

# San Diego Outlook

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New Car  
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San Diego County

Covering the San Diego County automotive market

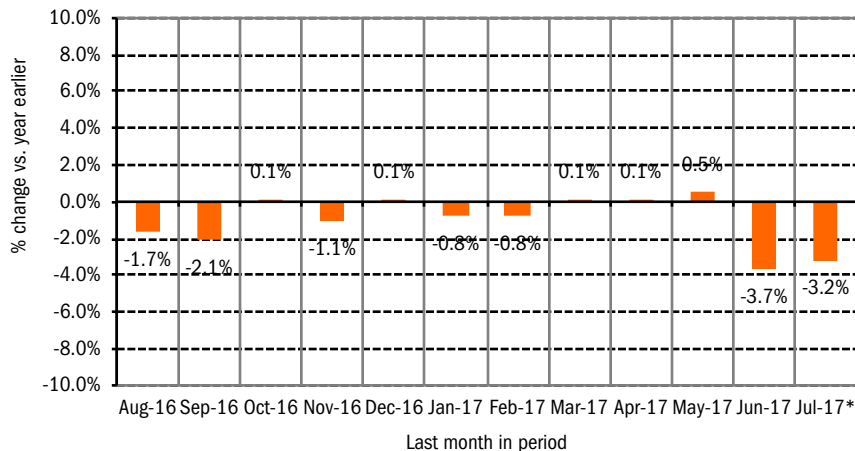
Data thru July 2017

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

	Most Recent Two Months			Year to date thru July*			YTD Market Share		
	6/16 & 7/16	6/17 & 7/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	26,300	25,177	-4.3%	92,639	90,763	-2.0%			
Cars	13,674	11,841	-13.4%	48,436	42,431	-12.4%	52.3	46.7	-5.6
Light Trucks	12,626	13,336	5.6%	44,203	48,332	9.3%	47.7	53.3	5.6
Japanese Brands	13,580	13,287	-2.2%	48,026	46,317	-3.6%	51.8	51.0	-0.8
Honda	3,551	3,480	-2.0%	12,369	12,250	-1.0%	13.4	13.5	0.1
Nissan	2,306	2,089	-9.4%	9,117	7,877	-13.6%	9.8	8.7	-1.1
Toyota	5,816	5,705	-1.9%	19,900	19,036	-4.3%	21.5	21.0	-0.5
Other	1,907	2,013	5.6%	6,640	7,154	7.7%	7.2	7.9	0.7
Domestic Brands	6,753	6,176	-8.5%	24,467	23,976	-2.0%	26.4	26.4	0.0
FCA (excl. FIAT)	1,600	1,411	-11.8%	6,103	5,840	-4.3%	6.6	6.4	-0.2
Ford	2,582	2,423	-6.2%	9,847	9,638	-2.1%	10.6	10.6	0.0
General Motors	2,336	2,096	-10.3%	7,764	7,653	-1.4%	8.4	8.4	0.0
Other	235	246	4.7%	753	845	12.2%	0.8	0.9	0.1
European Brands	3,894	3,780	-2.9%	13,249	13,352	0.8%	14.3	14.7	0.4
BMW	1,127	956	-15.2%	3,855	3,316	-14.0%	4.2	3.7	-0.5
Mercedes	846	824	-2.6%	2,927	2,877	-1.7%	3.2	3.2	0.0
Volkswagen	1,310	1,341	2.4%	4,445	4,828	8.6%	4.8	5.3	0.5
Other	611	659	7.9%	2,022	2,331	15.3%	2.2	2.6	0.4
Korean Brands	2,073	1,934	-6.7%	6,897	7,118	3.2%	7.4	7.8	0.4

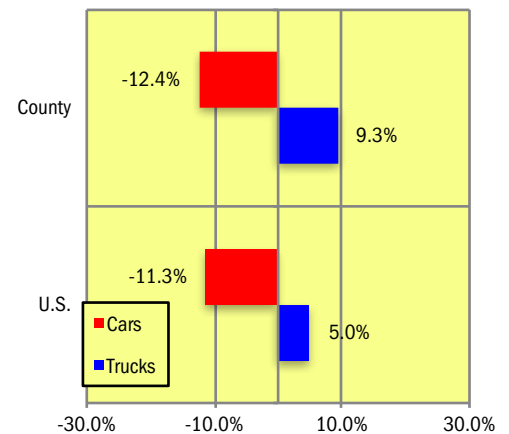
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 July 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 July 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 July\* 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 July, 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 July	thru July*		thru July	thru July*
TOTAL	92,639	90,763	-2%		
Acura	1,082	1,030	-5%	1.2%	1.1%
Alfa Romeo	6	98	1533%	0.0%	0.1%
Audi	1,590	1,753	10%	1.7%	1.9%
BMW	3,331	2,843	-15%	3.6%	3.1%
Buick	395	337	-15%	0.4%	0.4%
Cadillac	543	511	-6%	0.6%	0.6%
Chevrolet	5,551	5,613	1%	6.0%	6.2%
Chrysler	383	396	3%	0.4%	0.4%
Dodge	1,190	1,031	-13%	1.3%	1.1%
FIAT	354	518	46%	0.4%	0.6%
Ford	9,463	9,252	-2%	10.2%	10.2%
Genesis	0	112		0.0%	0.1%
GMC	1,275	1,192	-7%	1.4%	1.3%
Honda	11,287	11,220	-1%	12.2%	12.4%
Hyundai	3,098	3,215	4%	3.3%	3.5%
Infiniti	573	938	64%	0.6%	1.0%
Jaguar	201	333	66%	0.2%	0.4%
Jeep	3,181	3,146	-1%	3.4%	3.5%
Kia	3,799	3,791	0%	4.1%	4.2%
Land Rover	772	716	-7%	0.8%	0.8%
Lexus	3,004	2,723	-9%	3.2%	3.0%
Lincoln	384	386	1%	0.4%	0.4%
Maserati	91	140	54%	0.1%	0.2%
Mazda	2,970	3,138	6%	3.2%	3.5%
Mercedes	2,809	2,835	1%	3.0%	3.1%
MINI	514	467	-9%	0.6%	0.5%
Mitsubishi	380	380	0%	0.4%	0.4%
Nissan	8,544	6,939	-19%	9.2%	7.6%
Other	230	158	-31%	0.2%	0.2%
Porsche	532	540	2%	0.6%	0.6%
Ram	1,349	1,267	-6%	1.5%	1.4%
Subaru	3,285	3,624	10%	3.5%	4.0%
Tesla	733	837	14%	0.8%	0.9%
Toyota	16,896	16,313	-3%	18.2%	18.0%
Volkswagen	2,323	2,535	9%	2.5%	2.8%
Volvo	521	436	-16%	0.6%	0.5%

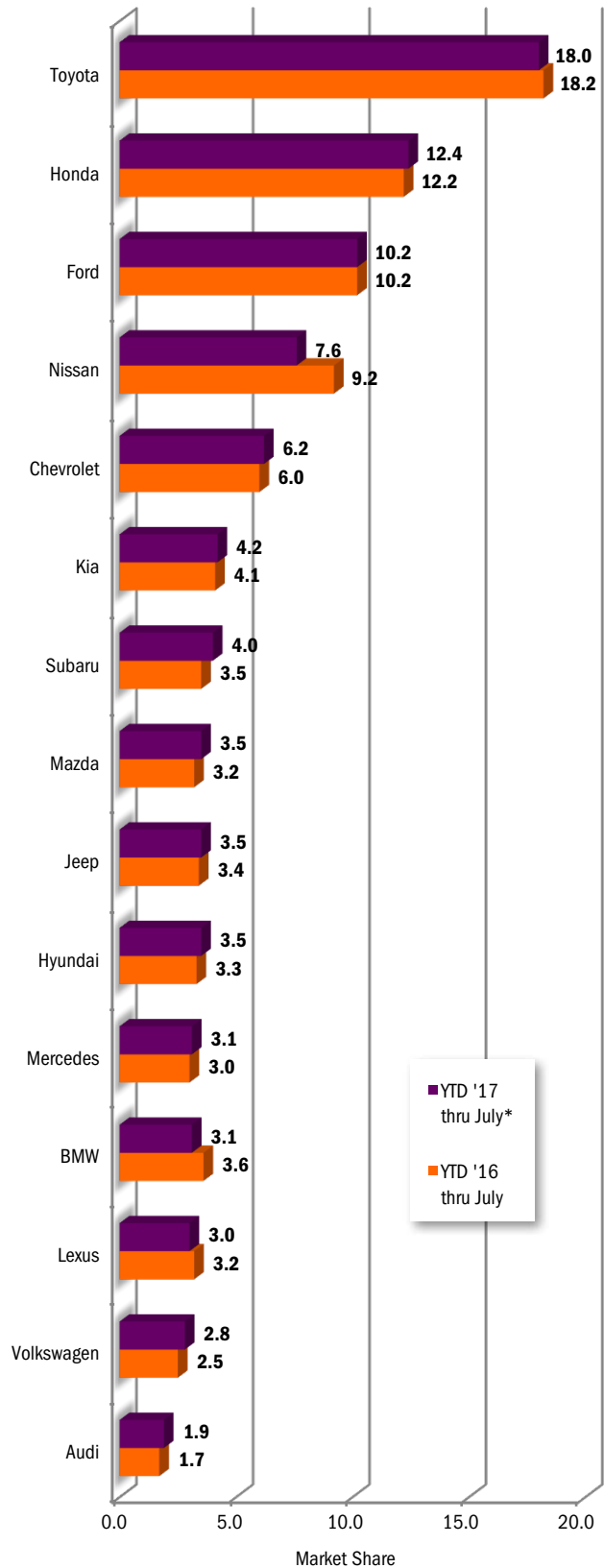
Top ten ranked brands in each percent change category are shaded green.  
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County Market Share for Top 15 Selling Brands  
YTD '17 thru July\* vs. YTD '16



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