

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

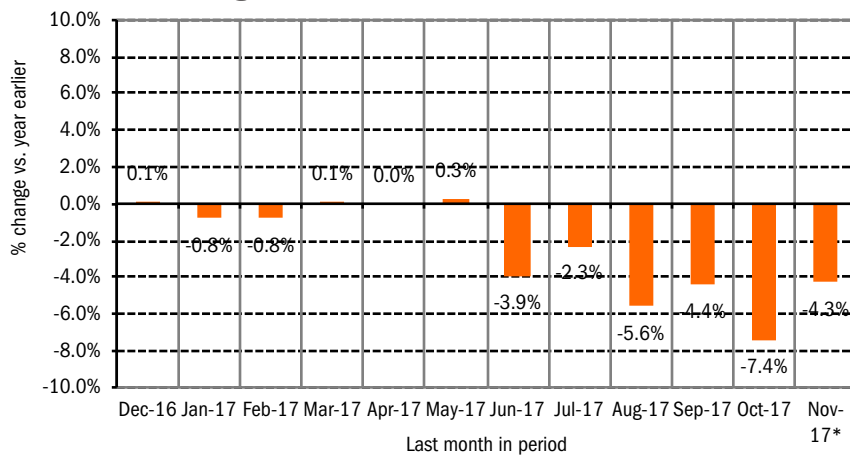
Data thru November 2017

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru Nov.*			YTD Market Share		
	10/16 & 11/16	10/17 & 11/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	25,518	24,124	-5.5%	146,863	142,028	-3.3%			
Cars	12,295	10,880	-11.5%	75,448	65,600	-13.1%	51.4	46.2	-5.2
Light Trucks	13,223	13,244	0.2%	71,415	76,428	7.0%	48.6	53.8	5.2
Japanese Brands	12,848	11,972	-6.8%	75,396	72,005	-4.5%	51.3	50.7	-0.6
Honda	3,320	3,166	-4.6%	19,325	19,382	0.3%	13.2	13.6	0.4
Nissan	2,437	2,260	-7.3%	14,353	12,211	-14.9%	9.8	8.6	-1.2
Toyota	5,258	4,904	-6.7%	31,089	29,540	-5.0%	21.2	20.8	-0.4
Other	1,833	1,642	-10.4%	10,629	10,872	2.3%	7.2	7.7	0.5
Domestic Brands	6,792	6,479	-4.6%	38,901	37,710	-3.1%	26.5	26.6	0.1
FCA (excl. FIAT)	1,634	1,591	-2.6%	9,652	9,215	-4.5%	6.6	6.5	-0.1
Ford	2,533	2,593	2.4%	15,496	15,169	-2.1%	10.6	10.7	0.1
General Motors	2,377	2,089	-12.1%	12,502	12,121	-3.0%	8.5	8.5	0.0
Other	248	206	-16.9%	1,251	1,205	-3.7%	0.9	0.8	-0.1
European Brands	3,842	3,818	-0.6%	21,311	21,189	-0.6%	14.5	14.9	0.4
BMW	1,039	956	-8.0%	6,074	5,174	-14.8%	4.1	3.6	-0.5
Mercedes	851	836	-1.8%	4,751	4,650	-2.1%	3.2	3.3	0.1
Volkswagen	1,273	1,335	4.9%	7,075	7,676	8.5%	4.8	5.4	0.6
Other	679	691	1.8%	3,411	3,689	8.2%	2.3	2.6	0.3
Korean Brands	2,036	1,855	-8.9%	11,255	11,124	-1.2%	7.7	7.8	0.1

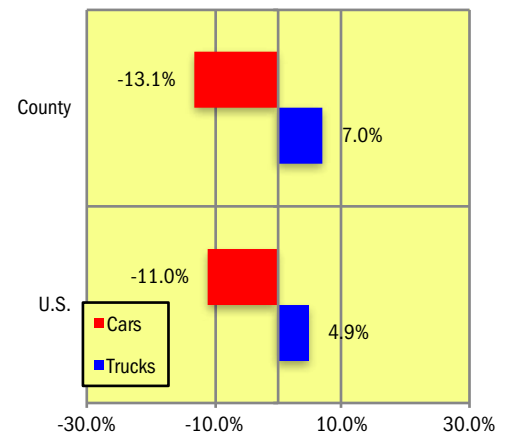
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 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 November 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 November* 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 November, 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 Nov.	thru Nov.*		thru Nov.	thru Nov.*
TOTAL	146,863	142,028	-3%		
Acura	1,659	1,666	0%	1.1%	1.2%
Alfa Romeo	7	226	3129%	0.0%	0.2%
Audi	2,512	2,759	10%	1.7%	1.9%
BMW	5,279	4,458	-16%	3.6%	3.1%
Buick	614	535	-13%	0.4%	0.4%
Cadillac	902	767	-15%	0.6%	0.5%
Chevrolet	8,961	8,961	0%	6.1%	6.3%
Chrysler	596	635	7%	0.4%	0.4%
Dodge	1,825	1,569	-14%	1.2%	1.1%
FIAT	659	693	5%	0.4%	0.5%
Ford	14,902	14,596	-2%	10.1%	10.3%
Genesis	27	169	526%	0.0%	0.1%
GMC	2,025	1,858	-8%	1.4%	1.3%
Honda	17,666	17,716	0%	12.0%	12.5%
Hyundai	5,066	5,024	-1%	3.4%	3.5%
Infiniti	1,065	1,469	38%	0.7%	1.0%
Jaguar	374	485	30%	0.3%	0.3%
Jeep	5,043	4,918	-2%	3.4%	3.5%
Kia	6,162	5,931	-4%	4.2%	4.2%
Land Rover	1,213	1,168	-4%	0.8%	0.8%
Lexus	4,818	4,396	-9%	3.3%	3.1%
Lincoln	594	573	-4%	0.4%	0.4%
Maserati	158	196	24%	0.1%	0.1%
Mazda	4,660	4,713	1%	3.2%	3.3%
Mercedes	4,582	4,574	0%	3.1%	3.2%
MINI	780	707	-9%	0.5%	0.5%
Mitsubishi	565	659	17%	0.4%	0.5%
Nissan	13,288	10,742	-19%	9.0%	7.6%
Other	363	236	-35%	0.2%	0.2%
Porsche	864	893	3%	0.6%	0.6%
Ram	2,188	2,093	-4%	1.5%	1.5%
Subaru	5,394	5,485	2%	3.7%	3.9%
Tesla	1,215	1,182	-3%	0.8%	0.8%
Toyota	26,271	25,144	-4%	17.9%	17.7%
Volkswagen	3,699	4,024	9%	2.5%	2.8%
Volvo	867	808	-7%	0.6%	0.6%

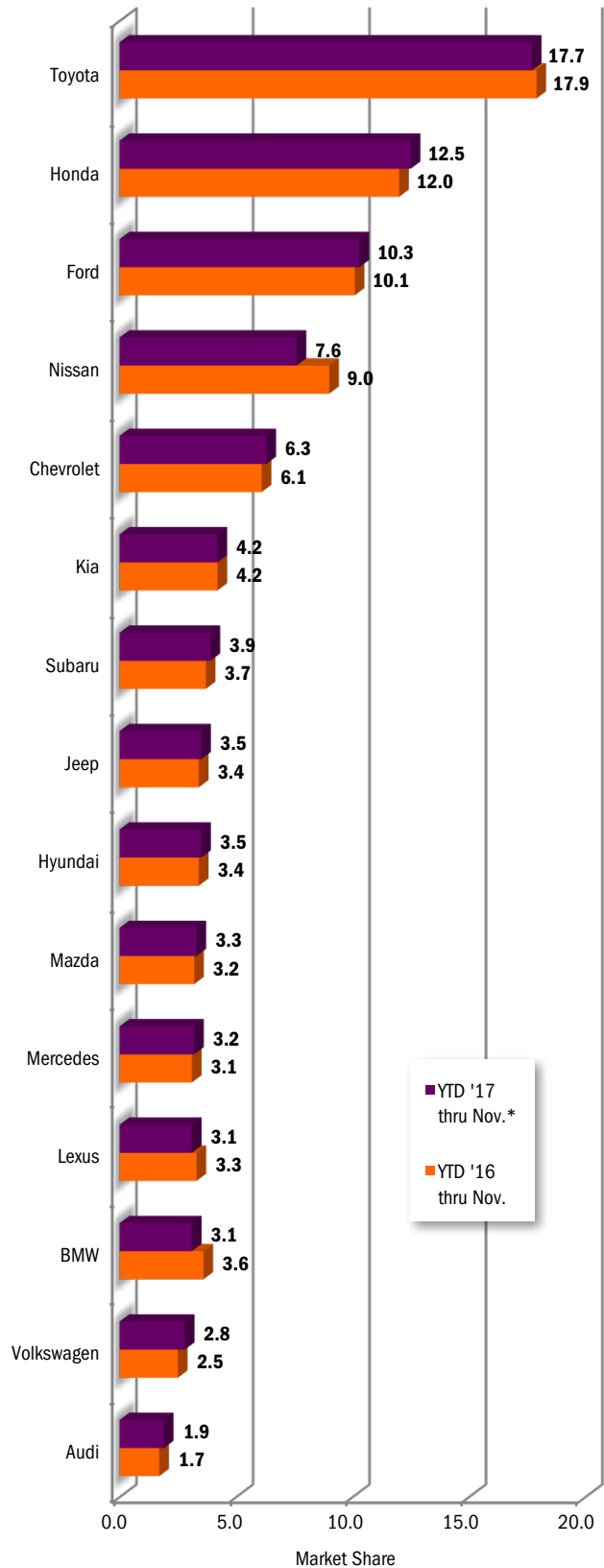
Top ten ranked brands in each percent change category are shaded green.
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County Market Share for Top 15 Selling Brands
YTD '17 thru November* vs. YTD '16



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