Washington Auto Outlook

Sponsored by: Washington Area New Automobile Dealers Association

FORECAST

Area New Vehicle Market Predicted to Increase Slightly in 2nd Half of Year

Year-to-date results in area market

Washington area new retail light vehicle registrations declined 11.4% during the first six months of this year versus a year earlier, steeper than the 6% drop in the nation. Second quarter registrations this year were off 7.5% compared to 2Q '25, an improvement from the 15.6% drop in the First Quarter.

Factors steering the new vehicle market

It might sound like a broken record because we have been emphasizing it for a long time, but pent-up demand resulting from delayed purchases during the pandemic will continue to support the market for the foreseeable future. The vehicle fleet continues to age, and as a result, replacement demand will place a floor on how low sales can go - which is a good thing because other key determinants are pointing to a softening market. 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. Increasing costs and inflationary pressures resulting from tariffs, higher gas prices, and an uncertain economy are other headwinds. It's a complicated forecast scenario, and there is heightened uncertainty due to changing federal government policies and geopolitical events, but it seems likely that the new vehicle market will drift lower this year while avoiding a significant decline.

Forecast for rest of this year

New retail light vehicle registrations in the second half of this year have a chance to improve versus year earlier. Third quarter results should be weaker compared to 3Q '25, while an increase is possible in the fourth quarter. Annual registrations this year are predicted to exceed 207,000 units and decline 5.2% from 2025.

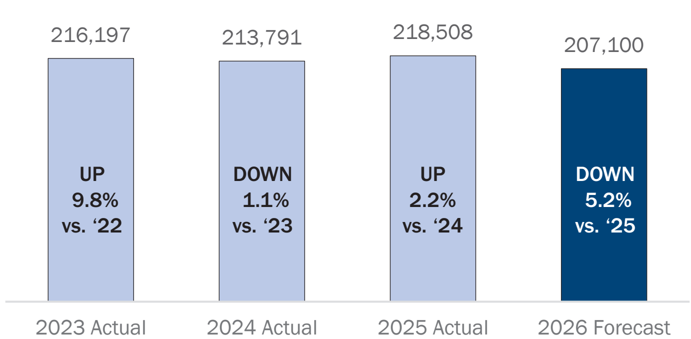
Tracking alternative powertrain sales

Battery electric vehicle registrations declined 33% 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 13.5% in 3Q '25 (before expiration of the federal government tax credits), to 7.6% in the first quarter of this year, but then increased to 10.7% in the second quarter. Hybrid vehicles continued to post gains, with registrations improving 5.7% in the first half of this year and market share reaching 23.3%.

Monitoring brand sales performance

Among the top 20 sellers, Nissan was the only brand to post an increase in registrations in the first half of this year versus year. Ram, BMW, Toyota, and Mazda each declined by less than 5%. Toyota, Honda, Ford, Kia, and Hyundai were top selling brands (see page 4). Based on a comparison to U.S. market share, Honda, Toyota, Lexus, BMW, and Tesla are strong performing brands in the area market (see page 5).

Forecast for Area 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

	YTD '25 thru June	YTD '26 thru June	% Chg. '25 to '26	Mkt. Share YTD '26
TOTAL	110,583	97,966	-11.4%	
Car	23,018	19,755	-14.2%	20.2%
Light Truck	87,565	78,211	-10.7%	79.8%
Domestic	29,101	24,561	-15.6%	25.0%
European	15,639	12,698	-18.8%	13.0%
Japanese	51,619	47,981	-7.0%	49.0%
Other Asian	14,224	12,726	-10.5%	13.0%

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 WASHINGTON AREA NEW VEHICLE MARKET

AREA MARKET VS. U.S.

% Change In New Retail Market YTD '26 thru June vs. YTD '25	Washington Area	U.S.
	DOWN 11.4%	**DOWN 6.0%**

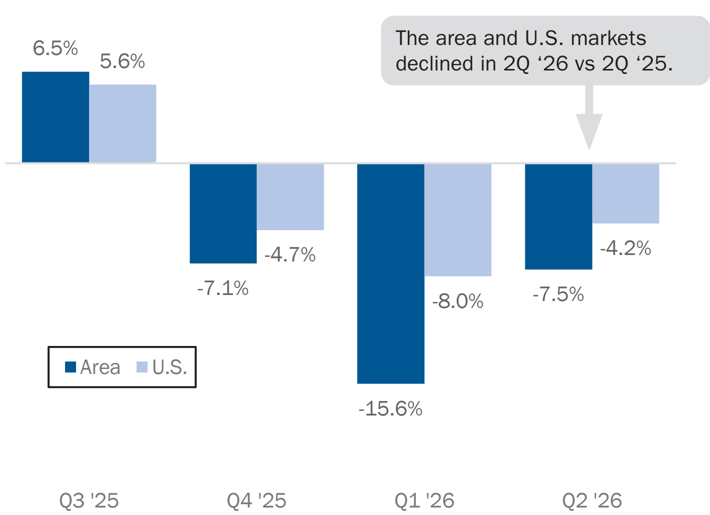
New retail light vehicle registrations in the area fell 11.4% during the first six months of this year versus year earlier, a steeper decline than the 6% drop in the Nation.

Data sourced from Experian Automotive.

QUARTERLY RESULTS

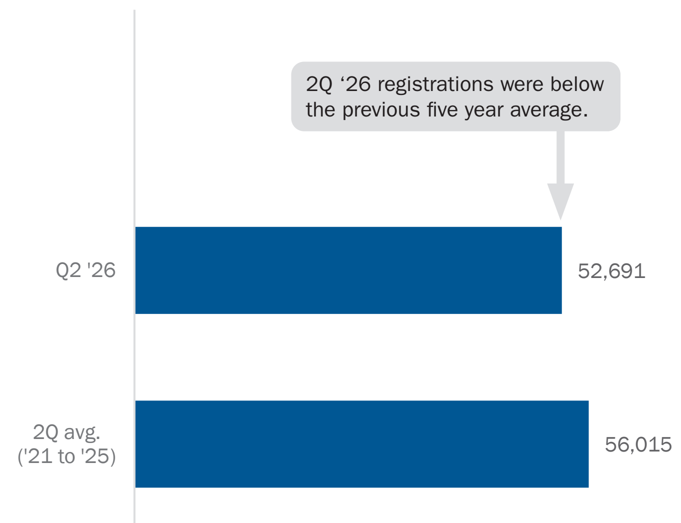
QUARTERLY TREND

Percent Change in Registrations vs. Year Earlier



QUARTERLY PERSPECTIVE

2Q '26 Registrations Versus 2Q Average for Previous Five Years



Data sourced from Experian Automotive.

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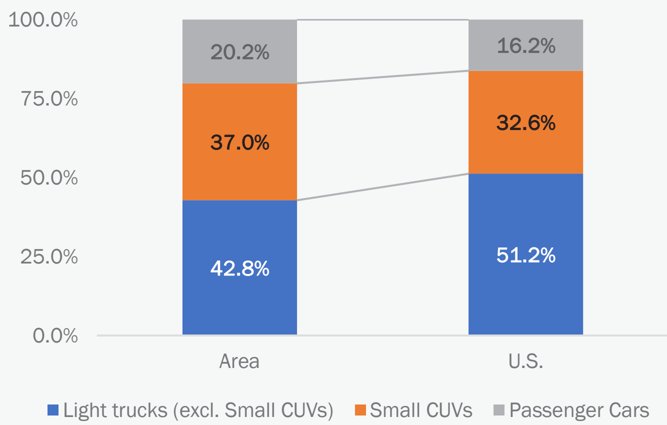
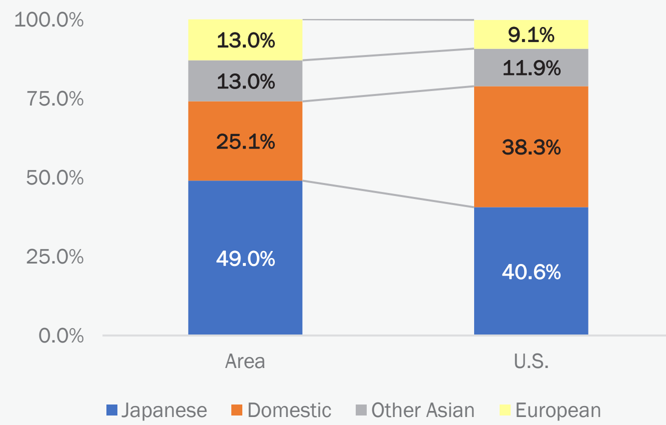
VEHICLE AND BRAND SEGMENTS - AREA AND U.S. (YTD '26 THRU JUNE)

Market Share by Type of Vehicle

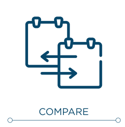


Combining the blue and orange sections in the graph above corresponds to the standard industry definition of light trucks. Small crossovers are broken out, however, since many are more similar to compact hatchbacks than to trucks. Small CUV share was **37.0%** during the first half of this year, higher than the **32.6%** share in the U.S. Data sourced from Experian Automotive.

Domestic, European, Japanese, & Other Asian Share



Japanese brand market share in the area was higher than U.S. levels: **49.0%** vs. **40.6%**. Area Domestic brand share (which includes Tesla and Rivian) was **25.1%** in the first half of this year. Other Asian and European brands accounted for a higher share of the area market than in the Nation. Note: Other Asian includes Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.



COMPARISON OF METRO AREA MARKETS - SEGMENT MARKET SHARES

Market Share for Primary Segments in 20 Selected Metro Area Markets - YTD 2026 thru June

	Mainstream Passenger Cars		Mainstream Small SUVs		Mainstream Mid and Full Size SUVs		Pickup Trucks		Luxury Segments	
Rank	Area	% share	Area	% share	Area	% share	Area	% share	Area	% share
1	Los Angeles	19.1	Cleveland	37.9	Denver	22.4	Houston	23.6	Silicon Valley	43.0
2	San Diego	16.2	Pittsburgh	37.6	Kansas City	22.0	Dallas Fort Worth	22.1	Orange County, CA	36.1
3	Atlanta	15.7	Boston	33.8	St. Louis	21.5	Kansas City	20.7	Los Angeles	33.5
4	Washington, DC	15.5	Chicago	33.8	Pittsburgh	20.8	Phoenix	19.8	Miami	31.1
5	Orange County, CA	15.3	Philadelphia	33.8	Philadelphia	20.2	St. Louis	19.3	New York City	28.1
6	Phoenix	15.1	Portland, OR	33.3	Cleveland	20.1	Pittsburgh	18.9	San Diego	26.7
7	Silicon Valley	15.0	New York City	31.6	New York City	19.9	Cleveland	17.6	Washington, DC	23.6
8	Miami	14.6	Denver	30.9	Atlanta	19.7	Atlanta	17.5	Philadelphia	21.2
9	Dallas Fort Worth	13.4	St. Louis	30.1	Chicago	19.4	Denver	17.0	Phoenix	21.0
10	Houston	13.2	Kansas City	28.8	Houston	19.4	Portland, OR	16.0	Denver	20.8
11	Chicago	12.7	Washington, DC	28.6	Dallas Fort Worth	19.2	San Diego	14.6	Chicago	20.4
12	Cleveland	11.2	Miami	26.4	Boston	19.0	Boston	13.3	Boston	20.1
13	Kansas City	10.9	San Diego	24.9	Portland, OR	18.8	Orange County, CA	11.3	Atlanta	19.9
14	Portland, OR	10.8	Atlanta	24.2	Phoenix	18.5	Miami	10.9	Dallas Fort Worth	19.9
15	Philadelphia	10.8	Los Angeles	23.3	Washington, DC	18.3	Philadelphia	10.5	Houston	19.9
16	St. Louis	10.5	Dallas Fort Worth	23.1	Miami	14.9	Washington, DC	10.0	Portland, OR	16.9
17	Boston	10.3	Phoenix	22.8	San Diego	14.4	Chicago	9.7	Kansas City	14.0
18	Pittsburgh	9.1	Houston	21.7	Orange County, CA	13.1	Los Angeles	9.6	St. Louis	13.3
19	New York City	9.0	Orange County, CA	20.9	Los Angeles	11.9	Silicon Valley	7.3	Pittsburgh	11.0
20	Denver	6.0	Silicon Valley	20.4	Silicon Valley	10.6	New York City	6.9	Cleveland	10.0

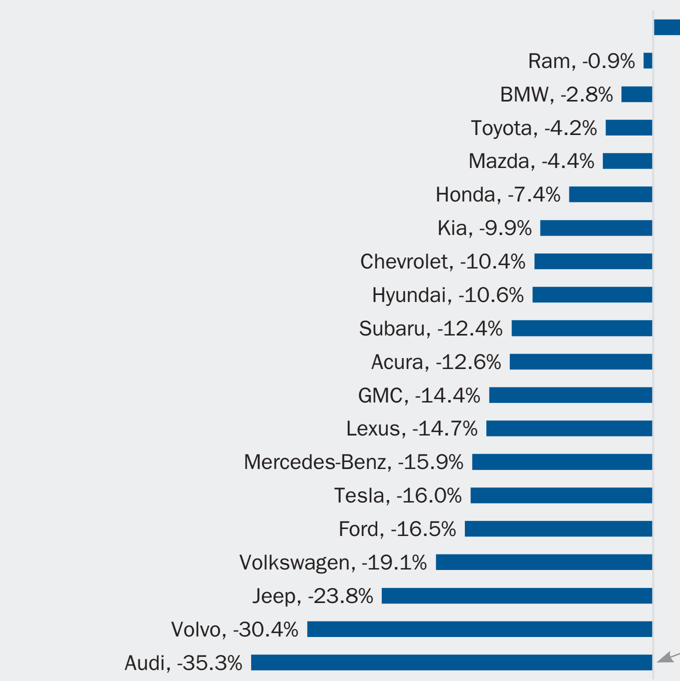
The table above shows percent market share for five primary segments in 20 selected metro area markets during the first half of this year. Data sourced from Experian Automotive.

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. Nissan was the only brand with an increase in the first half of this year among the top 20 brands. But this snapshot does not capture the shorter term trend in sales. Year to date registrations for a brand may have posted a decline, but if growth picked up during the most recent quarter, that's significant. The table below shows the ten brands with the largest increases, or smallest declines, from the first to the second quarters of last year. Data for all brands are shown on page 8.

% Change in Area Registrations for Top 20 Brands - YTD '26 thru Jun. vs. YTD '25



Audi had a relatively big decline in the first half of '26 (down 35.3%), but registrations trended higher in 2Q (up 22.9% vs. 1Q).

Quarterly Results

Largest % increases from 1Q '26 to 2Q '26

Tesla	Up	78.4%
Honda	Up	32.4%
Mazda	Up	25.0%
Acura	Up	23.5%
Audi	Up	22.9%
Kia	Up	21.3%
Mercedes-Benz	Up	18.5%
Subaru	Up	18.1%
Jeep	Up	14.3%
Toyota	Up	13.8%

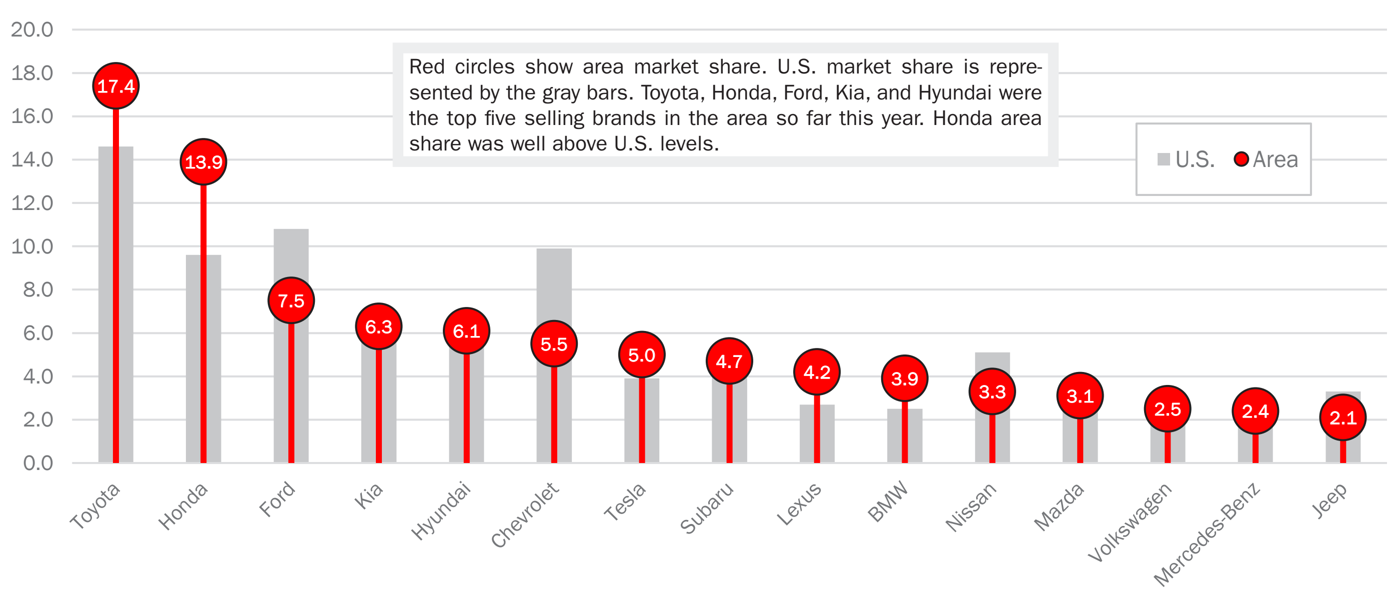
Only brand with an increase during YTD '26 vs. YTD '25: Nissan.

Largest % increases in 2Q '26 vs. 1Q '26: Tesla, Honda, Mazda, Acura, and Audi.

Data sourced from Experian Automotive.

TOP SELLING BRANDS

Washington Area and U.S. Market Shares for Top 15 Brands in Area - YTD '26 thru June



Red circles show area market share. U.S. market share is represented by the gray bars. Toyota, Honda, Ford, Kia, and Hyundai were the top five selling brands in the area so far this year. Honda area share was well above U.S. levels.

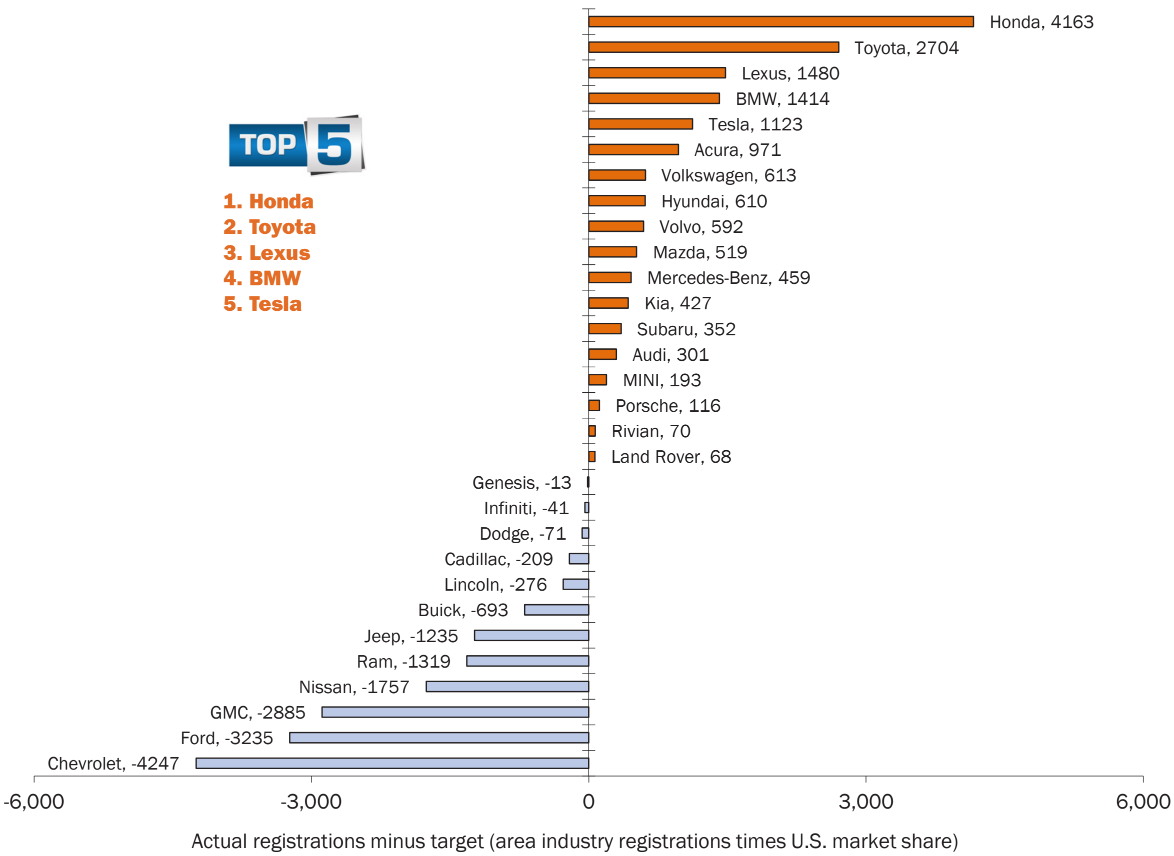
Data sourced from Experian Automotive.

BRANDS AND MODELS

BRAND SALES PERFORMANCE

The graph below provides an indicator of brands that are popular in the Washington Area (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 area during the first six months of this year. This yields a "target" for the area market. Target registrations are subtracted from actual registrations to derive the measurement of sales performance. Brands at the top of the graph (i.e., Honda, Toyota, Lexus, BMW, and Tesla) are relatively strong sellers in the area, with actual registrations exceeding calculated targets by large margins. For instance, Honda registrations exceeded the target by 4,163 units.

Washington Area Retail Market Performance based on registrations during YTD 2026 thru June
Actual registrations minus target (area industry registrations times U.S. market share)



Data sourced from Experian Automotive.

TOP SELLING MODELS

Top 20 Selling Models during YTD '26 thru June - Market Share and % Change in Registrations vs. YTD '25

Rank	Model	Area Share %	% chg. '25 to '26	Rank	Model	Area Share %	% chg. '25 to '26
1	Honda CR-V	4.9	-7.4	11	Toyota Grand Highlander	1.6	21.9
2	Tesla Model Y	3.9	3.0	12	Lexus RX	1.5	-4.3
3	Toyota RAV4	3.2	-34.1	13	Honda HR-V	1.5	-7.1
4	Toyota Camry	2.7	-0.3	14	Toyota Tacoma	1.5	0.8
5	Honda Civic	2.7	5.0	15	Kia Sportage	1.5	4.6
6	Toyota Corolla	2.2	6.7	16	Chevrolet Silverado	1.4	1.5
7	Ford F-Series	2.1	-12.3	17	Subaru Crosstrek	1.4	-8.4
8	Honda Accord	1.8	1.6	18	Kia Telluride	1.4	16.8
9	Subaru Forester	1.8	8.1	19	Toyota Corolla Cross	1.3	23.1
10	Hyundai Tucson	1.7	-11.4	20	Honda Pilot	1.2	-6.2

Table on the left presents the top 20 selling models in the area during the first six months of this year. Share of industry registrations and the percent change versus the same period a year earlier are also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

BRANDS AND MODELS

SEGMENT LEADERS

The table below shows the top five selling models during the first six months of this year in 20 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

Mid Size & Large Cars: Toyota Camry

Full Size Pickup: Ford F-Series

Subcompact SUV: Honda HR-V

Compact SUV: Honda CR-V

3 Row Mid Size SUV: Grand Highlander

Luxury Compact SUV: Tesla Model Y

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	2614	29.1	Toyota Camry	2649	47.9	Ford Mustang	385	56.0	Tesla Model 3	653	21.4
Toyota Corolla	2154	24.0	Honda Accord	1790	32.4	Toyota 86	93	13.5	Acura Integra	399	13.1
Hyundai Elantra	975	10.8	Kia K5	408	7.4	Mazda MX5	82	11.9	BMW 3-Series	343	11.3
Kia K4	675	7.5	Hyundai Sonata	334	6.0	Toyota Supra	45	6.5	Lexus IS	237	7.8
Nissan Sentra	543	6.0	Nissan Altima	128	2.3	Honda Prelude	37	5.4	Lexus ES	220	7.2

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	184	12.2	Toyota Tacoma	1450	40.0	Ford F-Series	2024	33.0	Toyota Sienna	1025	36.4
Chevrolet Corvette	184	12.2	Ford Maverick	745	20.5	Chevrolet Silverado	1396	22.8	Kia Carnival	780	27.7
Mercedes E-Class	154	10.2	Chevrolet Colorado	354	9.8	Ram Pickup	991	16.2	Honda Odyssey	746	26.5
Porsche 911	151	10.0	Ford Ranger	333	9.2	Toyota Tundra	785	12.8	Chrysler Pacifica	151	5.4
Tesla Model S	143	9.5	Nissan Frontier	237	6.5	GMC Sierra	664	10.8	Volkswagen ID.Buzz	67	2.4

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	675	55.9	Honda HR-V	1456	19.0	Honda CR-V	4796	23.6	Hyundai Santa Fe	955	19.4
Ram Promaster	166	13.8	Subaru Crosstrek	1355	17.7	Toyota RAV4	3122	15.3	Toyota 4Runner	857	17.4
Mercedes Sprinter	146	12.1	Toyota Corolla Cross	1232	16.1	Subaru Forester	1733	8.5	Subaru Outback	793	16.1
Chevrolet Express	139	11.5	Chevrolet Trax	775	10.1	Hyundai Tucson	1648	8.1	Jeep Grand Cherokee	570	11.6
Ford E-Series	45	3.7	Nissan Kicks	445	5.8	Kia Sportage	1423	7.0	Honda Passport	446	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
Toyota Grand Highlan	1534	15.2	Ford Bronco	816	28.1	Acura ADX	416	28.2	Tesla Model Y	3858	47.2
Kia Telluride	1331	13.2	Chevrolet Suburban	439	15.1	BMW X1	324	22.0	Lexus NX	838	10.3
Honda Pilot	1194	11.9	Chevrolet Tahoe	391	13.4	Audi Q3	175	11.9	BMW X3	769	9.4
Hyundai Palisade	982	9.8	Ford Expedition	324	11.1	Volvo XC40	158	10.7	Mercedes GLC-Class	595	7.3
Ford Explorer	787	7.8	Toyota Land Cruiser	255	8.8	Lexus UX	107	7.3	Volvo XC60	462	5.7

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	1475	22.5	Lexus TX	655	28.3	Toyota Camry	2649	13.4	Honda CR-V	4796	6.1
BMW X5	894	13.6	BMW X7	314	13.6	Honda Civic	2614	13.2	Tesla Model Y	3858	4.9
Acura MDX	642	9.8	Cadillac Escalade	274	11.8	Toyota Corolla	2154	10.9	Toyota RAV4	3122	4.0
Mercedes GLE-Class	595	9.1	Land Rover Range Ro	196	8.5	Honda Accord	1790	9.1	Ford F-Series	2024	2.6
Volvo XC90	391	6.0	Rivian R1S	191	8.3	Hyundai Elantra	975	4.9	Subaru Forester	1733	2.2

Data sourced from Experian Automotive.

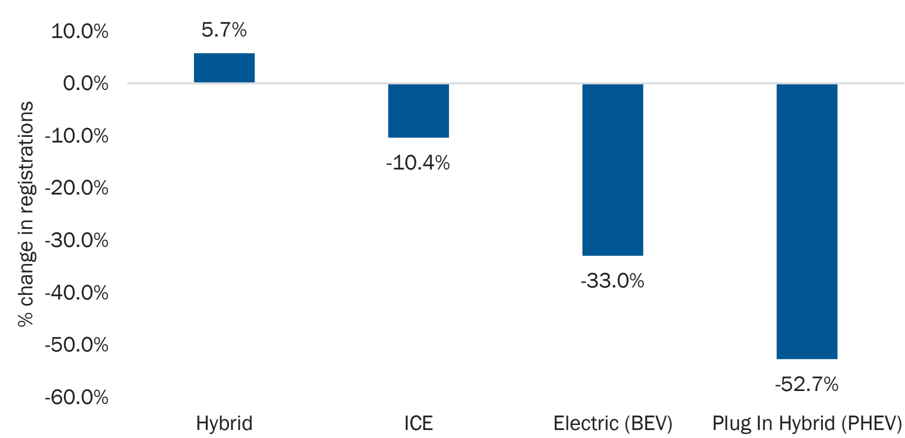
POWERTRAINS

FIVE KEY TRENDS

1. BEV registrations declined 33% during the first six months of 2026 vs. year earlier.
2. BEV market share was 10.7% in 2Q '26, up from 7.6% in the first quarter.
3. Hybrid vehicle registrations increased 5.7% so far this year vs. the 11.4% drop in the overall market.
4. ICE vehicle market share increased slightly from 65.0% in the first half of 2025 to 65.6% this year.
5. Franchised dealerships accounted for 84.2% of alternative powertrain sales so far this year (see below).

ICE, BEV, PHEV, AND HYBRID MARKET SHARE

% Change in Registrations by Powertrain Type YTD '26 thru June vs YTD '25



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

% Share of Industry Registrations by Powertrain Type

YTD thru June

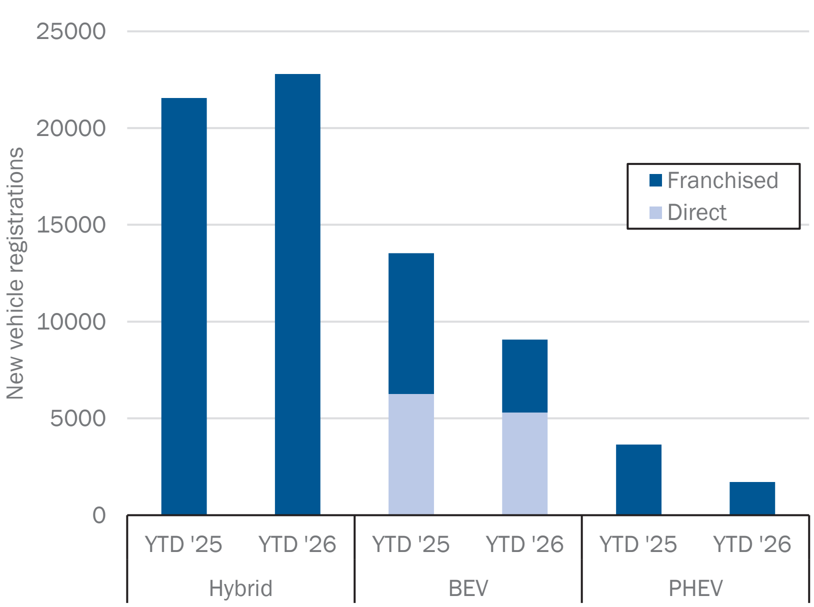
	YTD '25	YTD '26	
ICE	65.0%	65.6%	↑
Hybrid	19.5%	23.3%	↑
Electric (BEV)	12.2%	9.3%	↓
Plug In Hybrid (PHEV)	3.3%	1.8%	↓

Quarterly

	1Q '26	2Q '26	
ICE	69.3%	62.6%	↓
Hybrid	21.5%	24.8%	↑
Electric (BEV)	7.6%	10.7%	↑
Plug In Hybrid (PHEV)	1.6%	1.9%	↑

FRANCHISED DEALERSHIPS AND DIRECT SELLERS

New Hybrid, BEV, and PHEV Registrations in Washington Area by Type of Selling Dealership



Registrations and Market Share

	Franchised Dealerships	Direct Sellers
YTD '25 thru June		
Hybrid registrations	21,562	0
BEV registrations	7,266	6,265
PHEV regisrations	3,644	0
TOTAL	32,472	6,265
YTD '25 Share of total	83.8%	16.2%
YTD '26 thru June		
Hybrid registrations	22,801	0
BEV registrations	3,770	5,302
PHEV regisrations	1,722	0
TOTAL	28,293	5,302
YTD '26 Share of total	84.2%	15.8%

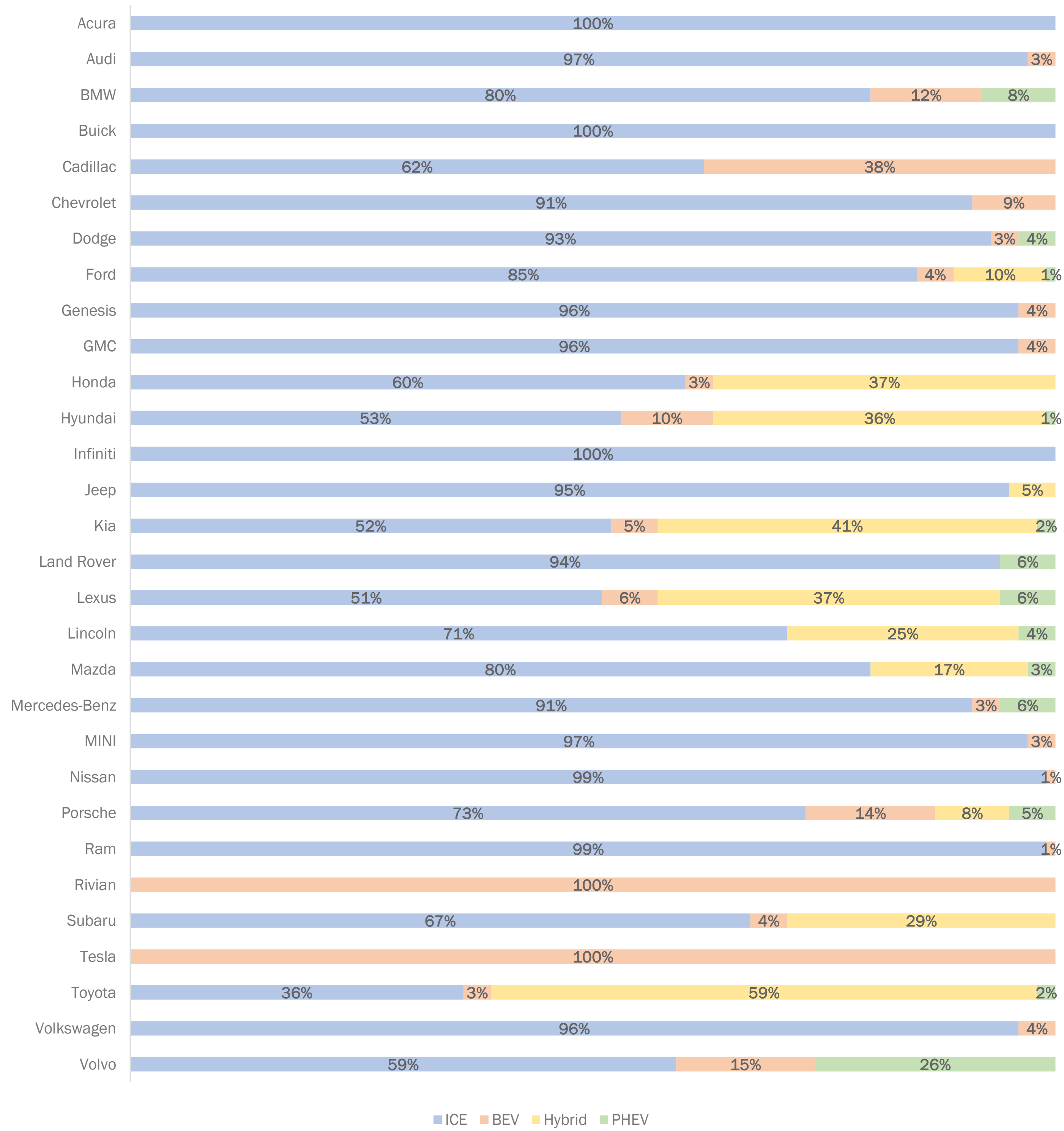
The dark blue areas in the graph show sales by powertrain type for franchised dealerships. Sum of the dark blue areas in YTD '26 is 28,293 units, 84.2% of the overall total, up slightly from 83.8% during the same period in 2025.

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

POWERTRAINS

POWERTRAIN MARKET SHARES

Share of Brand Registrations by Type of Powertrain - Second Quarter 2026 (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 area during the second quarter of 2026. Data sourced from Experian Automotive.

Brand Registrations Report Washington Area New Retail 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	56,960	52,691	-7.5				110,583	97,966	-11.4			
Cars	12,073	11,091	-8.1	21.2	21.0	-0.2	23,018	19,755	-14.2	20.8	20.2	-0.6
Light Trucks	44,887	41,600	-7.3	78.8	79.0	0.2	87,565	78,211	-10.7	79.2	79.8	0.6
Domestic Brands	14,152	13,251	-6.4	24.8	25.1	0.3	29,101	24,561	-15.6	26.3	25.0	-1.3
European Brands	7,983	6,574	-17.7	14.0	12.5	-1.5	15,639	12,698	-18.8	14.1	13.0	-1.1
Japanese Brands	27,264	26,126	-4.2	47.9	49.6	1.7	51,619	47,981	-7.0	46.7	49.0	2.3
Other Asian Brands	7,561	6,740	-10.9	13.3	12.8	-0.5	14,224	12,726	-10.5	12.9	13.0	0.1
Acura	1,236	1,062	-14.1	2.2	2.0	-0.2	2,199	1,922	-12.6	2.0	2.0	0.0
Alfa Romeo	18	12	-33.3	0.0	0.0	0.0	38	26	-31.6	0.0	0.0	0.0
Audi	951	639	-32.8	1.7	1.2	-0.5	1,792	1,159	-35.3	1.6	1.2	-0.4
BMW	1,982	1,923	-3.0	3.5	3.6	0.1	3,924	3,815	-2.8	3.5	3.9	0.4
Buick	236	163	-30.9	0.4	0.3	-0.1	489	314	-35.8	0.4	0.3	-0.1
Cadillac	489	381	-22.1	0.9	0.7	-0.2	940	737	-21.6	0.9	0.8	-0.1
Chevrolet	3,123	2,839	-9.1	5.5	5.4	-0.1	6,058	5,426	-10.4	5.5	5.5	0.0
Chrysler	148	97	-34.5	0.3	0.2	-0.1	286	195	-31.8	0.3	0.2	-0.1
Dodge	156	157	0.6	0.3	0.3	0.0	364	288	-20.9	0.3	0.3	0.0
Ferrari	12	11	-8.3	0.0	0.0	0.0	25	27	8.0	0.0	0.0	0.0
Ford	4,496	3,708	-17.5	7.9	7.0	-0.9	8,774	7,323	-16.5	7.9	7.5	-0.4
Genesis	312	257	-17.6	0.5	0.5	0.0	603	508	-15.8	0.5	0.5	0.0
GMC	751	656	-12.6	1.3	1.2	-0.1	1,533	1,312	-14.4	1.4	1.3	-0.1
Honda	7,738	7,746	0.1	13.6	14.7	1.1	14,682	13,598	-7.4	13.3	13.9	0.6
Hyundai	3,755	3,088	-17.8	6.6	5.9	-0.7	6,738	6,024	-10.6	6.1	6.1	0.0
Ineos	19	14	-26.3	0.0	0.0	0.0	45	27	-40.0	0.0	0.0	0.0
Infiniti	132	137	3.8	0.2	0.3	0.1	328	281	-14.3	0.3	0.3	0.0
Jeep	1,350	1,082	-19.9	2.4	2.1	-0.3	2,664	2,029	-23.8	2.4	2.1	-0.3
Kia	3,488	3,395	-2.7	6.1	6.4	0.3	6,876	6,194	-9.9	6.2	6.3	0.1
Land Rover	449	340	-24.3	0.8	0.6	-0.2	859	623	-27.5	0.8	0.6	-0.2
Lexus	2,552	2,126	-16.7	4.5	4.0	-0.5	4,780	4,079	-14.7	4.3	4.2	-0.1
Lincoln	316	249	-21.2	0.6	0.5	-0.1	562	470	-16.4	0.5	0.5	0.0
Lucid	39	55	41.0	0.1	0.1	0.0	96	138	43.8	0.1	0.1	0.0
Mazda	1,701	1,685	-0.9	3.0	3.2	0.2	3,173	3,033	-4.4	2.9	3.1	0.2
Mercedes-Benz	1,590	1,283	-19.3	2.8	2.4	-0.4	2,813	2,366	-15.9	2.5	2.4	-0.1
MINI	267	196	-26.6	0.5	0.4	-0.1	482	352	-27.0	0.4	0.4	0.0
Mitsubishi	176	92	-47.7	0.3	0.2	-0.1	364	176	-51.6	0.3	0.2	-0.1
Nissan	1,658	1,729	4.3	2.9	3.3	0.4	3,077	3,270	6.3	2.8	3.3	0.5
Porsche	314	284	-9.6	0.6	0.5	-0.1	657	524	-20.2	0.6	0.5	-0.1
Ram	558	581	4.1	1.0	1.1	0.1	1,173	1,163	-0.9	1.1	1.2	0.1
Rivian	146	124	-15.1	0.3	0.2	-0.1	293	237	-19.1	0.3	0.2	-0.1
Subaru	2,762	2,476	-10.4	4.8	4.7	-0.1	5,223	4,573	-12.4	4.7	4.7	0.0
Tesla	2,344	3,157	34.7	4.1	6.0	1.9	5,868	4,927	-16.0	5.3	5.0	-0.3
Toyota	9,309	9,073	-2.5	16.3	17.2	0.9	17,793	17,049	-4.2	16.1	17.4	1.3
Volkswagen	1,362	1,208	-11.3	2.4	2.3	-0.1	3,012	2,437	-19.1	2.7	2.5	-0.2
Volvo	874	599	-31.5	1.5	1.1	-0.4	1,730	1,204	-30.4	1.6	1.2	-0.4
Other	151	67	-55.6	0.3	0.1	-0.2	270	140	-48.1	0.2	0.1	-0.1

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

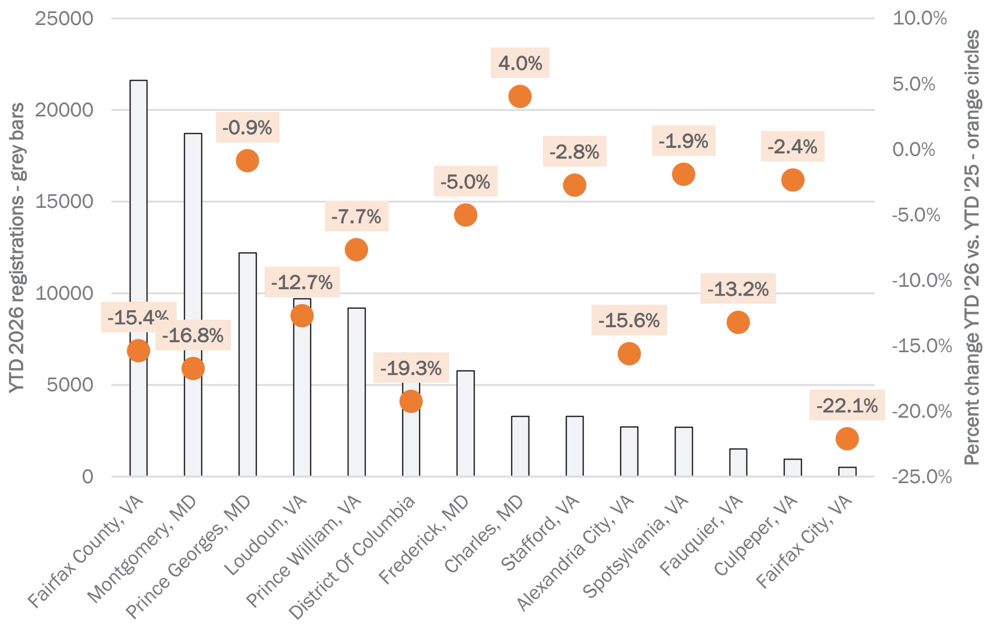
The table shows new retail light vehicle (car and light truck) registrations in the Washington Area market. Figures are shown for the second quarters of ‘25 and ‘26, and year to date totals. The top ten ranked brands in each change category are shaded yellow. Vehicle registrations are recorded based on when the vehicle title information is processed, which occurs after the vehicle is sold.

COUNTY MARKETS

Registrations Declined in Almost All County Markets

The graphs and tables on these two pages show specific data on each of the area's 14 county/city markets. The figures represent new vehicles registered to retail customers residing in each of the areas, and includes both purchase and lease transactions.

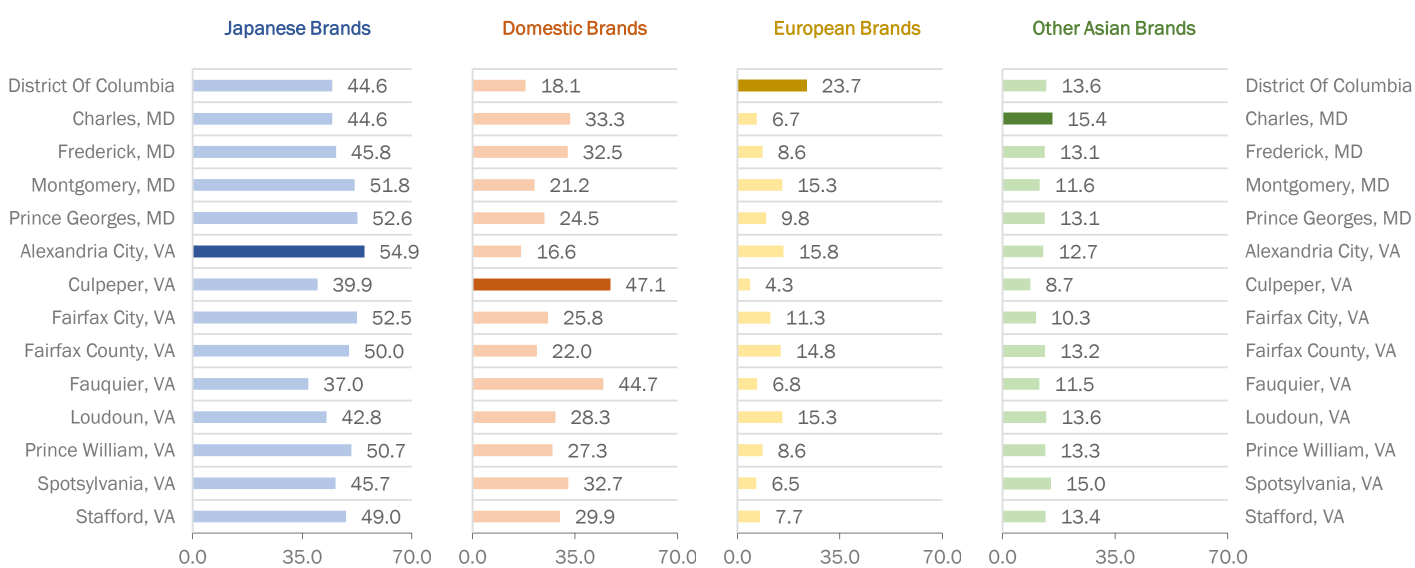
County New Retail Light Vehicle Registrations
YTD 2026 thru June and Percent Change vs. YTD 2025



New Vehicle Registrations YTD 2026 thru June	
County	**Regs.**
Fairfax County, VA	21621
Montgomery, MD	18714
Prince Georges, MD	12207
Loudoun, VA	9709
Prince William, VA	9191
District Of Columbia	5825
Frederick, MD	5762
Charles, MD	3289
Stafford, VA	3288
Alexandria City, VA	2705
Spotsylvania, VA	2690
Fauquier, VA	1508
Culpeper, VA	954
Fairfax City, VA	503

The graph above shows new vehicle registrations during the first six months of this year (grey bars and left axis) and percent change vs. year earlier (orange circles with labels and right axis). Data sourced from Experian Automotive.

County/City Market Shares for Japanese, Domestic, European, and Other Asian Brands - YTD 2026 thru June



The graphs above show market shares by brand segments. Darker colors show the highest rated county/city for each segment. Other Asian includes Genesis, Hyundai, Kia, and VinFast. Data sourced from Experian Automotive.

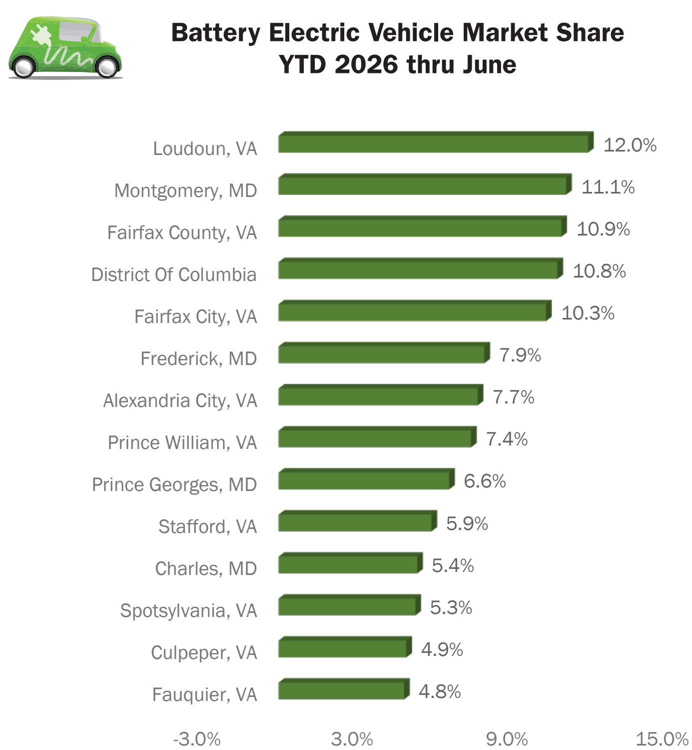
COUNTY MARKETS

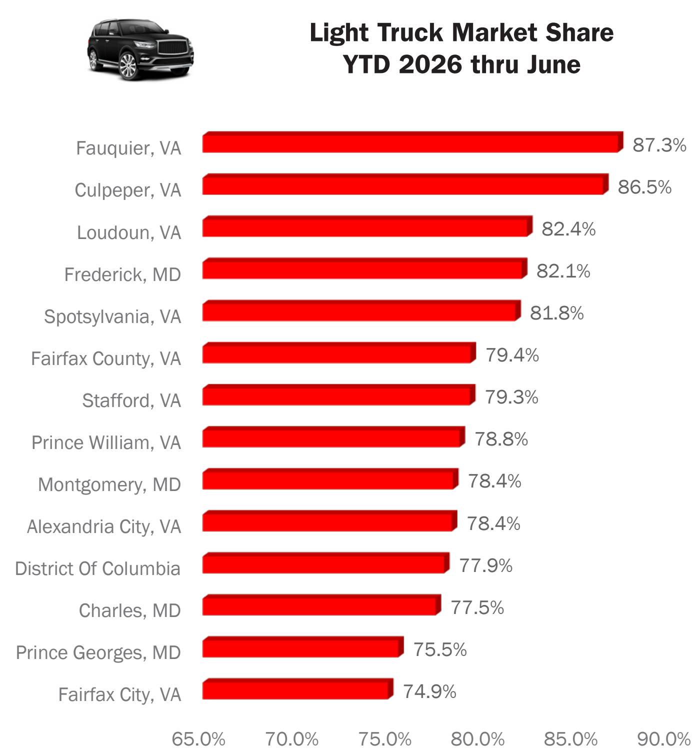
BMW Market Share Reached 6% in DC

Brand Market Share - YTD 2026 thru June

County/City	Toyota	Honda	Ford	Kia	Hyundai	Chevrolet	Tesla	Subaru	Lexus	BMW
District Of Columbia	13.8	12.1	5.4	5.9	7.1	3.5	3.5	5.2	3.3	6.0
Charles, MD	15.5	10.8	10.2	6.7	7.9	9.5	2.7	2.6	3.9	2.4
Frederick, MD	15.2	13.7	10.1	5.1	7.8	8.5	4.0	5.7	2.8	2.4
Montgomery, MD	18.9	14.2	5.7	5.6	5.6	3.8	6.1	5.4	5.0	4.5
Prince Georges, MD	18.8	13.8	7.4	4.8	7.7	7.3	2.9	2.2	5.4	3.1
Alexandria City, VA	21.2	14.2	5.5	5.7	6.2	3.4	3.3	6.1	4.1	5.2
Culpeper, VA	19.0	10.6	16.5	4.5	4.2	15.4	3.0	5.5	0.8	0.6
Fairfax City, VA	18.5	15.9	8.2	4.6	5.8	4.6	7.0	6.2	4.4	3.6
Fairfax County, VA	17.6	14.5	6.2	6.9	5.7	3.6	6.6	5.6	4.7	4.6
Fauquier, VA	16.0	8.6	15.3	6.9	4.2	15.4	2.3	4.5	2.1	1.3
Loudoun, VA	14.2	13.3	8.2	7.5	5.5	4.7	7.1	4.2	4.1	5.5
Prince William, VA	18.4	15.3	8.9	7.2	5.6	6.6	4.8	4.1	3.3	2.6
Spotsylvania, VA	16.4	14.4	10.4	9.1	5.6	9.4	2.8	5.1	1.3	0.9
Stafford, VA	19.3	15.0	9.5	7.6	5.5	7.4	3.2	3.9	2.2	1.6

The table above shows brand market shares in each of the 14 county/city markets. (Includes top ten selling brands in the area.) Highest market share for each brand is shaded grey. Data sourced from Experian Automotive.



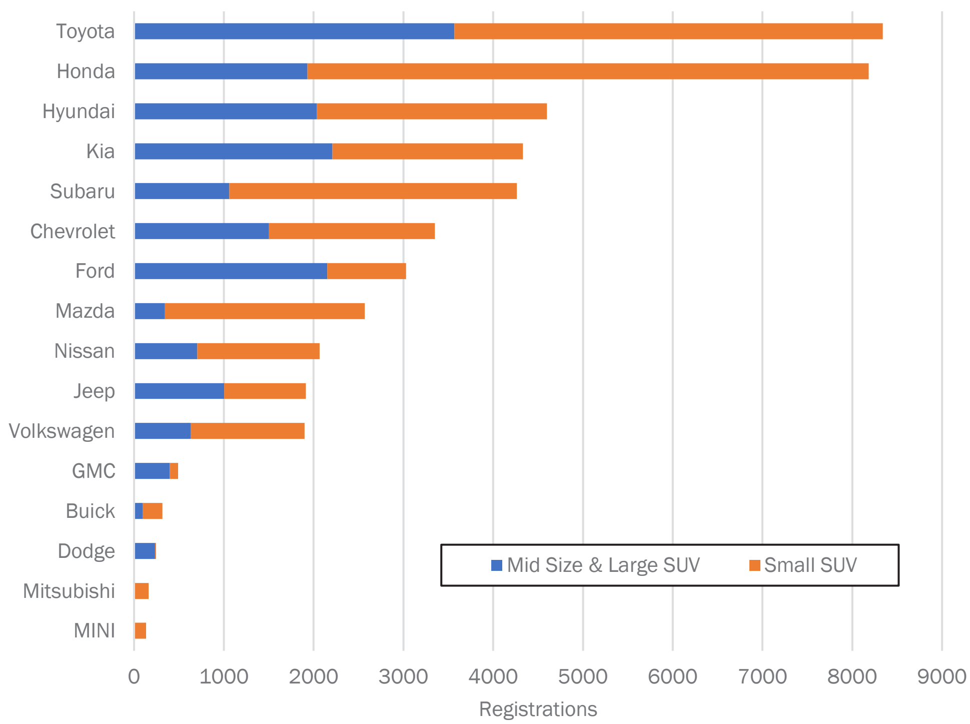


Data sourced from Experian Automotive.

SUV RANKINGS

Toyota is Best-Selling Non-Luxury SUV Brand in Area

New Registrations by Brand for Mid Size/Large and Small Non-Luxury SUVs in Area Market - YTD 2026 thru June



SUV Shares For Each Brand

Brand	% Small SUV	% Mid & Large SUV
Toyota	57%	43%
Honda	76%	24%
Hyundai	56%	44%
Kia	49%	51%
Subaru	75%	25%
Chevrolet	55%	45%
Ford	29%	71%
Mazda	87%	13%
Nissan	66%	34%
Jeep	48%	52%
Volkswagen	67%	33%
GMC	19%	81%
Buick	70%	30%
Dodge	5%	95%
Mitsubishi	100%	0%
MINI	100%	0%

The graph above shows new vehicle registrations by brand for Non-luxury Mid Size/Large SUVs (blue bar on the graph) and Small SUVs (orange bar) during the first six months of this year. The table shows the percentage breakdown for each brand. Toyota was the best-selling non-luxury SUV brand, with Small SUV registrations accounting for 57% of its total. Data source: AutoCount data from Experian.

Washington Auto Outlook

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