

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

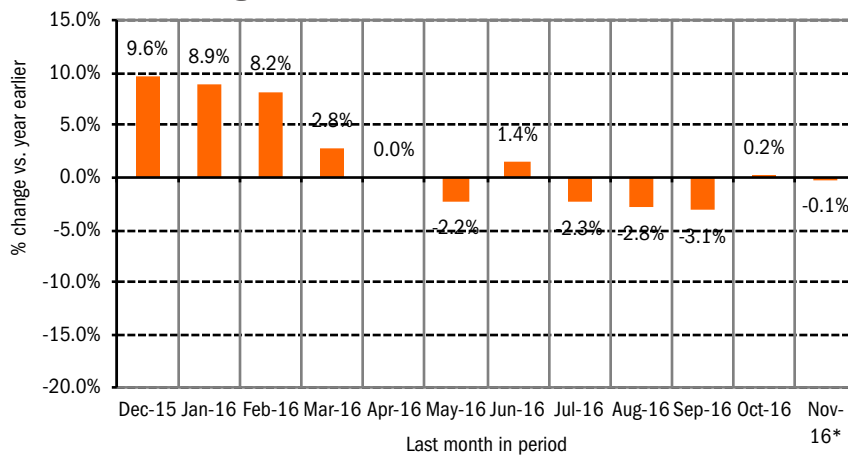
Data thru November 2016

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru November*			YTD Market Share		
	10/15 & 11/15	10/16 & 11/16	% change	2015	2016	% change	2015	2016	change
Industry Total	26,109	26,012	-0.4%	146,457	146,642	0.1%			
Cars	14,466	13,027	-9.9%	83,247	76,767	-7.8%	56.8	52.3	-4.5
Light Trucks	11,643	12,985	11.5%	63,210	69,875	10.5%	43.2	47.7	4.5
Japanese Brands	13,341	13,078	-2.0%	75,188	75,230	0.1%	51.3	51.3	0.0
Honda	3,169	3,259	2.8%	18,135	19,254	6.2%	12.4	13.1	0.7
Nissan	2,492	2,549	2.3%	14,149	14,283	0.9%	9.7	9.7	0.0
Toyota	5,817	5,373	-7.6%	32,315	31,000	-4.1%	22.1	21.1	-1.0
Other	1,863	1,897	1.8%	10,589	10,693	1.0%	7.2	7.3	0.1
Domestic Brands	6,930	7,103	2.5%	37,947	39,172	3.2%	25.9	26.7	0.8
FCA (excl. FIAT)	1,645	1,607	-2.3%	9,745	9,644	-1.0%	6.7	6.6	-0.1
Ford	2,879	2,740	-4.8%	16,130	15,756	-2.3%	11.0	10.7	-0.3
General Motors	2,264	2,473	9.2%	11,373	12,484	9.8%	7.8	8.5	0.7
Other	142	283	99.3%	699	1,288	84.3%	0.5	0.9	0.4
European Brands	3,917	3,775	-3.6%	22,051	21,083	-4.4%	15.1	14.4	-0.7
BMW	1,135	989	-12.9%	6,287	5,906	-6.1%	4.3	4.0	-0.3
Mercedes	886	831	-6.2%	4,894	4,696	-4.0%	3.3	3.2	-0.1
Volkswagen	1,303	1,267	-2.8%	7,813	7,067	-9.5%	5.3	4.8	-0.5
Other	593	688	16.0%	3,057	3,414	11.7%	2.1	2.3	0.2
Korean Brands	1,921	2,056	7.0%	11,271	11,157	-1.0%	7.7	7.6	-0.1

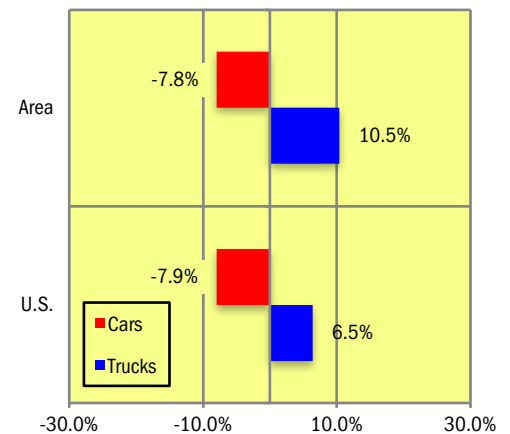
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '16 thru November* 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 November 2016 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 '15	YTD '16	% change	YTD '15	YTD '16
	thru Nov.	thru Nov.*		thru Nov.	thru Nov.*
TOTAL	146,457	146,642	0%		
Acura	1,876	1,670	-11%	1.3%	1.1%
Audi	2,328	2,510	8%	1.6%	1.7%
BMW	5,274	5,106	-3%	3.6%	3.5%
Buick	588	621	6%	0.4%	0.4%
Cadillac	824	905	10%	0.6%	0.6%
Chevrolet	7,934	8,905	12%	5.4%	6.1%
Chrysler	914	595	-35%	0.6%	0.4%
Dodge	2,062	1,766	-14%	1.4%	1.2%
FIAT	877	632	-28%	0.6%	0.4%
Ford	15,487	15,137	-2%	10.6%	10.3%
GMC	2,027	2,053	1%	1.4%	1.4%
Honda	16,259	17,584	8%	11.1%	12.0%
Hyundai	5,248	4,953	-6%	3.6%	3.4%
Infiniti	1,175	1,012	-14%	0.8%	0.7%
Jaguar	179	389	117%	0.1%	0.3%
Jeep	4,914	5,045	3%	3.4%	3.4%
Kia	6,023	6,183	3%	4.1%	4.2%
Land Rover	1,066	1,211	14%	0.7%	0.8%
Lexus	5,210	4,807	-8%	3.6%	3.3%
Lincoln	643	619	-4%	0.4%	0.4%
Mazda	4,842	4,678	-3%	3.3%	3.2%
Mercedes	4,724	4,543	-4%	3.2%	3.1%
MINI	1,000	785	-22%	0.7%	0.5%
Mitsubishi	633	580	-8%	0.4%	0.4%
Nissan	12,974	13,271	2%	8.9%	9.0%
Other	572	557	-3%	0.4%	0.4%
Porsche	828	894	8%	0.6%	0.6%
Ram	1,855	2,238	21%	1.3%	1.5%
Subaru	5,101	5,426	6%	3.5%	3.7%
Tesla	668	1,252	87%	0.5%	0.9%
Toyota	27,105	26,193	-3%	18.5%	17.9%
Volkswagen	4,657	3,663	-21%	3.2%	2.5%
Volvo	590	859	46%	0.4%	0.6%

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

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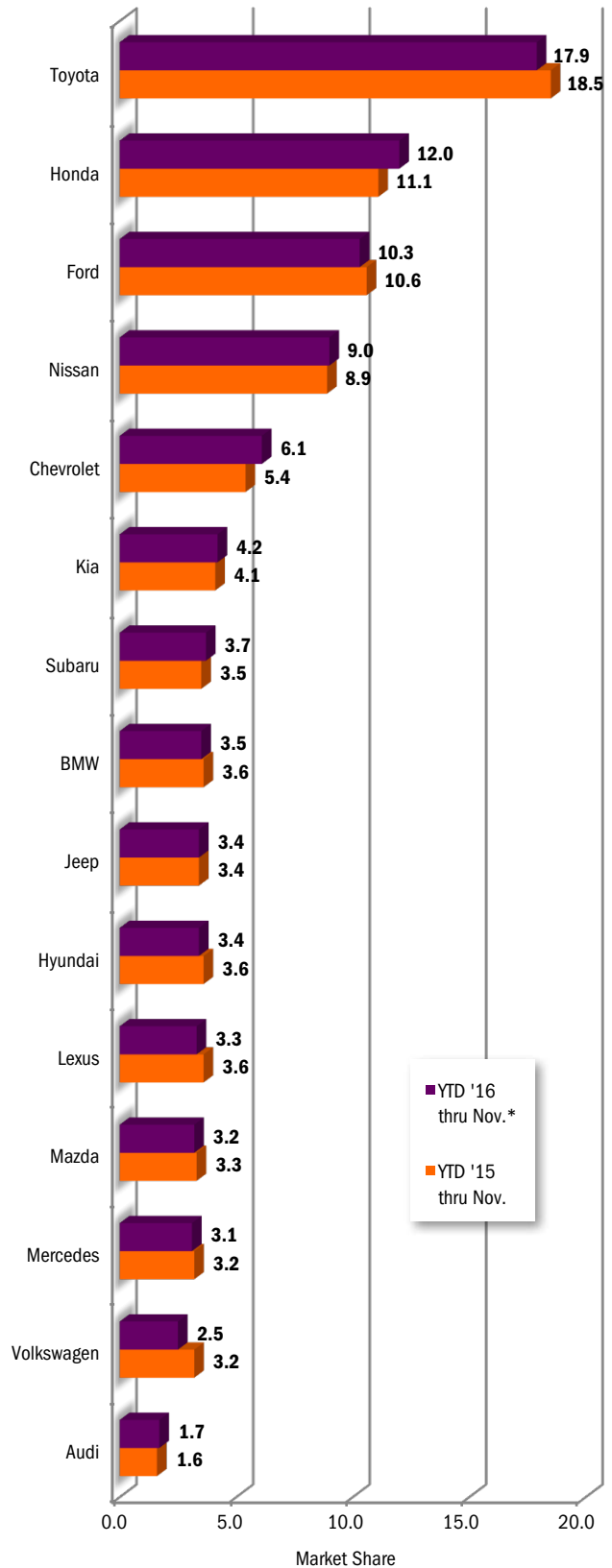
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County Market Share for Top 15 Selling Brands
YTD '16 thru November* vs. YTD 15



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