San Diego Outlook

Covering the San Diego County automotive market　　**Data thru July 2015**

Released by:
New Car
Dealers Association
San Diego County

San Diego County New Retail Car and Light Truck Registrations

|	Most Recent Two Months			YTD thru July*			YTD Market share (thru July*)		
	6/14 & 7/14	6/15 & 7/15*	% change	2014	2015	% change	2014	2015	change
Industry Total	24,687	26,098	5.7%	83,844	90,604	8.1%			
Cars	14,839	14,789	-0.3%	50,334	51,805	2.9%	60.0	57.2	-2.8
Light Trucks	9,848	11,309	14.8%	33,510	38,799	15.8%	40.0	42.8	2.8
Japanese Brands	12,897	13,416	4.0%	43,431	46,730	7.6%	51.8	51.6	-0.2
Toyota	5,858	5,718	-2.4%	19,743	20,058	1.6%	23.5	22.1	-1.4
Honda	2,879	3,174	10.2%	9,947	11,205	12.6%	11.9	12.4	0.5
Nissan	2,430	2,594	6.7%	8,243	8,832	7.1%	9.8	9.7	-0.1
Other	1,730	1,930	11.6%	5,498	6,635	20.7%	6.6	7.3	0.7
Domestic Brands	6,041	6,622	9.6%	21,002	23,173	10.3%	25.0	25.6	0.6
General Motors	1,757	1,991	13.3%	5,863	6,697	14.2%	7.0	7.4	0.4
Ford	2,616	2,747	5.0%	9,464	9,932	4.9%	11.3	11.0	-0.3
Chrysler	1,582	1,752	10.7%	5,408	6,124	13.2%	6.5	6.8	0.3
Other	86	132	53.5%	267	420	57.3%	0.3	0.5	0.2
European Brands	3,872	4,069	5.1%	12,997	13,801	6.2%	15.5	15.2	-0.3
Volkswagen	1,373	1,470	7.1%	4,814	4,925	2.3%	5.7	5.4	-0.3
BMW	1,157	1,182	2.2%	3,754	3,962	5.5%	4.5	4.4	-0.1
Mercedes	745	845	13.4%	2,482	3,001	20.9%	3.0	3.3	0.3
Other	597	572	-4.2%	1,947	1,913	-1.7%	2.3	2.1	-0.2
Korean Brands	1,877	1,991	6.1%	6,414	6,900	7.6%	7.6	7.6	0.0

Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (Audi, Bentley, Porsche, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz and smart), Other (Alfa Romeo, Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.
*Figures for July 2015 were estimated by Auto Outlook. Data Source: IHS Automotive.

Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier
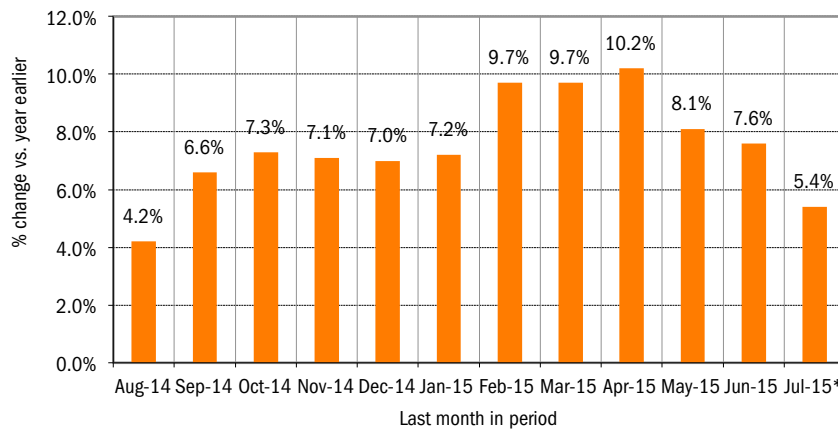
The graph above provides a clear picture of the trending direction of the county market. It shows the year-over-year percent change in the three month moving average of new retail light vehicle registrations. The three month moving average is less erratic than monthly registrations, which can fluctuate due to such factors as the timing of manufacturer incentive programs, weather and title processing delays by governmental agencies.
*Figures for July 2015 were estimated by Auto Outlook. Data Source: IHS Automotive.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '15 thru July* vs. YTD 14
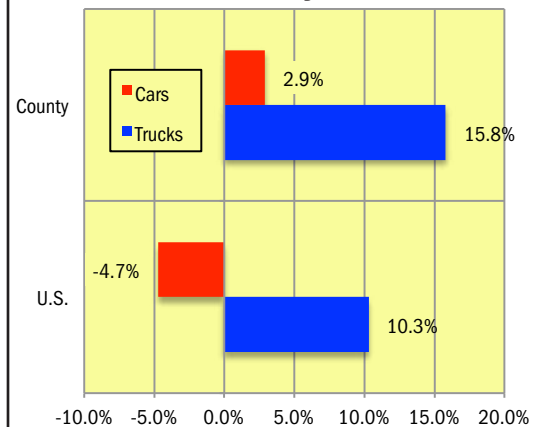
The graph above compares the change in new retail car and light truck registrations in both the area and U.S. markets.
*Figures for July 2015 were estimated by Auto Outlook.
Data Source: IHS Automotive.

Data Information

All data represents new vehicle retail registrations in San Diego County and excludes fleet and wholesale transactions. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental agencies. For this reason, the year-to-date figures will typically be more reflective of market results.**
Data Source: IHS Automotive.

San Diego County
New Retail Light Vehicle Registrations

	Registrations			Market share	
	YTD '14 thru July	YTD '15 thru July*	% change	YTD '14 thru July	YTD '15 thru July*
TOTAL	83,844	90,604	8%		
Acura	994	1,202	21%	1.2%	1.3%
Audi	1,295	1,514	17%	1.5%	1.7%
BMW	3,173	3,297	4%	3.8%	3.6%
Buick	286	339	19%	0.3%	0.4%
Cadillac	584	548	-6%	0.7%	0.6%
Chevrolet	4,162	4,666	12%	5.0%	5.1%
Chrysler	302	608	101%	0.4%	0.7%
Dodge	1,338	1,342	0%	1.6%	1.5%
FIAT	778	576	-26%	0.9%	0.6%
Ford	9,153	9,547	4%	10.9%	10.5%
GMC	831	1,128	36%	1.0%	1.2%
Honda	8,953	10,023	12%	10.7%	11.1%
Hyundai	3,236	3,267	1%	3.9%	3.6%
Infiniti	696	750	8%	0.8%	0.8%
Jaguar	145	105	-28%	0.2%	0.1%
Jeep	2,855	3,099	9%	3.4%	3.4%
Kia	3,178	3,639	15%	3.8%	4.0%
Land Rover	507	645	27%	0.6%	0.7%
Lexus	3,040	3,293	8%	3.6%	3.6%
Lincoln	311	397	28%	0.4%	0.4%
Mazda	2,610	2,998	15%	3.1%	3.3%
Mercedes	2,334	2,889	24%	2.8%	3.2%
MINI	566	649	15%	0.7%	0.7%
Mitsubishi	310	399	29%	0.4%	0.4%
Nissan	7,547	8,093	7%	9.0%	8.9%
Other	361	373	3%	0.4%	0.4%
Porsche	386	545	41%	0.5%	0.6%
Ram	913	1,094	20%	1.1%	1.2%
Subaru	2,569	3,200	25%	3.1%	3.5%
Tesla	250	400	60%	0.3%	0.4%
Toyota	16,703	16,747	0%	19.9%	18.5%
Volkswagen	3,133	2,875	-8%	3.7%	3.2%
Volvo	345	357	3%	0.4%	0.4%

Data source: IHS Automotive.

Top ten ranked brands in each percent change category are shaded green.
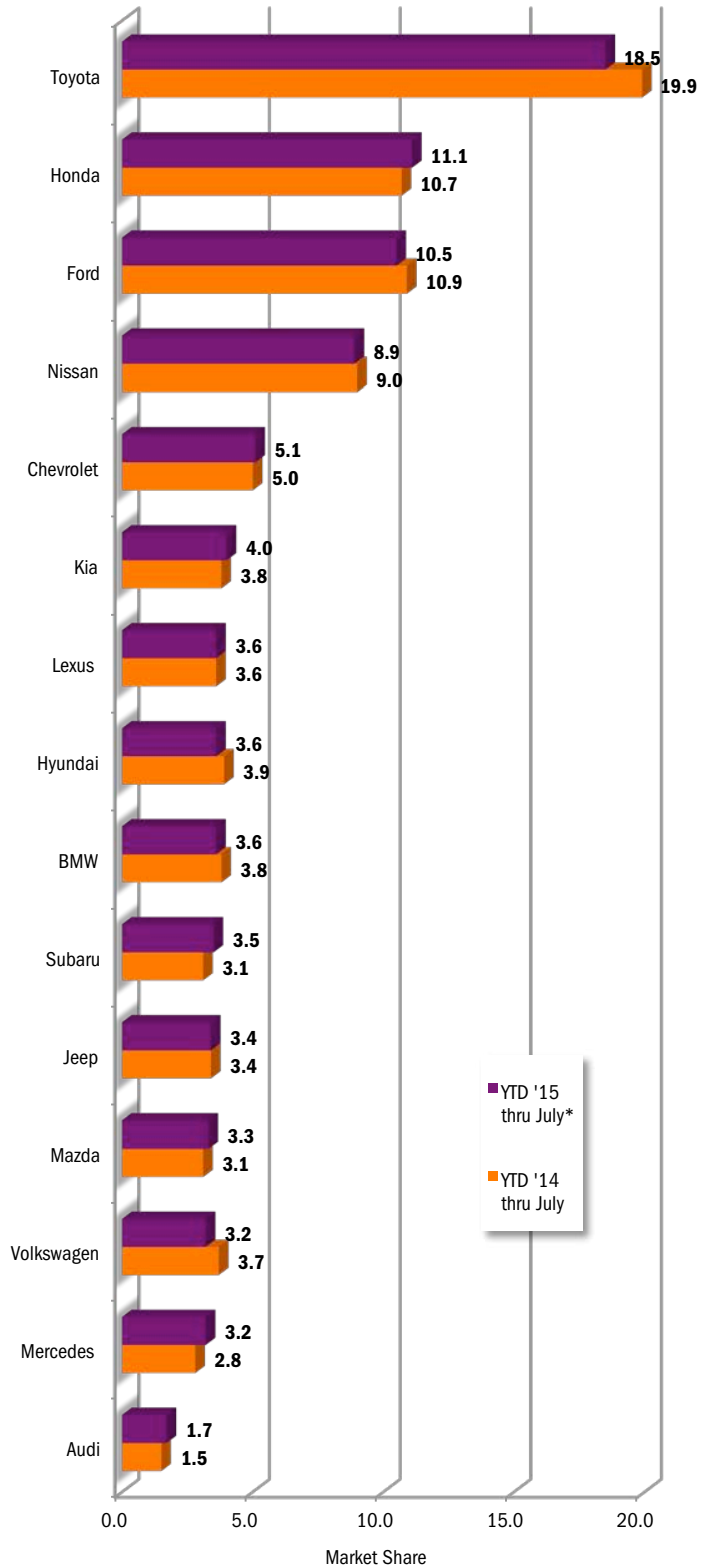
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County Market Share for Top 15 Selling Brands
YTD '15 thru July* vs. YTD 14

Brand	YTD '15 thru July*	YTD '14 thru July
Toyota	18.5	19.9
Honda	11.1	10.7
Ford	10.5	10.9
Nissan	8.9	9.0
Chevrolet	5.1	5.0
Kia	4.0	3.8
Lexus	3.6	3.6
Hyundai	3.6	3.9
BMW	3.6	3.8
Subaru	3.5	3.1
Jeep	3.4	3.4
Mazda	3.3	3.1
Volkswagen	3.2	3.7
Mercedes	3.2	2.8
Audi	1.7	1.5

Market Share

Data source: IHS Automotive.

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