

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

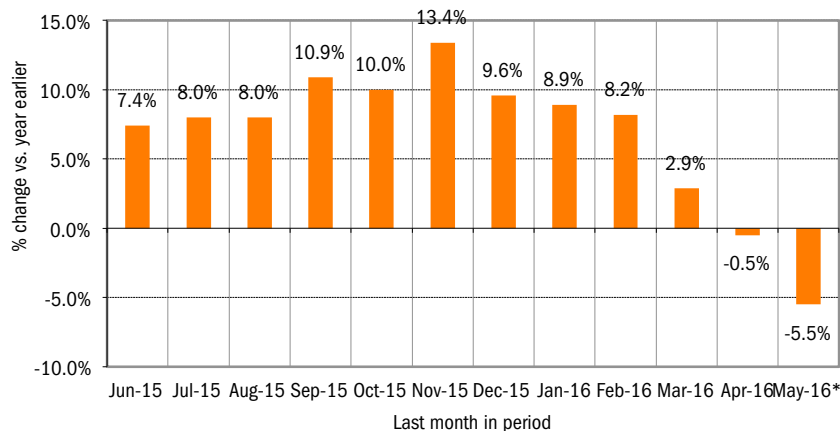
Data thru May 2016

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru May			YTD Market Share		
	4/15 & 5/15	4/16 & 5/16*	% change	2015	2016	% change	2015	2016	change
	Industry Total	27,566	26,433	-4.1%	64,819	64,786	-0.1%		
Cars	15,791	13,698	-13.3%	37,184	34,453	-7.3%	57.4	53.2	-4.2
Light Trucks	11,775	12,735	8.2%	27,635	30,333	9.8%	42.6	46.8	4.2
Japanese Brands	14,133	13,844	-2.0%	33,436	34,003	1.7%	51.6	52.5	0.9
Toyota	6,176	5,785	-6.3%	14,404	14,037	-2.5%	22.2	21.7	-0.5
Honda	3,618	3,808	5.3%	8,049	8,784	9.1%	12.4	13.6	1.2
Nissan	2,450	2,391	-2.4%	6,272	6,563	4.6%	9.7	10.1	0.4
Other	1,889	1,860	-1.5%	4,711	4,619	-2.0%	7.3	7.1	-0.2
Domestic Brands	7,247	6,938	-4.3%	16,601	17,110	3.1%	25.6	26.4	0.8
General Motors	2,185	1,985	-9.2%	4,731	5,083	7.4%	7.3	7.8	0.5
Ford	3,087	2,850	-7.7%	7,174	7,108	-0.9%	11.1	11.0	-0.1
Chrysler	1,867	1,848	-1.0%	4,403	4,426	0.5%	6.8	6.8	0.0
Other	108	255	136.1%	293	493	68.3%	0.5	0.8	0.3
European Brands	4,107	3,509	-14.6%	9,838	8,795	-10.6%	15.2	13.6	-1.6
Volkswagen	1,435	1,096	-23.6%	3,436	2,806	-18.3%	5.3	4.3	-1.0
BMW	1,170	1,117	-4.5%	2,846	2,652	-6.8%	4.4	4.1	-0.3
Mercedes	982	827	-15.8%	2,191	2,002	-8.6%	3.4	3.1	-0.3
Other	520	469	-9.8%	1,365	1,335	-2.2%	2.1	2.1	0.0
Korean Brands	2,079	2,142	3.0%	4,944	4,878	-1.3%	7.6	7.5	-0.1

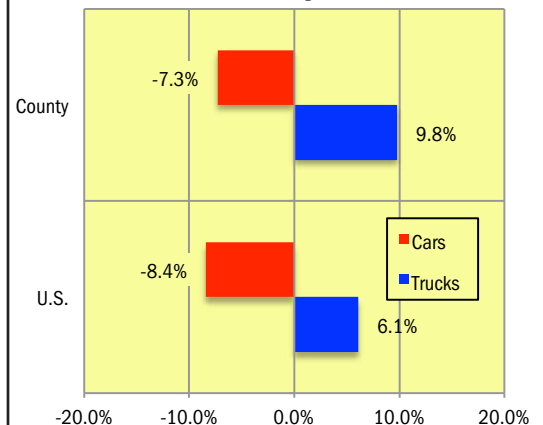
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 May 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 May 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 May* 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 May 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 May	thru May*		thru May	thru May*
TOTAL	64,819	64,786	0%		
Acura	867	816	-6%	1.3%	1.3%
Audi	1,030	944	-8%	1.6%	1.5%
BMW	2,380	2,263	-5%	3.7%	3.5%
Buick	248	259	4%	0.4%	0.4%
Cadillac	384	332	-14%	0.6%	0.5%
Chevrolet	3,291	3,658	11%	5.1%	5.6%
Chrysler	458	274	-40%	0.7%	0.4%
Dodge	1,016	857	-16%	1.6%	1.3%
FIAT	430	253	-41%	0.7%	0.4%
Ford	6,867	6,785	-1%	10.6%	10.5%
GMC	808	834	3%	1.2%	1.3%
Honda	7,182	7,968	11%	11.1%	12.3%
Hyundai	2,294	2,209	-4%	3.5%	3.4%
Infiniti	561	500	-11%	0.9%	0.8%
Jaguar	80	96	20%	0.1%	0.1%
Jeep	2,136	2,319	9%	3.3%	3.6%
Kia	2,650	2,669	1%	4.1%	4.1%
Land Rover	472	531	13%	0.7%	0.8%
Lexus	2,369	2,127	-10%	3.7%	3.3%
Lincoln	307	323	5%	0.5%	0.5%
Mazda	2,171	2,016	-7%	3.3%	3.1%
Mercedes	2,110	1,943	-8%	3.3%	3.0%
MINI	460	383	-17%	0.7%	0.6%
Mitsubishi	292	292	0%	0.5%	0.5%
Nissan	5,711	6,063	6%	8.8%	9.4%
Other	266	195	-27%	0.4%	0.3%
Porsche	392	384	-2%	0.6%	0.6%
Ram	793	976	23%	1.2%	1.5%
Subaru	2,240	2,308	3%	3.5%	3.6%
Tesla	279	483	73%	0.4%	0.7%
Toyota	12,035	11,910	-1%	18.6%	18.4%
Volkswagen	2,014	1,478	-27%	3.1%	2.3%
Volvo	226	338	50%	0.3%	0.5%

Data source: IHS Automotive.

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

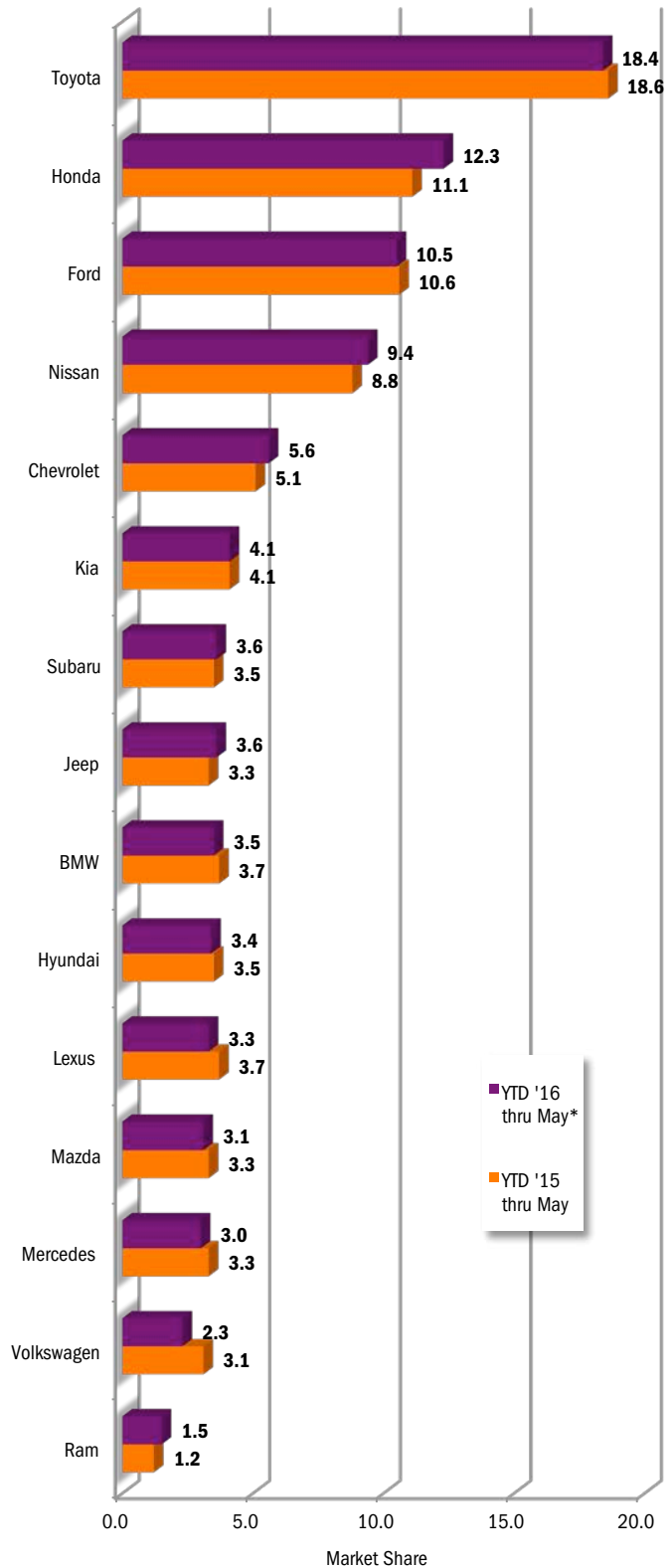
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County Market Share for Top 15 Selling Brands
YTD '16 thru May* vs. YTD 15



Data source: IHS Automotive.

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