

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

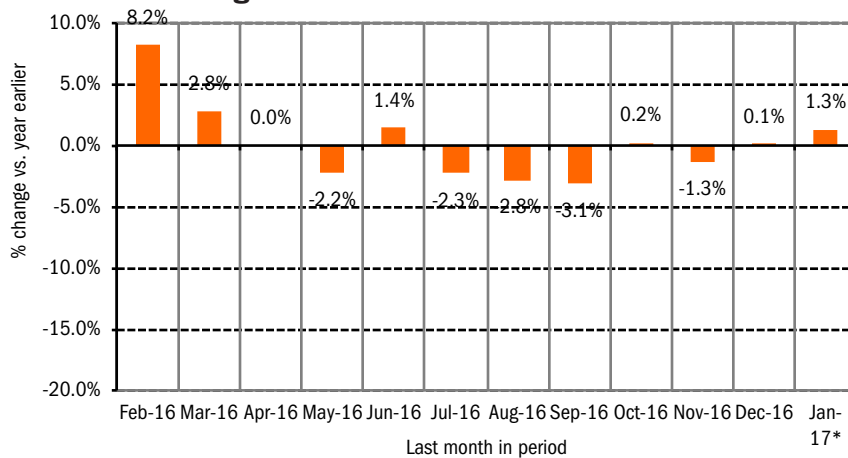
Data thru January 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual Totals			Annual Market Share		
	12/15 & 1/16	12/16 & 1/17*	% change	2015	2016	% change	2015	2016	change
Industry Total	27,280	28,160	3.2%	161,196	161,532	0.2%			
Cars	14,570	13,683	-6.1%	89,744	82,147	-8.5%	55.7	50.9	-4.8
Light Trucks	12,710	14,477	13.9%	71,452	79,385	11.1%	44.3	49.1	4.8
Japanese Brands	13,924	14,558	4.6%	82,497	82,868	0.4%	51.2	51.3	0.1
Honda	3,639	3,898	7.1%	20,200	21,503	6.5%	12.5	13.3	0.8
Nissan	2,352	2,731	16.1%	15,298	15,583	1.9%	9.5	9.6	0.1
Toyota	6,022	5,968	-0.9%	35,406	34,199	-3.4%	22.0	21.2	-0.8
Other	1,911	1,961	2.6%	11,593	11,583	-0.1%	7.2	7.2	0.0
Domestic Brands	6,981	6,884	-1.4%	41,684	42,499	2.0%	25.9	26.3	0.4
FCA (excl. FIAT)	1,677	1,530	-8.8%	10,606	10,430	-1.7%	6.6	6.5	-0.1
Ford	2,675	2,585	-3.4%	17,591	16,935	-3.7%	10.9	10.5	-0.4
General Motors	2,389	2,454	2.7%	12,687	13,758	8.4%	7.9	8.5	0.6
Other	240	315	31.3%	800	1,376	72.0%	0.5	0.9	0.4
European Brands	4,394	4,693	6.8%	24,673	23,915	-3.1%	15.3	14.8	-0.5
BMW	1,327	1,314	-1.0%	7,090	6,721	-5.2%	4.4	4.2	-0.2
Mercedes	1,084	1,027	-5.3%	5,552	5,295	-4.6%	3.4	3.3	-0.1
Volkswagen	1,327	1,636	23.3%	8,596	8,076	-6.0%	5.3	5.0	-0.3
Other	656	716	9.1%	3,435	3,823	11.3%	2.1	2.4	0.3
Korean Brands	1,981	2,025	2.2%	12,342	12,250	-0.7%	7.7	7.6	-0.1

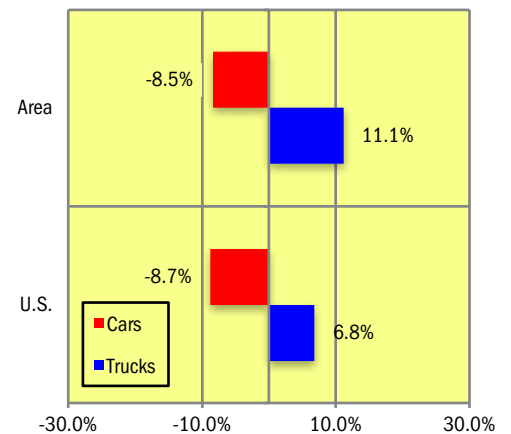
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 January 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 January 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

Percent Change in County and U.S. New Retail Light Vehicle Markets 2016 vs. 2015



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 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	
	2015	2016	% change	2015	2016
	Annual	Annual		Annual	Annual
TOTAL	161,196	161,532	0%		
Acura	2,096	1,873	-11%	1.3%	1.2%
Audi	2,611	2,892	11%	1.6%	1.8%
BMW	5,992	5,858	-2%	3.7%	3.6%
Buick	648	684	6%	0.4%	0.4%
Cadillac	931	999	7%	0.6%	0.6%
Chevrolet	8,839	9,805	11%	5.5%	6.1%
Chrysler	952	636	-33%	0.6%	0.4%
Dodge	2,230	1,941	-13%	1.4%	1.2%
FIAT	925	734	-21%	0.6%	0.5%
Ford	16,876	16,269	-4%	10.5%	10.1%
GMC	2,269	2,270	0%	1.4%	1.4%
Honda	18,104	19,630	8%	11.2%	12.2%
Hyundai	5,737	5,433	-5%	3.6%	3.4%
Infiniti	1,277	1,308	2%	0.8%	0.8%
Jaguar	201	431	114%	0.1%	0.3%
Jeep	5,376	5,460	2%	3.3%	3.4%
Kia	6,605	6,777	3%	4.1%	4.2%
Land Rover	1,221	1,348	10%	0.8%	0.8%
Lexus	5,843	5,473	-6%	3.6%	3.4%
Lincoln	715	666	-7%	0.4%	0.4%
Mazda	5,305	5,018	-5%	3.3%	3.1%
Mercedes	5,357	5,114	-5%	3.3%	3.2%
MINI	1,083	846	-22%	0.7%	0.5%
Mitsubishi	682	612	-10%	0.4%	0.4%
Nissan	14,021	14,275	2%	8.7%	8.8%
Other	637	632	-1%	0.4%	0.4%
Porsche	912	949	4%	0.6%	0.6%
Ram	2,048	2,393	17%	1.3%	1.5%
Subaru	5,591	5,942	6%	3.5%	3.7%
Tesla	767	1,338	74%	0.5%	0.8%
Toyota	29,563	28,726	-3%	18.3%	17.8%
Volkswagen	5,073	4,235	-17%	3.1%	2.6%
Volvo	709	965	36%	0.4%	0.6%

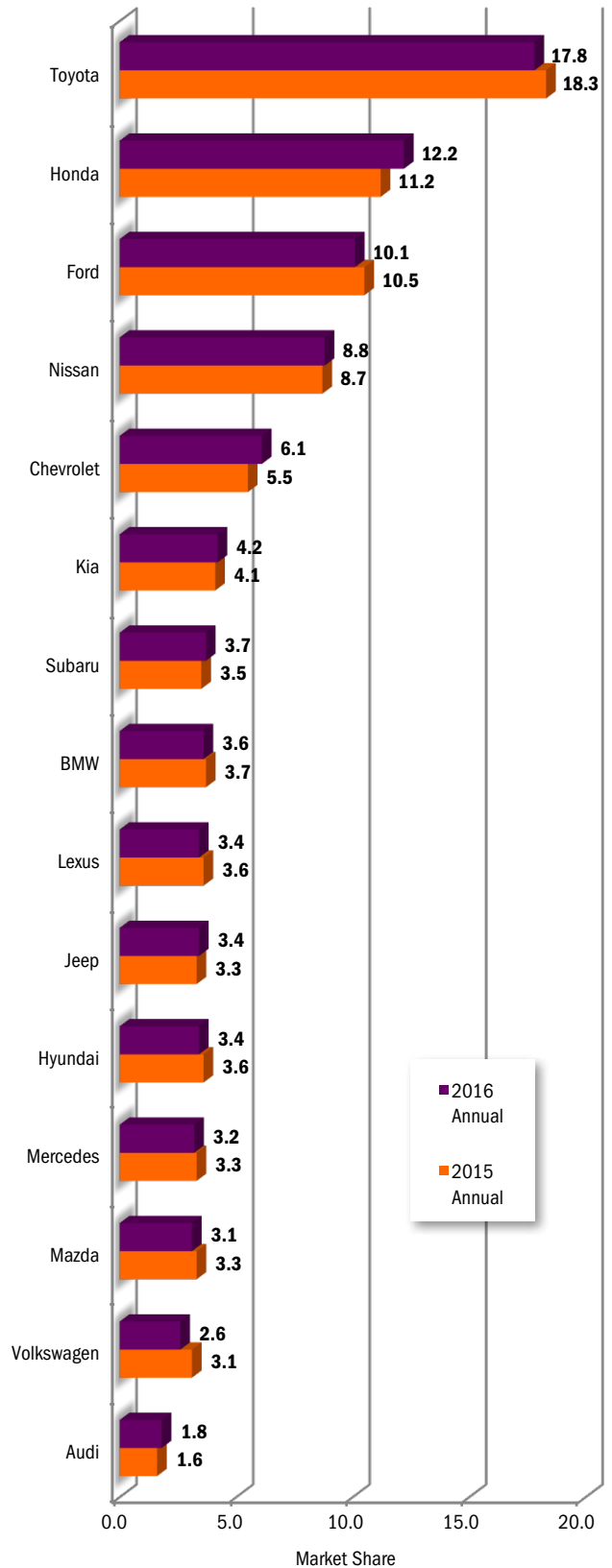
Top ten ranked brands in each percent change category are shaded green.
Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands
2016 vs. 2015



Data Source: IHS Markit.