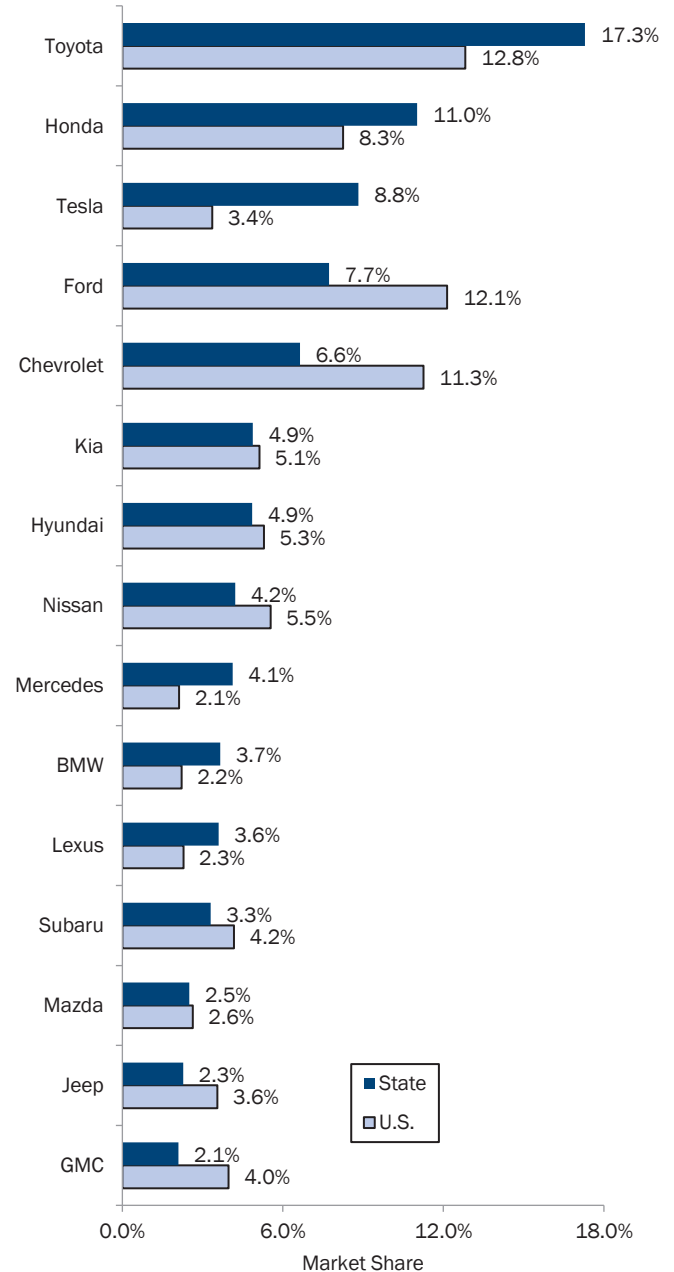
BRAND SUMMARY

Registrations Increased by More Than 20 Percent for Seven Brands; Toyota and Honda are Market Leaders

Percent Change in Brand Registrations
YTD 2025 thru June vs. YTD 2024
(Top 30 selling brands in CA)



California and U.S. Market Share - YTD 2025 thru March
(Top 15 selling brands in CA)



Registrations increased by more than 20 percent for Buick, Jeep, Acura, Genesis, Cadillac, Land Rover, and Chevrolet



Toyota, Honda, Tesla, Ford, and Chevrolet were market share leaders in California.

BRAND REGISTRATIONS

Detailed Results for All Brands in California Market

California New Car and Light Truck Registrations												
	Second Quarter						Year to date thru June					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	2Q '24	2Q '25	% Change	2Q '24	2Q '25	Change	YTD '24	YTD '25	% Change	YTD '24	YTD '25	Change
TOTAL	459,009	484,044	5.5				886,492	944,834	6.6			
Acura	3,273	5,374	64.2	0.7	1.1	0.4	6,591	9,596	45.6	0.7	1.0	0.3
Alfa Romeo	232	126	-45.7	0.1	0.0	-0.1	547	287	-47.5	0.1	0.0	-0.1
Audi	8,809	7,336	-16.7	1.9	1.5	-0.4	18,381	15,570	-15.3	2.1	1.6	-0.5
BMW	16,596	16,884	1.7	3.6	3.5	-0.1	33,135	34,523	4.2	3.7	3.7	0.0
Buick	1,368	3,593	162.6	0.3	0.7	0.4	2,669	6,168	131.1	0.3	0.7	0.4
Cadillac	3,510	4,258	21.3	0.8	0.9	0.1	6,865	8,784	28.0	0.8	0.9	0.1
Chevrolet	27,218	34,031	25.0	5.9	7.0	1.1	51,857	62,722	21.0	5.8	6.6	0.8
Chrysler	1,341	1,065	-20.6	0.3	0.2	-0.1	2,494	2,701	8.3	0.3	0.3	0.0
Dodge	4,080	1,691	-58.6	0.9	0.3	-0.6	9,028	3,709	-58.9	1.0	0.4	-0.6
Ford	32,534	38,680	18.9	7.1	8.0	0.9	66,020	72,956	10.5	7.4	7.7	0.3
Genesis	1,820	2,264	24.4	0.4	0.5	0.1	3,574	4,769	33.4	0.4	0.5	0.1
GMC	9,170	9,754	6.4	2.0	2.0	0.0	17,245	19,753	14.5	1.9	2.1	0.2
Honda	49,651	54,278	9.3	10.8	11.2	0.4	94,718	104,059	9.9	10.7	11.0	0.3
Hyundai	21,748	24,420	12.3	4.7	5.0	0.3	38,234	45,829	19.9	4.3	4.9	0.6
Infiniti	1,114	888	-20.3	0.2	0.2	0.0	2,461	1,811	-26.4	0.3	0.2	-0.1
Jaguar	866	235	-72.9	0.2	0.0	-0.2	1,509	1,062	-29.6	0.2	0.1	-0.1
Jeep	6,914	11,973	73.2	1.5	2.5	1.0	14,496	21,443	47.9	1.6	2.3	0.7
Kia	23,226	22,816	-1.8	5.1	4.7	-0.4	41,918	46,053	9.9	4.7	4.9	0.2
Land Rover	3,429	3,938	14.8	0.7	0.8	0.1	6,820	8,422	23.5	0.8	0.9	0.1
Lexus	16,811	18,416	9.5	3.7	3.8	0.1	32,808	33,951	3.5	3.7	3.6	-0.1
Lincoln	1,274	1,782	39.9	0.3	0.4	0.1	2,597	2,943	13.3	0.3	0.3	0.0
Maserati	327	161	-50.8	0.1	0.0	-0.1	715	310	-56.6	0.1	0.0	-0.1
Mazda	9,898	11,732	18.5	2.2	2.4	0.2	19,823	23,641	19.3	2.2	2.5	0.3
Mercedes	16,345	19,585	19.8	3.6	4.0	0.4	33,235	38,996	17.3	3.7	4.1	0.4
MINI	912	1,237	35.6	0.2	0.3	0.1	2,179	2,294	5.3	0.2	0.2	0.0
Mitsubishi	786	937	19.2	0.2	0.2	0.0	1,455	2,086	43.4	0.2	0.2	0.0
Nissan	20,080	19,592	-2.4	4.4	4.0	-0.4	35,741	39,814	11.4	4.0	4.2	0.2
Polestar	590	374	-36.6	0.1	0.1	0.0	974	690	-29.2	0.1	0.1	0.0
Porsche	3,964	4,291	8.2	0.9	0.9	0.0	7,786	9,210	18.3	0.9	1.0	0.1
Ram	4,450	5,571	25.2	1.0	1.2	0.2	10,177	11,968	17.6	1.1	1.3	0.2
Rivian	3,739	2,668	-28.6	0.8	0.6	-0.2	6,899	5,551	-19.5	0.8	0.6	-0.2
Subaru	16,570	15,203	-8.2	3.6	3.1	-0.5	31,024	31,173	0.5	3.5	3.3	-0.2
Tesla	52,119	41,138	-21.1	11.4	8.5	-2.9	101,991	83,375	-18.3	11.5	8.8	-2.7
Toyota	78,964	86,683	9.8	17.2	17.9	0.7	150,634	163,416	8.5	17.0	17.3	0.3
Volkswagen	8,280	5,516	-33.4	1.8	1.1	-0.7	16,967	13,668	-19.4	1.9	1.4	-0.5
Volvo	3,917	3,450	-11.9	0.9	0.7	-0.2	7,589	7,191	-5.2	0.9	0.8	-0.1
Other	3,084	2,104	-31.8	0.7	0.4	-0.3	5,336	4,340	-18.7	0.6	0.5	-0.1

Data sourced from Experian Automotive.

The table above shows new light vehicle (car and light truck) registrations in California. Figures are shown for the Second Quarters of 2024 and 2025, and year-to-date totals. Vehicle registrations are recorded based on when the vehicle title information is processed by the state, which typically occurs after the vehicle is sold. The top ten ranked brands for change in market share are shaded yellow. Historical figures have been updated since the previous release.

California Auto Outlook

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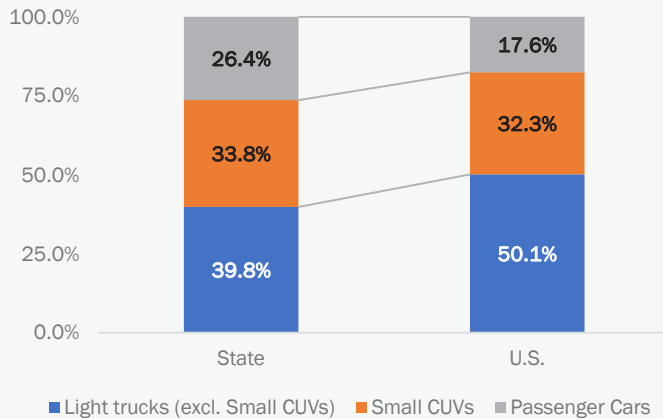
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VEHICLE AND BRAND SEGMENTS

Passenger Car Market Share in California Exceeds U.S. Levels

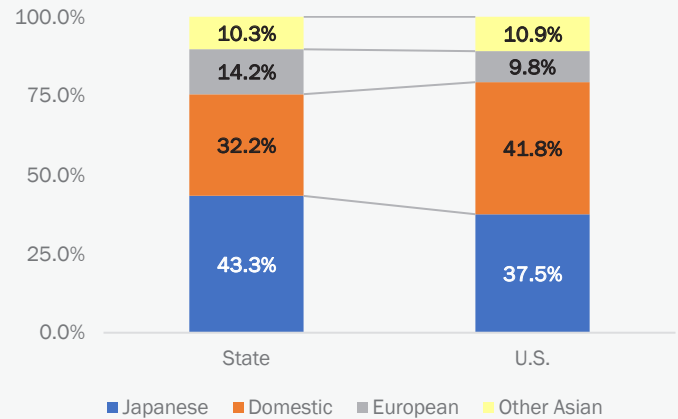
Market Share by Type of Vehicle - YTD '25 thru June



Combining the blue and orange sections in the graph above corresponds to the standard industry definition of light trucks. Small crossovers are broken out, however, since many are more similar to compact hatchbacks than to many trucks. State passenger car share was **26.4%** so far this year, well above the **17.6%** share in the U.S.

Data sourced from Experian Automotive.

Market Share by Brand Category - YTD '25 thru June



Japanese brand market share in the state was higher than U.S. levels: **43.3%** vs. **37.5%**. State Domestic brand share (which includes Tesla and Rivian) was **32.2%**. European brands accounted for a higher share of the state market than in the Nation. Note: Other Asian includes Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.

REGIONAL MARKETS IN CALIFORNIA

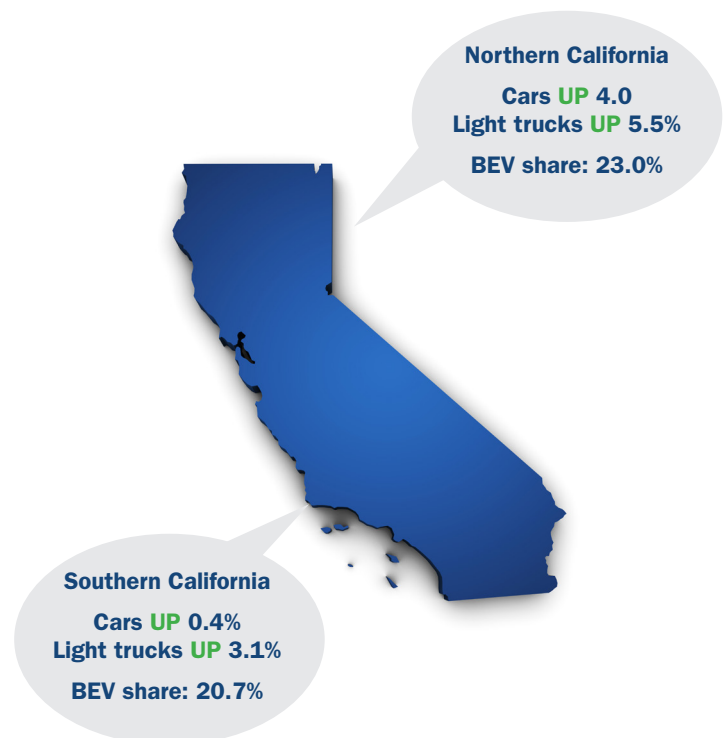
Northern California New Retail Market Improved by 5.1% in First Half 2025

BEV share in Southern California fell to 20.7%

New Retail Registrations (excluding fleets) YTD thru June			
North and South California	YTD '24	YTD '25	% chg.
Statewide Total	780,286	810,582	3.9%
Cars	216,201	219,569	1.6%
Light Trucks	564,085	591,013	4.8%
Northern California	263,849	277,284	5.1%
Cars	67,627	70,357	4.0%
Light Trucks	196,222	206,927	5.5%
Southern California	516,437	533,298	3.3%
Cars	148,574	149,212	0.4%
Light Trucks	367,863	384,086	4.4%
Selected Regional Markets			
San Francisco Bay	149,327	154,340	3.4%
Cars	39,060	40,699	4.2%
Light Trucks	110,267	113,641	3.1%
LA and Orange Counties	299,217	306,220	2.3%
Cars	87,969	88,956	1.1%
Light Trucks	211,248	217,264	2.8%
San Diego County	72,477	74,301	2.5%
Cars	18,274	17,773	-2.7%
Light Trucks	54,203	56,528	4.3%

Data sourced from Experian Automotive.

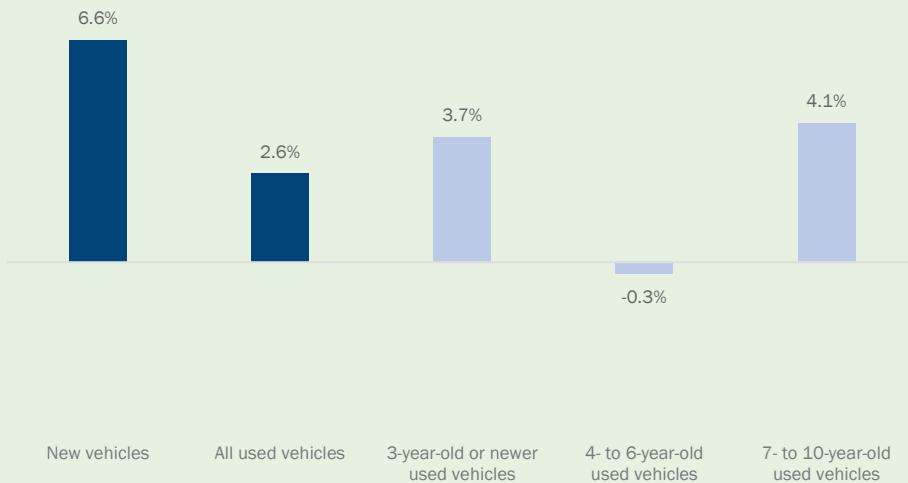
Percent Change in New Retail Registrations - YTD '25 vs. YTD '24



CALIFORNIA USED VEHICLE MARKET

Used Vehicle Market Increased Slightly in First Half of This Year

Percent Change in New and Used Vehicle Registrations
YTD 2025 thru June vs. YTD 2024



Data sourced from Experian Automotive.

THREE KEY TRENDS IN USED VEHICLE MARKET



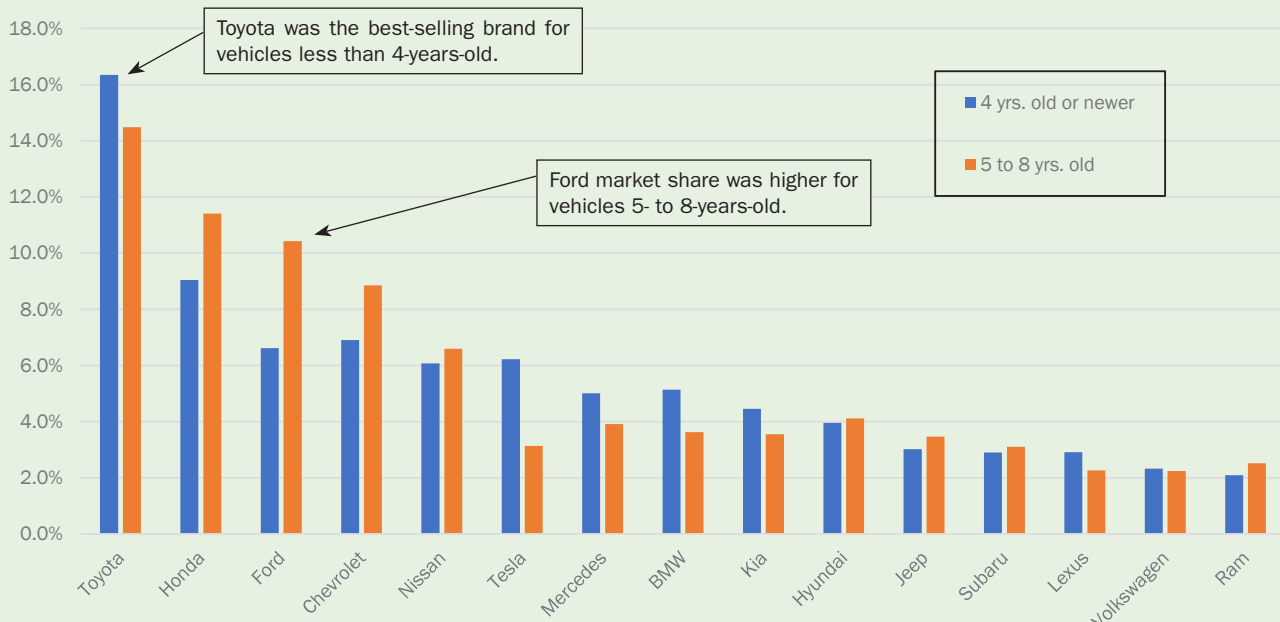
- 01.** The state used vehicle market increased 2.6 percent during the first six months of this year versus year earlier. The new vehicle market was up 6.6 percent.
- 02.** As shown on the graph to the left, registrations for 7- to 10-year-old used vehicles increased 4.1 percent so far this year. The 4- to 6-year old market declined slightly.
- 03.** Toyota, Honda, Ford, Chevrolet, Nissan, Tesla, Mercedes, BMW, Kia, and Hyundai were the top 10 sellers during the first half of this year (see graph below).

USED VEHICLE BRAND MARKET SHARE

Toyota is Top Seller in California Used Vehicle Market

The graph below shows used light vehicle registrations by brand for two age categories: vehicles less than 4-years-old and vehicles 5- to 8-years-old. Brands are positioned from left to right based on overall market share.

Brand Market Share for Top 15 Selling Brands, by Vehicle Age (YTD '25 thru June)



Data sourced from Experian Automotive.