Los Angeles Auto Outlook

Comprehensive information on the LA County new vehicle market

Greater Los Angeles New Car Dealers Association

FORECAST

County New Vehicle Market Predicted to Decline Slightly in 2026

Below is a list of six primary questions and answers regarding the Los Angeles County new retail light vehicle market.

How did the county market perform in 2025?
County new light vehicle registrations were flat from 2024 to 2025 versus the slight 1.0% improvement from 2023 to 2024.

What is the outlook for 2026?
Registrations for all of this year are predicted to slip below 423,000 units and decline a slim 1.4% from 2025 (see graph below).

What are the key factors impacting new vehicle sales this year?
Transaction prices nearing $50,000 make 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 (see page 3). This resulting pent-up demand, coupled with the prospects of lower interest rates, should limit any potential decline in sales this year.

Which brands posted gains during all of 2025 and which finished the year strong?
County new retail registrations for Acura, Toyota, Land Rover, Ford, Mercedes-Benz, Kia, and Chevrolet increased by more than 6% last year. BMW, Toyota, and Kia gained some momentum as the year ended, with 4Q '25 registrations increasing by more than 5% from 3Q.

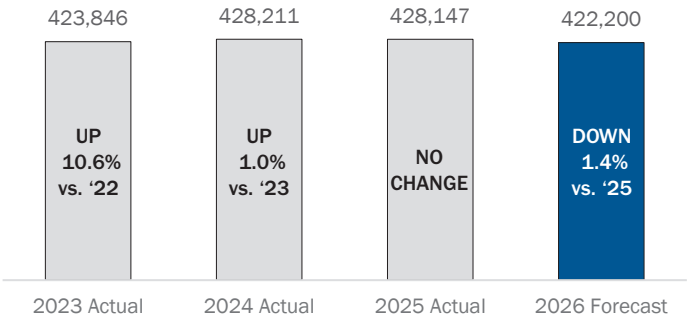
Based on a comparison to U.S. market share, which brands are strong performers in the county market?
The analysis on page 5 compares actual registrations in the county for each of the top 30 selling brands to a calculated target. The target equals county registrations required for the brand to attain the same county market share as in the Nation. Actual registrations significantly exceeded target for Tesla, Toyota, Mercedes-Benz, Honda, and BMW.

What are recent trends in the alternative powertrain vehicle market?
BEV share fell from 25.0% during January thru October of last year to 13.4% in November and December, following expiration of federal tax credits on September 30 (see page 3). Hybrid vehicle registrations increased 31% from 2024 to 2025 and market share reached 19.4%.

Six Key facts for County New Vehicle Market

1. County market was unchanged in 2025. U.S. improved 3.3%
2. Total registrations exceeded 428,000 last year, well above the recent low of 383,228 in 2022.
3. Market was down 5.0% in 4Q '25 vs. year earlier compared to the slight improvement in 3Q.
4. Toyota, Honda, Tesla, Mercedes-Benz, and Kia were market share leaders (see page 4).
5. Hybrid vehicles accounted for more than 34% of Toyota, Lexus, and Honda registrations in the Fourth Quarter of this year (see page 6).
6. Tesla Model Y, Toyota Camry, and RAV4 were top three sellers in county market. Honda Prologue had a large percentage increase from 2024 to 2025 (see page 5).

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

	2024 Annual	2025 Annual	% Chg. '24 to '25	Mkt. Share 2025
TOTAL	428,211	428,147	0.0%	
Car	132,554	126,494	-4.6%	29.5%
Light Truck	295,657	301,653	2.0%	70.5%
Domestic	118,431	111,260	-6.1%	26.0%
European	80,333	77,420	-3.6%	18.1%
Japanese	186,636	194,055	4.0%	45.3%
Other Asian	42,811	45,412	6.1%	10.6%

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 LOS ANGELES COUNTY NEW VEHICLE MARKET

COUNTY MARKET VS. U.S.

% Change In New Retail Market 2025 vs. 2024	Los Angeles County	California	U.S.
	NO CHANGE	UP 1.5%	UP 3.3%

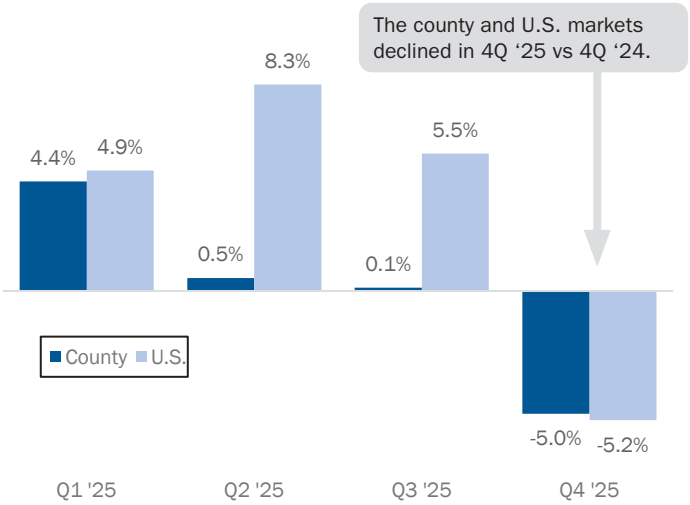
New retail light vehicle registrations in the county were essentially unchanged from 2024 to 2025. State market increased 1.5%, while U.S. was up 3.3%.

Data sourced from Experian Automotive.

QUARTERLY RESULTS

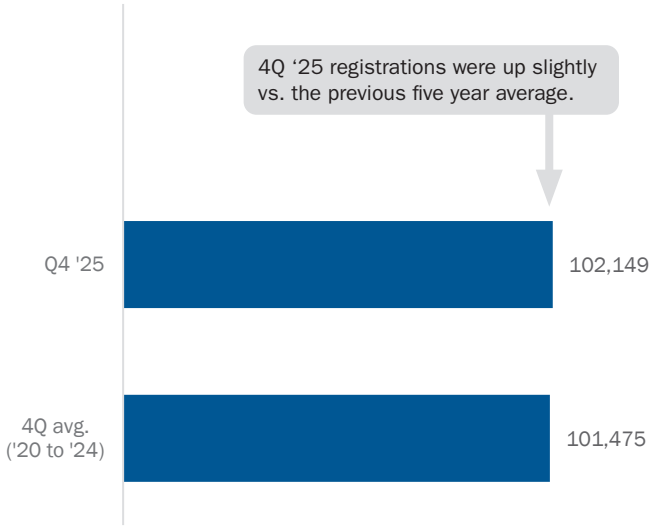
QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



QUARTERLY PERSPECTIVE

4Q '25 Registrations Versus Average for Previous Five Years



Data sourced from Experian Automotive.

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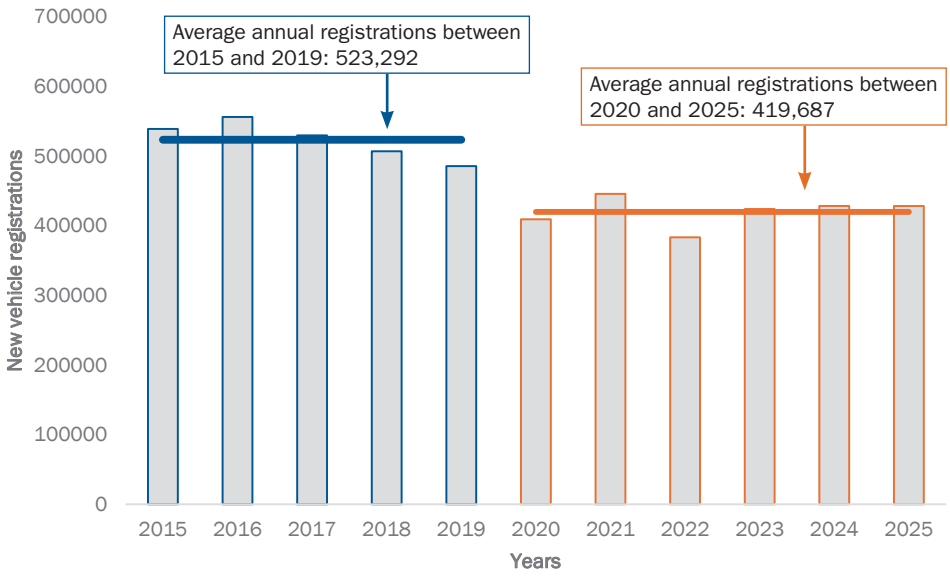
KEY TRENDS IN LOS ANGELES COUNTY NEW VEHICLE MARKET

LONG TERM RESULTS

Annual New Retail Light Vehicle Registrations in County Market - 2015 thru 2025



Data sourced from Experian Automotive.

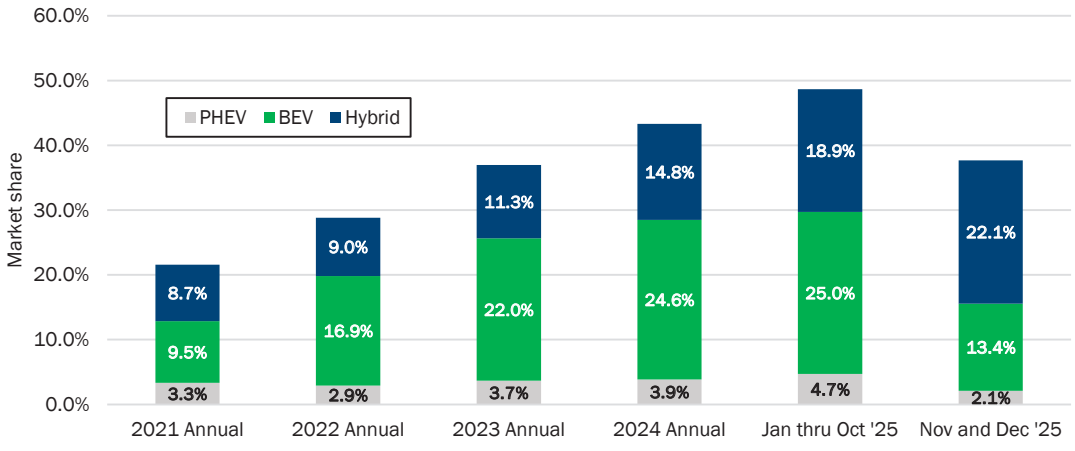
The graph on the left shows annual new retail light vehicle registrations from 2015 thru 2025. The grey bars show the actual totals in each year. The blue line represents average registrations between 2015 and 2019 and the orange line is the average between 2020 and 2025. The pandemic and subsequent supply chain issues in 2022 clearly took a toll on the market. Average registrations between 2020 and 2025 were 419,687 units, well below the previous five year average of 523,292. Postponed purchases that accrued during the past six years should provide some support for the market in 2026.

ALTERNATIVE POWERTRAIN MARKET

FIVE KEY TRENDS

1. BEV share fell from 25.0% during the first ten months of 2025 to 13.4% in November and December.
2. BEV share during all of last year was 23.5%, down from 24.6% in 2024
3. Hybrid market share increased to 22.1% in Nov and Dec of last year, up from 18.9% during the preceding 10 months.
4. Plug in Hybrid vehicle market share fell to just 2.1% during the last two months of 2025.
5. ICE vehicles accounted for 52.8% of registrations for all of last year.

Share of Industry Registrations for Alternative Powertrain Vehicles



Data sourced from Experian Automotive.

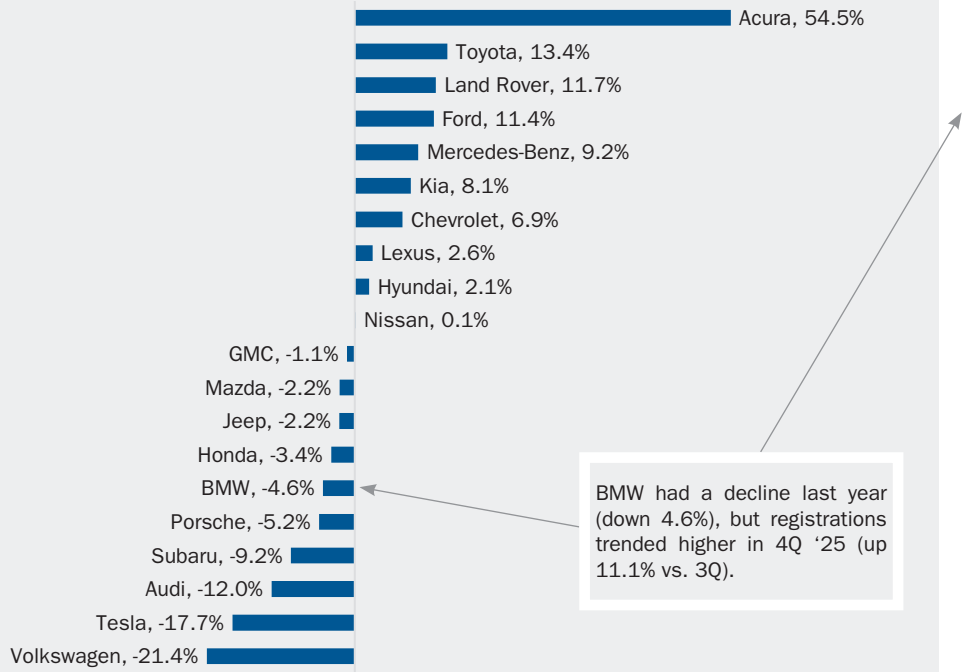
Due to customary processing delays, vehicle registration data lags the reporting of actual sales. This has impacted the measurement of BEV market share during the last few months of 2025. BEV **sales** were high in the second half of September due to the expiration of federal government tax credits, 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 22.0% vs. just 13.4% in November and December. The two-month figure is more reflective of BEV share following the expiration of the tax credits.

BRANDS AND MODELS

WINNERS AND LOSERS

The primary metric used to identify winning and losing brands is the percent change in registrations vs. year earlier, shown on the graph below. Acura and Toyota were the biggest gainers last year among the top 20 brands. But this snapshot does not capture the shorter term trend in sales. Annual registrations for a brand may have posted a decline, but if growth picked up during the most recent quarter, that's significant. The table to the right of the graph shows the ten brands with the largest increases, or smallest declines, from the third to the fourth quarters of last year. Data for all brands are shown on page 8.

% Change in County Registrations for Top 20 Brands-2025 vs. 2024



Quarterly Results

Largest % increases or smallest % declines from 3Q '25 to 4Q '25

BMW	Up	11.1%
Toyota	Up	6.8%
Kia	Up	5.8%
Nissan	Up	1.1%
Volkswagen	Up	0.8%
Land Rover	Down	0.3%
Ford	Down	1.7%
Porsche	Down	3.2%
Lexus	Down	4.2%
Jeep	Down	4.4%

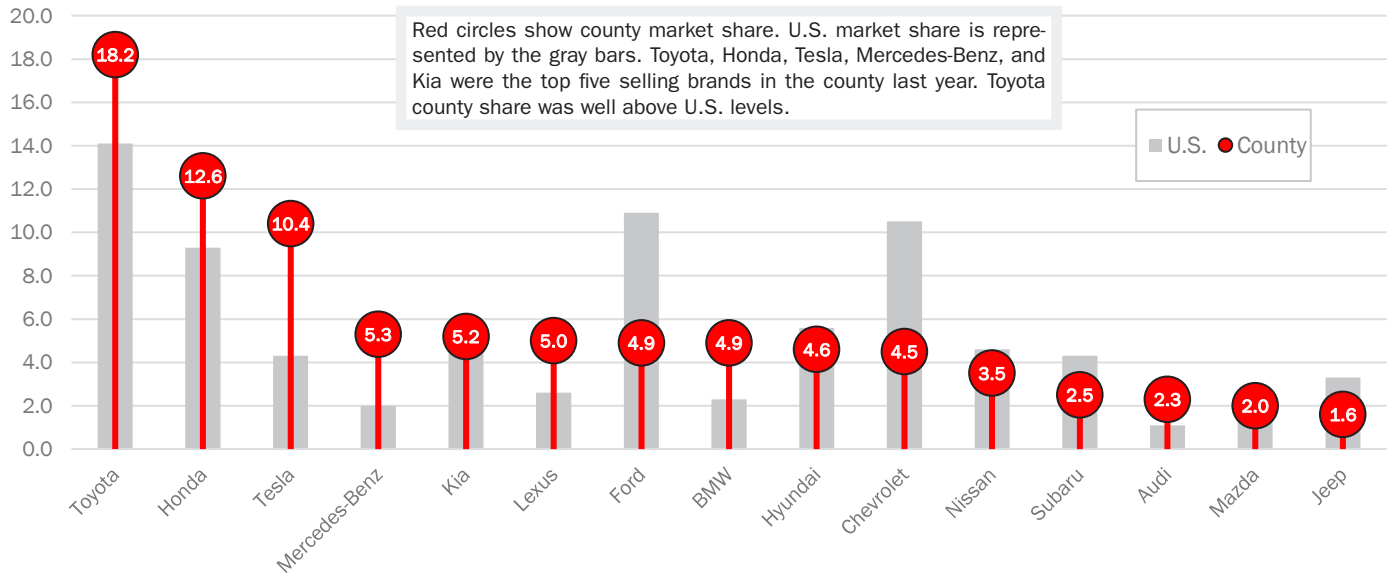
Largest % increases from 2024 to 2025: Acura, Toyota, Land Rover, Ford, and Mercedes-Benz.

Brands with increases in 4Q '25 vs. 3Q '25: BMW, Toyota, Kia, Nissan, and Volkswagen.

Data sourced from Experian Automotive.

TOP SELLING BRANDS

Los Angeles County and U.S. Market Shares for Top 15 Brands in County - 2025



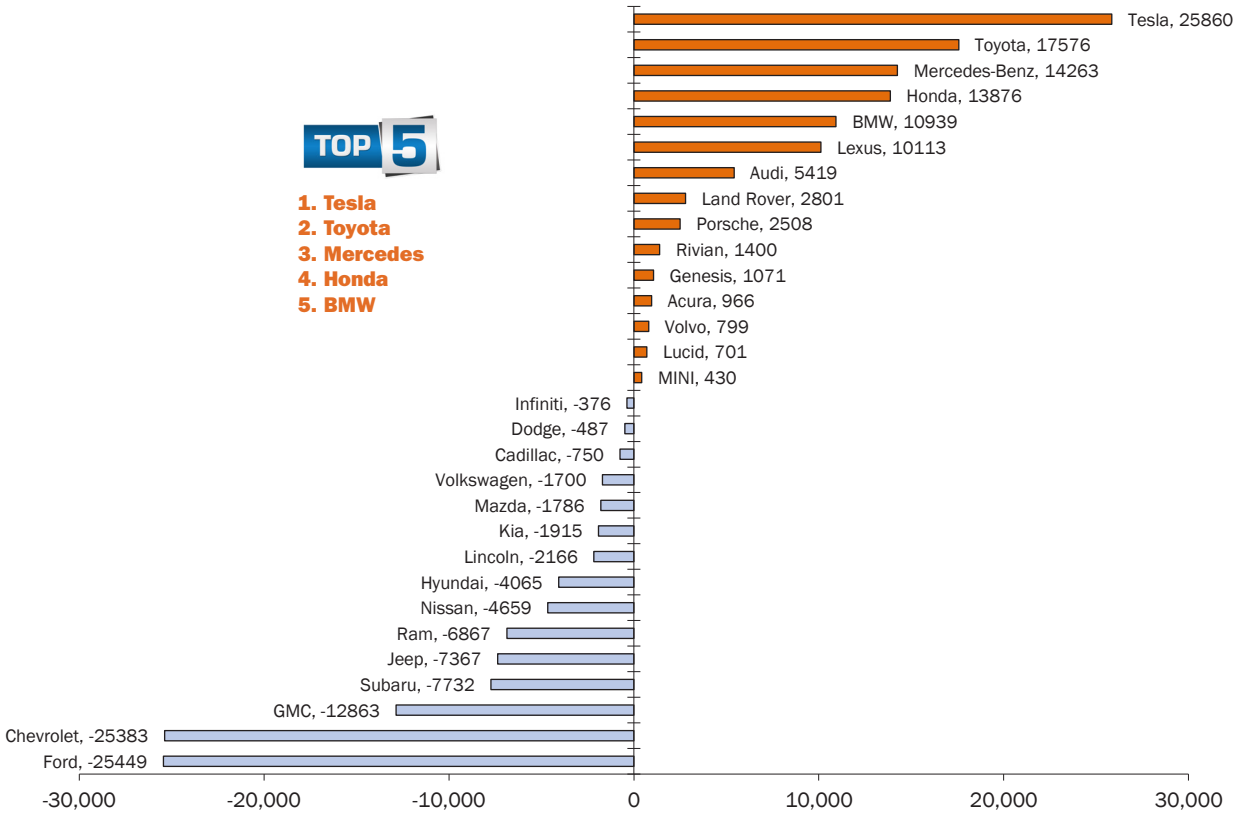
Data sourced from Experian Automotive.

BRANDS AND MODELS

BRAND SALES PERFORMANCE

The graph below provides an indicator of brands that are popular in Los Angeles County (relative to the National standard), and those that are not. Here's how it works: For the top 30 selling brands, each brand's share of the U.S. market is multiplied by industry retail registrations in the county during 2025. This yields a "target" for the county market. Target registrations are subtracted from actual registrations to derive the measurement of sales performance. Brands at the top of the graph (i.e., Tesla, Toyota, Mercedes-Benz, Honda, and BMW) are relatively strong sellers in the county, with actual registrations exceeding calculated targets by large margins. For instance, Tesla registrations exceeded the target by 25,860 units.

Los Angeles County Retail Market Performance based on registrations during 2025
Actual registrations minus target (county industry registrations times U.S. market share)



Data sourced from Experian Automotive.

TOP SELLING MODELS

Top 20 Selling Models during 2025 - Market Share and % Change in Registrations vs. 2024

Rank	Model	County Share %	% chg. '24 to '25	Rank	Model	County Share %	% chg. '24 to '25
1	Tesla Model Y	6.2	-19.8	11	Hyundai Ioniq 5	1.3	8.5
2	Toyota Camry	3.8	14.7	12	Lexus RX	1.3	-3.5
3	Toyota RAV4	3.7	3.6	13	Lexus NX	1.2	-3.6
4	Honda Civic	3.5	-6.2	14	Chevrolet Silverado	1.1	-8.4
5	Tesla Model 3	3.4	-7.3	15	Chevrolet Equinox	1.0	101.9
6	Honda CR-V	3.2	0.2	16	Honda Prologue	1.0	111.4
7	Toyota Tacoma	2.6	64.1	17	Mercedes GLC-Class	1.0	66.9
8	Toyota Corolla	2.2	1.6	18	Ford F-Series	1.0	13.6
9	Honda Accord	2.1	-9.2	19	Lexus ES	1.0	6.9
10	Honda HR-V	1.4	-20.2	20	Toyota Prius	1.0	38.9

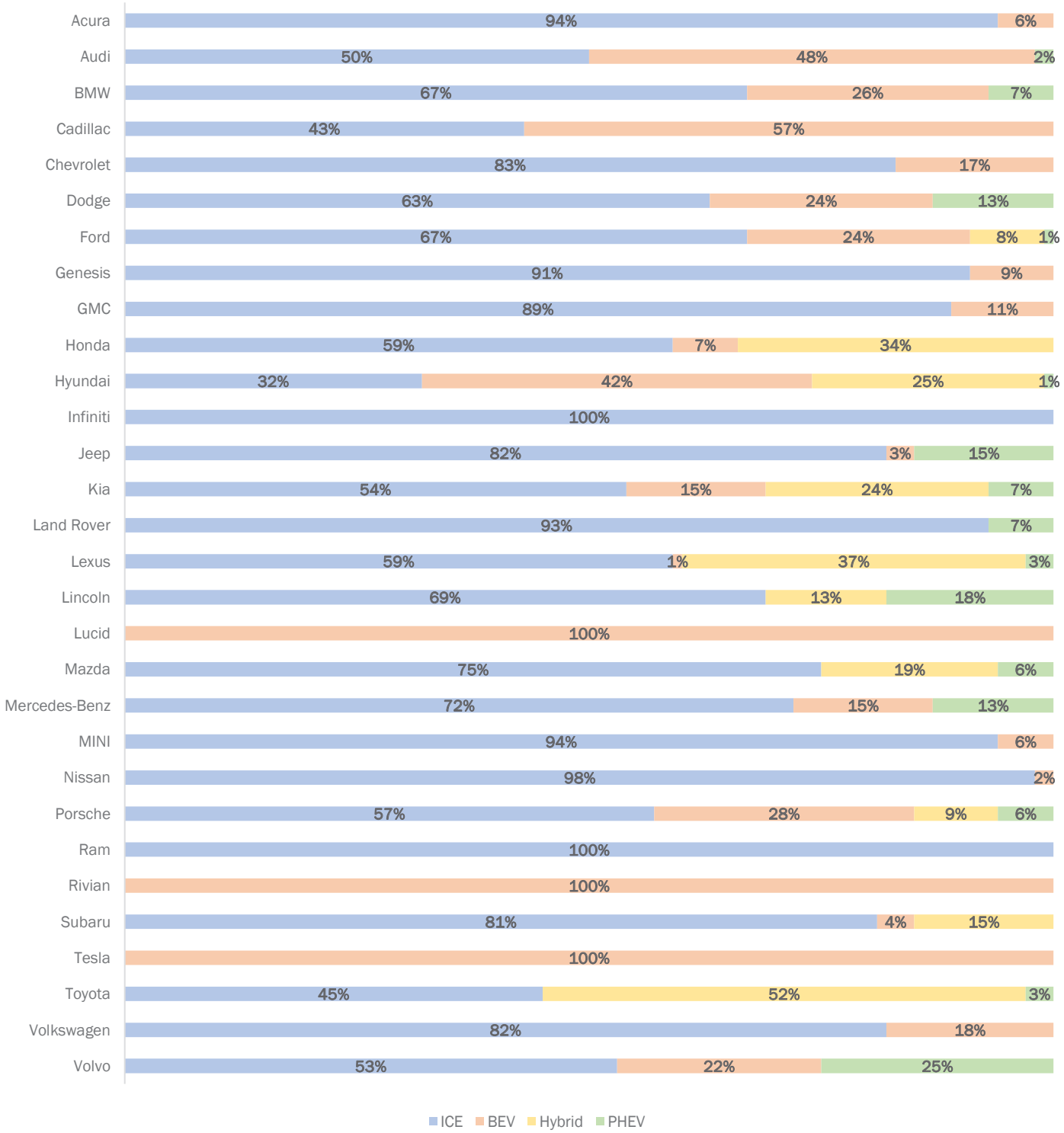
Table on the left presents the top 20 selling models in the county in 2025. Share of industry registrations and the percent change versus 2024 are also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

BRANDS AND MODELS

POWERTRAIN MARKET SHARES

Share of Brand Registrations by Type of Powertrain - Fourth Quarter 2025 (top 30 brands)

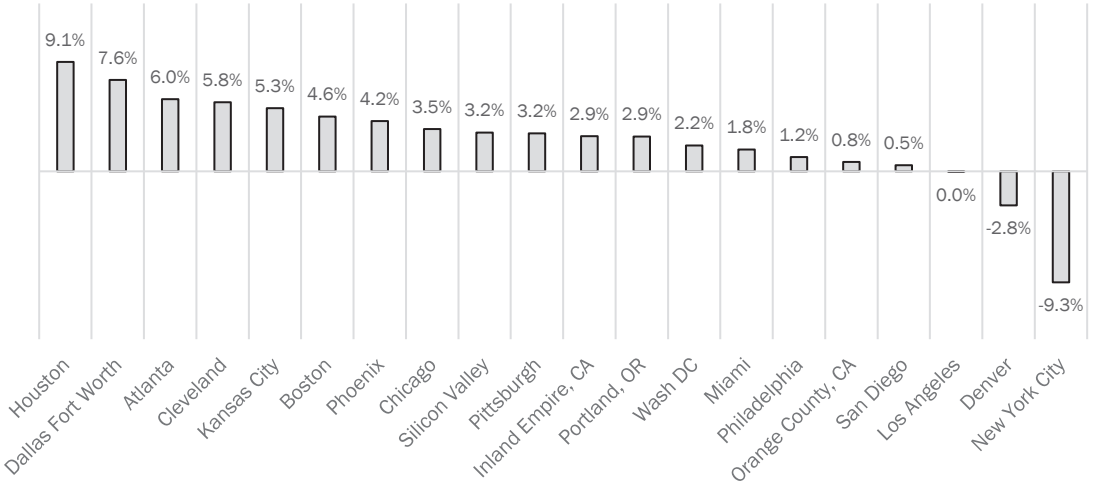


The graph above shows the breakdown of new vehicle registrations by powertrain type for each of the top 30 selling brands in the county during the fourth quarter of 2025. Data sourced from Experian Automotive.

COMPARISON OF METRO AREA MARKETS

INDUSTRY RESULTS IN 2025

Percent Change in New Retail Light Vehicle Registrations - 2025 vs. 2024



The graph on the left shows the percent change in new retail light vehicle registrations from 2024 to 2025 in 20 selected metro areas. Los Angeles County registrations were flat from 2024 to 2025, below average, but in-line with other California markets. The Houston market improved by 9.1% and the National market was up 3.3%.

Data sourced from Experian Automotive.

POWERTRAIN MARKET SHARES

Market Share by Powertrain Type in 20 Selected Metro Area Markets - November and December 2025

	ICE		Hybrid		BEV		PHEV	
Rank	Area	% share	Area	% share	Area	% share	Area	% share
1	Cleveland	84.9	Silicon Valley	29.2	Silicon Valley	23.0	Denver	2.7
2	Pittsburgh	83.1	Portland, OR	24.2	Orange County, CA	16.1	Portland, OR	2.6
3	New York City	81.6	San Diego	23.3	Los Angeles	13.4	Silicon Valley	2.6
4	Miami	80.5	Inland Empire, CA	22.5	San Diego	13.5	Los Angeles	2.1
5	Houston	79.8	Orange County, CA	22.2	Portland, OR	13.2	Orange County, CA	2.0
6	Kansas City	79.1	Los Angeles	22.1	Denver	11.8	San Diego	2.0
7	Dallas Fort Worth	77.2	Wash DC	21.1	Dallas Fort Worth	10.2	Wash DC	1.7
8	Philadelphia	76.9	Phoenix	17.2	Wash DC	9.8	Boston	1.6
9	Atlanta	75.7	Boston	17.1	Inland Empire, CA	9.5	New York City	1.4
10	Phoenix	75.6	Philadelphia	17.0	Atlanta	9.4	Philadelphia	1.4
11	Boston	75.3	Denver	16.7	Chicago	8.4	Chicago	1.2
12	Chicago	74.1	Chicago	16.3	Houston	8.2	Phoenix	1.2
13	Denver	68.8	Kansas City	14.7	Miami	8.1	Inland Empire, CA	1.1
14	Wash DC	67.4	Atlanta	13.9	Boston	6.0	Kansas City	1.1
15	Inland Empire, CA	66.9	Pittsburgh	13.9	Phoenix	6.0	Miami	1.1
16	Los Angeles	62.3	New York City	12.2	Kansas City	5.1	Atlanta	1.0
17	San Diego	61.2	Dallas Fort Worth	11.8	New York City	4.8	Cleveland	0.8
18	Portland, OR	60.0	Houston	11.3	Philadelphia	4.7	Dallas Fort Worth	0.8
19	Orange County, CA	59.7	Cleveland	10.7	Cleveland	3.6	Houston	0.7
20	Silicon Valley	45.2	Miami	10.3	Pittsburgh	2.3	Pittsburgh	0.7

The table above shows percent market share by powertrain type (internal combustion, hybrids, battery electric, and plug in hybrids) for 20 selected metro area markets during November and December of 2025. Data sourced from Experian Automotive.

Brand Registrations Report
Los Angeles County New Retail 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	107,480	102,149	-5.0				428,211	428,147	0.0			
Cars	33,261	29,999	-9.8	30.9	29.4	-1.5	132,554	126,494	-4.6	31.0	29.5	-1.5
Light Trucks	74,219	72,150	-2.8	69.1	70.6	1.5	295,657	301,653	2.0	69.0	70.5	1.5
Domestic Brands	28,048	26,385	-5.9	26.0	25.8	-0.2	118,431	111,260	-6.1	27.6	26.0	-1.6
European Brands	20,698	17,937	-13.3	19.3	17.6	-1.7	80,333	77,420	-3.6	18.8	18.1	-0.7
Japanese Brands	47,156	46,290	-1.8	43.9	45.3	1.4	186,636	194,055	4.0	43.6	45.3	1.7
Other Asian Brands	11,578	11,537	-0.4	10.8	11.3	0.5	42,811	45,412	6.1	10.0	10.6	0.6
Acura	847	944	11.5	0.8	0.9	0.1	3,098	4,785	54.5	0.7	1.1	0.4
Alfa Romeo	87	45	-48.3	0.1	0.0	-0.1	490	215	-56.1	0.1	0.1	0.0
Audi	2,624	2,123	-19.1	2.4	2.1	-0.3	11,287	9,930	-12.0	2.6	2.3	-0.3
BMW	5,627	5,184	-7.9	5.2	5.1	-0.1	22,010	20,993	-4.6	5.1	4.9	-0.2
Buick	278	163	-41.4	0.3	0.2	-0.1	855	809	-5.4	0.2	0.2	0.0
Cadillac	983	1,118	13.7	0.9	1.1	0.2	3,623	4,386	21.1	0.8	1.0	0.2
Chevrolet	5,107	4,365	-14.5	4.8	4.3	-0.5	18,209	19,464	6.9	4.3	4.5	0.2
Chrysler	125	89	-28.8	0.1	0.1	0.0	602	375	-37.7	0.1	0.1	0.0
Dodge	391	319	-18.4	0.4	0.3	-0.1	2,559	1,279	-50.0	0.6	0.3	-0.3
Ford	4,664	5,162	10.7	4.3	5.1	0.8	18,944	21,111	11.4	4.4	4.9	0.5
Genesis	561	911	62.4	0.5	0.9	0.4	2,113	3,244	53.5	0.5	0.8	0.3
GMC	1,440	1,161	-19.4	1.3	1.1	-0.2	5,200	5,141	-1.1	1.2	1.2	0.0
Honda	13,975	12,223	-12.5	13.0	12.0	-1.0	55,791	53,890	-3.4	13.0	12.6	-0.4
Hyundai	5,074	4,865	-4.1	4.7	4.8	0.1	19,320	19,718	2.1	4.5	4.6	0.1
Ineos	64	79	23.4	0.1	0.1	0.0	253	269	6.3	0.1	0.1	0.0
Infiniti	406	227	-44.1	0.4	0.2	-0.2	1,749	1,091	-37.6	0.4	0.3	-0.1
Jeep	1,758	1,607	-8.6	1.6	1.6	0.0	6,876	6,722	-2.2	1.6	1.6	0.0
Kia	5,590	5,751	2.9	5.2	5.6	0.4	20,626	22,296	8.1	4.8	5.2	0.4
Land Rover	1,371	1,204	-12.2	1.3	1.2	-0.1	4,813	5,378	11.7	1.1	1.3	0.2
Lexus	4,650	5,025	8.1	4.3	4.9	0.6	20,722	21,256	2.6	4.8	5.0	0.2
Lincoln	276	200	-27.5	0.3	0.2	-0.1	1,162	999	-14.0	0.3	0.2	-0.1
Lucid	189	308	63.0	0.2	0.3	0.1	718	1,017	41.6	0.2	0.2	0.0
Mazda	2,129	1,754	-17.6	2.0	1.7	-0.3	8,959	8,764	-2.2	2.1	2.0	-0.1
Mercedes-Benz	6,040	5,241	-13.2	5.6	5.1	-0.5	20,907	22,829	9.2	4.9	5.3	0.4
MINI	319	294	-7.8	0.3	0.3	0.0	1,211	1,228	1.4	0.3	0.3	0.0
Mitsubishi	203	107	-47.3	0.2	0.1	-0.1	869	694	-20.1	0.2	0.2	0.0
Nissan	3,769	3,652	-3.1	3.5	3.6	0.1	15,066	15,080	0.1	3.5	3.5	0.0
Polestar	57	72	26.3	0.1	0.1	0.0	607	378	-37.7	0.1	0.1	0.0
Porsche	1,282	977	-23.8	1.2	1.0	-0.2	4,695	4,452	-5.2	1.1	1.0	-0.1
Ram	755	783	3.7	0.7	0.8	0.1	2,940	3,185	8.3	0.7	0.7	0.0
Rivian	674	528	-21.7	0.6	0.5	-0.1	2,669	2,399	-10.1	0.6	0.6	0.0
Subaru	2,783	2,205	-20.8	2.6	2.2	-0.4	11,824	10,732	-9.2	2.8	2.5	-0.3
Tesla	11,373	10,576	-7.0	10.6	10.4	-0.2	53,847	44,323	-17.7	12.6	10.4	-2.2
Toyota	18,394	20,153	9.6	17.1	19.7	2.6	68,558	77,763	13.4	16.0	18.2	2.2
Volkswagen	1,950	1,577	-19.1	1.8	1.5	-0.3	8,513	6,690	-21.4	2.0	1.6	-0.4
Volvo	884	856	-3.2	0.8	0.8	0.0	3,806	3,723	-2.2	0.9	0.9	0.0
Other	781	301	-61.5	0.7	0.3	-0.4	2,720	1,539	-43.4	0.6	0.4	-0.2

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

Los Angeles Auto Outlook

Published for:
Greater Los Angeles New Car Dealers Assoc.
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Montrose, CA 91020

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Published by:
Auto Outlook, Inc.
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Exton, PA 19341

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