

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

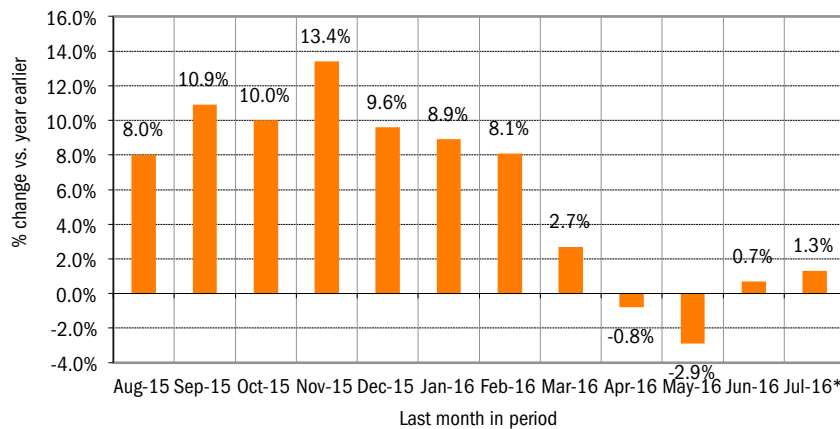
Data thru July 2016

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru July			YTD Market Share		
	6/15 & 7/15	6/16 & 7/16*	% change	2015	2016	% change	2015	2016	change
Industry Total	27,096	27,241	0.5%	91,915	93,085	1.3%			
Cars	15,348	14,215	-7.4%	52,532	49,165	-6.4%	57.2	52.8	-4.4
Light Trucks	11,748	13,026	10.9%	39,383	43,920	11.5%	42.8	47.2	4.4
Japanese Brands	13,707	13,879	1.3%	47,143	48,248	2.3%	51.3	51.8	0.5
Toyota	5,794	5,890	1.7%	20,198	19,916	-1.4%	22.0	21.4	-0.6
Honda	3,287	3,550	8.0%	11,336	12,368	9.1%	12.3	13.3	1.0
Nissan	2,648	2,526	-4.6%	8,920	9,316	4.4%	9.7	10.0	0.3
Other	1,978	1,913	-3.3%	6,689	6,648	-0.6%	7.3	7.1	-0.2
Domestic Brands	6,996	7,176	2.6%	23,597	24,918	5.6%	25.7	26.8	1.1
General Motors	2,167	2,252	3.9%	6,898	7,630	10.6%	7.5	8.2	0.7
Ford	2,818	2,906	3.1%	9,992	10,246	2.5%	10.9	11.0	0.1
Chrysler	1,870	1,814	-3.0%	6,273	6,320	0.7%	6.8	6.8	0.0
Other	141	204	44.7%	434	722	66.4%	0.5	0.8	0.3
European Brands	4,185	3,942	-5.8%	14,023	12,851	-8.4%	15.3	13.8	-1.5
Volkswagen	1,544	1,402	-9.2%	4,980	4,226	-15.1%	5.4	4.5	-0.9
BMW	1,197	1,042	-12.9%	4,043	3,637	-10.0%	4.4	3.9	-0.5
Mercedes	908	859	-5.4%	3,099	2,937	-5.2%	3.4	3.2	-0.2
Other	536	639	19.2%	1,901	2,051	7.9%	2.1	2.2	0.1
Korean Brands	2,208	2,244	1.6%	7,152	7,068	-1.2%	7.8	7.6	-0.2

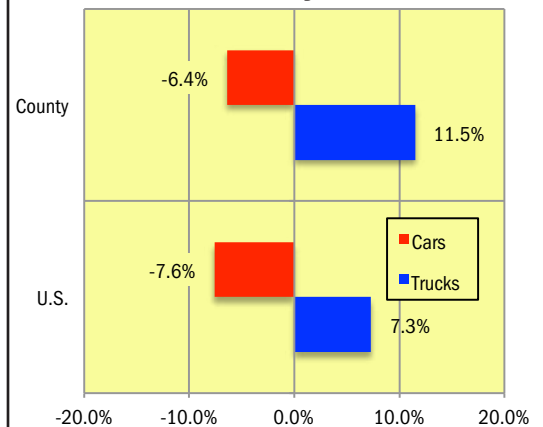
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 July 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 July 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 July* 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 July 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 July	thru July*		thru July	thru July*
TOTAL	91,915	93,085	1%		
Acura	1,217	1,109	-9%	1.3%	1.2%
Audi	1,515	1,453	-4%	1.6%	1.6%
BMW	3,368	3,112	-8%	3.7%	3.3%
Buick	365	412	13%	0.4%	0.4%
Cadillac	523	516	-1%	0.6%	0.6%
Chevrolet	4,802	5,421	13%	5.2%	5.8%
Chrysler	620	382	-38%	0.7%	0.4%
Dodge	1,384	1,234	-11%	1.5%	1.3%
FIAT	577	387	-33%	0.6%	0.4%
Ford	9,586	9,845	3%	10.4%	10.6%
GMC	1,208	1,281	6%	1.3%	1.4%
Honda	10,119	11,259	11%	11.0%	12.1%
Hyundai	3,333	3,190	-4%	3.6%	3.4%
Infiniti	782	626	-20%	0.9%	0.7%
Jaguar	106	181	71%	0.1%	0.2%
Jeep	3,126	3,294	5%	3.4%	3.5%
Kia	3,819	3,878	2%	4.2%	4.2%
Land Rover	669	778	16%	0.7%	0.8%
Lexus	3,331	3,112	-7%	3.6%	3.3%
Lincoln	406	401	-1%	0.4%	0.4%
Mazda	3,066	2,950	-4%	3.3%	3.2%
Mercedes	2,989	2,838	-5%	3.3%	3.0%
MINI	665	515	-23%	0.7%	0.6%
Mitsubishi	409	388	-5%	0.4%	0.4%
Nissan	8,138	8,690	7%	8.9%	9.3%
Other	368	315	-14%	0.4%	0.3%
Porsche	534	551	3%	0.6%	0.6%
Ram	1,143	1,410	23%	1.2%	1.5%
Subaru	3,204	3,307	3%	3.5%	3.6%
Tesla	411	706	72%	0.4%	0.8%
Toyota	16,867	16,804	0%	18.4%	18.1%
Volkswagen	2,931	2,222	-24%	3.2%	2.4%
Volvo	334	518	55%	0.4%	0.6%

Data source: IHS Automotive.

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

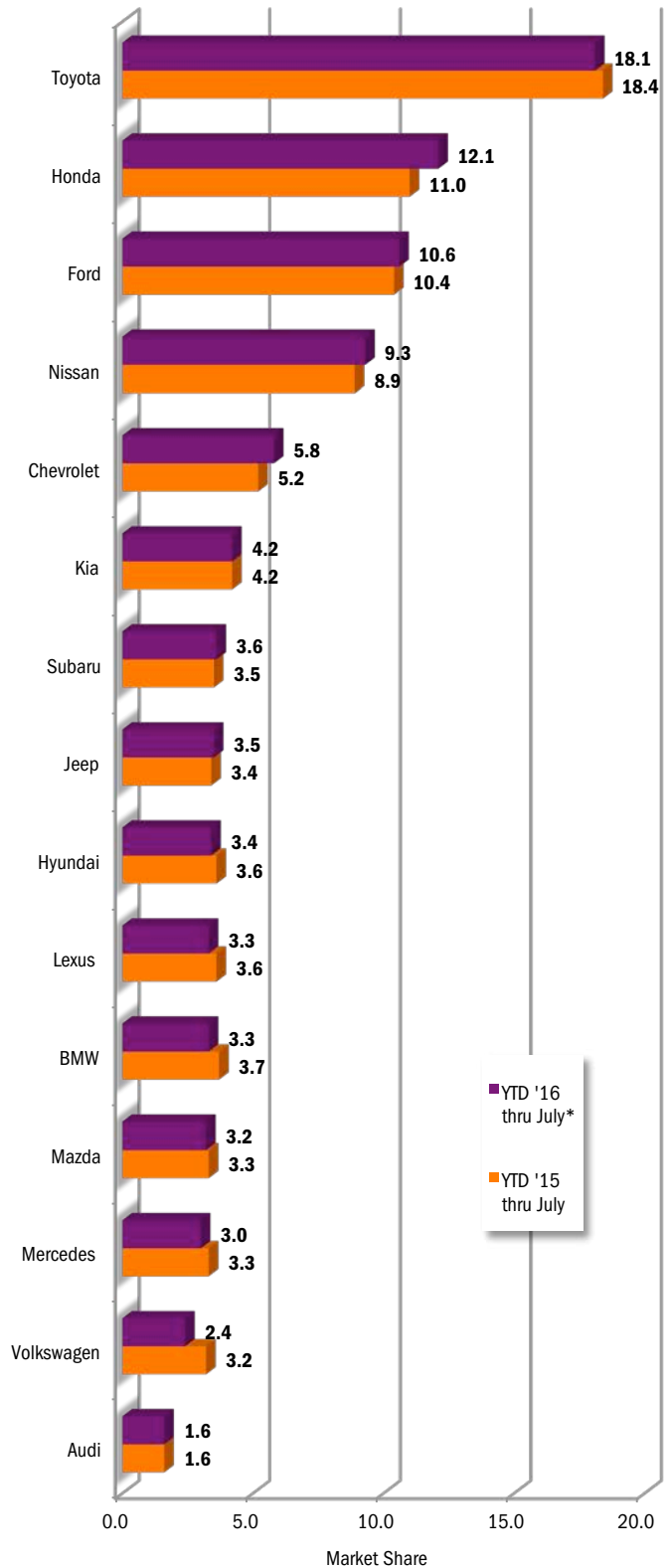
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County Market Share for Top 15 Selling Brands
YTD '16 thru July* vs. YTD 15



Data source: IHS Automotive.

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