

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

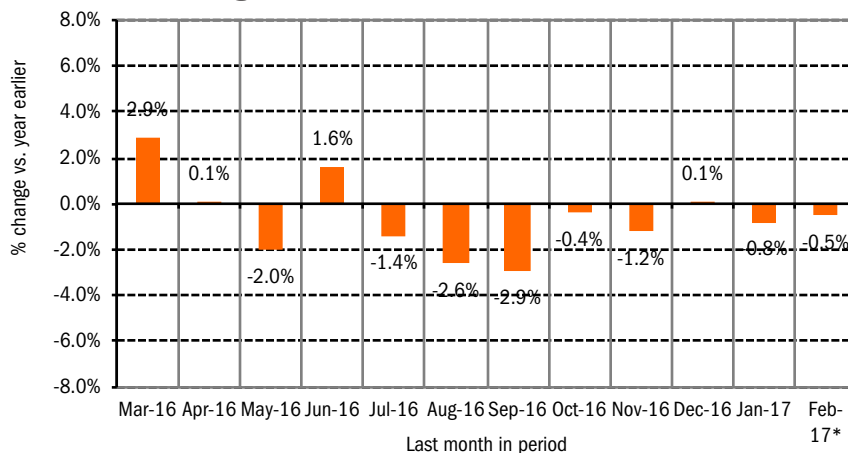
Data thru February 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual Totals			YTD Market Share (thru Feb.*)		
	1/16 & 2/16	1/17 & 2/17*	% change	2015	2016	% change	YTD '16	YTD '17	change
Industry Total	25,389	24,544	-3.3%	161,196	161,692	0.3%			
Cars	13,617	11,691	-14.1%	89,744	82,250	-8.4%	53.6	47.6	-6.0
Light Trucks	11,772	12,853	9.2%	71,452	79,442	11.2%	46.4	52.4	6.0
Japanese Brands	13,221	12,191	-7.8%	82,497	82,832	0.4%	52.1	49.7	-2.4
Honda	3,168	3,031	-4.3%	20,200	21,499	6.4%	12.5	12.3	-0.2
Nissan	2,735	2,622	-4.1%	15,298	15,572	1.8%	10.8	10.7	-0.1
Toyota	5,504	4,512	-18.0%	35,406	34,178	-3.5%	21.7	18.4	-3.3
Other	1,814	2,026	11.7%	11,593	11,583	-0.1%	7.1	8.3	1.2
Domestic Brands	6,876	7,019	2.1%	41,684	42,513	2.0%	27.1	28.6	1.5
FCA (excl. FIAT)	1,764	1,777	0.7%	10,606	10,412	-1.8%	6.9	7.2	0.3
Ford	2,833	2,938	3.7%	17,591	16,839	-4.3%	11.2	12.0	0.8
General Motors	2,115	2,054	-2.9%	12,687	13,888	9.5%	8.3	8.4	0.1
Other	164	250	52.4%	800	1,374	71.8%	0.6	1.0	0.4
European Brands	3,487	3,595	3.1%	24,673	24,094	-2.3%	13.7	14.6	0.9
BMW	1,002	901	-10.1%	7,090	6,851	-3.4%	3.9	3.7	-0.2
Mercedes	840	829	-1.3%	5,552	5,337	-3.9%	3.3	3.4	0.1
Volkswagen	1,092	1,201	10.0%	8,596	8,077	-6.0%	4.3	4.9	0.6
Other	553	664	20.1%	3,435	3,829	11.5%	2.2	2.7	0.5
Korean Brands	1,805	1,739	-3.7%	12,342	12,253	-0.7%	7.1	7.1	0.0

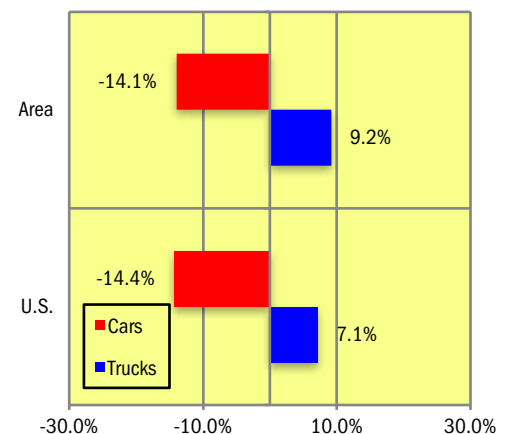
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 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 February 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 February* 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 February, 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 Feb.	thru Feb.*		thru Feb.	thru Feb.*
TOTAL	25,389	24,544	-3%		
Acura	293	241	-18%	1.2%	1.0%
Audi	337	383	14%	1.3%	1.6%
BMW	886	789	-11%	3.5%	3.2%
Buick	123	85	-31%	0.5%	0.3%
Cadillac	149	123	-17%	0.6%	0.5%
Chevrolet	1,503	1,503	0%	5.9%	6.1%
Chrysler	106	105	-1%	0.4%	0.4%
Dodge	354	322	-9%	1.4%	1.3%
FIAT	104	162	56%	0.4%	0.7%
Ford	2,700	2,797	4%	10.6%	11.4%
GMC	340	343	1%	1.3%	1.4%
Honda	2,875	2,790	-3%	11.3%	11.4%
Hyundai	833	861	3%	3.3%	3.5%
Infiniti	220	242	10%	0.9%	1.0%
Jaguar	37	97	162%	0.1%	0.4%
Jeep	916	942	3%	3.6%	3.8%
Kia	972	855	-12%	3.8%	3.5%
Land Rover	236	215	-9%	0.9%	0.9%
Lexus	864	637	-26%	3.4%	2.6%
Lincoln	133	141	6%	0.5%	0.6%
Mazda	752	808	7%	3.0%	3.3%
Mercedes	815	819	0%	3.2%	3.3%
MINI	115	110	-4%	0.5%	0.4%
Mitsubishi	123	130	6%	0.5%	0.5%
Nissan	2,515	2,380	-5%	9.9%	9.7%
Other	76	126	66%	0.3%	0.5%
Porsche	169	168	-1%	0.7%	0.7%
Ram	388	408	5%	1.5%	1.7%
Subaru	938	1,085	16%	3.7%	4.4%
Tesla	162	249	54%	0.6%	1.0%
Toyota	4,640	3,875	-16%	18.3%	15.8%
Volkswagen	586	650	11%	2.3%	2.6%
Volvo	129	103	-20%	0.5%	0.4%

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

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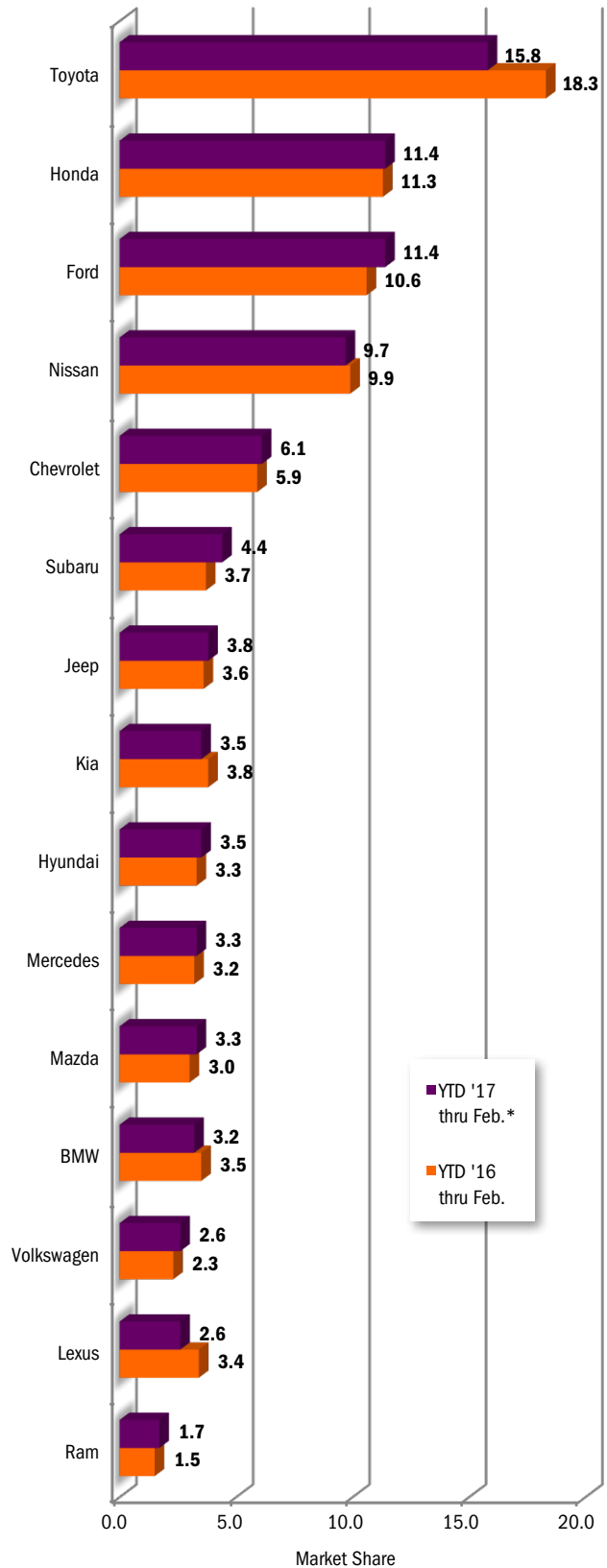
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County Market Share for Top 15 Selling Brands
YTD '17 thru February* vs. YTD '16



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