

ORANGE COUNTY AUTO OUTLOOK™

1st Quarter, 2025

Orange County New Retail Automotive Market Data - Retail Sales *Does Not Include Fleet Sales

FORECAST

Outlook for 2025 is Clouded Due to Tariffs

Below is a review of key trends in the county new vehicle market.

Market got off to a decent start in First Quarter of this year

County new retail registrations increased 2.7% in the First Quarter of 2025 versus a year earlier, below the 4.9% improvement in the state. As shown on the following page, U.S. equivalent SAAR levels in the county reached 15.2 million units in 1Q '25.

Outlook for rest of year is clouded

Pent-up-demand, combined with improvements in affordability were expected to propel the market in 2025. However, the potential overhaul of U.S. trade policy has added significant unknowns into the new vehicle sales outlook. The sidebar on the right presents three forecast scenarios for county new vehicle registrations this year, incorporating varying assumptions for tariff policies and economic outcomes. After the events of the past few weeks, it's safe to say that things are likely to change, so stay tuned.

Tesla suffers losses in county market

Tesla registrations in the First Quarter of this year fell 14.8% versus year earlier, while registrations for all other BEVs increased 30%. Tesla's share of the county electric vehicle market fell from 60.7% in 1Q '24 to 50.1% this year. An aging product lineup and backlash against Elon Musk's political initiatives are key factors in the decline.

Toyota is strong performer in county Small SUV segment; Mercedes stands out among Mid and Full Size Luxury SUVs

As show on page 4, Toyota accounted for 23.5% of the county Small SUV segment, well above its 14.3% share in the Nation. Mercedes was a relatively strong performer in the Mid and Full Size Luxury SUV segment.

Outlook for Orange County New Vehicle Market



There is heightened uncertainty for the new vehicle sales outlook in 2025. Some tariffs were dialed back in early April, but automotive and raw material tariffs are still in place, and the trade scenario is far from settled. Below are three scenarios for the forecast incorporating varying assumptions for tariffs and economic outcomes.

Baseline Forecast

Key assumptions: tariffs are scaled back somewhat from current rates but remain above prior levels; vehicle prices increase by no more than 5%; minimal interest rate cuts by the Fed; inflation drifts higher; and economic growth slows.

Forecast: 160,900 units, down 2.9% vs. '24

Alternative Upside Forecast

Key assumptions: tariffs are largely removed and revert to prior levels; vehicle prices remain stable; several interest rate reductions by the Fed; inflation eases; and economic growth improves as the year progresses. This is similar to the forecast projection in January of this year.

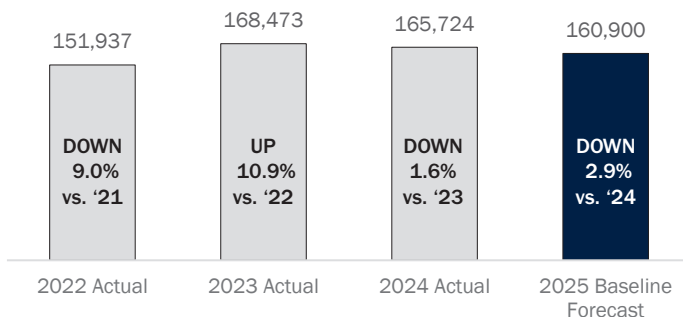
Forecast: 169,900 units, up 2.5% vs. '24

Alternative Downside Forecast

Key assumptions: tensions escalate and tariffs are increased; vehicle prices surge by roughly 10%; no interest rate cuts; inflation accelerates; and the economy enters recession.

Forecast: 148,800 units, down 10.2% vs. '24

Forecast for County New Retail Light Vehicle Registrations



The graph above shows annual new retail light vehicle registrations from 2022 through 2024, and Auto Outlook's baseline projection for 2025. Historical data sourced from Experian Automotive.

Market Summary

	YTD '24 thru Mar.	YTD '25 thru Mar.	% Chg. '24 to '25	Mkt. Share YTD '25
TOTAL	40,859	41,957	2.7%	
Car	10,634	10,517	-1.1%	25.1%
Light Truck	30,225	31,440	4.0%	74.9%
Domestic	13,215	12,668	-4.1%	30.2%
European	7,754	7,885	1.7%	18.8%
Japanese	16,169	17,316	7.1%	41.3%
Other Asian	3,721	4,088	9.9%	9.7%

Domestics consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa Romeo and FIAT), Tesla, Rivian, and Lucid. Other Asian includes Genesis, Hyundai, Kia, and VinFast.

Data sourced from Experian Automotive.

KEY TRENDS IN ORANGE COUNTY NEW VEHICLE MARKET



COUNTY MARKET VS. U.S.

% Change In
New Retail Market
YTD '25 thru Mar.
vs.
YTD '24

Orange County
UP 2.7%

California
UP 4.9%

U.S.
UP 4.2%

New retail light vehicle registrations in the county increased 2.7% in the First Quarter of this year. State market improved 4.9%, while U.S. was up 4.2%.

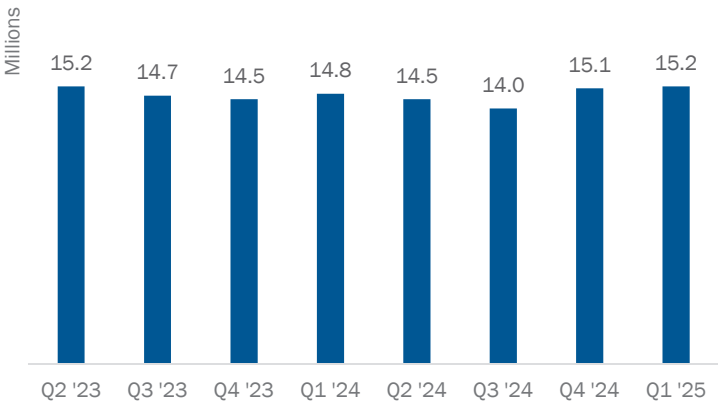
Data sourced from Experian Automotive.



QUARTERLY RESULTS

Orange County
Quarterly Registrations

Seasonally Adjusted
Annual Rate, Converted
to Equivalent U.S. New
Vehicle Market SAAR
(millions of units)



The graph on the left provides an easily recognizable way to gauge the strength of the county market. It shows quarterly registrations based on a seasonally adjusted annual rate. These figures are then indexed to SAAR sales figures for the U.S. new vehicle market. So just like in the national market, when the quarterly SAAR is above 17 million units, the county market is strong, 15 million is about average, and below 13 million is weak. Equivalent SAAR levels in the county increased from 15.1 million in the Fourth Quarter of 2024 to 15.2 million in the First Quarter of 2025.

Data sourced from Experian Automotive. SAAR estimates: Auto Outlook.

% Change in
registrations vs.
previous quarter
(1Q '25 vs. 4Q '24)

**UP
2.3%**



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KEY TRENDS IN ORANGE COUNTY NEW VEHICLE MARKET

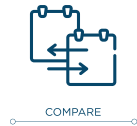


LONG TERM TRENDS

Annual New Retail Light Vehicle Registrations in County Market - 2015 thru 2024

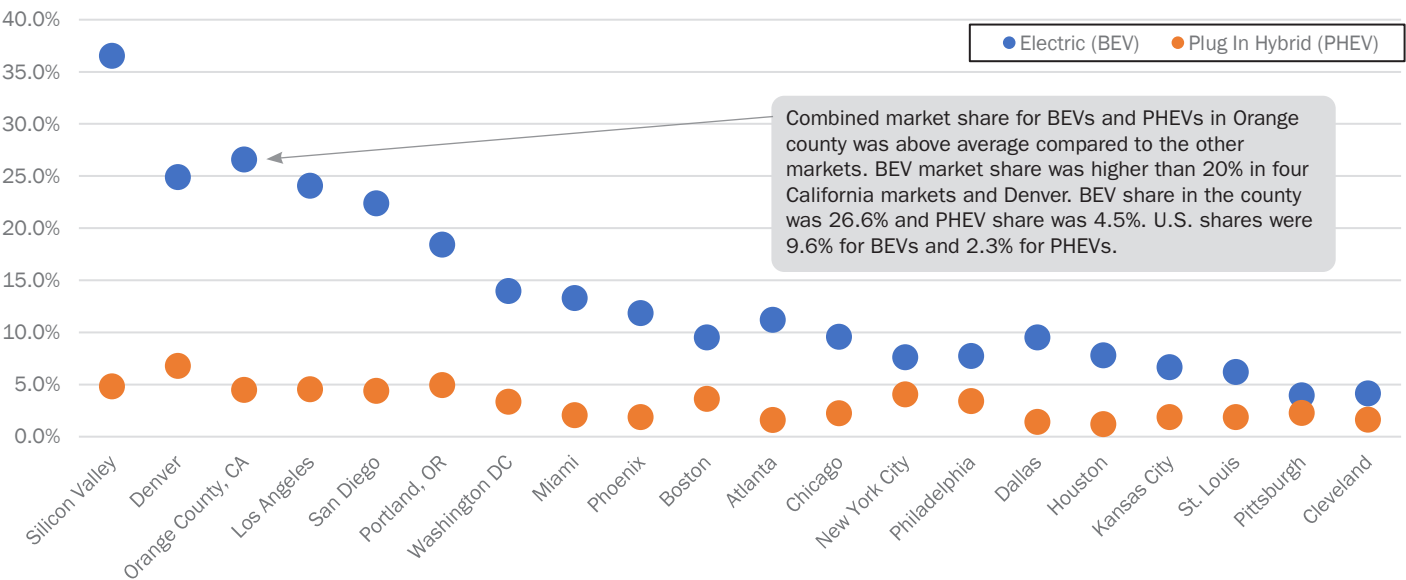


The graph on the left shows annual new retail light vehicle registrations from 2015 thru 2024. The grey bars show the actual totals in each year. The blue line represents average registrations between 2015 and 2019 and the orange line is the average between 2020 and 2024. The pandemic and subsequent supply chain issues in 2022 clearly took a toll on the market. Average registrations between 2020 and 2024 were 161,195 units, well below the previous five year average of 191,028. Postponed purchases that accrued during the past five years should provide some support for the market in 2025.



COMPARISON OF METRO AREA MARKETS

BEV and PHEV Share in Selected Metro Area Markets - YTD 2025 thru March



Markets are shown from left (highest) to right (lowest) based on combined BEV and PHEV market share. Data sourced from Experian Automotive.

BRANDS AND MODELS

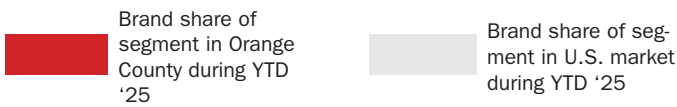


TOP SELLING BRANDS IN 7 PRIMARY SEGMENTS

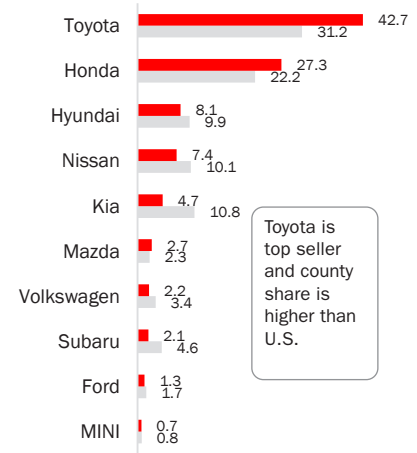
The seven graphs on this page show brand market share in seven key segments during the first three months of 2025 in both the Orange County and U.S. markets. County percent share is depicted by the red bars, U.S. share is light gray. Top ten brands in each segment are ranked from top to bottom based on Orange County share.

Segments were defined based on model classifications instead of overall brand positioning. For instance, Chevrolet appears on the Luxury and Sports cars graph because of the Corvette. Small SUVs consists of both Sub Compact and Compact models.

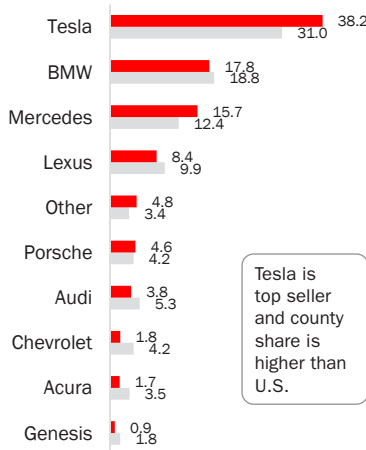
Legend for all graphs



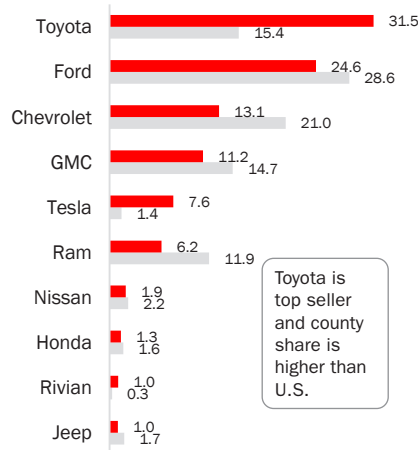
Non Luxury Cars



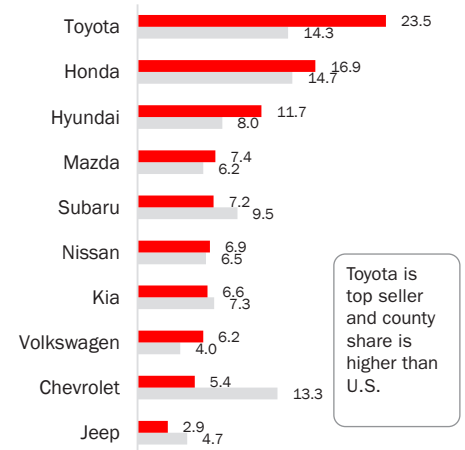
Luxury and Sports Cars



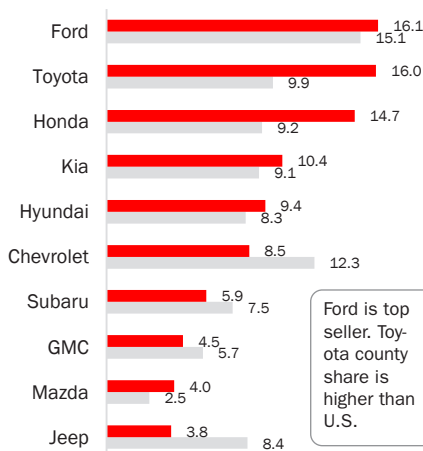
Pickups



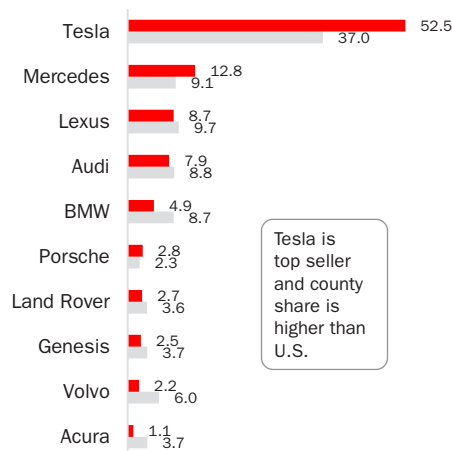
Small Non Luxury SUVs



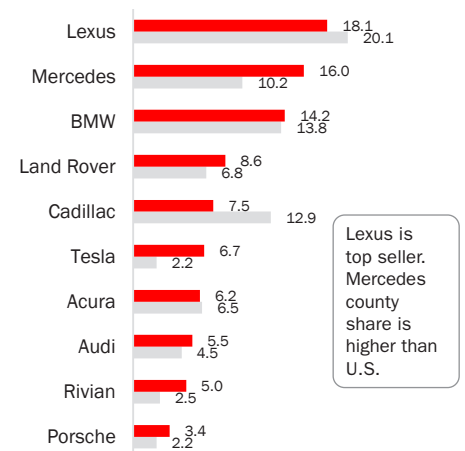
Mid and Full Size Non Luxury SUVs



Small Luxury SUVs



Mid and Full Size Luxury SUVs



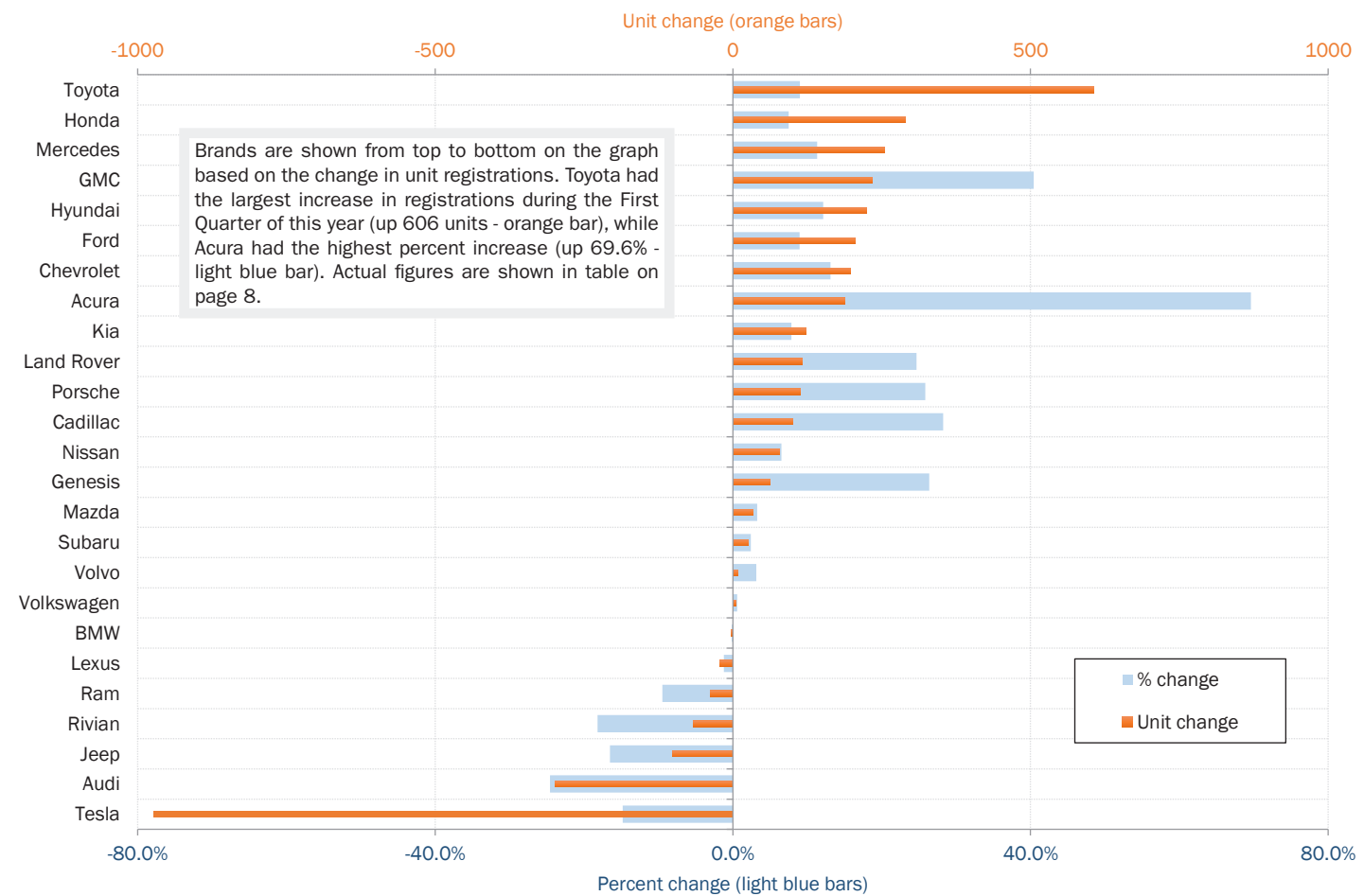
BRANDS AND MODELS



WINNERS AND LOSERS

The graph below shows both the percent and unit change in registrations during the First Quarter of this year versus year earlier. Comparing the percent change in registrations is helpful for establishing the relative change in results, but it can be misleading since it doesn't take into account the absolute level of registrations. As shown below, Acura posted a big percentage improvement in the First Quarter (up 69.6%, blue bar) but the unit increase was relatively small (up by 188 units). Toyota's percentage increase was smaller than Acura (up 9%), but the unit total improved by more than 600 units.

Percent and Unit Change in New Retail Light Vehicle Registrations for Top 25 Selling Brands - YTD '25 thru Mar. vs. YTD '24



Data sourced from Experian Automotive.



TOP SELLING MODELS

Top 20 Selling Models during YTD '25 thru Mar. - Market Share and % Change in Registrations vs. YTD '24						
Rank	Model	County Share %	% chg. '24 to '25	Rank	Model	County Share %
1	Tesla Model Y	7.3	-28.9	11	Lexus RX	1.2
2	Tesla Model 3	4.1	29.2	12	Toyota Tundra	1.2
3	Toyota RAV4	4.0	-6.9	13	Chevrolet Silverado	1.2
4	Honda CR-V	2.7	4.3	14	Toyota Prius	1.2
5	Toyota Camry	2.6	-4.8	15	Hyundai Tucson	1.1
6	Honda Civic	2.5	3.1	16	Lexus NX	1.1
7	Toyota Tacoma	2.4	168.1	17	Honda Prologue	1.1
8	Toyota Corolla	1.8	-3.6	18	Honda HR-V	1.0
9	Ford F-Series	1.7	20.8	19	Hyundai Ioniq 5	1.0
10	Honda Accord	1.3	-17.9	20	Mercedes GLC-Class	1.0

Table on the left presents the top 20 selling models in the county during the first three months of 2025. Share of industry registrations and the percent change versus the same period in 2024 are also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

ALTERNATIVE POWERTRAIN MARKET

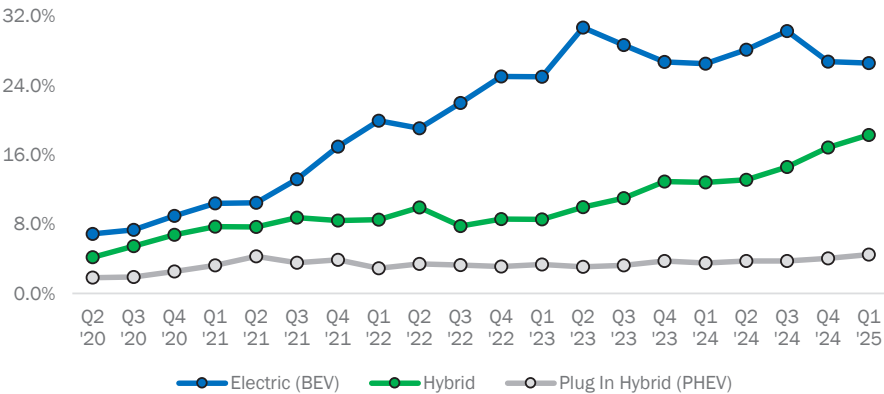
FIVE KEY TRENDS

1. BEV share was 26.6% in 1Q '25, up slightly vs. year earlier, but off from 4Q '24.
2. Hybrid vehicles continued to post gains. Hybrid share was 18.3% in 1Q '25, up 5.5 points vs. year earlier.
3. Tesla registrations declined 14.8% so far this year. BEV sales by franchised dealerships increased 38.4% vs. year earlier.
4. Nissan, Ford, and Chevrolet posted big gains in the BEV market so far this year vs. 2024.
5. Toyota hybrid registrations increased by 49.2% in 1Q '25 vs. year earlier and market share reached 52.5%.



BEV, PHEV, AND HYBRID MARKET SHARE

Percent Share of Industry Registrations by Powertrain Type



YTD thru March			
	YTD '24	YTD '25	
Electric (BEV)	26.5%	26.6%	▲
Hybrid	12.8%	18.3%	▲
Plug In Hybrid (PHEV)	3.5%	4.5%	▲

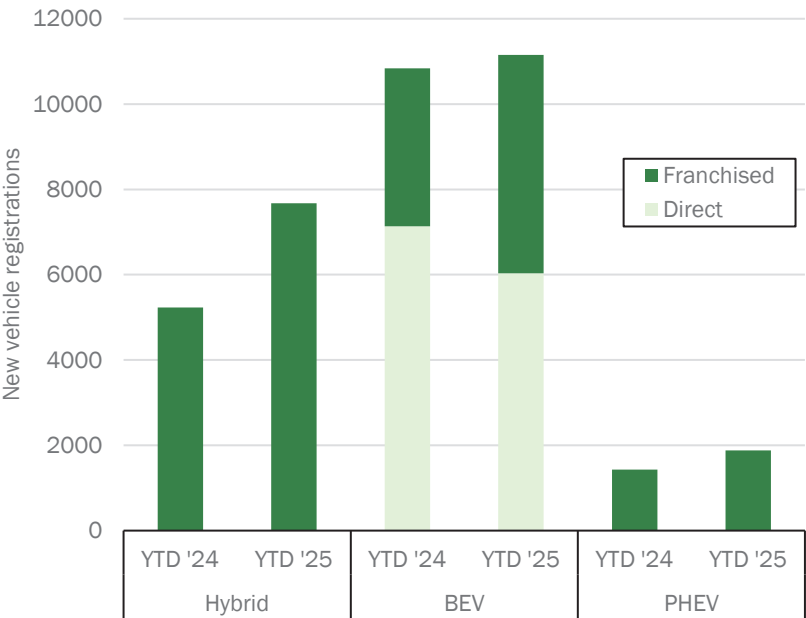
Quarterly			
	4Q '24	1Q '25	
Electric (BEV)	26.8%	26.6%	▼
Hybrid	16.8%	18.3%	▲
Plug In Hybrid (PHEV)	4.0%	4.5%	▲

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



FRANCHISED DEALERSHIPS AND DIRECT SELLERS

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



BEV Registrations and Market Share		
	Franchised Dealerships	Direct Sellers
YTD '24 thru Mar. regs.	3,697	7,138
YTD '25 thru Mar. regs.	5,117	6,034
% change	38.4%	-15.5%
YTD '24 mkt. share %	34.1	65.9
YTD '25 mkt. share %	45.9	54.1
change	11.8	-11.8
4Q '24 regs.	5,007	6,100
1Q '25 regs.	5,117	6,034
% change	2.2%	-1.1%
4Q '24 mkt. share %	45.1	54.9
1Q '25 mkt. share %	45.9	54.1
change	0.8	-0.8

The dark green areas in the graph show registrations by powertrain type for franchised dealerships. Sum of the green areas is 14,675 units, 71% of the overall total.

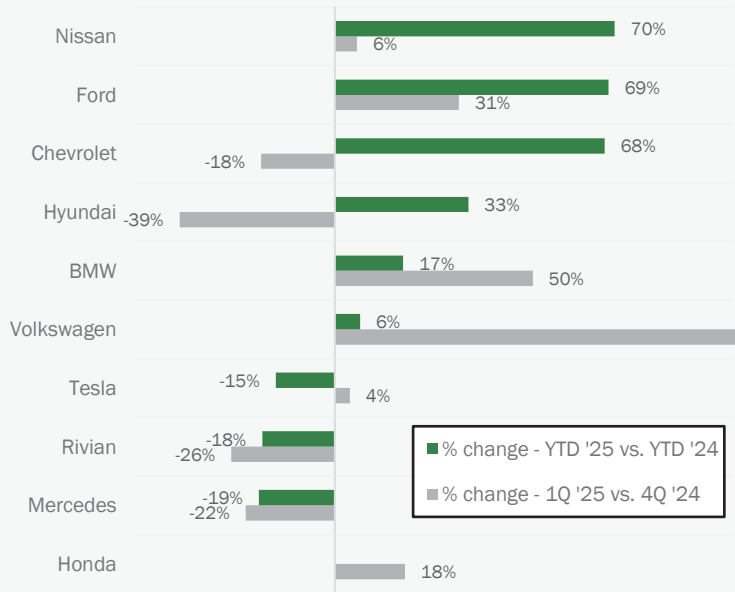
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

ALTERNATIVE POWERTRAIN MARKET

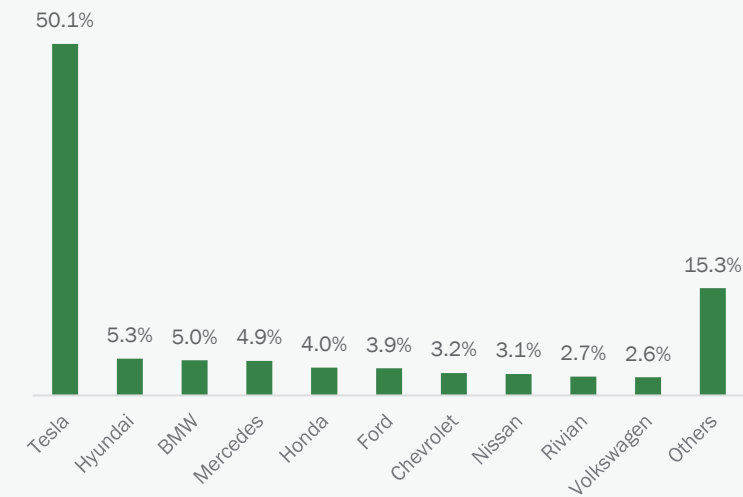


MAKES AND MODELS

% Change in BEV Registrations for Top 10 Brands
YTD '25 thru Mar. vs. YTD '24 and 1Q '25 vs. 4Q '24



Brand Share of Orange County BEV Market (%)
YTD 2025 thru March



Observations

- » Nissan had the largest % increase in BEV registrations in the First Quarter of this year versus year earlier.
- » BEV registrations increased from 4Q '24 to 1Q '25 for six of the top 10 selling brands.
- » Tesla share of the BEV market was 50.1% in 1Q '25.

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

Top Five Brands by type of Powertrain
Registrations for YTD '24 and '25 thru Mar.

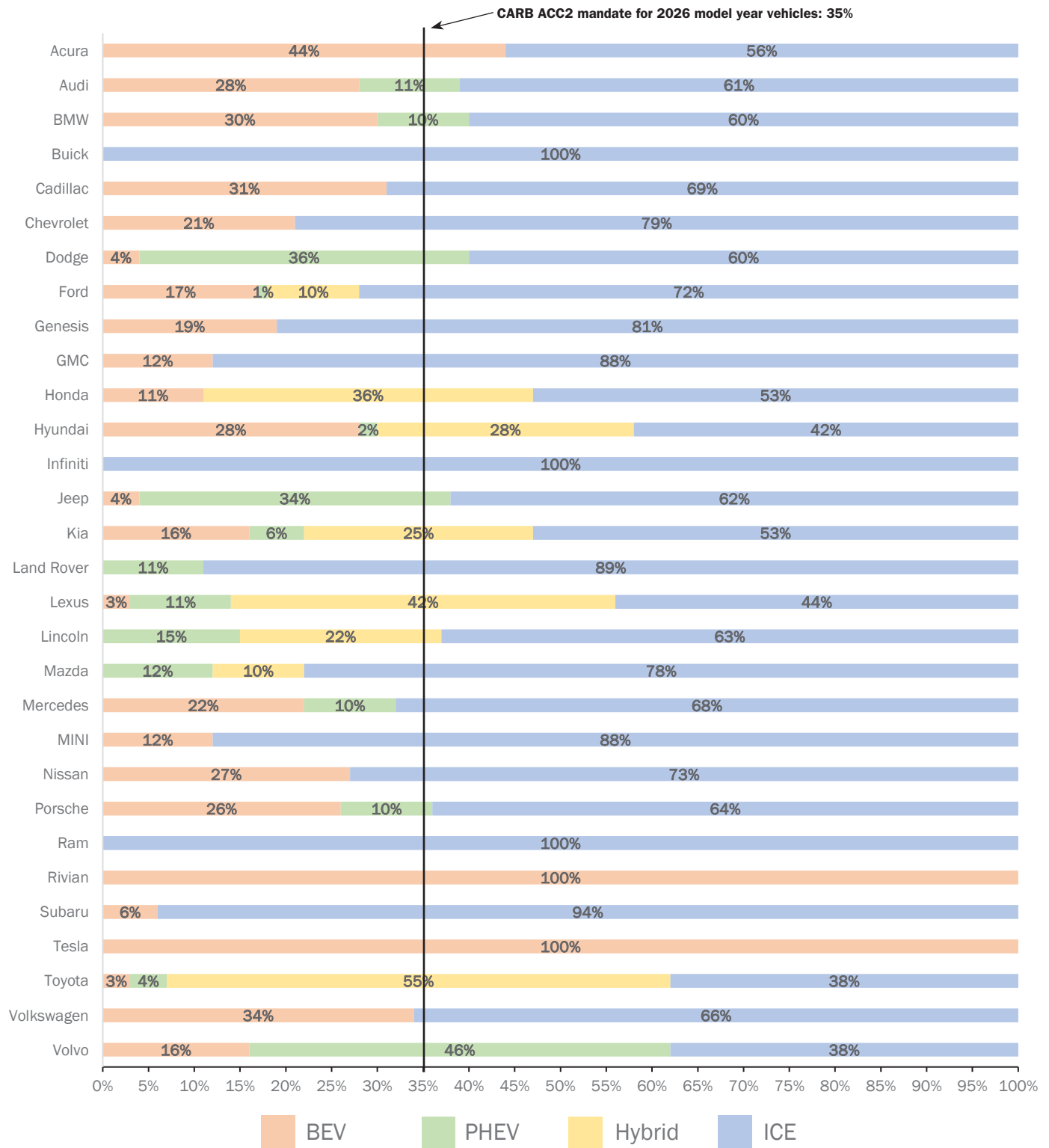
			YTD '24	YTD '25		YTD '25
	Rank	Brand	Regs.	Regs.	% chg.	Share
BEV	1	Tesla	6,565	5,592	-14.8%	50.1%
	2	Hyundai	439	586	33.5%	5.3%
	3	BMW	479	561	17.1%	5.0%
	4	Mercedes	678	549	-19.0%	4.9%
	5	Honda	0	442		4.0%
PHEV	1	Toyota	389	313	-19.5%	16.6%
	2	Mercedes	39	259	564.1%	13.8%
	3	Lexus	142	198	39.4%	10.5%
	4	BMW	113	185	63.7%	9.8%
	5	Jeep	254	174	-31.5%	9.3%
HYBRID	1	Toyota	2,699	4,027	49.2%	52.5%
	2	Honda	963	1,497	55.5%	19.5%
	3	Lexus	680	754	10.9%	9.8%
	4	Hyundai	320	589	84.1%	7.7%
	5	Kia	226	421	86.3%	5.5%

Market Share for Top 15 Selling
BEVs, PHEVs, and Hybrids - YTD '25 thru Mar.

			YTD '25
Rank	Model	Type	Share
1	Tesla Model Y	BEV	14.9%
2	Tesla Model 3	BEV	8.3%
3	Toyota Camry	Hybrid	5.3%
4	Toyota RAV4	Hybrid	4.2%
5	Honda CR-V	Hybrid	3.6%
6	Honda Prologue	BEV	2.1%
7	Hyundai Ioniq 5	BEV	2.0%
8	Honda Civic	Hybrid	1.8%
9	Honda Accord	Hybrid	1.8%
10	Toyota Sienna	Hybrid	1.8%
11	Tesla Cybertruck	BEV	1.7%
12	Toyota Prius	Hybrid	1.7%
13	Toyota Corolla	Hybrid	1.7%
14	Tesla Model X	BEV	1.6%
15	Nissan Ariya	BEV	1.5%

ALTERNATIVE POWERTRAIN MARKET

Share of Brand Registrations by Type of Powertrain - YTD 2025 thru March (top 30 brands)

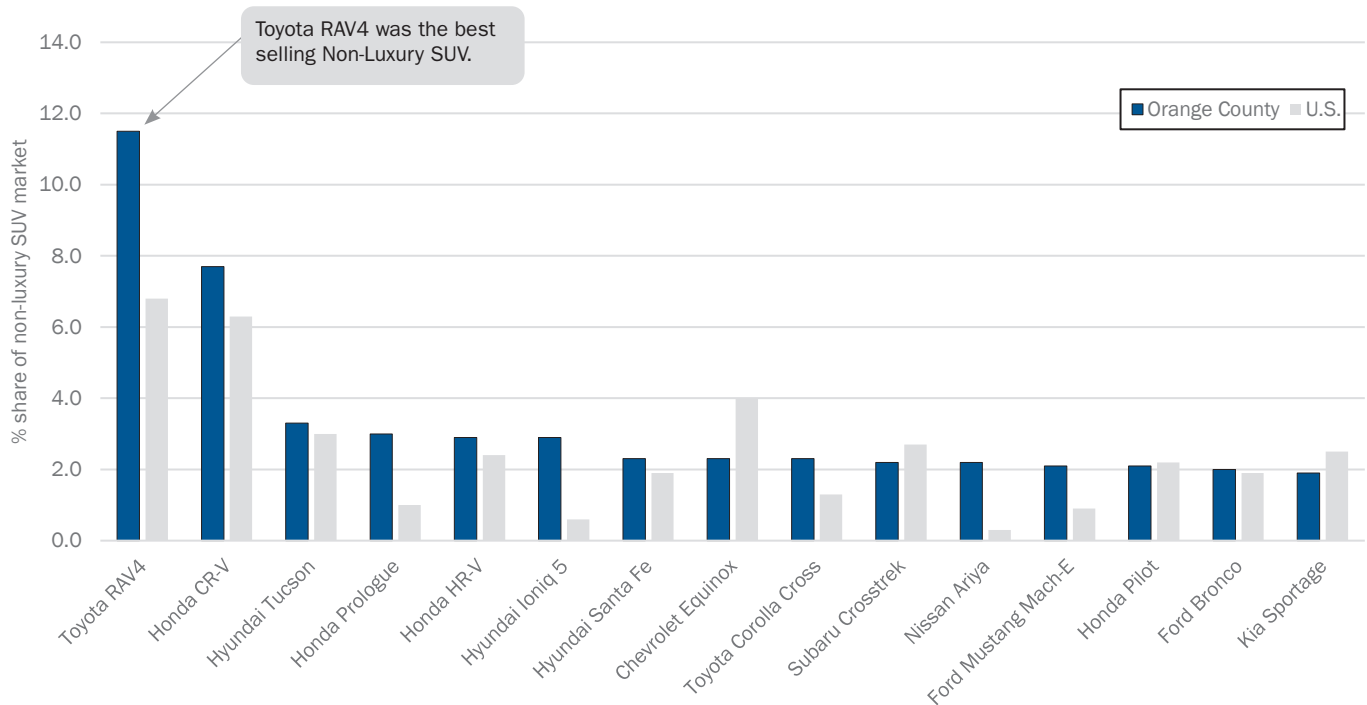
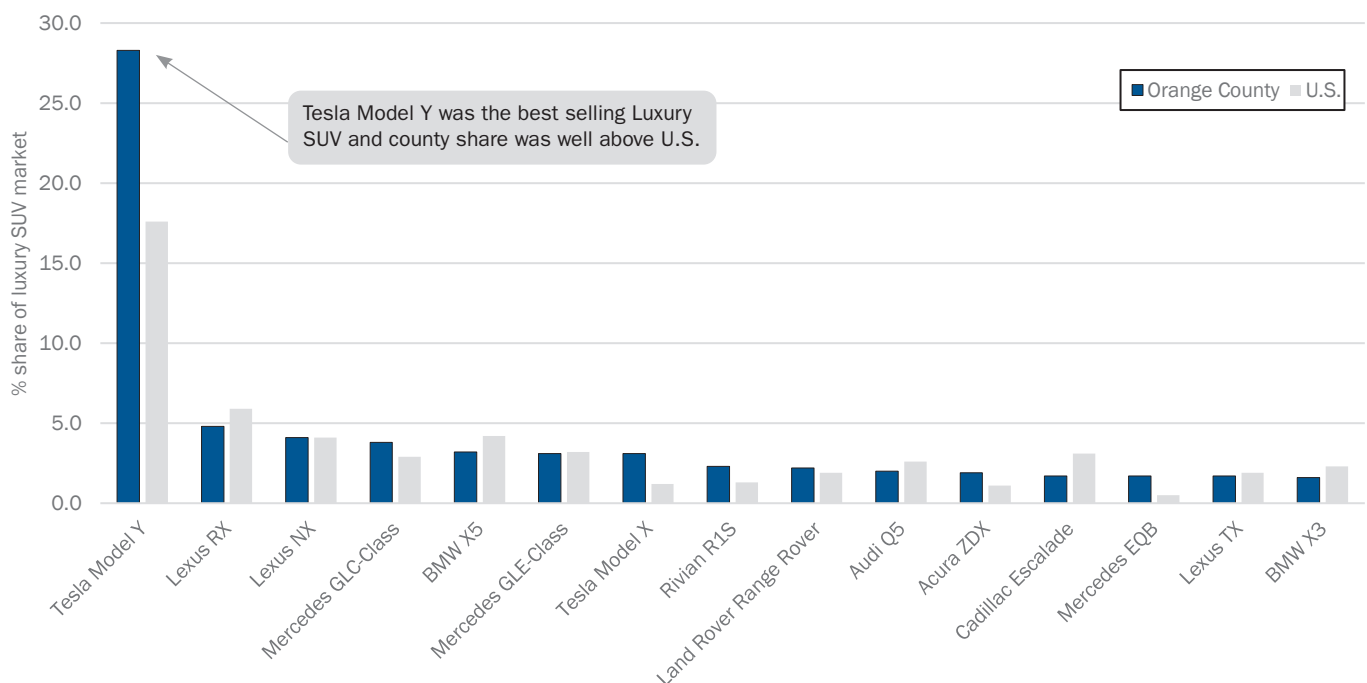


The graph above shows the breakdown of new vehicle registrations by powertrain type for each of the top 30 selling brands in the county during the first three months of 2025. The California Air Resources Board's 2035 ZEV rule (also known as Advanced Clean Cars II) starts with the 2026 model year. The rule's ZEV stringency requirement is 35%. Data sourced from Experian Automotive.

SUV MARKET SHARES

RAV4 is On Top for Non-Luxury SUVs; Model Y Has Big Lead in Luxury Segment

The two graphs below show market share in the Orange County and National Non-Luxury and Luxury SUV markets during the first three months of this year. Includes the top 15 selling models in the county market. (Note: following significant price reductions, some industry sources now classify the Tesla Model Y as a non-luxury SUV. However, it's likely that average Model Y transaction prices still exceed \$50,000, which is closer to luxury SUVs, such as the BMW X3 and Audi Q5 than it is to non-luxury models, such as the RAV4 and CR-V.)

Market Share for Top 15 Selling Non-Luxury SUVs - Orange County and U.S. Market, YTD 2025 thru March**Market Share for Top 15 Selling Luxury SUVs - Orange County and U.S. Market, YTD 2025 thru March**

Data sourced from Experian Automotive.

COMPARISON OF ORANGE COUNTY, CALIFORNIA, AND U.S. RETAIL MARKETS

Domestic Brand Share of County Market was 30.2% vs 39.7% in U.S.

	Orange County	California	U.S.
% change in registrations YTD 2025 thru March vs. YTD 2024	2.7%	4.9%	4.2%
Car share of industry retail light vehicle market YTD 2025 thru March	25.1%	26.4%	16.8%
Domestic brand market share YTD 2025 thru March	30.2%	30.5%	39.7%

Brand	New Retail Registrations - YTD 2025 thru March				Market Share (YTD '25 thru March)		
	Orange County		U.S.		Orange County	U.S.	Variance
	Regs.	% ch. vs. YTD 2024	Regs.	% ch. vs. YTD 2024			
Acura	458	69.6%	27,863	-0.5%	1.1	0.9	0.2
Alfa Romeo	17	-48.5%	1,373	-46.9%	0.0	0.0	0.0
Audi	918	-24.6%	36,931	-12.2%	2.2	1.2	1.0
BMW	1,850	-0.2%	78,323	-0.5%	4.4	2.5	1.9
Buick	91	85.7%	42,943	19.9%	0.2	1.4	-1.2
Cadillac	454	28.2%	39,442	20.2%	1.1	1.2	-0.1
Chevrolet	1,698	13.1%	334,098	8.7%	4.0	10.5	-6.5
Chry Dodge Jeep Ram	1,003	-20.0%	204,712	-2.8%	2.4	6.5	-4.1
Chrysler	41	-40.6%	9,015	-5.6%	0.1	0.3	-0.2
Dodge	83	-50.0%	14,775	-39.2%	0.2	0.5	-0.3
Jeep	516	-16.5%	104,005	-0.3%	1.2	3.3	-2.1
Ram	363	-9.5%	76,917	6.3%	0.9	2.4	-1.5
Ford	2,497	8.9%	330,649	5.0%	6.0	10.4	-4.4
Genesis	297	26.4%	16,373	20.9%	0.7	0.5	0.2
GMC	813	40.4%	136,181	24.7%	1.9	4.3	-2.4
Honda	4,147	7.5%	301,931	6.1%	9.9	9.5	0.4
Hyundai	2,081	12.1%	166,456	8.2%	5.0	5.3	-0.3
Infiniti	105	-28.1%	12,098	-2.3%	0.3	0.4	-0.1
Jaguar	19	-51.3%	1,003	-44.1%	0.0	0.0	0.0
Kia	1,675	7.9%	174,769	13.8%	4.0	5.5	-1.5
Land Rover	591	24.7%	23,315	19.6%	1.4	0.7	0.7
Lexus	1,815	-1.2%	81,427	-1.7%	4.3	2.6	1.7
Lincoln	113	-9.6%	22,595	7.0%	0.3	0.7	-0.4
Maserati	34	-19.0%	878	-43.6%	0.1	0.0	0.1
Mazda	1,051	3.2%	80,517	-1.4%	2.5	2.5	0.0
Mercedes	2,500	11.3%	68,598	12.0%	6.0	2.2	3.8
MINI	73	-29.1%	5,685	-23.5%	0.2	0.2	0.0
Mitsubishi	29	-25.6%	15,124	-11.9%	0.1	0.5	-0.4
Nissan	1,278	6.5%	135,533	-1.5%	3.0	4.3	-1.3
Polestar	29	-29.3%	1,134	14.1%	0.1	0.0	0.1
Porsche	555	25.9%	16,155	29.0%	1.3	0.5	0.8
Rivian	297	-18.2%	7,438	-23.1%	0.7	0.2	0.5
Subaru	1,101	2.4%	148,646	7.9%	2.6	4.7	-2.1
Tesla	5,592	-14.8%	137,596	-4.5%	13.3	4.3	9.0
Toyota	7,332	9.0%	416,588	-2.7%	17.5	13.1	4.4
Volkswagen	854	0.6%	71,205	7.6%	2.0	2.2	-0.2
Volvo	263	3.1%	23,340	0.0%	0.6	0.7	-0.1
Other	327	-11.9%	8,234	5.2%	0.8	0.3	0.5

The two tables above provide a comparison of the Orange County and U.S. new light vehicle markets. Data sourced from Experian Automotive.

Orange County New Retail Car and Light Truck Registrations									
	First Quarter			Annual Totals			Annual Market Share (%)		
	2024	2025	% chg.	2023	2024	% chg.	2023	2024	Chg.
MARKET SUMMARY									
TOTAL	40,859	41,957	2.7%	40,859	41,957	2.7%			
Cars	10,634	10,517	-1.1%	10,634	10,517	-1.1%	26.0	25.1	-1.0
Light Trucks	30,225	31,440	4.0%	30,225	31,440	4.0%	74.0	74.9	1.0
Domestic	13,215	12,668	-4.1%	13,215	12,668	-4.1%	32.3	30.2	-2.2
European	7,754	7,885	1.7%	7,754	7,885	1.7%	19.0	18.8	-0.2
Japanese	16,169	17,316	7.1%	16,169	17,316	7.1%	39.6	41.3	1.7
Other Asian	3,721	4,088	9.9%	3,721	4,088	9.9%	9.1	9.7	0.6
BRAND REGISTRATIONS									
Acura	270	458	69.6%	270	458	69.6%	0.7	1.1	0.4
Alfa Romeo	33	17	-48.5%	33	17	-48.5%	0.1	0.0	-0.1
Audi	1,217	918	-24.6%	1,217	918	-24.6%	3.0	2.2	-0.8
BMW	1,853	1,850	-0.2%	1,853	1,850	-0.2%	4.5	4.4	-0.1
Buick	49	91	85.7%	49	91	85.7%	0.1	0.2	0.1
Cadillac	354	454	28.2%	354	454	28.2%	0.9	1.1	0.2
Chevrolet	1,501	1,698	13.1%	1,501	1,698	13.1%	3.7	4.0	0.3
C/D/J/R	1,254	1,003	-20.0%	1,254	1,003	-20.0%	3.1	2.4	-0.7
Chrysler	69	41	-40.6%	69	41	-40.6%	0.2	0.1	-0.1
Dodge	166	83	-50.0%	166	83	-50.0%	0.4	0.2	-0.2
Jeep	618	516	-16.5%	618	516	-16.5%	1.5	1.2	-0.3
Ram	401	363	-9.5%	401	363	-9.5%	1.0	0.9	-0.1
Ford	2,292	2,497	8.9%	2,292	2,497	8.9%	5.6	6.0	0.4
Genesis	235	297	26.4%	235	297	26.4%	0.6	0.7	0.1
GMC	579	813	40.4%	579	813	40.4%	1.4	1.9	0.5
Honda	3,858	4,147	7.5%	3,858	4,147	7.5%	9.4	9.9	0.5
Hyundai	1,856	2,081	12.1%	1,856	2,081	12.1%	4.5	5.0	0.5
Infiniti	146	105	-28.1%	146	105	-28.1%	0.4	0.3	-0.1
Jaguar	39	19	-51.3%	39	19	-51.3%	0.1	0.0	-0.1
Kia	1,553	1,675	7.9%	1,553	1,675	7.9%	3.8	4.0	0.2
Land Rover	474	591	24.7%	474	591	24.7%	1.2	1.4	0.2
Lexus	1,837	1,815	-1.2%	1,837	1,815	-1.2%	4.5	4.3	-0.2
Lincoln	125	113	-9.6%	125	113	-9.6%	0.3	0.3	0.0
Maserati	42	34	-19.0%	42	34	-19.0%	0.1	0.1	0.0
Mazda	1,018	1,051	3.2%	1,018	1,051	3.2%	2.5	2.5	0.0
Mercedes	2,246	2,500	11.3%	2,246	2,500	11.3%	5.5	6.0	0.5
MINI	103	73	-29.1%	103	73	-29.1%	0.3	0.2	-0.1
Mitsubishi	39	29	-25.6%	39	29	-25.6%	0.1	0.1	0.0
Nissan	1,200	1,278	6.5%	1,200	1,278	6.5%	2.9	3.0	0.1
Polestar	41	29	-29.3%	41	29	-29.3%	0.1	0.1	0.0
Porsche	441	555	25.9%	441	555	25.9%	1.1	1.3	0.2
Rivian	363	297	-18.2%	363	297	-18.2%	0.9	0.7	-0.2
Subaru	1,075	1,101	2.4%	1,075	1,101	2.4%	2.6	2.6	0.0
Tesla	6,565	5,592	-14.8%	6,565	5,592	-14.8%	16.1	13.3	-2.8
Toyota	6,726	7,332	9.0%	6,726	7,332	9.0%	16.5	17.5	1.0
Volkswagen	849	854	0.6%	849	854	0.6%	2.1	2.0	-0.1
Volvo	255	263	3.1%	255	263	3.1%	0.6	0.6	0.0
Other	371	327	-11.9%	371	327	-11.9%	0.9	0.8	-0.1

Other includes Aston Martin, Bentley, Ferrari, Freightliner, GEM, Lamborghini, Lotus, Lucid, McLaren, and Rolls Royce. Other Asian includes Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.

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Explanation of Data

Data presented in Auto Outlook measures new vehicle registrations in Orange County. Monthly recording of registrations occurs when vehicle title information is processed.

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