

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

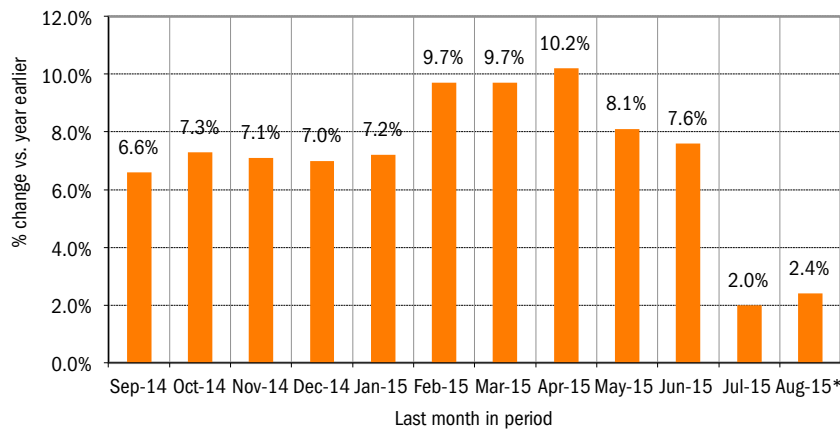
Data thru August 2015

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Aug.*			YTD Market share (thru Aug.*)		
	7/14 & 8/14	7/15 & 8/15*	% change	2014	2015	% change	2014	2015	change
	Industry Total	26,915	27,093	0.7%	97,565	103,844	6.4%		
Cars	16,385	15,325	-6.5%	58,763	59,278	0.9%	60.2	57.1	-3.1
Light Trucks	10,530	11,768	11.8%	38,802	44,566	14.9%	39.8	42.9	3.1
Japanese Brands	14,571	14,061	-3.5%	51,024	53,496	4.8%	52.3	51.5	-0.8
Toyota	6,665	6,300	-5.5%	23,207	23,089	-0.5%	23.8	22.2	-1.6
Honda	3,690	3,610	-2.2%	12,019	13,086	8.9%	12.3	12.6	0.3
Nissan	2,416	2,362	-2.2%	9,410	9,855	4.7%	9.6	9.5	-0.1
Other	1,800	1,789	-0.6%	6,388	7,466	16.9%	6.5	7.2	0.7
Domestic Brands	6,417	6,841	6.6%	24,199	26,590	9.9%	24.8	25.6	0.8
General Motors	1,878	2,022	7.7%	6,794	7,698	13.3%	7.0	7.4	0.4
Ford	2,954	3,133	6.1%	10,968	11,548	5.3%	11.2	11.1	-0.1
Chrysler	1,517	1,612	6.3%	6,164	6,916	12.2%	6.3	6.7	0.4
Other	68	74	8.8%	273	428	56.8%	0.3	0.4	0.1
European Brands	4,069	4,140	1.7%	15,038	15,839	5.3%	15.4	15.3	-0.1
Volkswagen	1,558	1,626	4.4%	5,637	5,765	2.3%	5.8	5.6	-0.2
BMW	1,177	1,158	-1.6%	4,341	4,517	4.1%	4.4	4.3	-0.1
Mercedes	772	817	5.8%	2,861	3,426	19.7%	2.9	3.3	0.4
Other	562	539	-4.1%	2,199	2,131	-3.1%	2.3	2.1	-0.2
Korean Brands	1,858	2,051	10.4%	7,304	7,919	8.4%	7.5	7.6	0.1

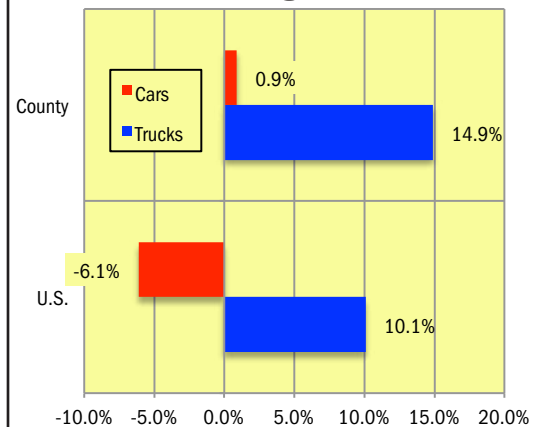
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 August 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 August 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 August* 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 August 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 Aug.	thru Aug.*		thru Aug.	thru Aug.*
TOTAL	97,565	103,844	6%		
Acura	1,173	1,391	19%	1.2%	1.3%
Audi	1,501	1,749	17%	1.5%	1.7%
BMW	3,659	3,755	3%	3.8%	3.6%
Buick	345	419	21%	0.4%	0.4%
Cadillac	683	612	-10%	0.7%	0.6%
Chevrolet	4,803	5,348	11%	4.9%	5.2%
Chrysler	361	658	82%	0.4%	0.6%
Dodge	1,503	1,498	0%	1.5%	1.4%
FIAT	855	649	-24%	0.9%	0.6%
Ford	10,594	11,078	5%	10.9%	10.7%
GMC	963	1,325	38%	1.0%	1.3%
Honda	10,846	11,675	8%	11.1%	11.2%
Hyundai	3,674	3,683	0%	3.8%	3.5%
Infiniti	783	860	10%	0.8%	0.8%
Jaguar	163	124	-24%	0.2%	0.1%
Jeep	3,257	3,528	8%	3.3%	3.4%
Kia	3,630	4,239	17%	3.7%	4.1%
Land Rover	582	737	27%	0.6%	0.7%
Lexus	3,660	3,923	7%	3.8%	3.8%
Lincoln	374	461	23%	0.4%	0.4%
Mazda	3,078	3,451	12%	3.2%	3.3%
Mercedes	2,687	3,306	23%	2.8%	3.2%
MINI	663	764	15%	0.7%	0.7%
Mitsubishi	348	449	29%	0.4%	0.4%
Nissan	8,627	9,010	4%	8.8%	8.7%
Other	413	424	3%	0.4%	0.4%
Porsche	462	618	34%	0.5%	0.6%
Ram	1,043	1,252	20%	1.1%	1.2%
Subaru	2,951	3,544	20%	3.0%	3.4%
Tesla	255	401	57%	0.3%	0.4%
Toyota	19,547	19,110	-2%	20.0%	18.4%
Volkswagen	3,674	3,398	-8%	3.8%	3.3%
Volvo	408	405	-1%	0.4%	0.4%

Data source: IHS Automotive.

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

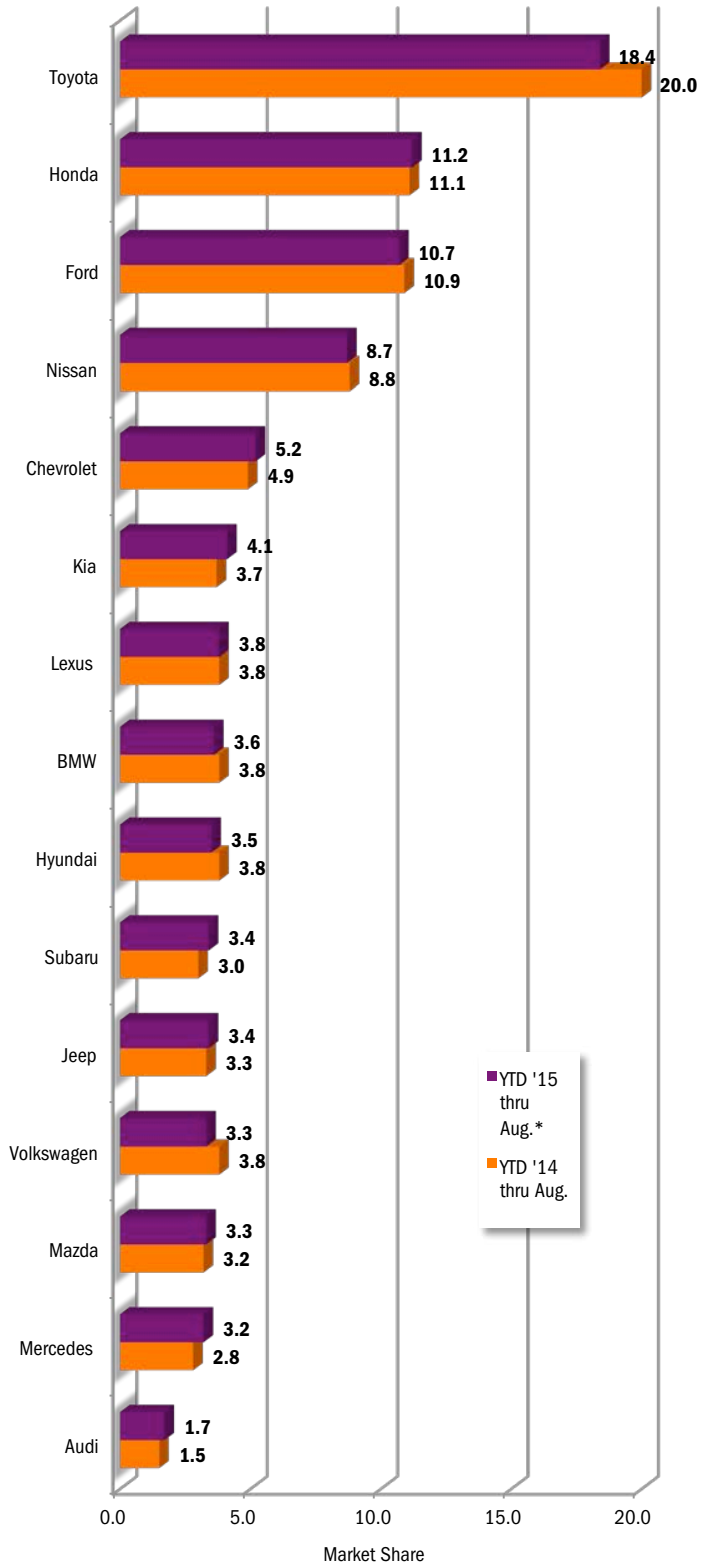
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County Market Share for Top 15 Selling Brands
YTD '15 thru August* vs. YTD 14



Data source: IHS Automotive.

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