

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

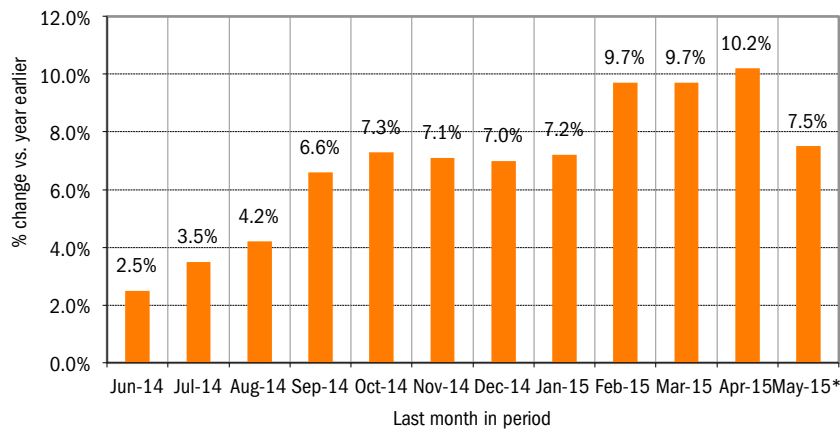
Data thru May 2015

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

	Most Recent Two Months			YTD thru May*			YTD Market share (thru May*)		
	4/14 & 5/14	4/15 & 5/15*	% change	2014	2015	% change	2014	2015	change
	Industry Total	25,567	27,394	7.1%	59,157	64,257	8.6%		
Cars	15,593	15,851	1.7%	35,495	37,053	4.4%	60.0	57.7	-2.3
Light Trucks	9,974	11,543	15.7%	23,662	27,204	15.0%	40.0	42.3	2.3
Japanese Brands	13,234	13,976	5.6%	30,534	33,123	8.5%	51.6	51.5	-0.1
Toyota	5,908	6,111	3.4%	13,885	14,257	2.7%	23.5	22.2	-1.3
Honda	3,247	3,464	6.7%	7,068	7,861	11.2%	11.9	12.2	0.3
Nissan	2,500	2,570	2.8%	5,813	6,358	9.4%	9.8	9.9	0.1
Other	1,579	1,831	16.0%	3,768	4,647	23.3%	6.4	7.2	0.8
Domestic Brands	6,397	7,214	12.8%	14,961	16,473	10.1%	25.3	25.6	0.3
General Motors	1,768	2,105	19.1%	4,106	4,609	12.3%	6.9	7.2	0.3
Ford	2,961	3,211	8.4%	6,848	7,283	6.4%	11.6	11.3	-0.3
Chrysler	1,607	1,794	11.6%	3,826	4,297	12.3%	6.5	6.7	0.2
Other	61	104	70.5%	181	284	56.9%	0.3	0.4	0.1
European Brands	3,911	4,229	8.1%	9,125	9,856	8.0%	15.4	15.3	-0.1
Volkswagen	1,456	1,504	3.3%	3,441	3,509	2.0%	5.8	5.5	-0.3
BMW	1,156	1,155	-0.1%	2,597	2,783	7.2%	4.4	4.3	-0.1
Mercedes	771	995	29.1%	1,737	2,173	25.1%	2.9	3.4	0.5
Other	528	575	8.9%	1,350	1,391	3.0%	2.3	2.2	-0.1
Korean Brands	2,025	1,975	-2.5%	4,537	4,805	5.9%	7.7	7.5	-0.2

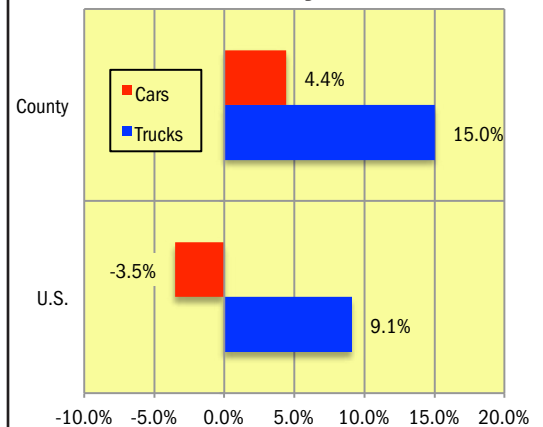
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 May 2015 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 2015 were estimated by Auto Outlook. Data Source: IHS Automotive.

### Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '15 thru May\* vs. YTD 14



The graph above compares the change in new retail car and light truck registrations in both the area and U.S. markets.  
\*Figures for May 2015 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 '14	YTD '15	% change	YTD '14	YTD '15
	thru May	thru May*		thru May	thru May*
TOTAL	59,157	64,257	9%		
Acura	773	907	17%	1.3%	1.4%
Audi	917	1,085	18%	1.6%	1.7%
BMW	2,196	2,340	7%	3.7%	3.6%
Buick	196	234	19%	0.3%	0.4%
Cadillac	429	396	-8%	0.7%	0.6%
Chevrolet	2,893	3,167	9%	4.9%	4.9%
Chrysler	203	428	111%	0.3%	0.7%
Dodge	966	968	0%	1.6%	1.5%
FIAT	550	465	-15%	0.9%	0.7%
Ford	6,611	7,005	6%	11.2%	10.9%
GMC	588	788	34%	1.0%	1.2%
Honda	6,295	6,954	10%	10.6%	10.8%
Hyundai	2,260	2,252	0%	3.8%	3.5%
Infiniti	525	544	4%	0.9%	0.8%
Jaguar	115	92	-20%	0.2%	0.1%
Jeep	2,016	2,132	6%	3.4%	3.3%
Kia	2,277	2,564	13%	3.8%	4.0%
Land Rover	348	438	26%	0.6%	0.7%
Lexus	2,109	2,400	14%	3.6%	3.7%
Lincoln	237	290	22%	0.4%	0.5%
Mazda	1,778	2,073	17%	3.0%	3.2%
Mercedes	1,636	2,106	29%	2.8%	3.3%
MINI	388	445	15%	0.7%	0.7%
Mitsubishi	234	296	26%	0.4%	0.5%
Nissan	5,288	5,808	10%	8.9%	9.0%
Other	248	265	7%	0.4%	0.4%
Porsche	276	375	36%	0.5%	0.6%
Ram	641	747	17%	1.1%	1.2%
Subaru	1,748	2,262	29%	3.0%	3.5%
Tesla	171	275	61%	0.3%	0.4%
Toyota	11,776	11,850	1%	19.9%	18.4%
Volkswagen	2,248	2,069	-8%	3.8%	3.2%
Volvo	221	237	7%	0.4%	0.4%

Data source: IHS Automotive.

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

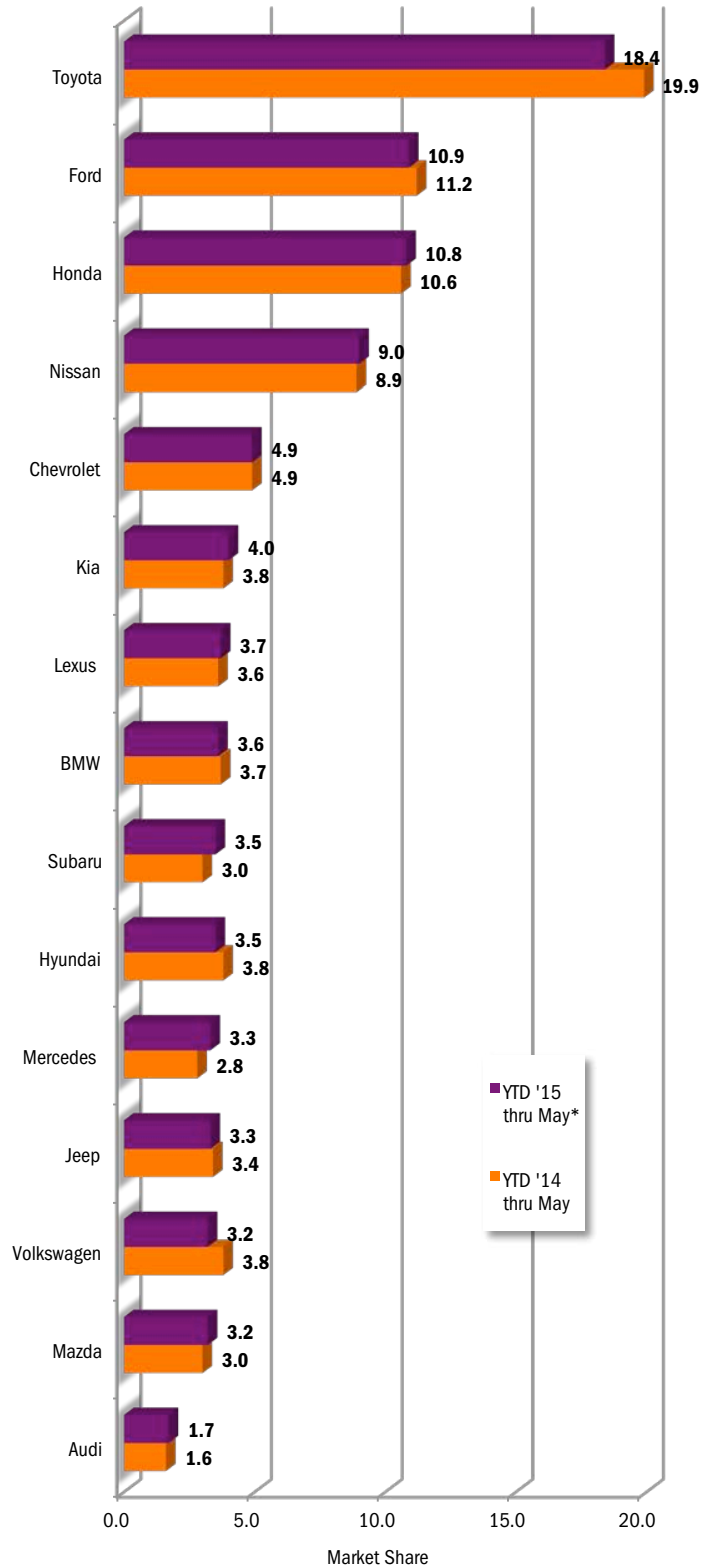
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County Market Share for Top 15 Selling Brands  
YTD '15 thru May\* vs. YTD 14



Data source: IHS Automotive.

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