

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

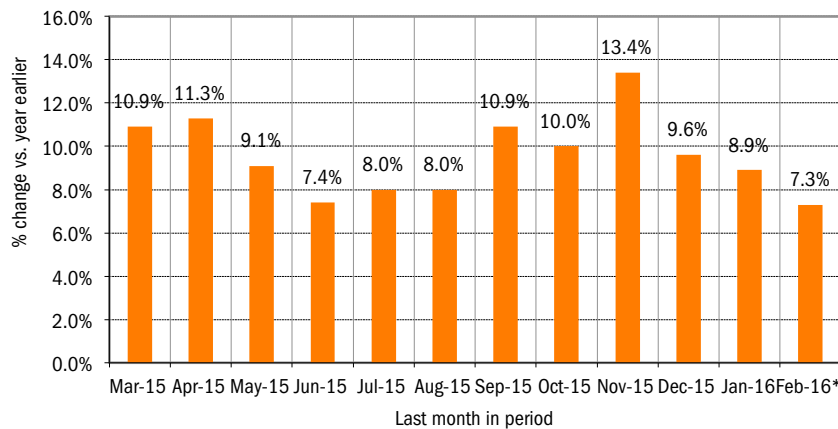
Data thru February 2016

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru February			YTD Market Share		
	1/15 & 2/15	1/16 & 2/16*	% change	2015	2016	% change	2015	2016	change
	Industry Total	23,118	25,053	8.4%	23,118	25,053	8.4%		
Cars	13,221	13,757	4.1%	13,221	13,757	4.1%	57.2	54.9	-2.3
Light Trucks	9,897	11,296	14.1%	9,897	11,296	14.1%	42.8	45.1	2.3
Japanese Brands	12,066	13,354	10.7%	12,066	13,354	10.7%	52.2	53.3	1.1
Toyota	5,233	5,780	10.5%	5,233	5,780	10.5%	22.6	23.1	0.5
Honda	2,844	3,250	14.3%	2,844	3,250	14.3%	12.3	13.0	0.7
Nissan	2,302	2,504	8.8%	2,302	2,504	8.8%	10.0	10.0	0.0
Other	1,687	1,820	7.9%	1,687	1,820	7.9%	7.3	7.3	0.0
Domestic Brands	5,841	6,430	10.1%	5,841	6,430	10.1%	25.3	25.7	0.4
General Motors	1,591	1,707	7.3%	1,591	1,707	7.3%	6.9	6.8	-0.1
Ford	2,603	2,863	10.0%	2,603	2,863	10.0%	11.3	11.4	0.1
Chrysler	1,522	1,692	11.2%	1,522	1,692	11.2%	6.6	6.8	0.2
Other	125	168	34.4%	125	168	34.4%	0.5	0.7	0.2
European Brands	3,510	3,441	-2.0%	3,510	3,441	-2.0%	15.2	13.7	-1.5
Volkswagen	1,260	1,168	-7.3%	1,260	1,168	-7.3%	5.5	4.7	-0.8
BMW	994	921	-7.3%	994	921	-7.3%	4.3	3.7	-0.6
Mercedes	769	817	6.2%	769	817	6.2%	3.3	3.3	0.0
Other	487	535	9.9%	487	535	9.9%	2.1	2.1	0.0
Korean Brands	1,701	1,828	7.5%	1,701	1,828	7.5%	7.4	7.3	-0.1

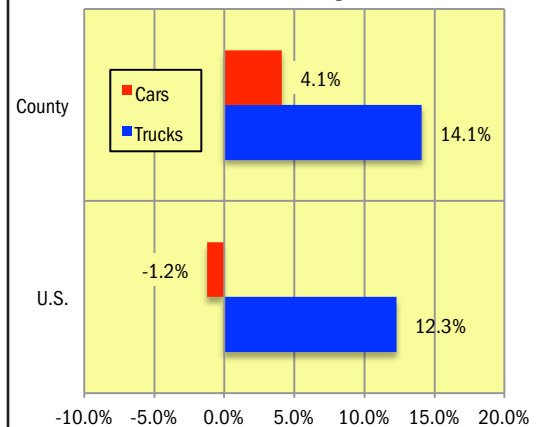
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '16 thru February* 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 February 2016 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 '15	YTD '16	% change	YTD '15	YTD '16
	thru Feb.	thru Feb.*		thru Feb.	thru Feb.*
TOTAL	23,118	25,053	8%		
Acura	318	288	-9%	1.4%	1.1%
Audi	348	343	-1%	1.5%	1.4%
BMW	838	772	-8%	3.6%	3.1%
Buick	77	102	32%	0.3%	0.4%
Cadillac	173	155	-10%	0.7%	0.6%
Chevrolet	1,053	1,282	22%	4.6%	5.1%
Chrysler	179	119	-34%	0.8%	0.5%
Dodge	355	368	4%	1.5%	1.5%
FIAT	119	108	-9%	0.5%	0.4%
Ford	2,497	2,681	7%	10.8%	10.7%
GMC	288	286	-1%	1.2%	1.1%
Honda	2,526	3,005	19%	10.9%	12.0%
Hyundai	794	812	2%	3.4%	3.2%
Infiniti	203	204	0%	0.9%	0.8%
Jaguar	30	27	-10%	0.1%	0.1%
Jeep	719	849	18%	3.1%	3.4%
Kia	907	1,025	13%	3.9%	4.1%
Land Rover	182	214	18%	0.8%	0.9%
Lexus	920	914	-1%	4.0%	3.6%
Lincoln	106	142	34%	0.5%	0.6%
Mazda	732	717	-2%	3.2%	2.9%
Mercedes	742	784	6%	3.2%	3.1%
MINI	154	114	-26%	0.7%	0.5%
Mitsubishi	115	120	4%	0.5%	0.5%
Nissan	2,099	2,310	10%	9.1%	9.2%
Other	93	91	-2%	0.4%	0.4%
Porsche	170	177	4%	0.7%	0.7%
Ram	269	331	23%	1.2%	1.3%
Subaru	837	942	13%	3.6%	3.8%
Tesla	119	163	37%	0.5%	0.7%
Toyota	4,313	4,845	12%	18.7%	19.3%
Volkswagen	742	620	-16%	3.2%	2.5%
Volvo	101	143	42%	0.4%	0.6%

Data source: IHS Automotive.

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

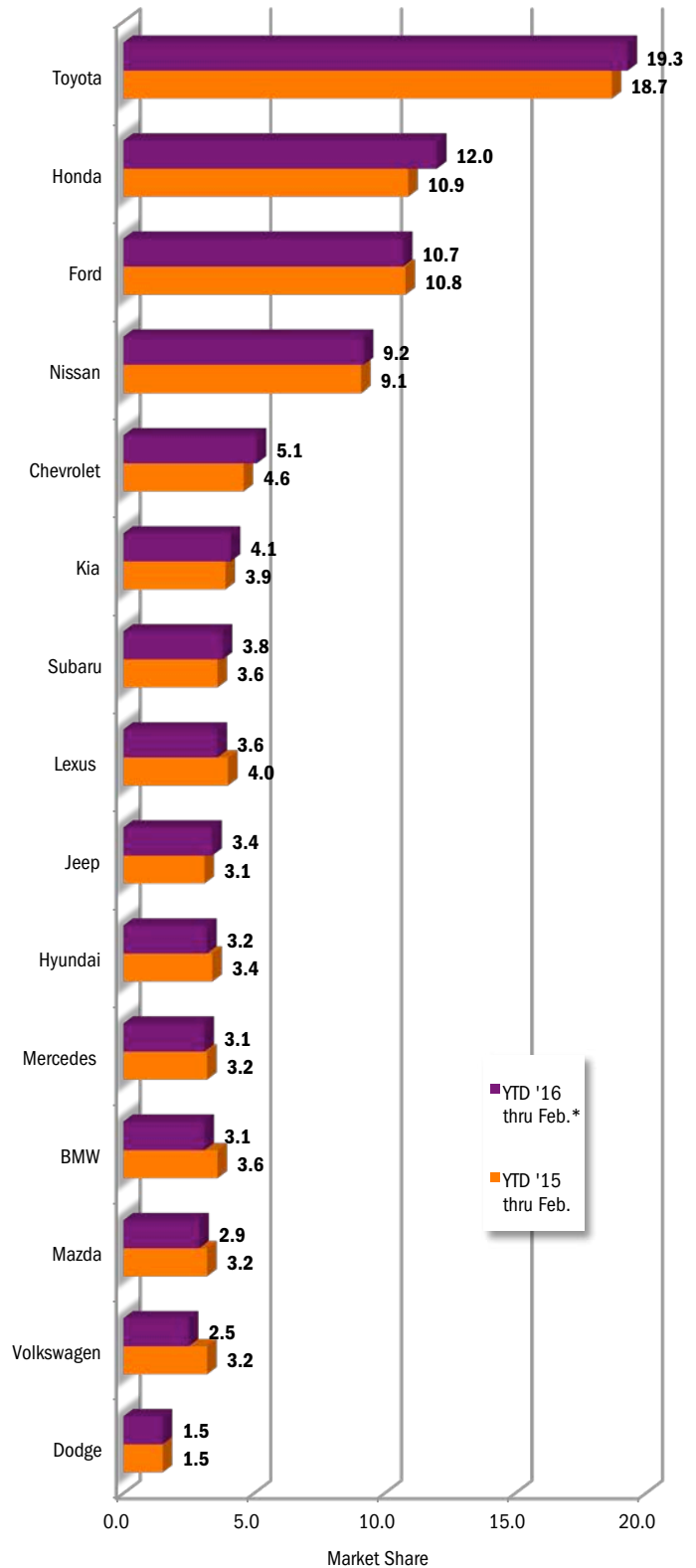
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County Market Share for Top 15 Selling Brands
YTD '16 thru February* vs. YTD 15



Data source: IHS Automotive.

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