

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

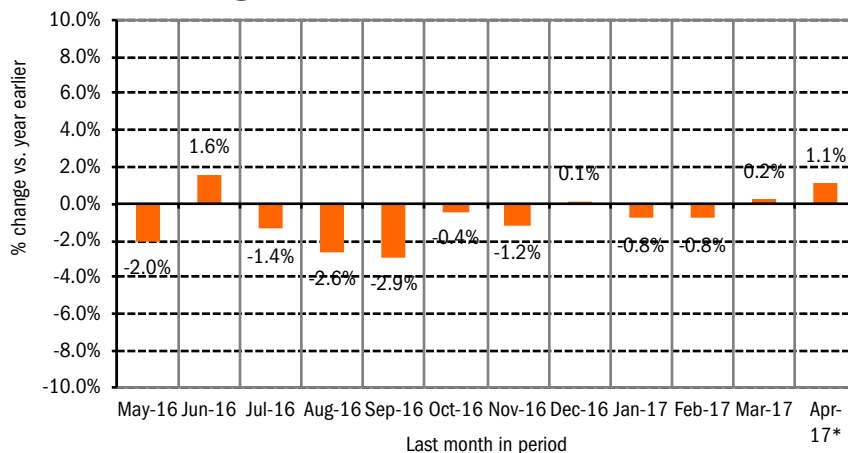
Data thru April 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru April			YTD Market Share		
	3/16 & 4/16	3/17 & 4/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	25,849	26,615	3.0%	51,238	51,063	-0.3%			
Cars	13,389	12,761	-4.7%	27,006	24,100	-10.8%	52.7	47.2	-5.5
Light Trucks	12,460	13,854	11.2%	24,232	26,963	11.3%	47.3	52.8	5.5
Japanese Brands	13,546	13,535	-0.1%	26,767	25,587	-4.4%	52.2	50.1	-2.1
Honda	3,731	3,753	0.6%	6,899	6,883	-0.2%	13.5	13.5	0.0
Nissan	2,504	2,391	-4.5%	5,239	4,533	-13.5%	10.2	8.9	-1.3
Toyota	5,436	5,464	0.5%	10,940	10,231	-6.5%	21.4	20.0	-1.4
Other	1,875	1,927	2.8%	3,689	3,940	6.8%	7.2	7.7	0.5
Domestic Brands	6,602	6,923	4.9%	13,478	13,909	3.2%	26.3	27.2	0.9
FCA (excl. FIAT)	1,621	1,685	3.9%	3,385	3,395	0.3%	6.6	6.6	0.0
Ford	2,607	2,562	-1.7%	5,440	5,401	-0.7%	10.6	10.6	0.0
General Motors	2,086	2,288	9.7%	4,201	4,462	6.2%	8.2	8.7	0.5
Other	288	388	34.7%	452	651	44.0%	0.9	1.3	0.4
European Brands	3,791	4,053	6.9%	7,278	7,640	5.0%	14.2	15.0	0.8
BMW	1,140	1,040	-8.8%	2,142	1,922	-10.3%	4.2	3.8	-0.4
Mercedes	750	808	7.7%	1,590	1,555	-2.2%	3.1	3.0	-0.1
Volkswagen	1,338	1,494	11.7%	2,430	2,782	14.5%	4.7	5.4	0.7
Other	563	711	26.3%	1,116	1,381	23.7%	2.2	2.7	0.5
Korean Brands	1,910	2,104	10.2%	3,715	3,927	5.7%	7.3	7.7	0.4

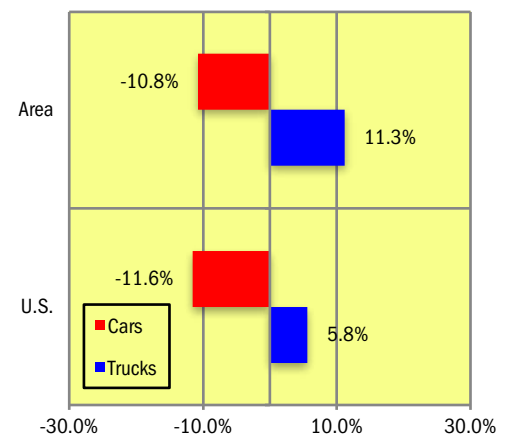
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

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 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '17 thru April* vs. YTD '16



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. *Figures for April, 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

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 Markit.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '16	YTD '17	% change	YTD '16	YTD '17
	thru Apr.	thru Apr.*		thru Apr.	thru Apr.*
TOTAL	51,238	51,063	0%		
Acura	669	573	-14%	1.3%	1.1%
Audi	846	967	14%	1.7%	1.9%
BMW	1,848	1,647	-11%	3.6%	3.2%
Buick	214	199	-7%	0.4%	0.4%
Cadillac	287	294	2%	0.6%	0.6%
Chevrolet	3,022	3,292	9%	5.9%	6.4%
Chrysler	200	218	9%	0.4%	0.4%
Dodge	649	626	-4%	1.3%	1.2%
FIAT	212	354	67%	0.4%	0.7%
Ford	5,204	5,167	-1%	10.2%	10.1%
GMC	678	677	0%	1.3%	1.3%
Honda	6,230	6,310	1%	12.2%	12.4%
Hyundai	1,661	1,724	4%	3.2%	3.4%
Infiniti	374	513	37%	0.7%	1.0%
Jaguar	73	195	167%	0.1%	0.4%
Jeep	1,771	1,807	2%	3.5%	3.5%
Kia	2,054	2,148	5%	4.0%	4.2%
Land Rover	456	379	-17%	0.9%	0.7%
Lexus	1,680	1,471	-12%	3.3%	2.9%
Lincoln	236	234	-1%	0.5%	0.5%
Mazda	1,553	1,623	5%	3.0%	3.2%
Mercedes	1,531	1,534	0%	3.0%	3.0%
MINI	288	271	-6%	0.6%	0.5%
Mitsubishi	239	202	-15%	0.5%	0.4%
Nissan	4,865	4,020	-17%	9.5%	7.9%
Other	164	283	73%	0.3%	0.6%
Porsche	316	331	5%	0.6%	0.6%
Ram	765	744	-3%	1.5%	1.5%
Subaru	1,894	2,107	11%	3.7%	4.1%
Tesla	443	647	46%	0.9%	1.3%
Toyota	9,260	8,760	-5%	18.1%	17.2%
Volkswagen	1,268	1,484	17%	2.5%	2.9%
Volvo	288	262	-9%	0.6%	0.5%

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

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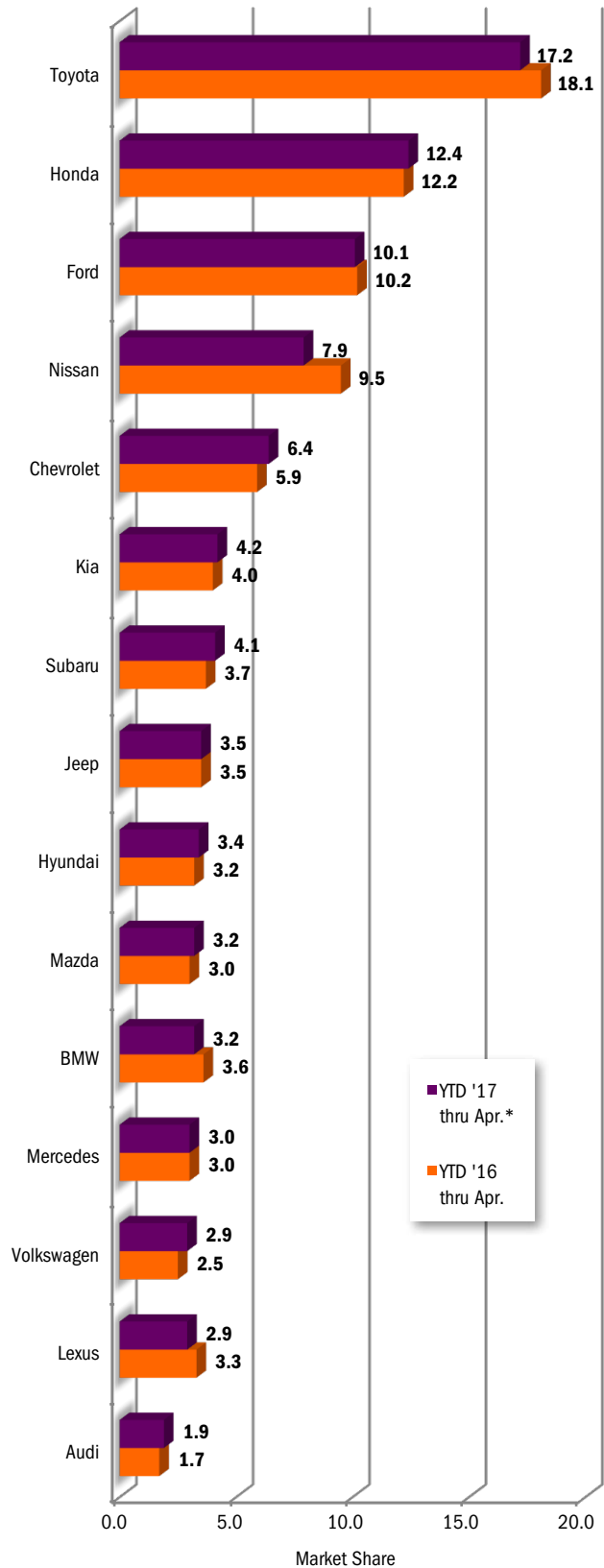
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County Market Share for Top 15 Selling Brands
YTD '17 thru April* vs. YTD '16



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Data Source: IHS Markit.