

Sales Review MX – Diciembre 2025

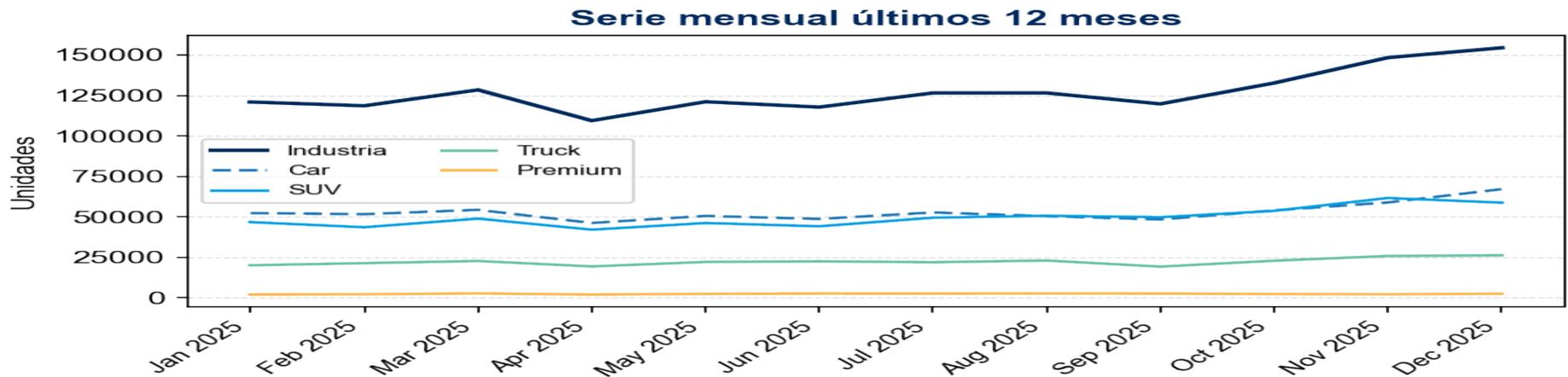
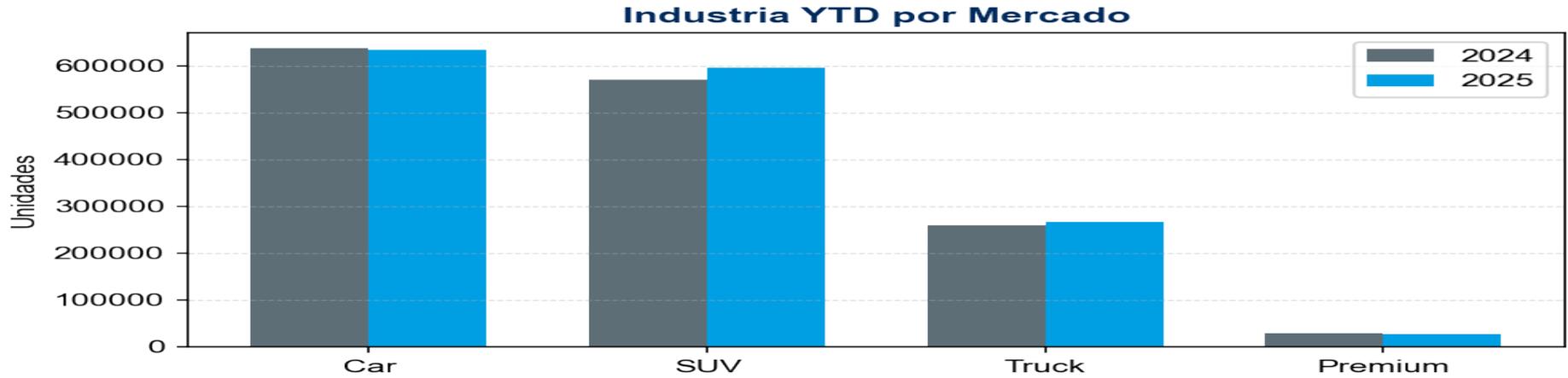
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KPIs Industria – México

Total Industria (YTD): 1,524,638 unidades

YoY: +1.8%

Industry Trend



YOY (YTD): +1.8%

Total Industria: 1,524,638 unidades

Industry Retail Summary – Car Market

Marca	Volume					Share			
	Mes 2025	Mes 2024	YTD 2025	YTD 2024	YoY YTD	Mes 2025	Mes 2024	YTD 2025	YTD 2024
Nissan	15,887	14,684	143,591	144,984	-1.0%	23.7%	23.7%	22.6%	22.7%
General Motors	10,865	9,360	94,509	98,034	-3.6%	16.2%	15.1%	14.9%	15.4%
KIA	6,444	5,851	71,378	65,336	+9.2%	9.6%	9.4%	11.2%	10.2%
Volkswagen	6,390	5,995	56,373	57,946	-2.7%	9.5%	9.7%	8.9%	9.1%
Mazda	4,372	3,942	47,841	47,638	+0.4%	6.5%	6.4%	7.5%	7.5%
Toyota	5,276	3,416	43,872	43,438	+1.0%	7.9%	5.5%	6.9%	6.8%
MG Motor	3,402	5,955	34,521	42,524	-18.8%	5.1%	9.6%	5.4%	6.7%
Hyundai	2,101	2,554	26,722	25,933	+3.0%	3.1%	4.1%	4.2%	4.1%
Suzuki	3,083	2,846	25,850	29,866	-13.4%	4.6%	4.6%	4.1%	4.7%
Renault	2,102	1,957	22,672	20,587	+10.1%	3.1%	3.2%	3.6%	3.2%
SEAT	1,187	1,613	13,128	15,527	-15.5%	1.8%	2.6%	2.1%	2.4%
Geely	1,709	0	11,973	0	—	2.5%	0.0%	1.9%	0.0%
Honda	1,096	1,035	10,954	12,909	-15.1%	1.6%	1.7%	1.7%	2.0%
Changan	684	0	7,549	0	—	1.0%	0.0%	1.2%	0.0%
Chrysler	1,138	939	7,305	8,595	-15.0%	1.7%	1.5%	1.2%	1.3%
Peugeot	532	214	3,690	2,298	+60.6%	0.8%	0.3%	0.6%	0.4%
JAC	325	342	3,447	5,477	-37.1%	0.5%	0.6%	0.5%	0.9%
Mitsubishi	48	282	2,135	4,030	-47.0%	0.1%	0.5%	0.3%	0.6%
Ford	123	108	1,646	1,469	+12.0%	0.2%	0.2%	0.3%	0.2%
Fiat	28	254	1,479	4,358	-66.1%	0.0%	0.4%	0.2%	0.7%

Industry Retail Summary – SUV Market

Marca	Volume					Share			
	Mes 2025	Mes 2024	YTD 2025	YTD 2024	YoY YTD	Mes 2025	Mes 2024	YTD 2025	YTD 2024
Nissan	7,445	5,295	71,108	49,473	+43.7%	12.7%	9.2%	11.9%	8.7%
General Motors	7,181	5,735	63,397	59,467	+6.6%	12.2%	10.0%	10.7%	10.4%
Volkswagen	6,041	6,741	60,820	60,796	+0.0%	10.3%	11.7%	10.2%	10.7%
Mazda	4,367	4,735	58,046	52,159	+11.3%	7.4%	8.2%	9.8%	9.1%
Toyota	2,900	3,894	41,980	40,014	+4.9%	4.9%	6.8%	7.1%	7.0%
KIA	3,949	3,650	39,794	39,048	+1.9%	6.7%	6.3%	6.7%	6.8%
Honda	2,593	2,800	28,706	28,479	+0.8%	4.4%	4.9%	4.8%	5.0%
Ford	3,061	3,343	28,470	27,377	+4.0%	5.2%	5.8%	4.8%	4.8%
Hyundai	3,551	2,824	27,775	27,372	+1.5%	6.0%	4.9%	4.7%	4.8%
Chrysler	2,191	3,110	21,068	25,337	-16.8%	3.7%	5.4%	3.5%	4.4%
MG Motor	1,684	2,856	13,934	17,516	-20.4%	2.9%	5.0%	2.3%	3.1%
Suzuki	1,055	1,488	13,586	13,795	-1.5%	1.8%	2.6%	2.3%	2.4%
Mitsubishi	1,250	781	13,240	8,790	+50.6%	2.1%	1.4%	2.2%	1.5%
Great Wall Motor	975	789	11,019	10,880	+1.3%	1.7%	1.4%	1.9%	1.9%
BMW	1,029	910	10,457	9,763	+7.1%	1.8%	1.6%	1.8%	1.7%
Geely	1,826	0	10,285	0	—	3.1%	0.0%	1.7%	0.0%
JAC	873	922	9,428	8,398	+12.3%	1.5%	1.6%	1.6%	1.5%
SEAT	856	709	8,594	10,496	-18.1%	1.5%	1.2%	1.4%	1.8%
Mercedes-Benz	765	885	8,563	9,970	-14.1%	1.3%	1.5%	1.4%	1.7%
Changan	731	0	8,022	0	—	1.2%	0.0%	1.3%	0.0%

Industry Retail Summary – SUV Market (cont.)

Marca	Volume					Share			
	Mes 2025	Mes 2024	YTD 2025	YTD 2024	YoY YTD	Mes 2025	Mes 2024	YTD 2025	YTD 2024
Renault	602	413	5,994	3,403	+76.1%	1.0%	0.7%	1.0%	0.6%
Peugeot	718	575	5,015	5,616	-10.7%	1.2%	1.0%	0.8%	1.0%
Volvo	373	414	4,981	5,534	-10.0%	0.6%	0.7%	0.8%	1.0%
Audi	479	726	4,795	5,924	-19.1%	0.8%	1.3%	0.8%	1.0%
Subaru	469	292	3,982	2,900	+37.3%	0.8%	0.5%	0.7%	0.5%
Fiat	311	356	3,791	5,598	-32.3%	0.5%	0.6%	0.6%	1.0%
Chirey	0	1,478	3,496	19,939	-82.5%	0.0%	2.6%	0.6%	3.5%
Jetour Soueast	591	0	2,679	0	—	1.0%	0.0%	0.5%	0.0%
Lexus	282	253	2,623	2,462	+6.5%	0.5%	0.4%	0.4%	0.4%
Porsche	89	130	1,641	1,624	+1.0%	0.2%	0.2%	0.3%	0.3%
MOTORNATION	23	418	1,390	5,384	-74.2%	0.0%	0.7%	0.2%	0.9%
Land Rover	63	124	1,218	1,061	+14.8%	0.1%	0.2%	0.2%	0.2%
Infiniti	104	110	1,201	1,111	+8.1%	0.2%	0.2%	0.2%	0.2%
Omoda	0	352	1,019	4,363	-76.6%	0.0%	0.6%	0.2%	0.8%
Mini	104	108	865	1,148	-24.7%	0.2%	0.2%	0.1%	0.2%
Acura	65	61	625	801	-22.0%	0.1%	0.1%	0.1%	0.1%
Lincoln	93	62	611	678	-9.9%	0.2%	0.1%	0.1%	0.1%
Foton	37	90	547	524	+4.4%	0.1%	0.2%	0.1%	0.1%
JETOUR	0	166	195	3,148	-93.8%	0.0%	0.3%	0.0%	0.6%
Alfa Romeo	3	19	194	321	-39.6%	0.0%	0.0%	0.0%	0.1%

Industry Retail Summary – Premium Market

Marca	Volume					Share			
	Mes 2025	Mes 2024	YTD 2025	YTD 2024	YoY YTD	Mes 2025	Mes 2024	YTD 2025	YTD 2024
Toyota	879	932	9,315	9,205	+1.2%	35.8%	31.0%	33.3%	31.5%
BMW	397	309	4,589	4,309	+6.5%	16.2%	10.3%	16.4%	14.8%
Audi	404	549	3,884	4,039	-3.8%	16.5%	18.3%	13.9%	13.8%
Mini	237	260	3,042	2,115	+43.8%	9.7%	8.6%	10.9%	7.2%
Mercedes-Benz	190	342	2,100	2,935	-28.4%	7.7%	11.4%	7.5%	10.1%
Lincoln	80	127	1,017	905	+12.4%	3.3%	4.2%	3.6%	3.1%
Volvo	80	103	934	1,571	-40.5%	3.3%	3.4%	3.3%	5.4%
Honda	51	83	756	948	-20.3%	2.1%	2.8%	2.7%	3.2%
Land Rover	54	77	749	749	0.0%	2.2%	2.6%	2.7%	2.6%
Porsche	7	27	455	233	+95.3%	0.3%	0.9%	1.6%	0.8%
MG Motor	22	113	361	128	+182.0%	0.9%	3.8%	1.3%	0.4%
Lexus	12	25	203	255	-20.4%	0.5%	0.8%	0.7%	0.9%
Chirey	0	22	146	503	-71.0%	0.0%	0.7%	0.5%	1.7%
Alfa Romeo	9	9	117	127	-7.9%	0.4%	0.3%	0.4%	0.4%
Acura	20	10	116	200	-42.0%	0.8%	0.3%	0.4%	0.7%
Chrysler	4	6	115	632	-81.8%	0.2%	0.2%	0.4%	2.2%
General Motors	6	6	28	14	+100.0%	0.2%	0.2%	0.1%	0.0%
Nissan	0	4	23	241	-90.5%	0.0%	0.1%	0.1%	0.8%
Bentley	0	1	14	13	+7.7%	0.0%	0.0%	0.1%	0.0%
Jaguar	0	1	5	56	-91.1%	0.0%	0.0%	0.0%	0.2%

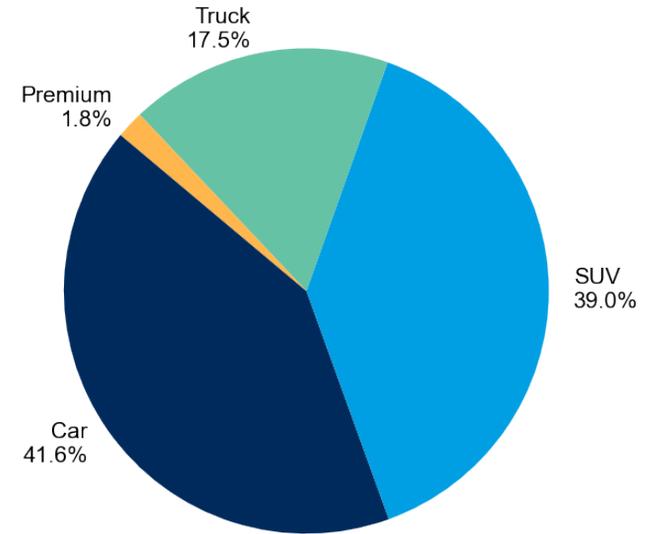
Segment Summary

Mercado	Mes 2025	Mes 2024	YTD 2025	YTD 2024	YoY	Participación
Car Market	67,076	61,994	634,804	638,130	-0.5%	41.6%
SUV Market	58,729	57,614	595,154	570,669	+4.3%	39.0%
Truck Market	26,193	23,667	266,711	259,749	+2.7%	17.5%
Premium Market	2,452	3,006	27,969	29,178	-4.1%	1.8%
Industria total	154,450	146,281	1,524,638	1,497,726	+1.8%	100.0%

Market Insights

- El mercado mexicano cerró septiembre con una caída marginal (-0.6% YTD).
- SUVs mantienen crecimiento (+1.2%) y ganan 0.4 pts de share.
- KIA y Mazda destacan con crecimiento sostenido.
- Chirey, Fiat y Honda con caídas relevantes.

Participación YTD por Mercado



Top Brands Performance

Marca	YTD 2025	YTD 2024	Δ Unidades	Share 2025	Share 2024	Δ Share (pp)	YoY %
Nissan	274,461	255,116	19,345	18.00%	17.03%	+0.97 pp	+7.6%
General Motors	198,153	205,043	-6,890	13.00%	13.69%	-0.69 pp	-3.4%
Volkswagen	137,970	138,181	-211	9.05%	9.23%	-0.18 pp	-0.2%
Toyota	126,358	121,968	4,390	8.29%	8.14%	+0.14 pp	+3.6%
KIA	111,172	104,384	6,788	7.29%	6.97%	+0.32 pp	+6.5%
Mazda	107,004	99,797	7,207	7.02%	6.66%	+0.36 pp	+7.2%
Chrysler	66,912	64,123	2,789	4.39%	4.28%	+0.11 pp	+4.3%
Hyundai	54,497	53,305	1,192	3.57%	3.56%	+0.02 pp	+2.2%
Ford	53,825	52,359	1,466	3.53%	3.50%	+0.03 pp	+2.8%
MG Motor	48,816	60,168	-11,352	3.20%	4.02%	-0.82 pp	-18.9%

Top 20 Modelos – Industria

Pos	Modelo (Marca)	YTD 2025	YTD 2024	YoY %	Share YTD 2025	Δ Share (pp)
1	Versa (Nissan)	90,223	93,278	-3.3%	5.92%	-0.31 pp
2	Aveo (General Motors)	61,066	58,503	+4.4%	4.01%	+0.10 pp
3	NP300 (Nissan)	58,422	59,031	-1.0%	3.83%	-0.11 pp
4	KIA K3 Sedan (KIA)	46,551	40,716	+14.3%	3.05%	+0.33 pp
5	March (Nissan)	31,401	27,926	+12.4%	2.06%	+0.20 pp
6	CX-30 (Mazda)	29,898	24,542	+21.8%	1.96%	+0.32 pp
7	Kicks (Nissan)	26,276	23,679	+11.0%	1.72%	+0.14 pp
8	Virtus (Volkswagen)	25,040	30,945	-19.1%	1.64%	-0.42 pp
9	Sentra (Nissan)	21,929	23,694	-7.4%	1.44%	-0.14 pp
10	Creta (Hyundai)	21,547	18,558	+16.1%	1.41%	+0.17 pp
11	Mazda 2 Sedan (Mazda)	21,369	16,453	+29.9%	1.40%	+0.30 pp
12	Taos (Volkswagen)	21,189	20,126	+5.3%	1.39%	+0.05 pp
13	MG5 (MG Motor)	21,132	26,768	-21.1%	1.39%	-0.40 pp
14	S10 (General Motors)	21,037	16,773	+25.4%	1.38%	+0.26 pp
15	Nuevo Jetta (Volkswagen)	20,820	19,306	+7.8%	1.37%	+0.08 pp
16	Hilux Dc (Toyota)	19,661	21,370	-8.0%	1.29%	-0.14 pp
17	Tiguan- (Volkswagen)	19,419	14,265	+36.1%	1.27%	+0.32 pp
18	Tornado Van (General Motors)	18,982	17,849	+6.3%	1.25%	+0.05 pp
19	Kwid (Renault)	18,158	17,195	+5.6%	1.19%	+0.04 pp
20	Groove SUV (General Motors)	17,401	14,002	+24.3%	1.14%	+0.21 pp

Nota: Se excluyen modelos con menos de 200 unidades en YTD 2024 para garantizar estabilidad.

Top 10 Modelos por Segmento – YTD 2025

Car Segment

Pos	Modelo (Marca)	YTD 2025	Share
1	Versa (Nissan)	90,223	14.2%
2	Aveo (General Motors)	61,066	9.6%
3	KIA K3 Sedan (KIA)	46,551	7.3%
4	March (Nissan)	31,401	4.9%
5	Virtus (Volkswagen)	25,040	3.9%
6	Sentra (Nissan)	21,929	3.5%
7	Mazda 2 Sedan (Mazda)	21,369	3.4%
8	MG5 (MG Motor)	21,132	3.3%
9	Nuevo Jetta (Volkswagen)	20,820	3.3%
10	Tornado Van (General Motors)	18,982	3.0%

Top 10 Modelos por Segmento – YTD 2025

SUV Segment

Pos	Modelo (Marca)	YTD 2025	Share
1	CX-30 (Mazda)	29,898	5.0%
2	Kicks (Nissan)	26,276	4.4%
3	Creta (Hyundai)	21,547	3.6%
4	Taos (Volkswagen)	21,189	3.6%
5	Tiguan- (Volkswagen)	19,419	3.3%
6	Magnite (Nissan)	19,212	3.2%
7	Groove SUV (General Motors)	17,401	2.9%
8	Captiva SUV (General Motors)	16,649	2.8%
9	Xtrail (Nissan)	16,142	2.7%
10	Seltos- (KIA)	15,844	2.7%

Top 10 Modelos por Segmento – YTD 2025

Truck Segment

Pos	Modelo (Marca)	YTD 2025	Share
1	NP300 (Nissan)	58,422	21.9%
2	S10 (General Motors)	21,037	7.9%
3	Hilux Dc (Toyota)	19,661	7.4%
4	RAM 700 (Chrysler)	17,349	6.5%
5	Saveiro (Volkswagen)	14,848	5.6%
6	RAM 1200 (Chrysler)	13,199	4.9%
7	L200 (Mitsubishi)	12,619	4.7%
8	Tacoma- (Toyota)	10,793	4.0%
9	Frison (JAC)	9,610	3.6%
10	Ranger (Ford)	6,576	2.5%

Top 10 Modelos – Mes (Dec 2025)

Pos	Modelo (Marca)	Mes 2025	Share Mes 2025
1	Versa (Nissan)	8,060	5.22%
2	Aveo (General Motors)	7,110	4.60%
3	NP300 (Nissan)	5,898	3.82%
4	March (Nissan)	4,472	2.90%
5	KIA K3 Sedan (KIA)	4,356	2.82%
6	Sentra (Nissan)	3,352	2.17%
7	MG5 (MG Motor)	3,212	2.08%
8	Magnite (Nissan)	3,105	2.01%
9	Creta (Hyundai)	3,042	1.97%
10	Virtus (Volkswagen)	2,859	1.85%

Winners & Losers por Modelo (YTD)

Winners	YoY %	Δ Share (pp)
K4 Sedan (KIA)	+224.7%	+0.63 pp
Outlander Sport (Mitsubishi)	+200.8%	+0.31 pp
Nuevo Attitude (Chrysler)	+166.7%	+0.29 pp
JAC2 (JAC)	+134.6%	+0.10 pp
RAM 1200 (Chrysler)	+125.6%	+0.48 pp
Tahoe (General Motors)	+91.4%	+0.06 pp
JAC4 (JAC)	+81.4%	+0.08 pp
Teramont (Volkswagen)	+69.1%	+0.14 pp
Crosstrek (Subaru)	+68.5%	+0.04 pp
RAM DS (Chrysler)	+66.0%	+0.05 pp

Losers	YoY %	Δ Share (pp)
Cross Sport (Volkswagen)	-100.0%	-0.20 pp
Promaster Rapid (Chrysler)	-100.0%	-0.11 pp
S10 Max Doble Cabina (General Motors)	-100.0%	-0.17 pp
Forte- (KIA)	-99.6%	-0.56 pp
E SUNRAY (JAC)	-99.1%	-0.09 pp
Soul (KIA)	-97.5%	-0.07 pp
Attitude (Chrysler)	-97.0%	-0.38 pp
Sei4 Pro (JAC)	-95.9%	-0.12 pp
CHANGAN ALSVIN (MOTORNATION)	-95.6%	-0.10 pp
CHANGAN CS55PLUS (MOTORNATION)	-92.9%	-0.08 pp

Market Highlights

Marcas con mayor crecimiento

KIA, Mazda, Mitsubishi

Mayores caídas

Chirey, Fiat, Honda

Segmento con mejor performance

SUV (+1.2%)

Industria

1,524,638 unidades (+1.8%)

Conclusiones

- La industria mantiene un volumen robusto pese a la ligera contracción anual, proyectando un cierre arriba de 1.2M unidades en 2025.
- SUV continúa liderando el crecimiento gracias a nuevos lanzamientos y disponibilidad de inventario, mientras que los autos siguen ajustando precios.
- KIA y Mazda ganan share con una mezcla competitiva; las marcas con caídas relevantes deben reforzar pipeline y financiamiento.
- Recomendación: capitalizar el momentum SUV con campañas específicas y fortalecer refacciones ante una demanda creciente en posventa.