

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

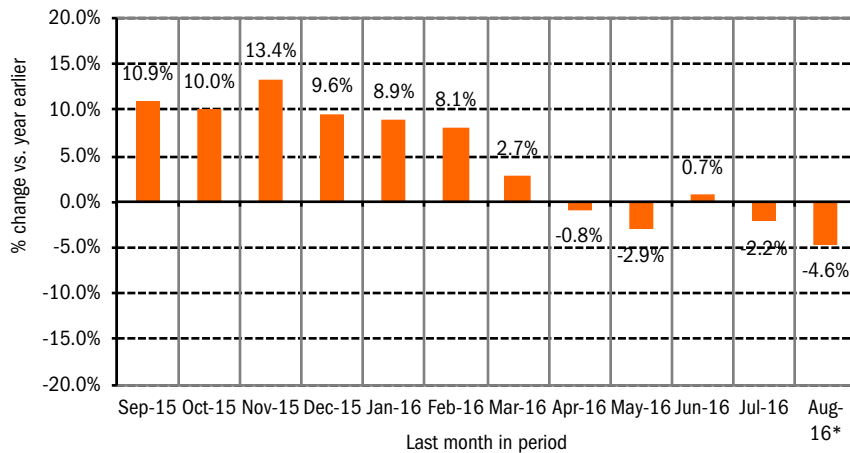
Data thru August 2016

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru August			YTD Market Share		
	7/15 & 8/15	7/16 & 8/16*	% change	2015	2016	% change	2015	2016	change
Industry Total	29,226	27,018	-7.6%	106,281	105,392	-0.8%			
Cars	16,602	14,132	-14.9%	60,736	55,661	-8.4%	57.1	52.8	-4.3
Light Trucks	12,624	12,886	2.1%	45,545	49,731	9.2%	42.9	47.2	4.3
Japanese Brands	15,022	14,114	-6.0%	54,569	54,836	0.5%	51.3	52.0	0.7
Honda	3,737	3,699	-1.0%	13,231	14,180	7.2%	12.4	13.5	1.1
Nissan	2,604	2,200	-15.5%	10,131	10,133	0.0%	9.5	9.6	0.1
Toyota	6,586	6,123	-7.0%	23,437	22,807	-2.7%	22.1	21.6	-0.5
Other	2,095	2,092	-0.1%	7,770	7,716	-0.7%	7.3	7.3	0.0
Domestic Brands	7,475	6,834	-8.6%	27,249	28,025	2.8%	25.6	26.6	1.0
FCA (excl. FIAT)	1,871	1,735	-7.3%	7,201	7,089	-1.6%	6.8	6.7	-0.1
Ford	3,177	2,672	-15.9%	11,566	11,393	-1.5%	10.9	10.8	-0.1
General Motors	2,290	2,238	-2.3%	7,988	8,717	9.1%	7.5	8.3	0.8
Other	137	189	38.0%	494	826	67.2%	0.5	0.8	0.3
European Brands	4,366	3,945	-9.6%	16,199	14,640	-9.6%	15.2	13.9	-1.3
BMW	1,171	833	-28.9%	4,631	3,929	-15.2%	4.4	3.7	-0.7
Mercedes	923	890	-3.6%	3,562	3,362	-5.6%	3.4	3.2	-0.2
Volkswagen	1,698	1,504	-11.4%	5,816	4,931	-15.2%	5.5	4.7	-0.8
Other	574	718	25.1%	2,190	2,418	10.4%	2.1	2.3	0.2
Korean Brands	2,363	2,125	-10.1%	8,264	7,891	-4.5%	7.8	7.5	-0.3

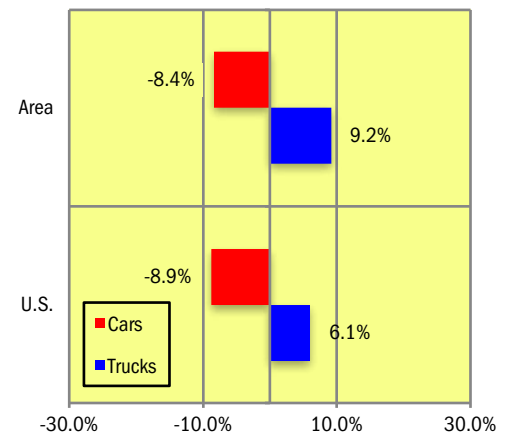
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 2016 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 August 2016 were estimated by Auto Outlook. Data Source: IHS Markit.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '16 thru August* vs. YTD 15



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. *Figures for August 2016 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 '15	YTD '16	% change	YTD '15	YTD '16
	thru Aug.	thru Aug.*		thru Aug.	thru Aug.*
TOTAL	106,281	105,392	-1%		
Acura	1,380	1,232	-11%	1.3%	1.2%
Audi	1,747	1,698	-3%	1.6%	1.6%
BMW	3,860	3,372	-13%	3.6%	3.2%
Buick	420	449	7%	0.4%	0.4%
Cadillac	600	616	3%	0.6%	0.6%
Chevrolet	5,547	6,196	12%	5.2%	5.9%
Chrysler	703	449	-36%	0.7%	0.4%
Dodge	1,559	1,376	-12%	1.5%	1.3%
FIAT	666	423	-36%	0.6%	0.4%
Ford	11,101	10,948	-1%	10.4%	10.4%
GMC	1,421	1,456	2%	1.3%	1.4%
Honda	11,851	12,948	9%	11.2%	12.3%
Hyundai	3,844	3,542	-8%	3.6%	3.4%
Infiniti	889	680	-24%	0.8%	0.6%
Jaguar	127	261	106%	0.1%	0.2%
Jeep	3,587	3,695	3%	3.4%	3.5%
Kia	4,420	4,349	-2%	4.2%	4.1%
Land Rover	753	870	16%	0.7%	0.8%
Lexus	3,890	3,516	-10%	3.7%	3.3%
Lincoln	465	445	-4%	0.4%	0.4%
Mazda	3,579	3,415	-5%	3.4%	3.2%
Mercedes	3,430	3,244	-5%	3.2%	3.1%
MINI	760	547	-28%	0.7%	0.5%
Mitsubishi	467	431	-8%	0.4%	0.4%
Nissan	9,242	9,453	2%	8.7%	9.0%
Other	418	415	-1%	0.4%	0.4%
Porsche	602	615	2%	0.6%	0.6%
Ram	1,352	1,569	16%	1.3%	1.5%
Subaru	3,711	3,865	4%	3.5%	3.7%
Tesla	471	796	69%	0.4%	0.8%
Toyota	19,547	19,291	-1%	18.4%	18.3%
Volkswagen	3,467	2,618	-24%	3.3%	2.5%
Volvo	405	612	51%	0.4%	0.6%

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

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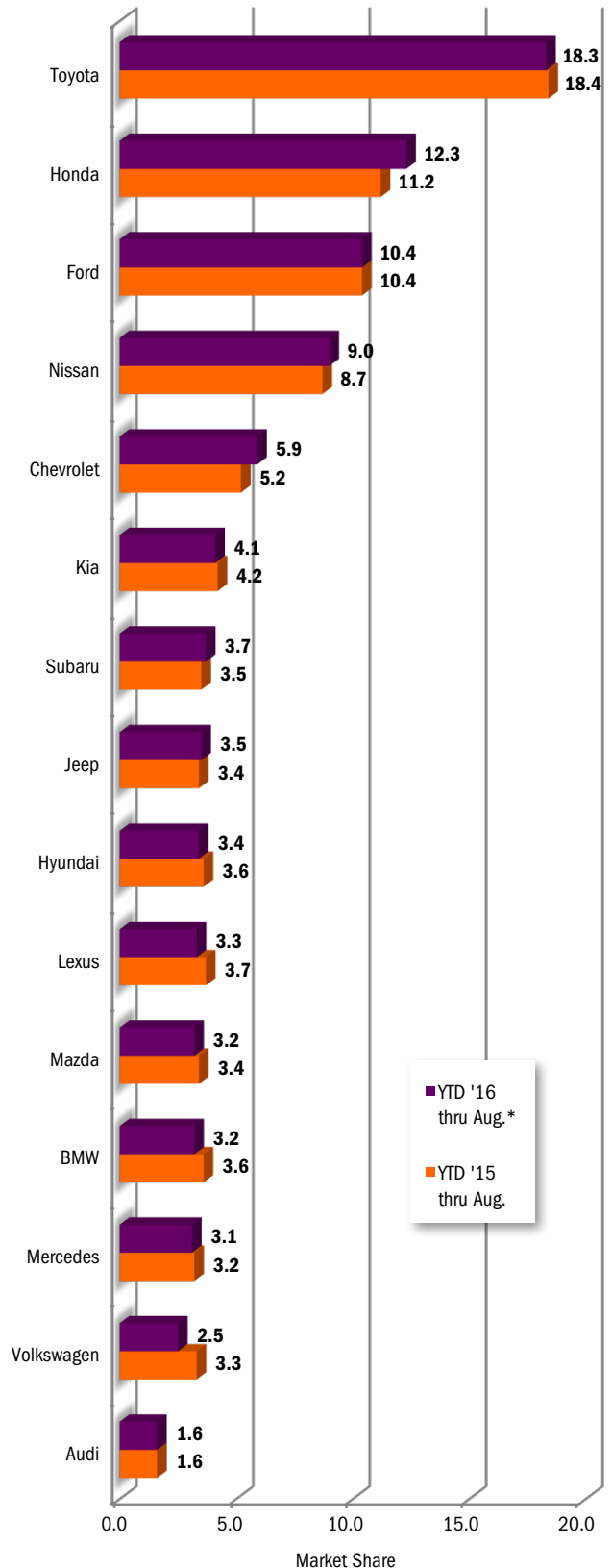
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County Market Share for Top 15 Selling Brands
YTD '16 thru August* vs. YTD 15



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