

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

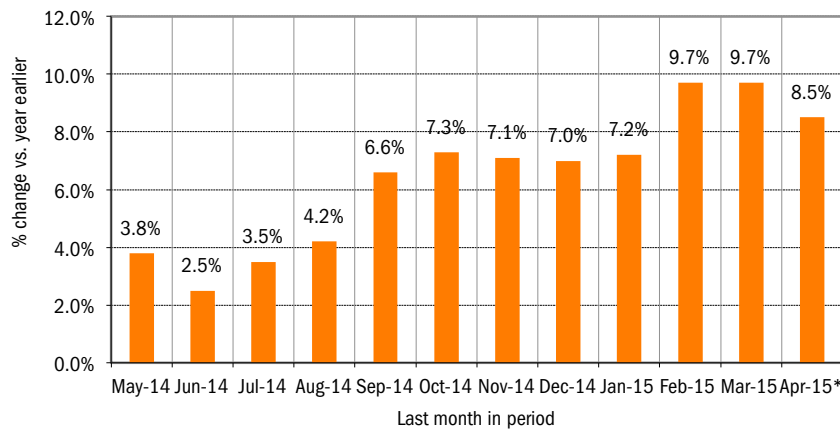
Data thru April 2015

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru April*			YTD Market share (thru April*)		
	3/14 & 4/14	3/15 & 4/15*	% change	2014	2015	% change	2014	2015	change
	Industry Total	24,301	26,153	7.6%	45,251	49,340	9.0%		
Cars	14,727	15,207	3.3%	27,026	28,464	5.3%	59.7	57.7	-2.0
Light Trucks	9,574	10,946	14.3%	18,225	20,876	14.5%	40.3	42.3	2.0
Japanese Brands	12,599	13,461	6.8%	23,339	25,561	9.5%	51.6	51.8	0.2
Toyota	5,607	5,694	1.6%	10,639	10,947	2.9%	23.5	22.2	-1.3
Honda	2,942	3,086	4.9%	5,325	5,933	11.4%	11.8	12.0	0.2
Nissan	2,416	2,672	10.6%	4,415	4,976	12.7%	9.8	10.1	0.3
Other	1,634	2,009	22.9%	2,960	3,705	25.2%	6.5	7.5	1.0
Domestic Brands	5,927	6,422	8.4%	11,349	12,305	8.4%	25.1	24.9	-0.2
General Motors	1,704	1,789	5.0%	3,144	3,394	8.0%	6.9	6.9	0.0
Ford	2,530	2,721	7.5%	5,070	5,351	5.5%	11.2	10.8	-0.4
Chrysler	1,569	1,826	16.4%	2,986	3,348	12.1%	6.6	6.8	0.2
Other	124	86	-30.6%	149	212	42.3%	0.3	0.4	0.1
European Brands	3,751	4,103	9.4%	7,049	7,607	7.9%	15.6	15.4	-0.2
Volkswagen	1,447	1,472	1.7%	2,680	2,741	2.3%	5.9	5.6	-0.3
BMW	1,072	1,232	14.9%	1,975	2,212	12.0%	4.4	4.5	0.1
Mercedes	682	799	17.2%	1,316	1,567	19.1%	2.9	3.2	0.3
Other	550	600	9.1%	1,078	1,087	0.8%	2.4	2.2	-0.2
Korean Brands	2,024	2,167	7.1%	3,514	3,867	10.0%	7.8	7.8	0.0

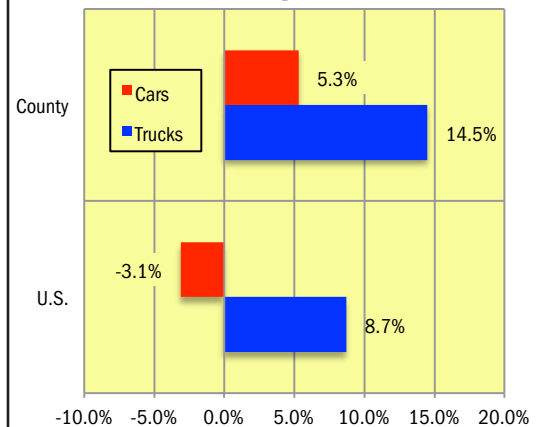
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 April 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 April 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 April* 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 April 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	YTD '15	% change	YTD '14	YTD '15
	thru Apr.	thru Apr.*		thru Apr.	thru Apr.*
TOTAL	45,251	49,340	9%		
Acura	595	665	12%	1.3%	1.3%
Audi	689	794	15%	1.5%	1.6%
BMW	1,679	1,886	12%	3.7%	3.8%
Buick	151	160	6%	0.3%	0.3%
Cadillac	355	351	-1%	0.8%	0.7%
Chevrolet	2,196	2,298	5%	4.9%	4.7%
Chrysler	156	323	107%	0.3%	0.7%
Dodge	748	757	1%	1.7%	1.5%
FIAT	443	403	-9%	1.0%	0.8%
Ford	4,896	5,135	5%	10.8%	10.4%
GMC	442	575	30%	1.0%	1.2%
Honda	4,730	5,247	11%	10.5%	10.6%
Hyundai	1,742	1,860	7%	3.8%	3.8%
Infiniti	421	464	10%	0.9%	0.9%
Jaguar	88	68	-23%	0.2%	0.1%
Jeep	1,590	1,701	7%	3.5%	3.4%
Kia	1,772	2,009	13%	3.9%	4.1%
Land Rover	291	326	12%	0.6%	0.7%
Lexus	1,630	1,856	14%	3.6%	3.8%
Lincoln	174	218	25%	0.4%	0.4%
Mazda	1,389	1,655	19%	3.1%	3.4%
Mercedes	1,234	1,517	23%	2.7%	3.1%
MINI	286	333	16%	0.6%	0.7%
Mitsubishi	189	252	33%	0.4%	0.5%
Nissan	3,994	4,520	13%	8.8%	9.2%
Other	197	199	1%	0.4%	0.4%
Porsche	231	334	45%	0.5%	0.7%
Ram	492	576	17%	1.1%	1.2%
Subaru	1,375	1,797	31%	3.0%	3.6%
Tesla	142	205	44%	0.3%	0.4%
Toyota	9,009	9,081	1%	19.9%	18.4%
Volkswagen	1,760	1,605	-9%	3.9%	3.3%
Volvo	165	170	3%	0.4%	0.3%

Data source: IHS Automotive.

Top ten ranked brands in each percent change category are shaded green.

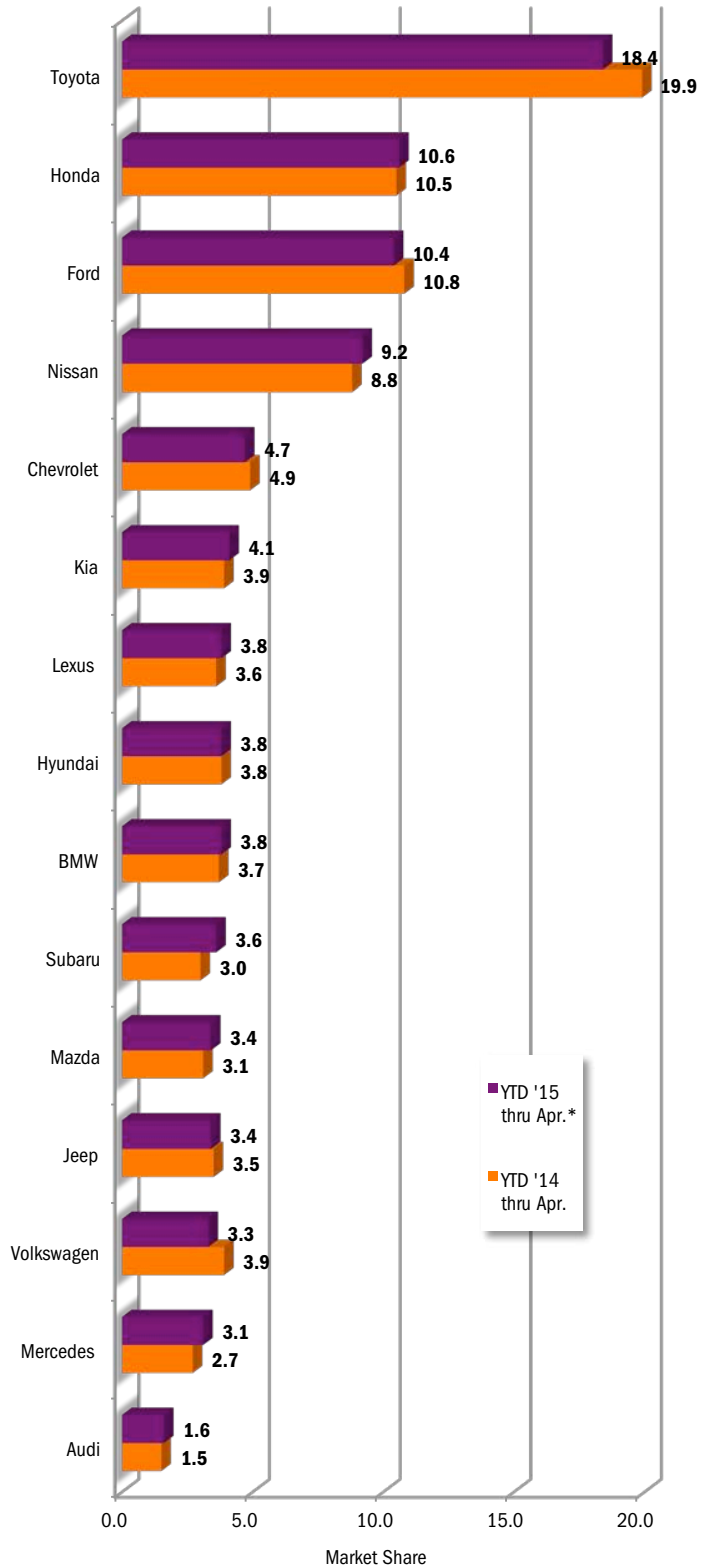
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County Market Share for Top 15 Selling Brands
YTD '15 thru April* vs. YTD 14



Data source: IHS Automotive.

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