

California Auto Outlook™

Comprehensive Information on the California Vehicle Market

Released January 2026

Covering Fourth Quarter 2025

Publication Sponsored By:



New Vehicle Registrations Predicted to Decline Slightly in 2026

KEY TRENDS IN NEW VEHICLE MARKET



State new vehicle market improved in 2025.

California new light vehicle registrations increased 3.3 percent from 2024 to 2025, slightly below the 4.2 percent improvement in the nation. As expected, the market declined in the fourth quarter, with registrations falling 1.9 percent versus the year earlier.

California new vehicle registrations predicted to decline slightly in 2026.

Transaction prices nearing \$50,000 are making new vehicle purchases a stretch for many consumers. Additionally, tariffs will almost certainly lead to rising vehicle prices, the labor market is weakening, and household incomes are barely keeping pace with inflation. However, the news isn't entirely bleak. The average age of vehicles on the road is at a record high, partly due to postponed purchases since the pandemic. This resulting pent-up demand, coupled with the prospects of lower interest rates, should limit any potential decline in sales in 2026. New vehicle registrations this year are predicted to slip below 1.8 million units and fall 1.5 percent from 2025.

ZEV sales declined sharply at the end of 2025.

New registrations of ZEVs headed lower during the last few months of 2025 due to the expiration of federal government tax credits. ZEV share of the new vehicle market was 22.2 percent during the first ten months of 2025 and declined to just 12.8 percent in November and December. Hybrid registrations increased 36 percent last year, and market share reached 19.4 percent, up more than ten percentage points versus points three years earlier.

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
2024 and 2025 Annual Totals

	California			U.S.		
	2024	2025	Change	2024	2025	Change
Registrations						
TOTAL	1,748,689	1,806,762	3.3%	15,457,894	16,102,983	4.2%
Car	478,419	463,741	-3.1%	2,914,244	2,688,920	-7.7%
Light Truck	1,270,270	1,343,021	5.7%	12,543,650	13,414,063	6.9%
Domestic	583,201	586,050	0.5%	6,448,504	6,766,496	4.9%
European	259,825	255,684	-1.6%	1,584,766	1,543,626	-2.6%
Japanese	731,941	774,618	5.8%	5,766,721	5,976,113	3.6%
Other Asian	173,722	190,410	9.6%	1,657,903	1,816,748	9.6%
Market Share						
Car	27.4	25.7	-1.7	18.9	16.7	-2.2
Light Truck	72.6	74.3	1.7	81.1	83.3	2.2
Domestic	33.4	32.4	-1.0	41.7	42.0	0.3
European	14.9	14.2	-0.7	10.3	9.6	-0.7
Japanese	42.0	42.9	0.9	37.3	37.1	-0.2
Other Asian	9.9	10.5	0.6	10.7	11.3	0.6

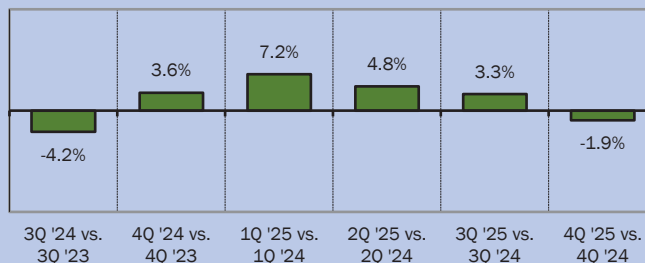
Data sourced from Experian Automotive. Other Asian brands includes Genesis, Hyundai, Kia, and VinFast.

QUARTERLY RESULTS



% change vs. year earlier

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



Data sourced from Experian Automotive.

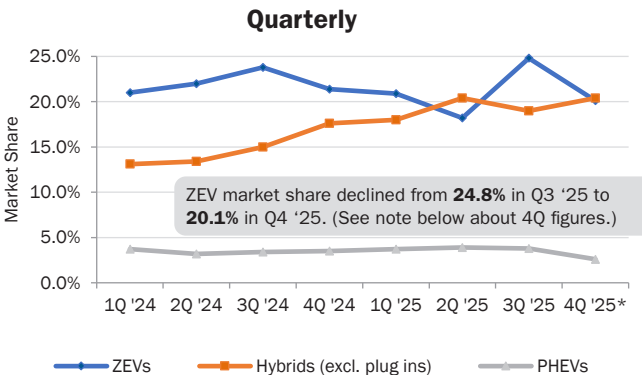
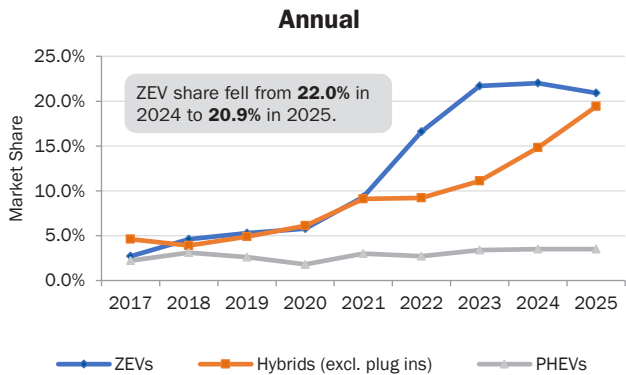
TWO YEAR PERSPECTIVE



Vehicle Powertrain Dashboard



Electric and Hybrid Vehicle Market Share



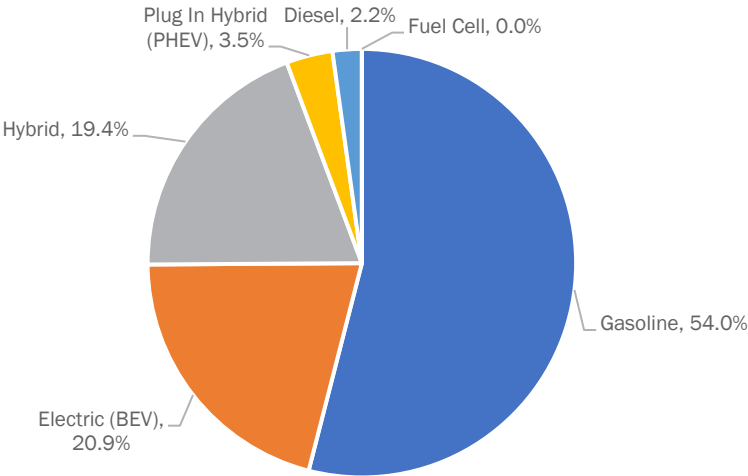
Annual Registrations and Market Share					
	2021	2022	2023	2024	2025
ZEV registrations	164453	262209	382335	385513	378216
ZEV share	9.3%	16.6%	21.7%	22.0%	20.9%
Hybrid regs. (excl. plug ins)	161076	144900	196211	258273	351391
Hybrid share (excl. plug ins)	9.1%	9.2%	11.1%	14.8%	19.4%
PHEV regs.	53166	41919	60517	60839	63701
PHEV share	3.0%	2.7%	3.4%	3.5%	3.5%

Quarterly Registrations and Market Share					
	4Q '24	1Q '25	2Q '25	3Q '25	4Q '25*
ZEV registrations	93166	95561	87464	109099	86092
ZEV share	21.4%	20.9%	18.2%	24.8%	20.1%
Hybrid regs. (excl. plug ins)	76541	82512	98280	83540	87059
Hybrid share (excl. plug ins)	17.6%	18.0%	20.4%	19.0%	20.4%
PHEV regs.	15454	17055	18885	16702	11059
PHEV share	3.5%	3.7%	3.9%	3.8%	2.6%

*Due to customary processing delays, vehicle registration data lags the reporting of actual sales. This has impacted the measurement of ZEV market share during the last few months of 2025. ZEV sales were high in the second half of September due to the expiration of federal government tax credits, but many of these transactions were likely recorded as October registrations, inflating the measurement of BEV share in 4Q '25. BEV share for the entire fourth quarter (October through December) was 20.1 percent vs. just 12.8% in November and December. The two-month figure is more reflective of BEV share following the expiration of the tax credits.

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

Market Share for all Powertrain Types - 2025



- ❑ Gasoline powered vehicles accounted for 54.0 percent of state new vehicle registrations in 2025.
- ❑ ICE vehicle market share (including gasoline and diesel vehicles) was 56.2 percent last year, down from 59.7 percent in 2024. ICE vehicle share should move slightly higher due to the expiration of federal government ZEV incentives, while sales of hybrids should continue to accelerate this year.
- ❑ Combined share for BEVs, PHEVs, hybrids, and fuel cell vehicles was 43.8 percent last year, up from just 11.6 percent in 2018.

Data sourced from Experian Automotive.

California and U.S. Markets

20.9%

California
ZEV market share
2025

8.2%

U.S.
ZEV market share
2025

28.5%

California share of
U.S. ZEV registrations
2025

Data sourced from Experian Automotive.

Vehicle Powertrain Dashboard



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

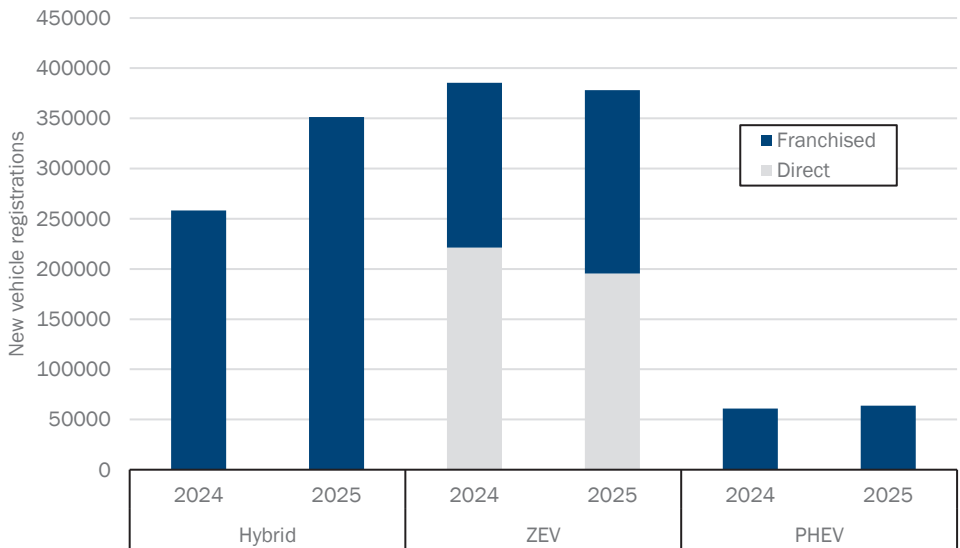
California New Zero Emission Vehicle Registrations by Make						
2024 and 2025 Annual Totals						
	Registrations			Market Share (%)		
	2024	2025	% Change	2024	2025	Change
TOTAL	385,513	378,216	-1.9			
Acura	1,102	4,488	307.3	0.3	1.2	0.9
Audi	10,071	12,484	24.0	2.6	3.3	0.7
BMW	18,430	17,520	-4.9	4.8	4.6	-0.2
Cadillac	5,062	7,906	56.2	1.3	2.1	0.8
Chevrolet	13,840	18,837	36.1	3.6	5.0	1.4
Dodge	0	833	-	0.0	0.2	0.2
Ford	17,184	19,245	12.0	4.5	5.1	0.6
Genesis	1,744	1,510	-13.4	0.5	0.4	-0.1
GMC	2,579	3,687	43.0	0.7	1.0	0.3
Honda	6,985	14,470	107.2	1.8	3.8	2.0
Hyundai	22,684	25,123	10.8	5.9	6.6	0.7
Jeep	0	1,213	-	0.0	0.3	0.3
Kia	13,890	10,117	-27.2	3.6	2.7	-0.9
Lexus	4,077	2,409	-40.9	1.1	0.6	-0.5
Lucid	2,464	3,910	58.7	0.6	1.0	0.4
Mazda	8	2	-75.0	0.0	0.0	0.0
Mercedes-Benz	17,220	10,946	-36.4	4.5	2.9	-1.6
MINI	870	597	-31.4	0.2	0.2	0.0
Nissan	5,851	5,956	1.8	1.5	1.6	0.1
Other	7,327	2,239	-69.4	1.9	0.6	-1.3
Polestar	1,957	1,139	-41.8	0.5	0.3	-0.2
Porsche	2,244	4,456	98.6	0.6	1.2	0.6
Ram	4	35	775.0	0.0	0.0	0.0
Rivian	12,031	11,133	-7.5	3.1	2.9	-0.2
Subaru	2,625	3,180	21.1	0.7	0.8	0.1
Tesla	202,865	179,656	-11.4	52.6	47.5	-5.1
Toyota	5,948	4,648	-21.9	1.5	1.2	-0.3
Volkswagen	5,435	7,782	43.2	1.4	2.1	0.7
Volvo	1,016	2,695	165.3	0.3	0.7	0.4

Top 25 Selling Hybrid, ZEV, and PHEV Models - 2025

Rank	Model	Type	Regs.
1	Tesla Model Y	ZEV	110,120
2	Toyota Camry	Hybrid	62,294
3	Tesla Model 3	ZEV	53,989
4	Honda CR-V	Hybrid	34,955
5	Toyota RAV4	Hybrid	30,927
6	Honda Civic	Hybrid	20,984
7	Hyundai Ioniq 5	ZEV	18,919
8	Honda Accord	Hybrid	18,507
9	Toyota Corolla	Hybrid	14,602
10	Honda Prologue	ZEV	14,308
11	Toyota Sienna	Hybrid	14,062
12	Ford Mustang Mach-E	ZEV	12,620
13	Chevrolet Equinox	ZEV	11,754
14	Ford Maverick	Hybrid	11,055
15	Toyota Prius	Hybrid	10,967
16	Toyota Grand Highlander	Hybrid	10,374
17	Rivian R1S	ZEV	8,658
18	Hyundai Tucson	Hybrid	8,496
19	Lexus NX	Hybrid	8,366
20	BMW i4	ZEV	8,274
21	Hyundai Santa Fe	Hybrid	8,184
22	Lexus RX	Hybrid	7,786
23	Lexus ES	Hybrid	7,347
24	Tesla Cybertruck	ZEV	7,312
25	Mazda CX-50	Hybrid	6,742

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 - 2024 and 2025



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 **75 percent** of combined sales for all three alternative powertrain types.
- ❑ Franchised dealership share of the ZEV only market increased to **48.4 percent** in 2025, up from **42.6 percent** a year earlier.
- ❑ Hybrid registrations exceeded **350,000 units** last year, all of these vehicles were sold by franchised dealerships.

MODEL RANKINGS

Tesla Model Y is Top-Selling Light Truck in California; Camry Expanded Lead in Passenger Car Market

The table below shows the top five selling models during 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: Honda Prologue
Comp./Mid Size Pickup: Toyota Tacoma	Luxury Mid-Size SUV: Lexus RX

Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (2025)

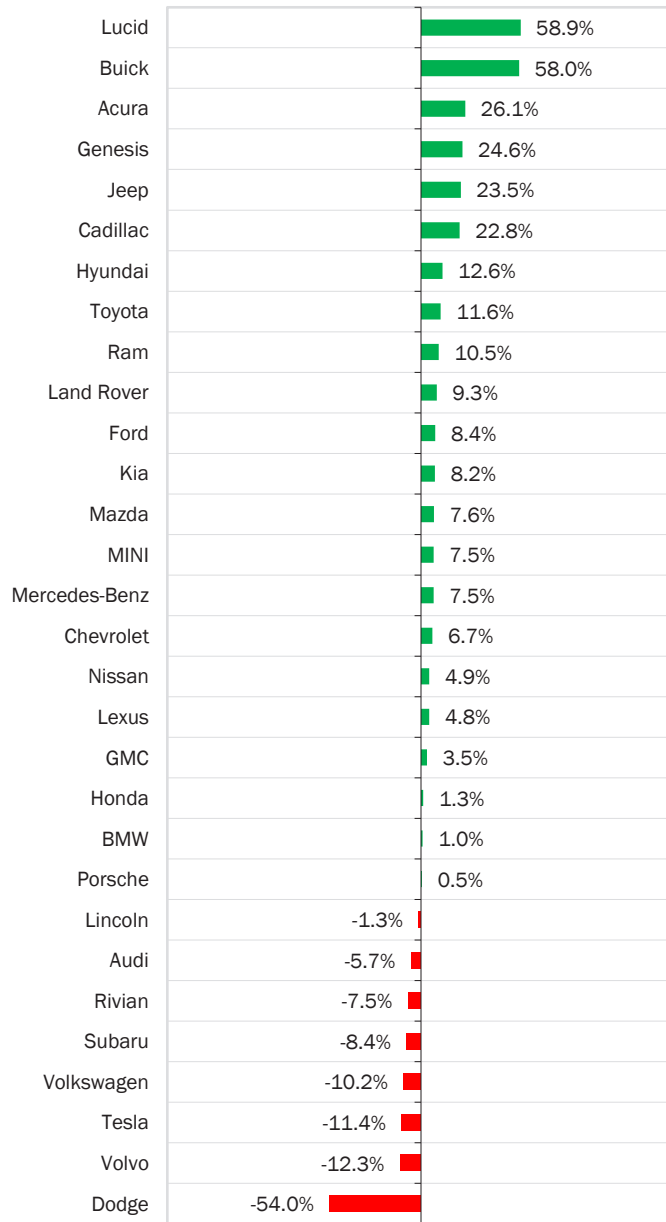
Small Cars			Mid Size and Large Cars			Sports/Pony Cars			Near Luxury Cars		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda Civic	53085	30.4	Toyota Camry	62324	50.0	Ford Mustang	4458	44.2	Tesla Model 3	53989	48.5
Toyota Corolla	39208	22.5	Honda Accord	30455	24.4	Toyota 86	2228	22.1	Lexus ES	10512	9.4
Toyota Prius	15888	9.1	Nissan Altima	10079	8.1	Mazda MX5	1464	14.5	BMW i4	8274	7.4
Kia K4/Forte	15352	8.8	Kia K5	7268	5.8	Subaru BRZ	611	6.1	Mercedes C-Class	7588	6.8
Nissan Sentra	14954	8.6	Hyundai Sonata	6803	5.5	Nissan Z	577	5.7	BMW 3-Series	6296	5.7
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
BMW 5-Series	3373	7.8	Toyota Tacoma	45258	51.3	Ford F-Series	39502	26.6	Toyota Sienna	14062	40.4
Lucid Air	3338	7.7	Ford Maverick	14904	16.9	Chevrolet Silverado	33634	22.7	Kia Carnival	8466	24.3
Mercedes E-Class	3212	7.4	Chevrolet Colorado	6798	7.7	Ram Pickup	20953	14.1	Honda Odyssey	7046	20.2
BMW i5	3193	7.4	Ford Ranger	5310	6.0	GMC Sierra	19689	13.3	Chrysler Pacifica	3298	9.5
Mercedes CLE-Class	3104	7.2	Nissan Frontier	4892	5.5	Toyota Tundra	15471	10.4	Volkswagen ID.Buzz	1431	4.1
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	9318	37.4	Subaru Crosstrek	18189	15.5	Toyota RAV4	65604	20.8	Honda Prologue	14308	16.4
Mercedes Sprinter	5834	23.4	Honda HR-V	18168	15.5	Honda CR-V	52311	16.6	Ford Mustang Mach-E	12620	14.5
Ram Promaster	3435	13.8	Toyota Corolla Cross	14382	12.3	Chevrolet Equinox	20388	6.5	Hyundai Santa Fe	12545	14.4
Chevrolet Express	2138	8.6	Chevrolet Trax	13301	11.3	Hyundai Ioniq 5	18919	6.0	Subaru Outback	11152	12.8
Ford E-Series	2069	8.3	Nissan Kicks	9542	8.1	Kia Sportage	17524	5.6	Toyota 4Runner	8341	9.6
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	15598	13.6	Ford Bronco	12480	26.3	Mercedes EQB	4192	15.6	Tesla Model Y	110120	59.0
Ford Explorer	13372	11.6	Chevrolet Tahoe	7339	15.5	Audi Q3	3640	13.6	Lexus NX	15542	8.3
Honda Pilot	11924	10.4	Chevrolet Suburban	5980	12.6	Mercedes GLA-Class	3306	12.3	Mercedes GLC-Class	14815	7.9
Kia Sorento	9506	8.3	Toyota Land Cruiser	5458	11.5	BMW X1	2975	11.1	BMW X3	9480	5.1
Kia Telluride	9099	7.9	GMC Yukon XL	3414	7.2	Audi Q4 E-Tron	2812	10.5	Porsche Macan	6753	3.6
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	17446	16.3	Rivian R1S	8658	19.5	Toyota Camry	62324	13.4	Tesla Model Y	110120	8.2
Mercedes GLE-Class	11411	10.7	Lexus TX	7421	16.7	Tesla Model 3	53989	11.6	Toyota RAV4	65604	4.9
BMW X5	9749	9.1	Land Rover Range Rover	4867	10.9	Honda Civic	53085	11.4	Honda CR-V	52311	3.9
Audi Q6 e-tron	6368	5.9	Cadillac Escalade	4752	10.7	Toyota Corolla	39208	8.5	Toyota Tacoma	45258	3.4
Tesla Model X	5411	5.1	Mercedes GLS-Class	4125	9.3	Honda Accord	30455	6.6	Ford F-Series	39502	2.9

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

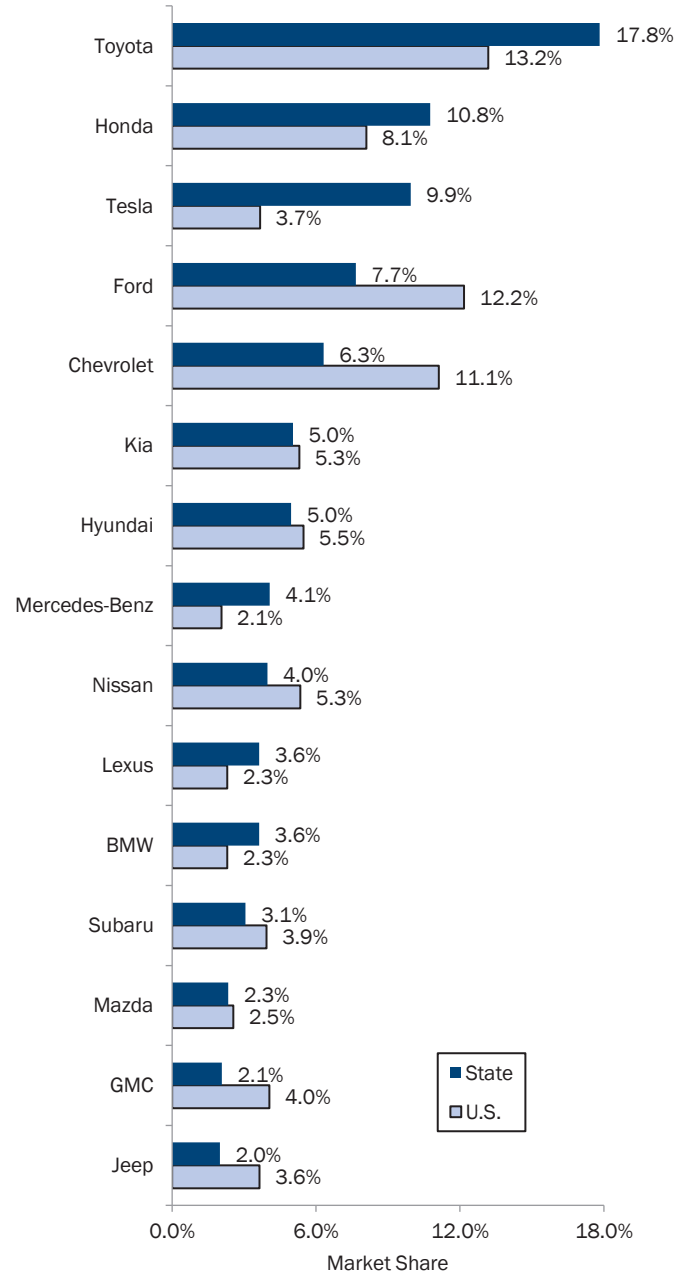
BRAND SUMMARY

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

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



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



Registrations increased by more than 20 percent for Lucid, Buick, Acura, Genesis, Jeep, and Cadillac



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												
	Fourth Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	4Q '24	4Q '25	% Change	4Q '24	4Q '25	Change	2024	2025	% Change	2024	2025	Change
TOTAL	435,881	427,432	-1.9				1,748,689	1,806,762	3.3			
Acura	3,642	3,568	-2.0	0.8	0.8	0.0	13,583	17,134	26.1	0.8	0.9	0.1
Alfa Romeo	156	97	-37.8	0.0	0.0	0.0	870	493	-43.3	0.0	0.0	0.0
Audi	7,902	7,018	-11.2	1.8	1.6	-0.2	33,559	31,641	-5.7	1.9	1.8	-0.1
BMW	16,740	16,295	-2.7	3.8	3.8	0.0	64,859	65,500	1.0	3.7	3.6	-0.1
Buick	1,191	1,873	57.3	0.3	0.4	0.1	5,734	9,059	58.0	0.3	0.5	0.2
Cadillac	3,610	4,274	18.4	0.8	1.0	0.2	13,632	16,743	22.8	0.8	0.9	0.1
Chevrolet	28,444	24,835	-12.7	6.5	5.8	-0.7	106,985	114,125	6.7	6.1	6.3	0.2
Chrysler	1,022	512	-49.9	0.2	0.1	-0.1	4,647	3,727	-19.8	0.3	0.2	-0.1
Dodge	1,682	1,470	-12.6	0.4	0.3	-0.1	13,247	6,093	-54.0	0.8	0.3	-0.5
Ford	31,282	32,947	5.3	7.2	7.7	0.5	127,598	138,266	8.4	7.3	7.7	0.4
Genesis	2,003	2,261	12.9	0.5	0.5	0.0	7,382	9,196	24.6	0.4	0.5	0.1
GMC	10,005	8,669	-13.4	2.3	2.0	-0.3	36,253	37,533	3.5	2.1	2.1	0.0
Honda	48,661	43,204	-11.2	11.2	10.1	-1.1	191,808	194,343	1.3	11.0	10.8	-0.2
Hyundai	21,045	20,965	-0.4	4.8	4.9	0.1	79,598	89,658	12.6	4.6	5.0	0.4
Ineos	195	206	5.6	0.0	0.0	0.0	833	779	-6.5	0.0	0.0	0.0
Infiniti	1,006	786	-21.9	0.2	0.2	0.0	4,511	3,190	-29.3	0.3	0.2	-0.1
Jeep	7,630	6,500	-14.8	1.8	1.5	-0.3	29,060	35,903	23.5	1.7	2.0	0.3
Kia	21,613	23,878	10.5	5.0	5.6	0.6	84,057	90,965	8.2	4.8	5.0	0.2
Land Rover	3,886	3,216	-17.2	0.9	0.8	-0.1	13,752	15,028	9.3	0.8	0.8	0.0
Lexus	14,548	15,840	8.9	3.3	3.7	0.4	62,603	65,623	4.8	3.6	3.6	0.0
Lincoln	1,183	962	-18.7	0.3	0.2	-0.1	4,908	4,845	-1.3	0.3	0.3	0.0
Lucid	584	1,315	125.2	0.1	0.3	0.2	2,464	3,910	58.7	0.1	0.2	0.1
Mazda	9,688	8,992	-7.2	2.2	2.1	-0.1	39,190	42,179	7.6	2.2	2.3	0.1
Mercedes-Benz	19,124	17,319	-9.4	4.4	4.1	-0.3	68,433	73,538	7.5	3.9	4.1	0.2
MINI	1,112	1,067	-4.0	0.3	0.2	-0.1	4,027	4,330	7.5	0.2	0.2	0.0
Mitsubishi	749	480	-35.9	0.2	0.1	-0.1	2,920	3,100	6.2	0.2	0.2	0.0
Nissan	16,861	16,946	0.5	3.9	4.0	0.1	68,326	71,700	4.9	3.9	4.0	0.1
Polestar	198	240	21.2	0.0	0.1	0.1	1,957	1,139	-41.8	0.1	0.1	0.0
Porsche	4,561	3,666	-19.6	1.0	0.9	-0.1	16,911	16,992	0.5	1.0	0.9	-0.1
Ram	6,280	6,893	9.8	1.4	1.6	0.2	22,101	24,423	10.5	1.3	1.4	0.1
Rivian	2,983	2,417	-19.0	0.7	0.6	-0.1	12,031	11,133	-7.5	0.7	0.6	-0.1
Subaru	14,910	11,582	-22.3	3.4	2.7	-0.7	60,320	55,281	-8.4	3.4	3.1	-0.3
Tesla	43,402	44,302	2.1	10.0	10.4	0.4	202,865	179,656	-11.4	11.6	9.9	-1.7
Toyota	73,758	81,377	10.3	16.9	19.0	2.1	288,680	322,068	11.6	16.5	17.8	1.3
Volkswagen	7,070	7,652	8.2	1.6	1.8	0.2	31,820	28,576	-10.2	1.8	1.6	-0.2
Volvo	3,878	2,807	-27.6	0.9	0.7	-0.2	14,688	12,876	-12.3	0.8	0.7	-0.1
Other	3,277	1,001	-69.5	0.8	0.2	-0.6	12,477	6,017	-51.8	0.7	0.3	-0.4

Data sourced from Experian Automotive.

The table above shows new light vehicle (car and light truck) registrations in California. Figures are shown for the fourth quarters of 2024 and 2025, and annual 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

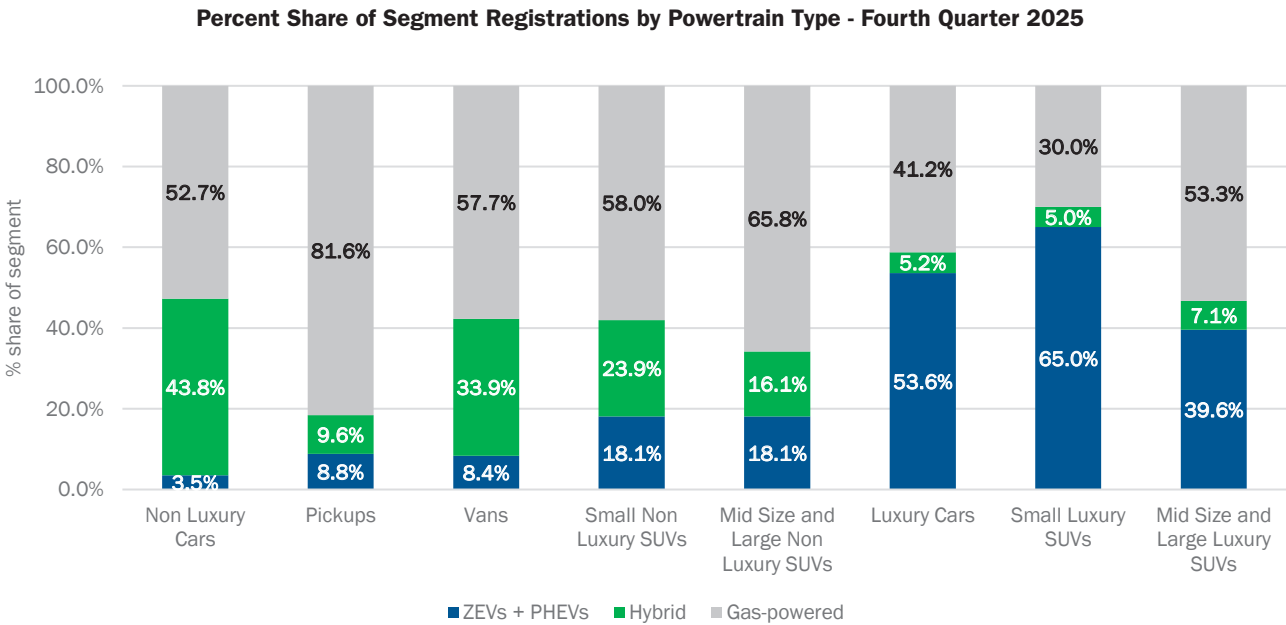
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POWERTRAIN MARKET SHARE FOR VEHICLE SEGMENTS

Hybrid Vehicle Market Share Approached 44 Percent in Non-Luxury Car Segment



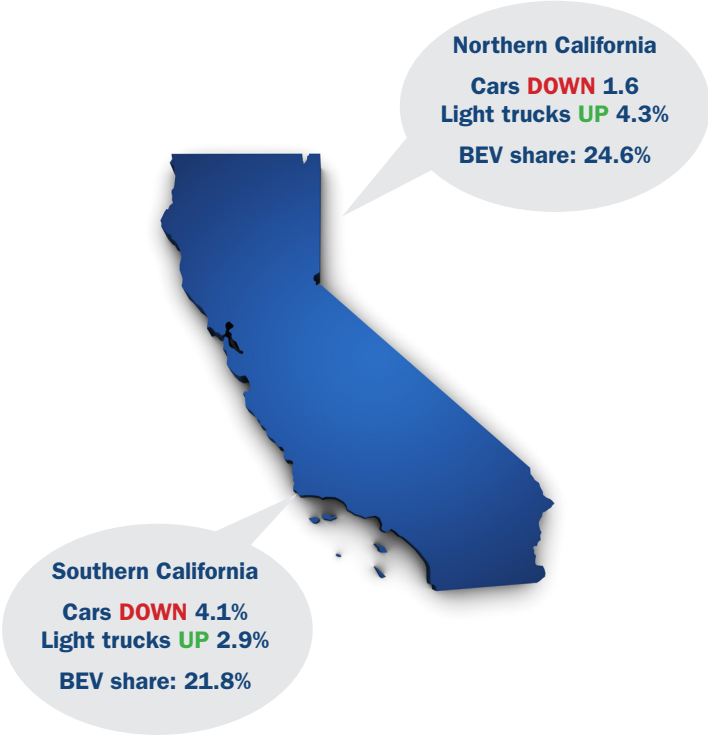
The graph above shows market share by powertrain type for eight vehicle segments. Gray bars show gasoline-powered vehicle market share, green is hybrids, and blue is combined share for ZEVs and PHEVs. Luxury segments are shown on the right side of the graph. ZEV/PHEV share exceeded 53% for Luxury Cars and Small Luxury SUVs. Data sourced from Experian Automotive.

REGIONAL MARKETS IN CALIFORNIA

Northern California New Retail Market Improved by 2.8 Percent in 2025
BEV share in Northern California was 24.6 percent

New Retail Registrations (excluding fleets) Annual Totals			
North and South California	2024	2025	% chg.
Statewide Total	1,557,916	1,582,031	1.5%
Cars	431,919	417,679	-3.3%
Light Trucks	1,125,997	1,164,352	3.4%
Northern California	528,824	543,368	2.8%
Cars	136,814	134,592	-1.6%
Light Trucks	392,010	408,776	4.3%
Southern California	1,029,092	1,038,663	0.9%
Cars	295,105	283,087	-4.1%
Light Trucks	733,987	755,576	2.9%
Selected Regional Markets			
San Francisco Bay	295,458	302,000	2.2%
Cars	78,906	76,465	-3.1%
Light Trucks	216,552	225,535	4.1%
LA and Orange Counties	593,878	595,112	0.2%
Cars	174,825	167,978	-3.9%
Light Trucks	419,053	427,134	1.9%
San Diego County	142,477	143,203	0.5%
Cars	35,861	33,370	-6.9%
Light Trucks	106,616	109,833	3.0%

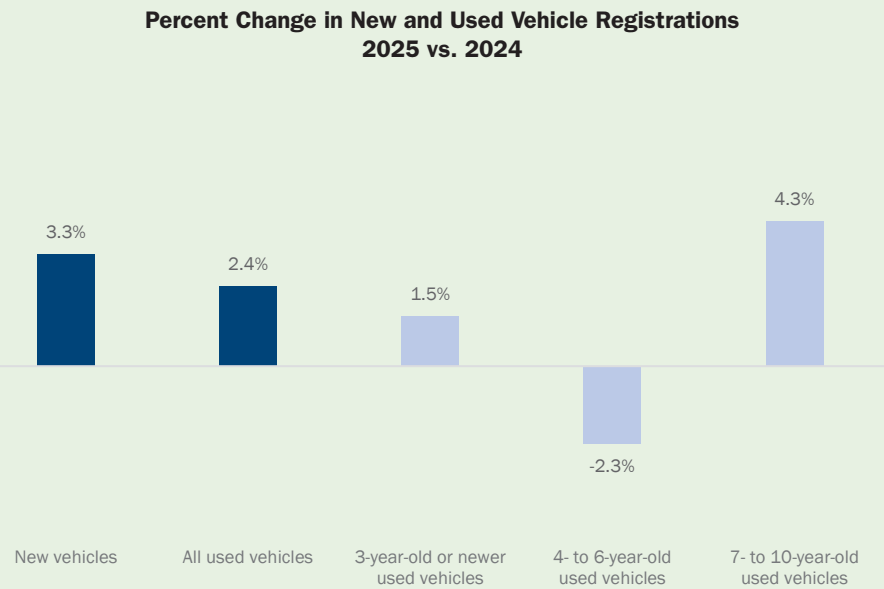
Percent Change in New Retail Registrations - 2025 and 2024



Data sourced from Experian Automotive.

CALIFORNIA USED VEHICLE MARKET

Used Vehicle Market Increased 2.4 Percent from 2024 to 2025



Data sourced from Experian Automotive.

THREE KEY TRENDS IN
USED VEHICLE
MARKET

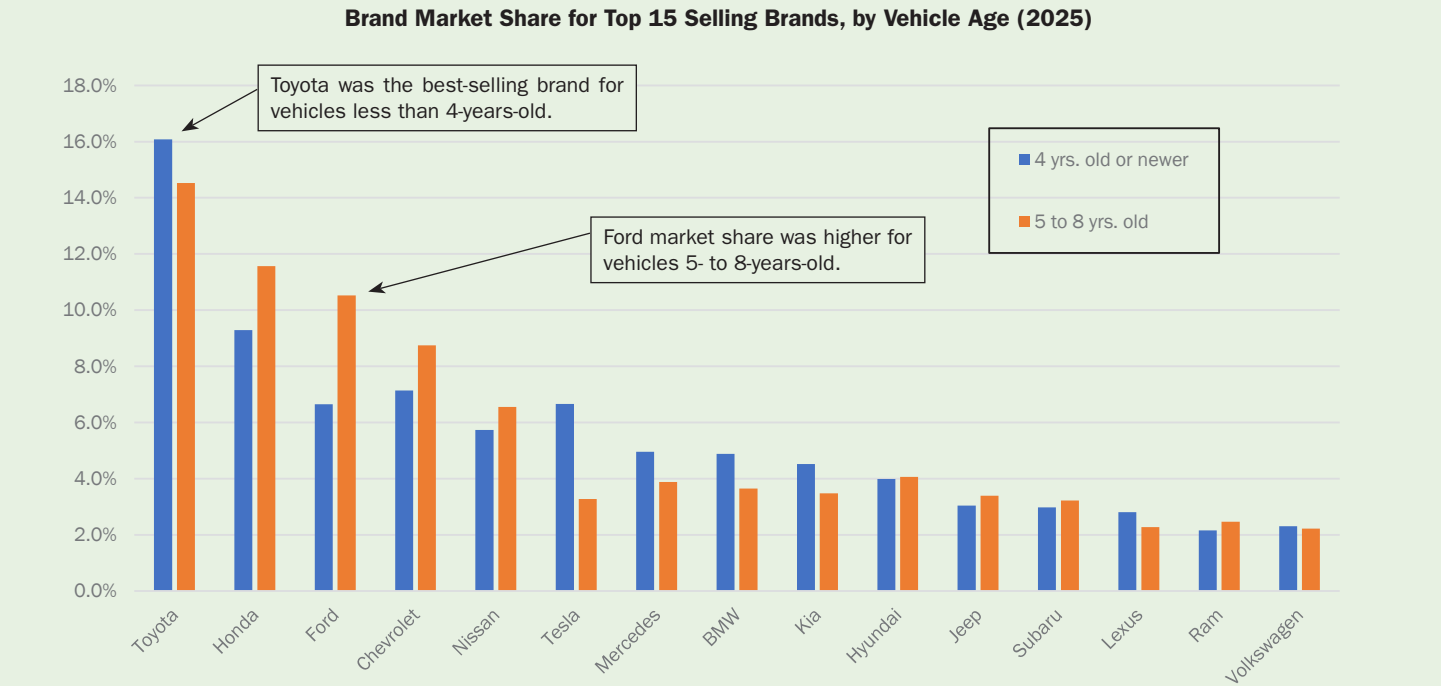


- 01.** The state used vehicle market increased 2.4 last year. The new vehicle market was up 3.3 percent.
- 02.** As shown on the graph to the left, registrations for 7- to 10-year-old used vehicles increased 4.3 percent from 2024 to 2025. The 4- to 6-year old market declined 2.3 percent.
- 03.** Toyota, Honda, Ford, Chevrolet, Nissan, Tesla, Mercedes, BMW, Kia, and Hyundai were the top 10 sellers in 2025. Ford and Honda market shares were higher for older vehicles (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.



Data sourced from Experian Automotive.