

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

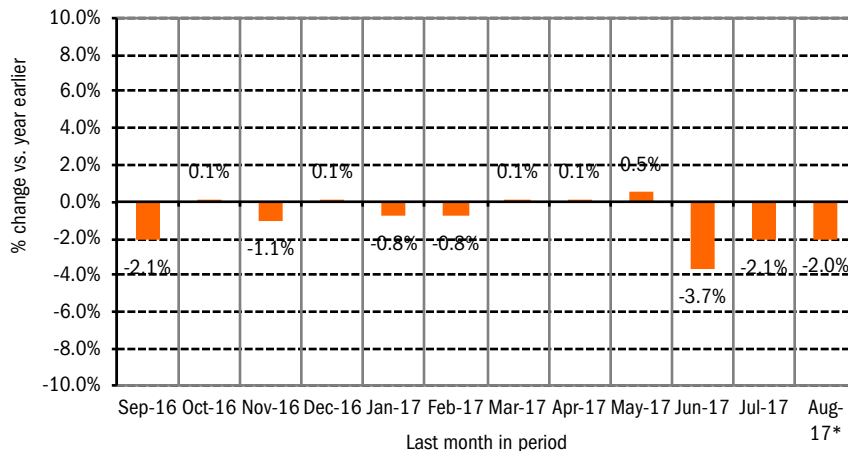
Data thru August 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru August*			YTD Market Share		
	7/16 & 8/16	7/17 & 8/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	28,169	28,066	-0.4%	107,114	105,546	-1.5%			
Cars	14,473	13,151	-9.1%	55,779	49,104	-12.0%	52.1	46.5	-5.6
Light Trucks	13,696	14,915	8.9%	51,335	56,442	9.9%	47.9	53.5	5.6
Japanese Brands	14,545	14,682	0.9%	55,424	53,696	-3.1%	51.7	50.9	-0.8
Honda	3,691	3,801	3.0%	14,172	14,163	-0.1%	13.2	13.4	0.2
Nissan	2,582	2,383	-7.7%	10,566	9,152	-13.4%	9.9	8.7	-1.2
Toyota	6,091	6,225	2.2%	22,883	22,000	-3.9%	21.4	20.8	-0.6
Other	2,181	2,273	4.2%	7,803	8,381	7.4%	7.3	7.9	0.6
Domestic Brands	7,159	7,350	2.7%	28,293	28,286	0.0%	26.4	26.8	0.4
FCA (excl. FIAT)	1,787	1,761	-1.5%	7,135	6,919	-3.0%	6.7	6.6	-0.1
Ford	2,776	2,965	6.8%	11,385	11,443	0.5%	10.6	10.8	0.2
General Motors	2,382	2,375	-0.3%	8,923	8,977	0.6%	8.3	8.5	0.2
Other	214	249	16.4%	850	947	11.4%	0.8	0.9	0.1
European Brands	4,259	4,024	-5.5%	15,409	15,390	-0.1%	14.4	14.6	0.2
BMW	1,238	1,009	-18.5%	4,478	3,790	-15.4%	4.2	3.6	-0.6
Mercedes	937	893	-4.7%	3,417	3,379	-1.1%	3.2	3.2	0.0
Volkswagen	1,402	1,432	2.1%	5,133	5,554	8.2%	4.8	5.3	0.5
Other	682	690	1.2%	2,381	2,667	12.0%	2.2	2.5	0.3
Korean Brands	2,206	2,010	-8.9%	7,988	8,174	2.3%	7.5	7.7	0.2

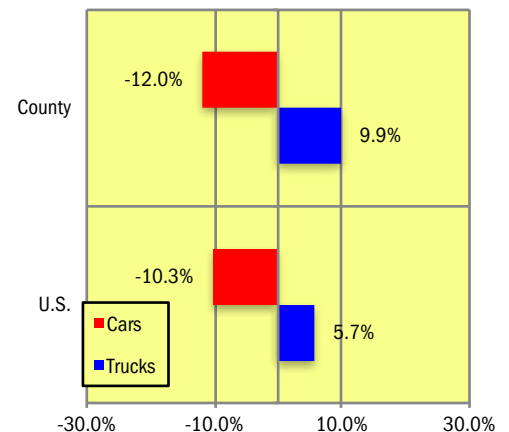
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 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 August 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 August* 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 August, 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 Aug.	thru Aug.*		thru Aug.	thru Aug.*
TOTAL	107,114	105,546	-1%		
Acura	1,237	1,213	-2%	1.2%	1.1%
Alfa Romeo	7	116	1557%	0.0%	0.1%
Audi	1,849	2,032	10%	1.7%	1.9%
BMW	3,890	3,259	-16%	3.6%	3.1%
Buick	435	363	-17%	0.4%	0.3%
Cadillac	628	580	-8%	0.6%	0.5%
Chevrolet	6,420	6,701	4%	6.0%	6.3%
Chrysler	452	466	3%	0.4%	0.4%
Dodge	1,365	1,216	-11%	1.3%	1.2%
FIAT	437	592	35%	0.4%	0.6%
Ford	10,941	10,992	0%	10.2%	10.4%
Genesis	4	119		0.0%	0.1%
GMC	1,440	1,333	-7%	1.3%	1.3%
Honda	12,935	12,950	0%	12.1%	12.3%
Hyundai	3,627	3,742	3%	3.4%	3.5%
Infiniti	674	1,107	64%	0.6%	1.0%
Jaguar	238	359	51%	0.2%	0.3%
Jeep	3,733	3,718	0%	3.5%	3.5%
Kia	4,357	4,313	-1%	4.1%	4.1%
Land Rover	883	826	-6%	0.8%	0.8%
Lexus	3,502	3,243	-7%	3.3%	3.1%
Lincoln	444	451	2%	0.4%	0.4%
Maserati	106	147	39%	0.1%	0.1%
Mazda	3,462	3,612	4%	3.2%	3.4%
Mercedes	3,284	3,334	2%	3.1%	3.2%
MINI	577	525	-9%	0.5%	0.5%
Mitsubishi	431	474	10%	0.4%	0.4%
Nissan	9,892	8,045	-19%	9.2%	7.6%
Other	266	174	-35%	0.2%	0.2%
Porsche	614	637	4%	0.6%	0.6%
Ram	1,585	1,519	-4%	1.5%	1.4%
Subaru	3,903	4,283	10%	3.6%	4.1%
Tesla	824	931	13%	0.8%	0.9%
Toyota	19,381	18,757	-3%	18.1%	17.8%
Volkswagen	2,670	2,885	8%	2.5%	2.7%
Volvo	621	532	-14%	0.6%	0.5%

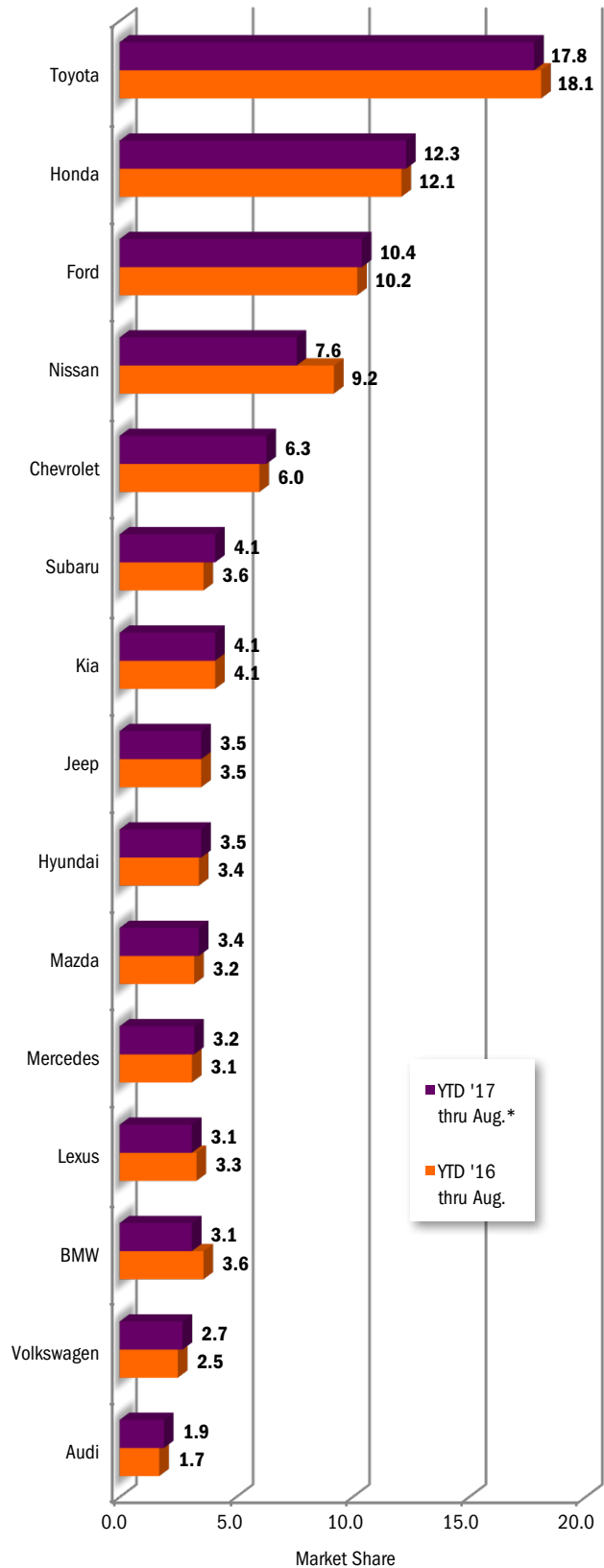
Top ten ranked brands in each percent change category are shaded green.
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Data Source: IHS Markit.

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



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