

California Auto Outlook™

Comprehensive Information on the California Vehicle Market

Released July 2026

Covering Second Quarter 2026

Publication Sponsored By:



State New Vehicle Registrations Predicted to Remain Above 1.7 Million Units in 2026

KEY TRENDS IN NEW VEHICLE MARKET



State new vehicle market moved lower in first half of this year.

California new light vehicle registrations declined 7.7 percent during the first six months of this year versus the same period in 2025. The U.S. market fell 2.8 percent.

Market predicted to decline by 3.9 percent in 2026.

Statewide new vehicle registrations are predicted to slip to 1.73 million units for all of this year, down 3.9 percent from 2025. This year's total should easily exceed the recent low point of 1.58 million in 2022.

Key forecast determinants point to a small decline in new vehicle market.

Pent-up demand resulting from delayed purchases during the pandemic will place a floor on how low sales can go, while 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. These two primary opposing forces should result in the new vehicle market drifting lower, while avoiding a significant decline.

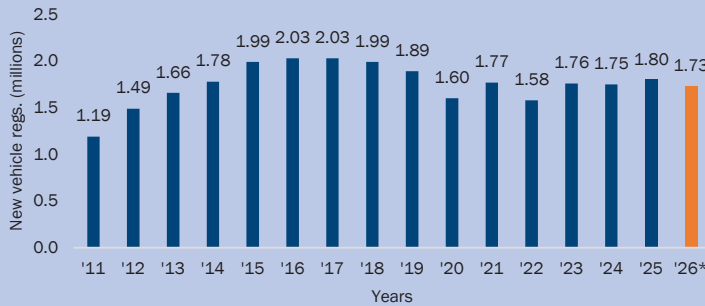
ZEV registrations declined in first half of year, but second quarter market share improves.

ZEV registrations declined 24.9 percent 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 24.9 percent in 3Q '25 (before expiration of the federal government tax credits), to 13.8 percent in the first quarter of this year, but then increased to 17.8 percent in the second quarter. Hybrid vehicle share increased to 22.1 percent in the first half of this year.

ANNUAL TRENDS



California Annual New Light Vehicle Registrations - 2011 thru 2026



Historical Data sourced from Experian Automotive. *2026 forecast by Auto Outlook. Historical figures have been updated since the previous release.

California and U.S. New Light Vehicle Registrations
Year-to-date 2025 and 2026 thru June

	California			U.S.		
	YTD '25	YTD '26	Change	YTD '25	YTD '26	Change
Registrations						
TOTAL	936,543	864,848	-7.7%	8,171,101	7,938,647	-2.8%
Car	247,229	215,757	-12.7%	1,438,309	1,310,814	-8.9%
Light Truck	689,314	649,091	-5.8%	6,732,792	6,627,833	-1.6%
Domestic	300,365	264,941	-11.8%	3,405,945	3,237,135	-5.0%
European	132,754	121,144	-8.7%	799,925	733,973	-8.2%
Japanese	407,223	385,389	-5.4%	3,070,711	3,045,891	-0.8%
Other Asian	96,201	93,374	-2.9%	894,520	921,648	3.0%
Market Share						
Car	26.4	24.9	-1.5	17.6	16.5	-1.1
Light Truck	73.6	75.1	1.5	82.4	83.5	1.1
Domestic	32.1	30.6	-1.5	41.7	40.8	-0.9
European	14.2	14.0	-0.2	9.8	9.2	-0.6
Japanese	43.4	44.6	1.2	37.6	38.4	0.8
Other Asian	10.3	10.8	0.5	10.9	11.6	0.7

TWO YEAR PERSPECTIVE



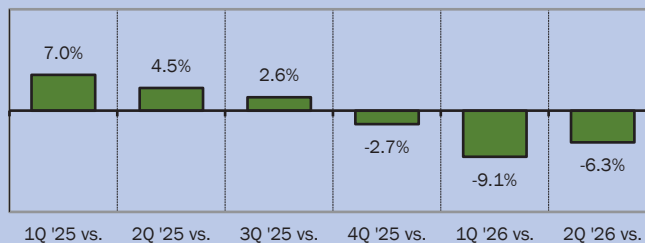
Data sourced from Experian Automotive. Other Asian brands includes Genesis, Hyundai, Kia, and VinFast.

QUARTERLY RESULTS



% change vs. year earlier

California Quarterly New Light Vehicle Registrations
Percent Change vs. Year Earlier



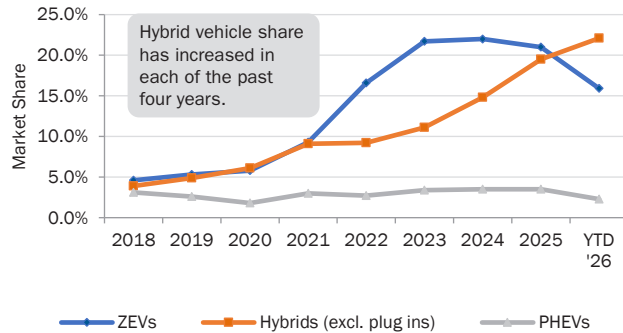
Data sourced from Experian Automotive.

Vehicle Powertrain Dashboard

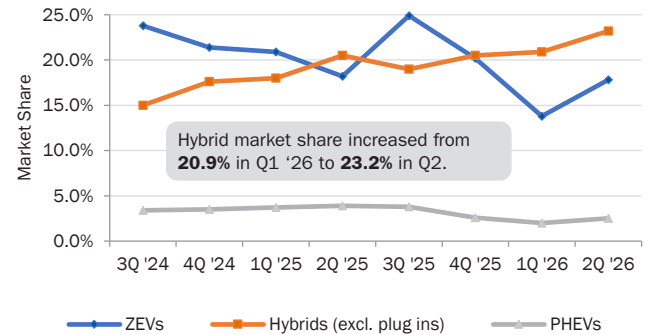


Electric and Hybrid Vehicle Market Share

Annual



Quarterly

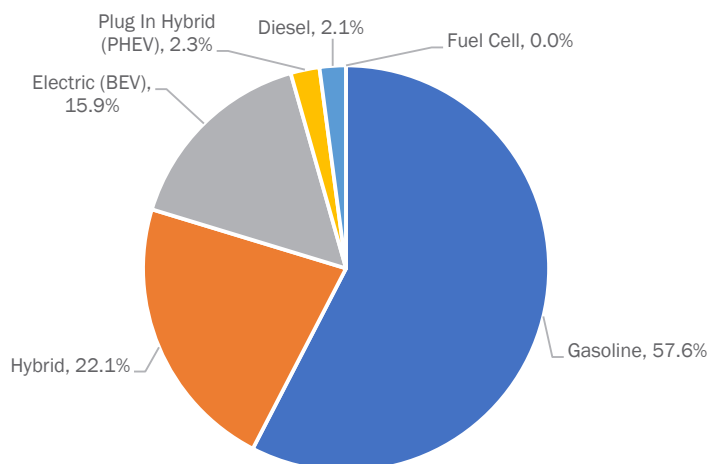


Annual Registrations and Market Share					
	2022	2023	2024	2025	YTD '26
ZEV registrations	262107	382219	385385	377198	137430
ZEV share	16.6%	21.7%	22.0%	21.0%	15.9%
Hybrid regs. (excl. plug ins)	144860	196148	258199	350533	191000
Hybrid share (excl. plug ins)	9.2%	11.1%	14.8%	19.5%	22.1%
PHEV regs.	41902	60506	60500	63291	19584
PHEV share	2.7%	3.4%	3.5%	3.5%	2.3%

Quarterly Registrations and Market Share					
	2Q '25	3Q '25	4Q '25	1Q '26	2Q '26
ZEV registrations	87306	108810	85586	57262	80168
ZEV share	18.2%	24.9%	20.2%	13.8%	17.8%
Hybrid regs. (excl. plug ins)	98117	83214	86738	86855	104145
Hybrid share (excl. plug ins)	20.5%	19.0%	20.5%	20.9%	23.2%
PHEV regs.	18827	16650	11000	8263	11321
PHEV share	3.9%	3.8%	2.6%	2.0%	2.5%

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 2026 thru June



- Gasoline powered vehicles accounted for 57.6 percent of state new vehicle registrations during the first six months of this year, up from 54.0 percent in 2025.
- Combined share for BEVs, PHEVs, hybrids, and fuel cell vehicles was 40.3 percent in the first half of this year, down from 43.8 percent in 2025, but up significantly from just 11.6 percent in 2018.
- Hybrid vehicle market share easily surpassed ZEV share in the first half of this year - 22.1 percent for hybrids versus 15.9 percent for ZEVs.

Data sourced from Experian Automotive.

California and U.S. Markets

15.9%

California
ZEV market share
YTD '26 thru June



5.9%

U.S.
ZEV market share
YTD '26 thru June



29.1%

California share of
U.S. ZEV registrations
YTD '26 thru June



Data sourced from Experian Automotive.

Vehicle Powertrain Dashboard



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

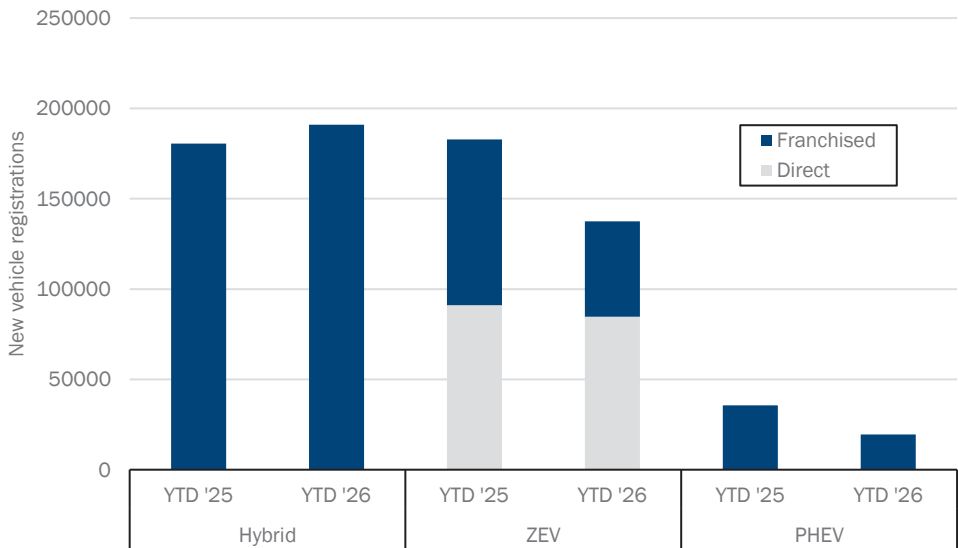
California New Zero Emission Vehicle Registrations by Make						
YTD 2025 and YTD 2026 thru June						
	Registrations			Market Share (%)		
	YTD '25	YTD '26	% Change	YTD '25	YTD '26	Change
TOTAL	182,802	137,430	-24.8			
Acura	3,317	18	-99.5	1.8	0.0	-1.8
Audi	4,726	677	-85.7	2.6	0.5	-2.1
BMW	10,371	5,023	-51.6	5.7	3.7	-2.0
Cadillac	3,370	3,783	12.3	1.8	2.8	1.0
Chevrolet	9,534	4,644	-51.3	5.2	3.4	-1.8
Dodge	401	49	-87.8	0.2	0.0	-0.2
Ford	9,096	4,685	-48.5	5.0	3.4	-1.6
Genesis	941	225	-76.1	0.5	0.2	-0.3
GMC	1,738	783	-54.9	1.0	0.6	-0.4
Honda	6,000	2,601	-56.7	3.3	1.9	-1.4
Hyundai	10,374	9,278	-10.6	5.7	6.8	1.1
Jeep	569	56	-90.2	0.3	0.0	-0.3
Kia	4,447	3,895	-12.4	2.4	2.8	0.4
Lexus	1,564	2,917	86.5	0.9	2.1	1.2
Lucid	1,896	2,327	22.7	1.0	1.7	0.7
Mazda	2	0	-100.0	0.0	0.0	0.0
Mercedes-Benz	6,731	1,891	-71.9	3.7	1.4	-2.3
MINI	400	99	-75.3	0.2	0.1	-0.1
Nissan	4,347	379	-91.3	2.4	0.3	-2.1
Other	2,284	968	-57.6	1.2	0.7	-0.5
Porsche	2,565	972	-62.1	1.4	0.7	-0.7
Ram	4	64	1500.0	0.0	0.0	0.0
Rivian	5,540	3,970	-28.3	3.0	2.9	-0.1
Subaru	1,670	2,262	35.4	0.9	1.6	0.7
Tesla	83,300	77,895	-6.5	45.6	56.7	11.1
Toyota	2,928	6,004	105.1	1.6	4.4	2.8
Volkswagen	3,304	894	-72.9	1.8	0.7	-1.1
Volvo	1,383	1,071	-22.6	0.8	0.8	0.0

Top 25 Selling Hybrid, ZEV, and PHEV Models - YTD '26 thru June

Rank	Model	Type	Regs.
1	Tesla Model Y	ZEV	54,327
2	Toyota Camry	Hybrid	33,523
3	Honda CR-V	Hybrid	18,712
4	Tesla Model 3	ZEV	16,643
5	Toyota RAV4	Hybrid	13,320
6	Honda Civic	Hybrid	10,188
7	Honda Accord	Hybrid	10,120
8	Hyundai Ioniq 5	ZEV	7,628
9	Toyota Sienna	Hybrid	7,361
10	Toyota Corolla	Hybrid	7,348
11	Toyota Grand Highlander	Hybrid	7,072
12	Ford Maverick	Hybrid	6,218
13	Kia Sportage	Hybrid	5,885
14	Lexus RX	Hybrid	5,300
15	Toyota bZ4X	ZEV	5,262
16	Mazda CX-50	Hybrid	4,567
17	Hyundai Santa Fe	Hybrid	4,301
18	Hyundai Tucson	Hybrid	4,237
19	Lexus NX	Hybrid	3,895
20	Subaru Forester	Hybrid	3,524
21	Tesla Model X	ZEV	3,324
22	Ford Mustang Mach-E	ZEV	3,231
23	Kia Carnival	Hybrid	3,179
24	Toyota Prius	Hybrid	3,151
25	Rivian R1S	ZEV	3,092

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 '25 and '26 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 **75.7 percent** of combined sales for all three alternative powertrain types during the first six months of this year.
- ❑ Hybrid registrations were **191,000 units** in the first half of this year, all of these vehicles were sold by franchised dealerships.

MODEL RANKINGS

Toyota Camry is Best-Selling Car in California; Tesla Model Y Leads Among Light Trucks

The table below shows the top five selling models during the first six months of 2026 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	Compact SUV: Honda CR-V
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

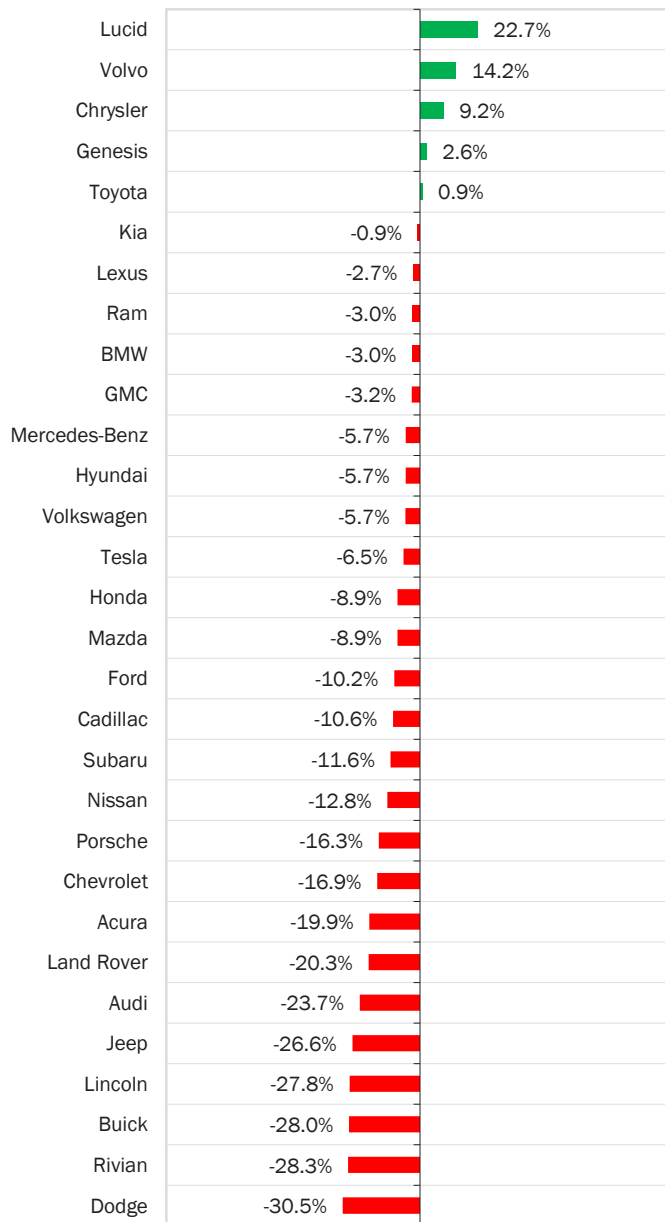
Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (YTD '26 thru June)

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	27897	32.0	Toyota Camry	33527	55.2	Ford Mustang	3302	54.0	Tesla Model 3	16643	39.2
Toyota Corolla	20874	24.0	Honda Accord	15933	26.2	Toyota 86	838	13.7	BMW 3-Series	4194	9.9
Kia K4	7837	9.0	Nissan Altima	3512	5.8	Mazda MX5	677	11.1	Mercedes C-Class	4128	9.7
Nissan Sentra	7452	8.6	Kia K5	3357	5.5	Toyota Supra	403	6.6	Lexus IS	2904	6.8
Hyundai Elantra	7006	8.0	Hyundai Sonata	2842	4.7	Honda Prelude	354	5.8	Acura Integra	2206	5.2
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
BMW 5-Series	2153	11.1	Toyota Tacoma	24254	52.3	Ford F-Series	18654	28.1	Toyota Sienna	7361	39.0
Tesla Model S	1961	10.1	Ford Maverick	8228	17.7	Chevrolet Silverado	15546	23.4	Kia Carnival	4417	23.4
Porsche 911	1853	9.6	Chevrolet Colorado	3560	7.7	Ram Pickup	10028	15.1	Honda Odyssey	3141	16.6
Mercedes E-Class	1691	8.7	Ford Ranger	2858	6.2	GMC Sierra	9750	14.7	Chrysler Pacifica	2661	14.1
Mercedes CLE-Class	1616	8.3	Nissan Frontier	2701	5.8	Toyota Tundra	7890	11.9	Volkswagen ID.Buzz	633	3.4
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	5427	44.3	Toyota Corolla Cross	8938	15.6	Honda CR-V	27670	19.3	Toyota 4Runner	7397	20.4
Mercedes Sprinter	2839	23.2	Subaru Crosstrek	8561	15.0	Toyota RAV4	22969	16.0	Hyundai Santa Fe	5843	16.1
Ram Promaster	1450	11.8	Honda HR-V	7959	13.9	Kia Sportage	9962	6.9	Subaru Outback	4646	12.8
Chevrolet Express	1103	9.0	Nissan Kicks	6474	11.3	Subaru Forester	8430	5.9	Ford Mustang Mach-E	3231	8.9
Ford E-Series	1013	8.3	Chevrolet Trax	6231	10.9	Hyundai Tucson	7852	5.5	Chevrolet Blazer	3002	8.3
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 Gr. Highlander	8800	13.7	Ford Bronco	6289	27.0	Acura ADX	2137	20.0	Tesla Model Y	54327	57.5
Ford Explorer	7120	11.1	Chevrolet Tahoe	3431	14.7	Audi Q3	1807	16.9	Mercedes GLC-Class	8247	8.7
Kia Telluride	6255	9.7	Chevrolet Suburban	2715	11.7	BMW X1	1576	14.7	Lexus NX	7157	7.6
Honda Pilot	5819	9.0	Toyota Land Cruiser	2338	10.0	Lexus UX	1429	13.4	BMW X3	5825	6.2
Hyundai Palisade	5402	8.4	Ford Expedition	1898	8.1	Mercedes GLA-Class	1295	12.1	Audi Q5	4293	4.5
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	10256	18.9	Lexus TX	4638	22.2	Toyota Camry	33527	15.5	Tesla Model Y	54327	8.4
Mercedes GLE-Class	6361	11.7	Rivian R1S	3092	14.8	Honda Civic	27897	12.9	Honda CR-V	27670	4.3
BMW X5	5928	10.9	Mercedes GLS-Class	2594	12.4	Toyota Corolla	20874	9.7	Toyota Tacoma	24254	3.7
Volvo XC90	3421	6.3	Cadillac Escalade	2146	10.3	Tesla Model 3	16643	7.7	Toyota RAV4	22969	3.5
Tesla Model X	3324	6.1	Land Rover Range Rover	1942	9.3	Honda Accord	15933	7.4	Ford F-Series	18654	2.9

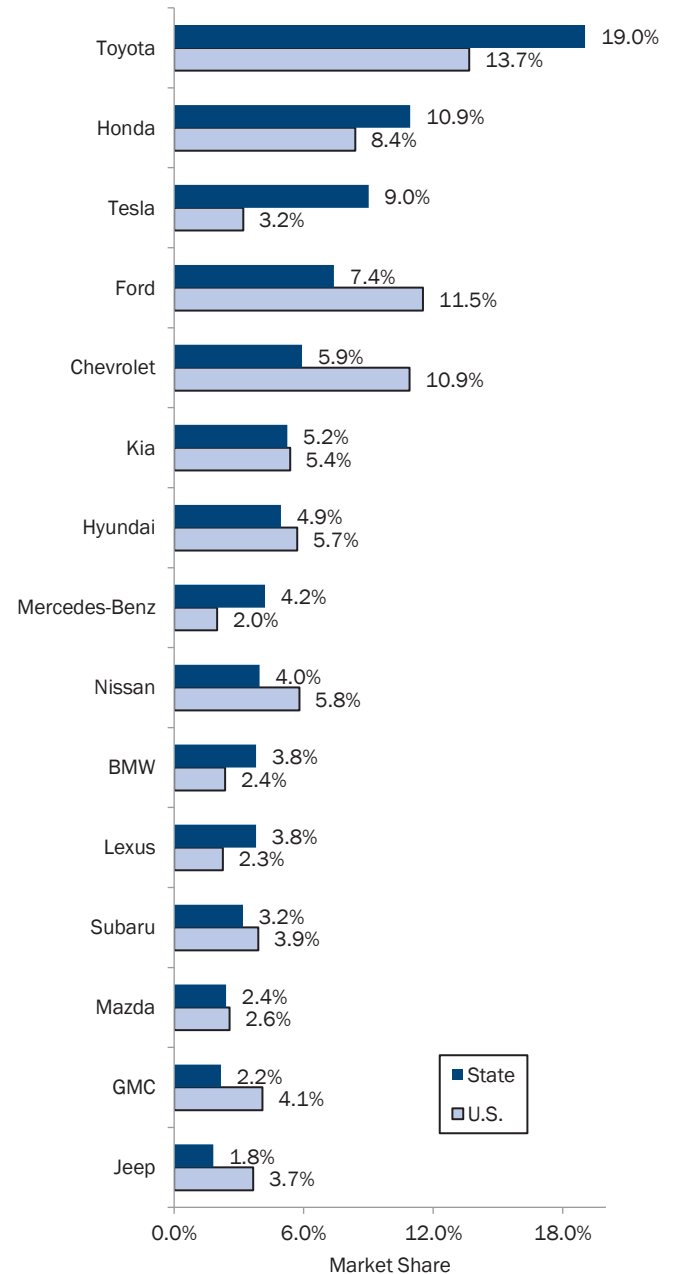
BRAND SUMMARY

Registrations Increased for Five of Top 30 Selling Brands; Toyota and Honda are Market Leaders

Percent Change in Brand Registrations
YTD '26 thru June vs. YTD '25
(Top 30 selling brands in CA)



California and U.S. Market Share - YTD '26 thru June
(Top 15 selling brands in CA)



Registrations increased for Lucid,
Volvo, Chrysler, Genesis, and Toyota.



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 '25	2Q '26	% Change	2Q '25	2Q '26	Change	YTD '25	YTD '26	% Change	YTD '25	YTD '26	Change
TOTAL	479,186	449,210	-6.3				936,543	864,848	-7.7			
Acura	5,339	3,775	-29.3	1.1	0.8	-0.3	9,554	7,649	-19.9	1.0	0.9	-0.1
Alfa Romeo	112	91	-18.8	0.0	0.0	0.0	256	192	-25.0	0.0	0.0	0.0
Audi	7,262	5,844	-19.5	1.5	1.3	-0.2	15,428	11,766	-23.7	1.6	1.4	-0.2
BMW	16,519	16,957	2.7	3.4	3.8	0.4	33,904	32,879	-3.0	3.6	3.8	0.2
Buick	3,550	1,918	-46.0	0.7	0.4	-0.3	6,095	4,388	-28.0	0.7	0.5	-0.2
Cadillac	3,997	4,073	1.9	0.8	0.9	0.1	8,372	7,484	-10.6	0.9	0.9	0.0
Chevrolet	33,416	27,082	-19.0	7.0	6.0	-1.0	61,704	51,269	-16.9	6.6	5.9	-0.7
Chrysler	1,071	1,256	17.3	0.2	0.3	0.1	2,705	2,955	9.2	0.3	0.3	0.0
Dodge	1,674	901	-46.2	0.3	0.2	-0.1	3,689	2,564	-30.5	0.4	0.3	-0.1
Ferrari	143	173	21.0	0.0	0.0	0.0	238	319	34.0	0.0	0.0	0.0
Ford	37,809	31,422	-16.9	7.9	7.0	-0.9	71,310	64,063	-10.2	7.6	7.4	-0.2
Genesis	2,240	2,148	-4.1	0.5	0.5	0.0	4,722	4,843	2.6	0.5	0.6	0.1
GMC	9,522	9,557	0.4	2.0	2.1	0.1	19,345	18,726	-3.2	2.1	2.2	0.1
Honda	54,078	51,369	-5.0	11.3	11.4	0.1	103,780	94,558	-8.9	11.1	10.9	-0.2
Hyundai	24,094	22,747	-5.6	5.0	5.1	0.1	45,341	42,763	-5.7	4.8	4.9	0.1
Ineos	172	173	0.6	0.0	0.0	0.0	406	441	8.6	0.0	0.1	0.1
Infiniti	845	689	-18.5	0.2	0.2	0.0	1,761	1,395	-20.8	0.2	0.2	0.0
Jeep	11,916	7,697	-35.4	2.5	1.7	-0.8	21,362	15,686	-26.6	2.3	1.8	-0.5
Kia	22,588	23,975	6.1	4.7	5.3	0.6	45,754	45,346	-0.9	4.9	5.2	0.3
Land Rover	3,920	3,333	-15.0	0.8	0.7	-0.1	8,376	6,676	-20.3	0.9	0.8	-0.1
Lexus	18,277	16,270	-11.0	3.8	3.6	-0.2	33,751	32,828	-2.7	3.6	3.8	0.2
Lincoln	1,700	986	-42.0	0.4	0.2	-0.2	2,797	2,020	-27.8	0.3	0.2	-0.1
Lucid	937	1,012	8.0	0.2	0.2	0.0	1,896	2,327	22.7	0.2	0.3	0.1
Mazda	11,353	10,107	-11.0	2.4	2.2	-0.2	22,820	20,790	-8.9	2.4	2.4	0.0
Mercedes-Benz	19,331	18,270	-5.5	4.0	4.1	0.1	38,601	36,412	-5.7	4.1	4.2	0.1
MINI	1,213	938	-22.7	0.3	0.2	-0.1	2,237	1,876	-16.1	0.2	0.2	0.0
Mitsubishi	938	423	-54.9	0.2	0.1	-0.1	2,087	1,830	-12.3	0.2	0.2	0.0
Nissan	19,231	17,423	-9.4	4.0	3.9	-0.1	39,290	34,243	-12.8	4.2	4.0	-0.2
Porsche	4,217	3,483	-17.4	0.9	0.8	-0.1	9,092	7,611	-16.3	1.0	0.9	-0.1
Ram	5,523	5,960	7.9	1.2	1.3	0.1	11,899	11,542	-3.0	1.3	1.3	0.0
Rivian	2,668	1,759	-34.1	0.6	0.4	-0.2	5,540	3,970	-28.3	0.6	0.5	-0.1
Subaru	15,197	14,208	-6.5	3.2	3.2	0.0	31,137	27,528	-11.6	3.3	3.2	-0.1
Tesla	41,094	45,953	11.8	8.6	10.2	1.6	83,300	77,895	-6.5	8.9	9.0	0.1
Toyota	86,490	85,237	-1.4	18.0	19.0	1.0	163,043	164,568	0.9	17.4	19.0	1.6
Volkswagen	5,508	6,560	19.1	1.1	1.5	0.4	13,647	12,863	-5.7	1.5	1.5	0.0
Volvo	3,423	4,174	21.9	0.7	0.9	0.2	7,148	8,161	14.2	0.8	0.9	0.1
Other	1,819	1,267	-30.3	0.4	0.3	-0.1	4,156	2,422	-41.7	0.4	0.3	-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 2025 and 2026, 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

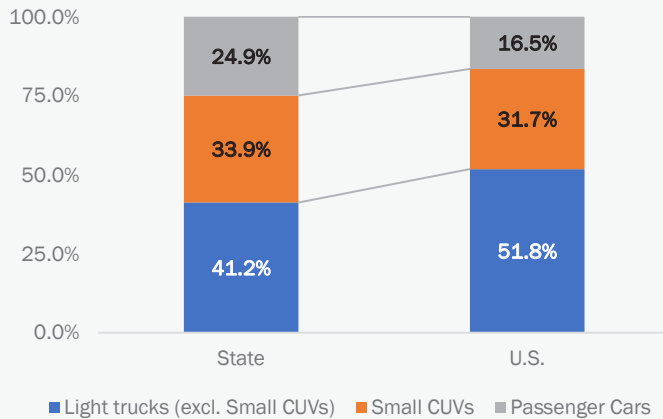
Published by: Auto Outlook, Inc., PO Box 390 Exton, PA 19341 Phone 610-640-1233 Email: autooutlook@icloud.com

Any material quoted must be attributed to California Auto Outlook, published by Auto Outlook, Inc. on behalf of the California New Car Dealers Association. Data source must also be shown as "Data sourced from Experian Automotive." **Please contact CNCDA with any questions or comments regarding the publication.** Copyright: Auto Outlook, Inc. July 2026.

At Auto Outlook, we strive to provide sound and accurate analyses and forecasts based upon the data available to us. However, our forecasts are derived from third-party data and contain a number of assumptions made by Auto Outlook and its management, including, without limitation, the accuracy of the data compiled. As a result, Auto Outlook can make no representation or warranty with respect to the accuracy or completeness of the data we provide or the forecasts or projections that we make based upon such data. Auto Outlook expressly disclaims any such warranties, and undue reliance should not be placed on any such data, forecasts, projections, or predictions. Auto Outlook undertakes no obligation to update or revise any predictions or forecasts, whether as a result of any new data, the occurrence of future events, or otherwise.

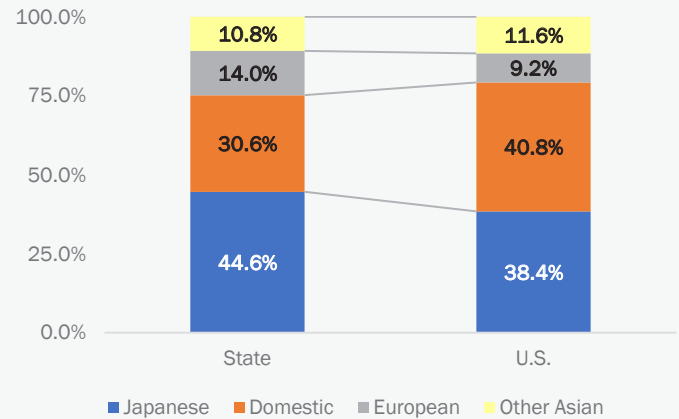
VEHICLE AND BRAND SEGMENTS

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

Market Share by Type of Vehicle - YTD '26 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 **24.9%** so far this year, well above the **16.5%** share in the U.S.

Data sourced from Experian Automotive.

Market Share by Brand Category - YTD '26 thru June


Japanese brand market share in the state was higher than U.S. levels: **44.6%** vs. **38.4%**. State Domestic brand share (which includes Tesla and Rivian) was **30.6%**. 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

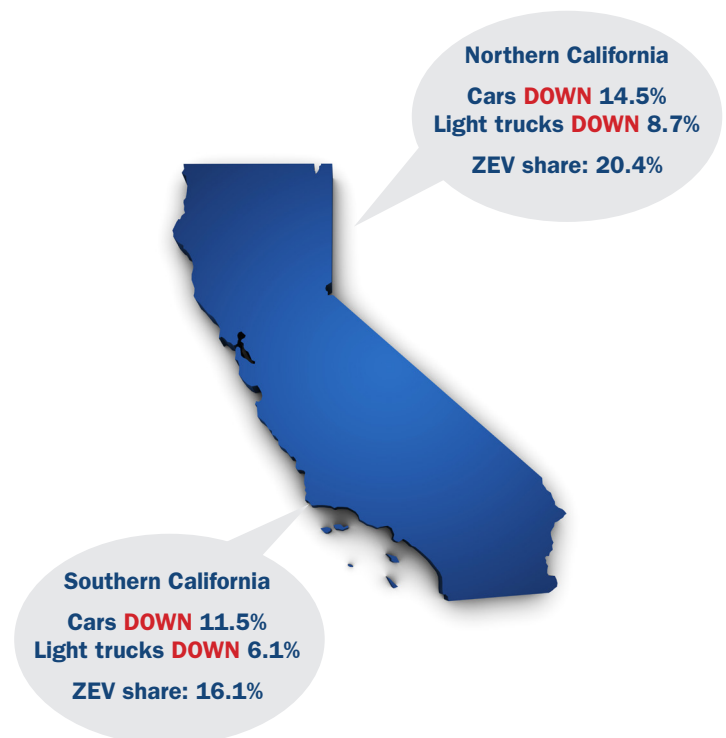
Northern California New Retail Market Fell by More than 10 Percent So Far This Year

ZEV share in Northern California was above 20% percent

New Retail Registrations (excluding fleets) YTD thru June			
North and South California	YTD '25	YTD '26	% chg.
Statewide Total	810,947	742,138	-8.5%
Cars	219,655	192,253	-12.5%
Light Trucks	591,292	549,885	-7.0%
Northern California	277,376	249,172	-10.2%
Cars	70,392	60,198	-14.5%
Light Trucks	206,984	188,974	-8.7%
Southern California	533,571	492,966	-7.6%
Cars	149,263	132,055	-11.5%
Light Trucks	384,308	360,911	-6.1%
Selected Regional Markets			
San Francisco Bay	154,366	134,767	-12.7%
Cars	40,694	32,395	-20.4%
Light Trucks	113,672	102,372	-9.9%
LA and Orange Counties	306,413	278,819	-9.0%
Cars	88,976	76,549	-14.0%
Light Trucks	217,437	202,270	-7.0%
San Diego County	74,366	67,727	-8.9%
Cars	17,801	15,565	-12.6%
Light Trucks	56,565	52,162	-7.8%

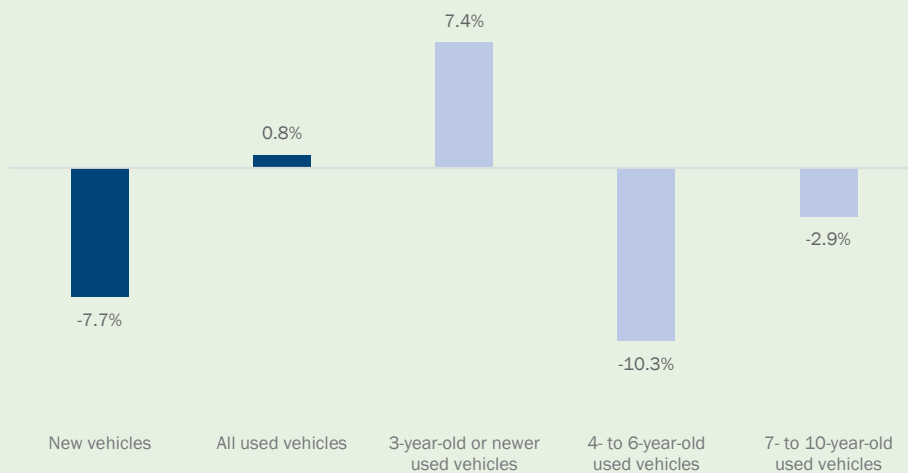
Data sourced from Experian Automotive.

Percent Change in New Retail Registrations - YTD '26 vs. YTD '25



CALIFORNIA USED VEHICLE MARKET

Elevated New Vehicle Prices Give a Boost to Used Vehicle Sales

Percent Change in New and Used Vehicle Registrations
YTD '26 thru June vs. YTD '25

Data sourced from Experian Automotive.

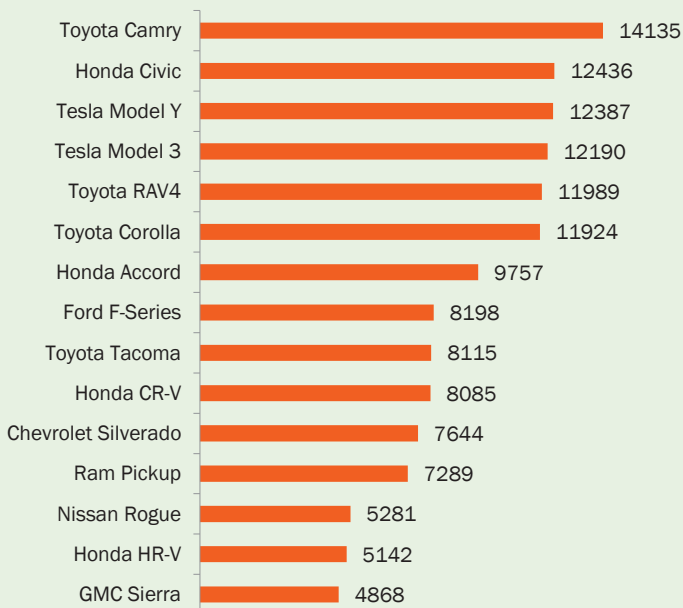
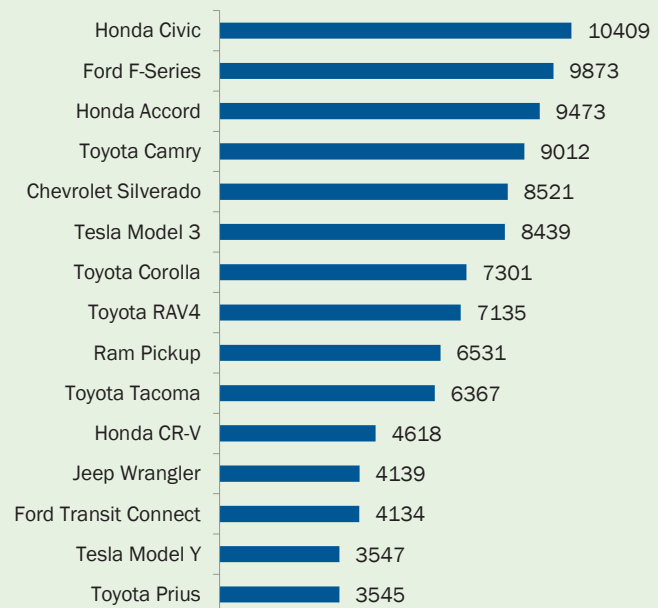
THREE KEY TRENDS IN
USED VEHICLE
MARKET

- 01.** The state's used vehicle market experienced a modest increase of less than 1% in the first half of this year compared to the previous year, while new vehicle registrations declined by 7.7%. The increase in new vehicle prices has likely compelled numerous consumers to transition to the used vehicle market.
- 02.** As shown on the graph to the left, registrations for 3-year-old or newer vehicles increased 7.4 percent during the first six months of this year.
- 03.** Toyota Camry and Honda Civic were top sellers in the state's used vehicle market (see graphs below).

TOP SELLING MODELS IN USED VEHICLE MARKET

Toyota Camry and Honda Civic are Top Sellers in Used Vehicle Market

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

Top 15 Selling Models for Vehicles 4-Years-Old or Newer
YTD 2026 thru JuneTop 15 Selling Models for 5- to 8-Year-Old Vehicles
YTD 2026 thru June

Data sourced from Experian Automotive.