

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

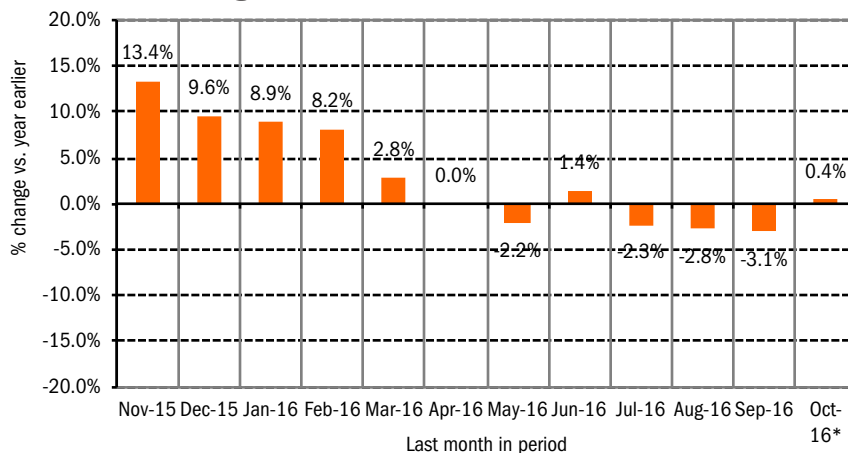
Data thru October 2016

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

	Most Recent Two Months			YTD thru October*			YTD Market Share		
	9/15 & 10/15	9/16 & 10/16*	% change	2015	2016	% change	2015	2016	change
Industry Total	26,910	26,844	-0.2%	133,191	133,344	0.1%			
Cars	15,343	14,114	-8.0%	76,079	70,406	-7.5%	57.1	52.8	-4.3
Light Trucks	11,567	12,730	10.1%	57,112	62,938	10.2%	42.9	47.2	4.3
Japanese Brands	13,974	13,760	-1.5%	68,543	68,808	0.4%	51.5	51.6	0.1
Honda	3,396	3,513	3.4%	16,627	17,678	6.3%	12.5	13.3	0.8
Nissan	2,675	2,518	-5.9%	12,806	12,915	0.9%	9.6	9.7	0.1
Toyota	6,040	5,806	-3.9%	29,477	28,489	-3.4%	22.1	21.4	-0.7
Other	1,863	1,923	3.2%	9,633	9,726	1.0%	7.2	7.3	0.1
Domestic Brands	7,020	6,967	-0.8%	34,269	35,229	2.8%	25.7	26.4	0.7
FCA (excl. FIAT)	1,632	1,588	-2.7%	8,833	8,739	-1.1%	6.6	6.6	0.0
Ford	3,035	2,841	-6.4%	14,601	14,266	-2.3%	11.0	10.7	-0.3
General Motors	2,211	2,302	4.1%	10,199	11,136	9.2%	7.7	8.4	0.7
Other	142	236	66.2%	636	1,088	71.1%	0.5	0.8	0.3
European Brands	3,909	3,939	0.8%	20,108	19,240	-4.3%	15.1	14.4	-0.7
BMW	1,060	1,000	-5.7%	5,691	5,388	-5.3%	4.3	4.0	-0.3
Mercedes	902	909	0.8%	4,464	4,316	-3.3%	3.4	3.2	-0.2
Volkswagen	1,399	1,329	-5.0%	7,215	6,459	-10.5%	5.4	4.8	-0.6
Other	548	701	27.9%	2,738	3,077	12.4%	2.1	2.3	0.2
Korean Brands	2,007	2,178	8.5%	10,271	10,067	-2.0%	7.7	7.5	-0.2

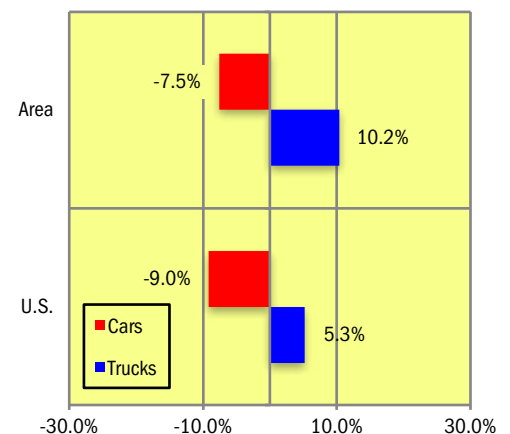
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 October 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 October 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 October\* 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 October 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 Oct.	thru Oct.*		thru Oct.	thru Oct.*
TOTAL	133,191	133,344	0%		
Acura	1,723	1,508	-12%	1.3%	1.1%
Audi	2,117	2,284	8%	1.6%	1.7%
BMW	4,768	4,666	-2%	3.6%	3.5%
Buick	528	537	2%	0.4%	0.4%
Cadillac	734	769	5%	0.6%	0.6%
Chevrolet	7,141	8,060	13%	5.4%	6.0%
Chrysler	839	547	-35%	0.6%	0.4%
Dodge	1,919	1,671	-13%	1.4%	1.3%
FIAT	821	559	-32%	0.6%	0.4%
Ford	14,023	13,707	-2%	10.5%	10.3%
GMC	1,796	1,770	-1%	1.3%	1.3%
Honda	14,904	16,170	8%	11.2%	12.1%
Hyundai	4,779	4,459	-7%	3.6%	3.3%
Infiniti	1,077	888	-18%	0.8%	0.7%
Jaguar	159	348	119%	0.1%	0.3%
Jeep	4,422	4,537	3%	3.3%	3.4%
Kia	5,492	5,593	2%	4.1%	4.2%
Land Rover	937	1,075	15%	0.7%	0.8%
Lexus	4,732	4,361	-8%	3.6%	3.3%
Lincoln	578	559	-3%	0.4%	0.4%
Mazda	4,421	4,283	-3%	3.3%	3.2%
Mercedes	4,303	4,168	-3%	3.2%	3.1%
MINI	910	710	-22%	0.7%	0.5%
Mitsubishi	573	530	-8%	0.4%	0.4%
Nissan	11,729	12,027	3%	8.8%	9.0%
Other	527	556	6%	0.4%	0.4%
Porsche	746	780	5%	0.6%	0.6%
Ram	1,653	1,984	20%	1.2%	1.5%
Subaru	4,626	4,906	6%	3.5%	3.7%
Tesla	605	1,057	75%	0.5%	0.8%
Toyota	24,745	24,128	-2%	18.6%	18.1%
Volkswagen	4,352	3,395	-22%	3.3%	2.5%
Volvo	512	752	47%	0.4%	0.6%

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

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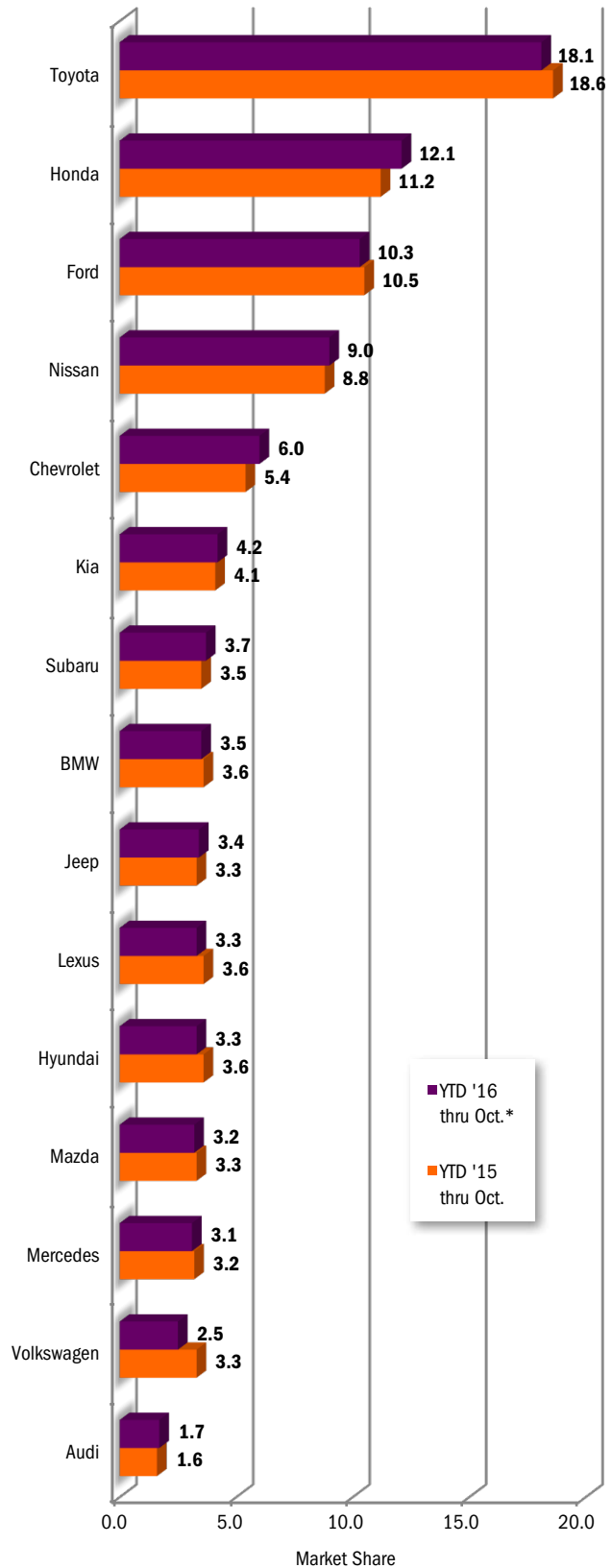
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County Market Share for Top 15 Selling Brands  
YTD '16 thru October\* vs. YTD 15



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