

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

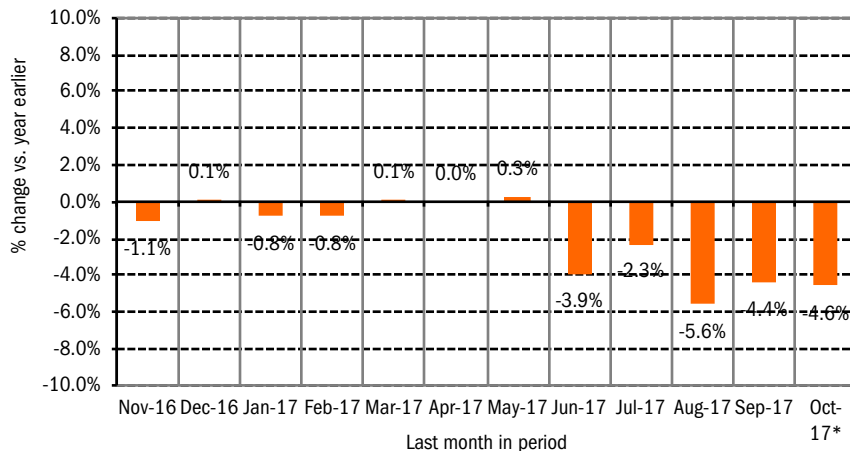
Data thru October 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru Oct.*			YTD Market Share		
	9/16 & 10/16	9/17 & 10/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	26,837	26,520	-1.2%	133,951	130,510	-2.6%			
Cars	13,388	12,090	-9.7%	69,167	60,369	-12.7%	51.6	46.3	-5.3
Light Trucks	13,449	14,430	7.3%	64,784	70,141	8.3%	48.4	53.7	5.3
Japanese Brands	13,429	13,525	0.7%	68,853	66,387	-3.6%	51.4	50.9	-0.5
Honda	3,539	3,747	5.9%	17,711	17,925	1.2%	13.2	13.7	0.5
Nissan	2,502	2,367	-5.4%	13,068	11,188	-14.4%	9.8	8.6	-1.2
Toyota	5,462	5,459	-0.1%	28,345	27,150	-4.2%	21.2	20.8	-0.4
Other	1,926	1,952	1.3%	9,729	10,124	4.1%	7.3	7.8	0.5
Domestic Brands	7,256	7,120	-1.9%	35,549	34,698	-2.4%	26.5	26.6	0.1
FCA (excl. FIAT)	1,706	1,544	-9.5%	8,841	8,360	-5.4%	6.6	6.4	-0.2
Ford	2,744	2,703	-1.5%	14,129	13,807	-2.3%	10.5	10.6	0.1
General Motors	2,434	2,467	1.4%	11,357	11,226	-1.2%	8.5	8.6	0.1
Other	372	406	9.1%	1,222	1,305	6.8%	0.9	1.0	0.1
European Brands	3,918	3,979	1.6%	19,327	19,284	-0.2%	14.4	14.8	0.4
BMW	1,064	1,005	-5.5%	5,542	4,698	-15.2%	4.1	3.6	-0.5
Mercedes	909	848	-6.7%	4,326	4,231	-2.2%	3.2	3.2	0.0
Volkswagen	1,261	1,387	10.0%	6,394	6,987	9.3%	4.8	5.4	0.6
Other	684	739	8.0%	3,065	3,368	9.9%	2.3	2.6	0.3
Korean Brands	2,234	1,896	-15.1%	10,222	10,141	-0.8%	7.6	7.8	0.2

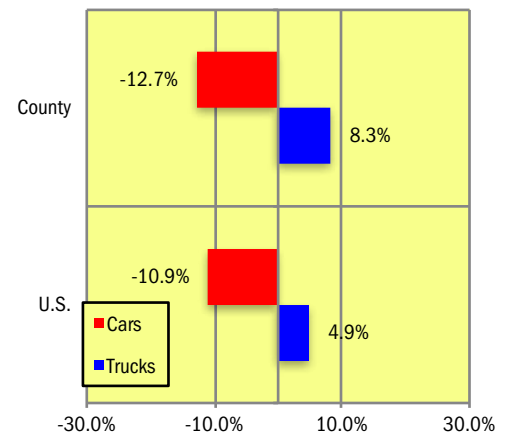
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 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 October 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 October* 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 October, 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 Oct.	thru Oct.*		thru Oct.	thru Oct.*
TOTAL	133,951	130,510	-3%		
Acura	1,531	1,540	1%	1.1%	1.2%
Alfa Romeo	7	189	2600%	0.0%	0.1%
Audi	2,306	2,541	10%	1.7%	1.9%
BMW	4,823	4,039	-16%	3.6%	3.1%
Buick	554	498	-10%	0.4%	0.4%
Cadillac	807	719	-11%	0.6%	0.6%
Chevrolet	8,200	8,333	2%	6.1%	6.4%
Chrysler	557	563	1%	0.4%	0.4%
Dodge	1,655	1,365	-18%	1.2%	1.0%
FIAT	586	658	12%	0.4%	0.5%
Ford	13,584	13,275	-2%	10.1%	10.2%
Genesis	21	159	657%	0.0%	0.1%
GMC	1,796	1,676	-7%	1.3%	1.3%
Honda	16,180	16,385	1%	12.1%	12.6%
Hyundai	4,609	4,588	0%	3.4%	3.5%
Infiniti	913	1,321	45%	0.7%	1.0%
Jaguar	329	441	34%	0.2%	0.3%
Jeep	4,628	4,543	-2%	3.5%	3.5%
Kia	5,592	5,394	-4%	4.2%	4.1%
Land Rover	1,106	1,059	-4%	0.8%	0.8%
Lexus	4,351	3,985	-8%	3.2%	3.1%
Lincoln	545	532	-2%	0.4%	0.4%
Maserati	146	192	32%	0.1%	0.1%
Mazda	4,284	4,320	1%	3.2%	3.3%
Mercedes	4,173	4,161	0%	3.1%	3.2%
MINI	704	651	-8%	0.5%	0.5%
Mitsubishi	521	573	10%	0.4%	0.4%
Nissan	12,155	9,867	-19%	9.1%	7.6%
Other	328	223	-32%	0.2%	0.2%
Porsche	791	802	1%	0.6%	0.6%
Ram	2,001	1,889	-6%	1.5%	1.4%
Subaru	4,915	5,217	6%	3.7%	4.0%
Tesla	1,188	1,283	8%	0.9%	1.0%
Toyota	23,994	23,165	-3%	17.9%	17.7%
Volkswagen	3,297	3,644	11%	2.5%	2.8%
Volvo	774	720	-7%	0.6%	0.6%

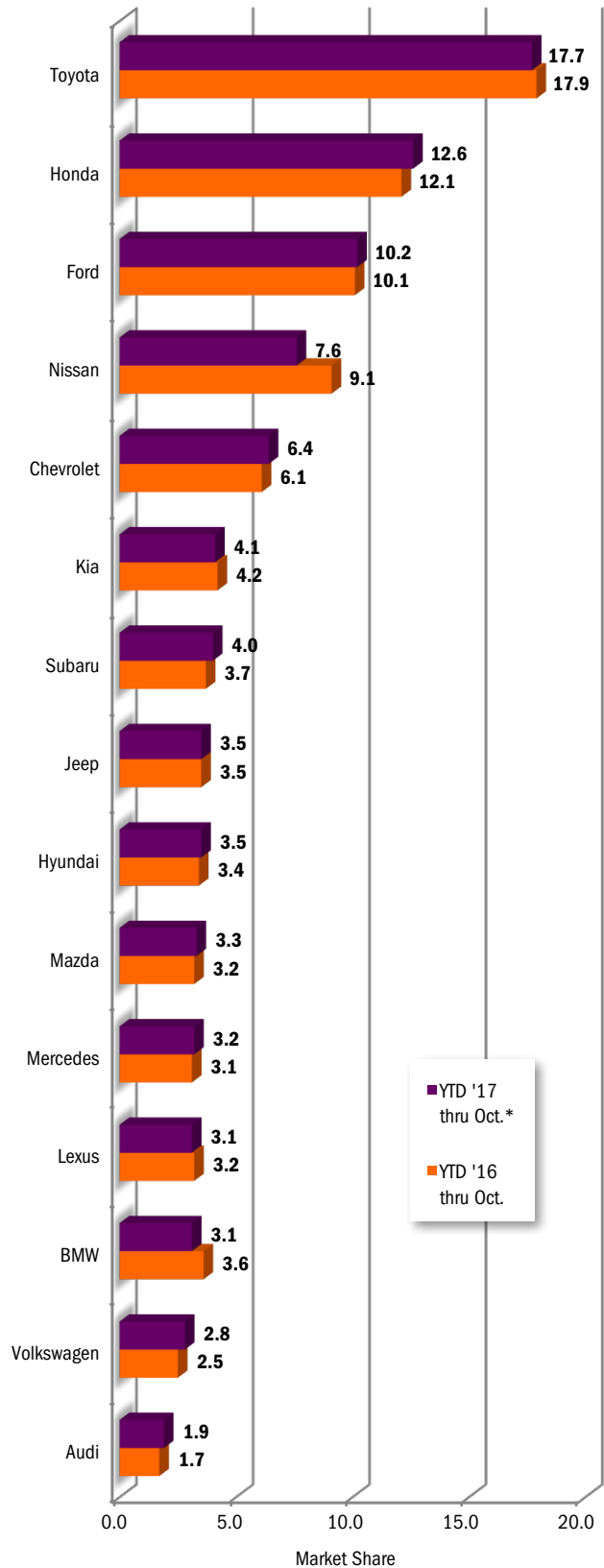
Top ten ranked brands in each percent change category are shaded green.
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County Market Share for Top 15 Selling Brands
YTD '17 thru October* vs. YTD '16



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