

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

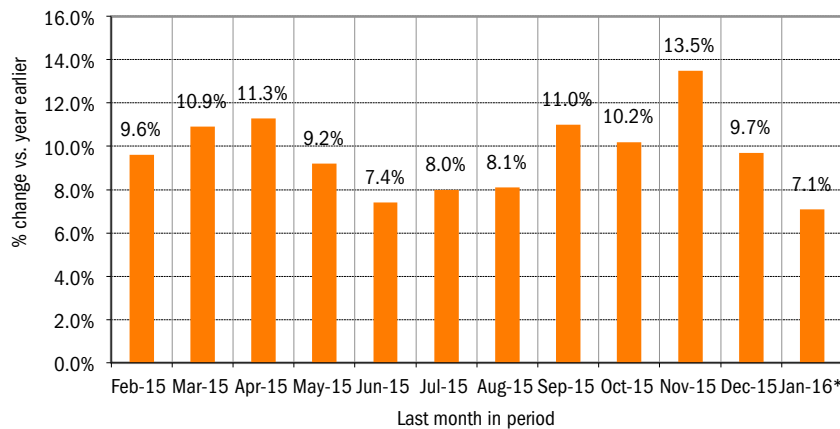
Data thru January 2016

## San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual Totals			Annual Market Share		
	12/14 & 1/15	12/15 & 1/16*	% change	2014	2015	% change	2014	2015	change
	Industry Total	25,600	26,603	3.9%	146,947	161,290	9.8%		
Cars	14,696	14,162	-3.6%	88,098	91,164	3.5%	60.0	56.5	-3.5
Light Trucks	10,904	12,441	14.1%	58,849	70,126	19.2%	40.0	43.5	3.5
Japanese Brands	12,938	13,240	2.3%	76,361	82,546	8.1%	52.0	51.2	-0.8
Toyota	5,561	5,649	1.6%	34,268	35,416	3.4%	23.3	22.0	-1.3
Honda	3,156	3,441	9.0%	18,261	20,216	10.7%	12.4	12.5	0.1
Nissan	2,578	2,340	-9.2%	14,314	15,314	7.0%	9.7	9.5	-0.2
Other	1,643	1,810	10.2%	9,518	11,600	21.9%	6.5	7.2	0.7
Domestic Brands	6,423	6,931	7.9%	36,291	41,783	15.1%	24.7	25.9	1.2
General Motors	1,939	2,198	13.4%	10,471	12,697	21.3%	7.1	7.9	0.8
Ford	2,558	2,747	7.4%	15,983	17,695	10.7%	10.9	11.0	0.1
Chrysler	1,760	1,790	1.7%	9,349	10,606	13.4%	6.4	6.6	0.2
Other	166	196	18.1%	488	785	60.9%	0.3	0.5	0.2
European Brands	4,444	4,481	0.8%	23,592	24,621	4.4%	16.1	15.3	-0.8
Volkswagen	1,515	1,410	-6.9%	8,709	8,621	-1.0%	5.9	5.3	-0.6
BMW	1,383	1,369	-1.0%	6,901	7,034	1.9%	4.7	4.4	-0.3
Mercedes	1,008	1,051	4.3%	4,752	5,526	16.3%	3.2	3.4	0.2
Other	538	651	21.0%	3,230	3,440	6.5%	2.2	2.1	-0.1
Korean Brands	1,795	1,951	8.7%	10,703	12,340	15.3%	7.3	7.7	0.4

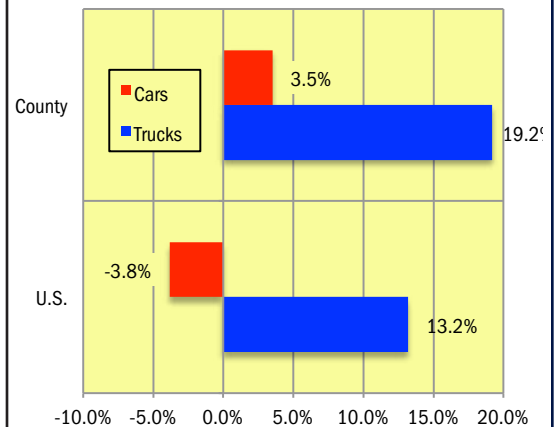
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

### Percent Change in County and U.S. New Retail Light Vehicle Markets 2015 vs. 2014



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets.

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	
	2014	2015	% change	2014	2015
TOTAL	146,947	161,290	10%		
Acura	1,810	2,096	16%	1.2%	1.3%
Audi	2,395	2,625	10%	1.6%	1.6%
BMW	5,856	5,930	1%	4.0%	3.7%
Buick	527	648	23%	0.4%	0.4%
Cadillac	1,017	925	-9%	0.7%	0.6%
Chevrolet	7,324	8,852	21%	5.0%	5.5%
Chrysler	663	952	44%	0.5%	0.6%
Dodge	2,183	2,229	2%	1.5%	1.4%
FIAT	1,235	925	-25%	0.8%	0.6%
Ford	15,428	16,980	10%	10.5%	10.5%
GMC	1,603	2,272	42%	1.1%	1.4%
Honda	16,451	18,120	10%	11.2%	11.2%
Hyundai	5,413	5,733	6%	3.7%	3.6%
Infiniti	1,186	1,289	9%	0.8%	0.8%
Jaguar	233	204	-12%	0.2%	0.1%
Jeep	4,800	5,376	12%	3.3%	3.3%
Kia	5,290	6,607	25%	3.6%	4.1%
Land Rover	861	1,224	42%	0.6%	0.8%
Lexus	5,593	5,843	4%	3.8%	3.6%
Lincoln	555	715	29%	0.4%	0.4%
Mazda	4,475	5,305	19%	3.0%	3.3%
Mercedes	4,500	5,331	18%	3.1%	3.3%
MINI	1,019	1,089	7%	0.7%	0.7%
Mitsubishi	522	682	31%	0.4%	0.4%
Nissan	13,128	14,025	7%	8.9%	8.7%
Other	622	636	2%	0.4%	0.4%
Porsche	764	923	21%	0.5%	0.6%
Ram	1,703	2,049	20%	1.2%	1.3%
Subaru	4,505	5,598	24%	3.1%	3.5%
Tesla	458	752	64%	0.3%	0.5%
Toyota	28,675	29,573	3%	19.5%	18.3%
Volkswagen	5,550	5,073	-9%	3.8%	3.1%
Volvo	603	709	18%	0.4%	0.4%

Data source: IHS Automotive.

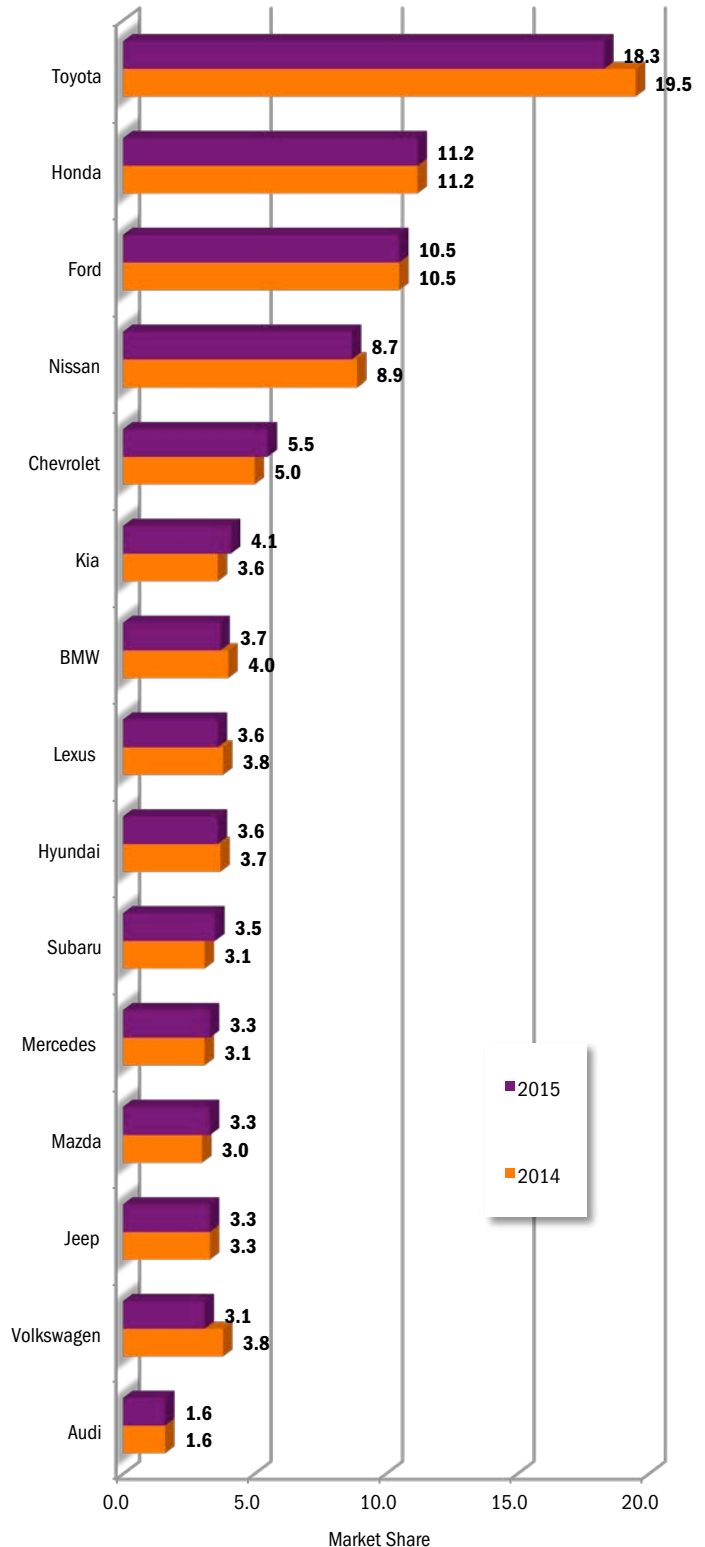
Top ten ranked brands in each percent change category are shaded green.

This report is sponsored by the New Car Dealers Association San Diego County (858-550-0080) and produced by Auto Outlook (800-206-0102).

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County Market Share for Top 15 Selling Brands  
2015 vs. 2014



Data source: IHS Automotive.