

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

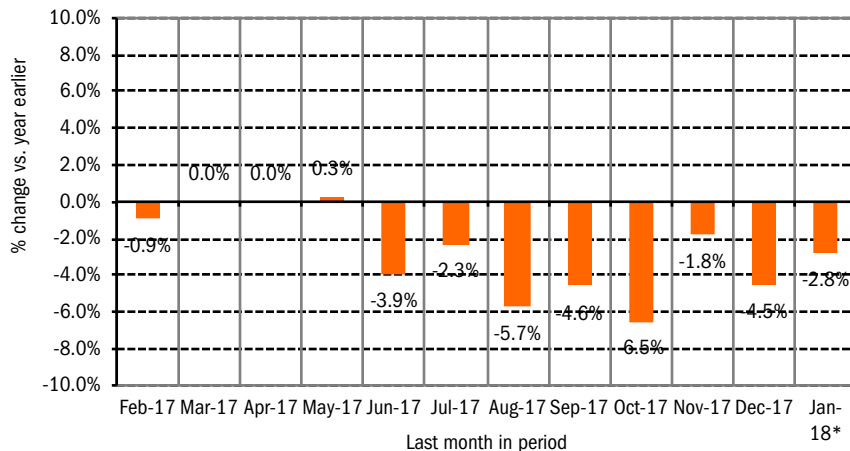
Data thru January 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual total			Annual Market Share		
	12/16 & 1/17	12/17 & 1/18*	% change	2016	2017	% change	2016	2017	change
Industry Total	27,320	25,866	-5.3%	162,239	156,895	-3.3%			
Cars	12,962	11,008	-15.1%	82,790	71,827	-13.2%	51.0	45.8	-5.2
Light Trucks	14,358	14,858	3.5%	79,449	85,068	7.1%	49.0	54.2	5.2
Japanese Brands	13,542	13,060	-3.6%	83,257	79,303	-4.7%	51.3	50.5	-0.8
Honda	3,602	3,254	-9.7%	21,509	21,491	-0.1%	13.3	13.7	0.4
Nissan	2,467	2,183	-11.5%	15,765	12,859	-18.4%	9.7	8.2	-1.5
Toyota	5,475	5,510	0.6%	34,400	32,934	-4.3%	21.2	21.0	-0.2
Other	1,998	2,113	5.8%	11,583	12,019	3.8%	7.1	7.7	0.6
Domestic Brands	7,155	6,726	-6.0%	42,519	41,463	-2.5%	26.2	26.4	0.2
FCA (excl. FIAT)	1,693	1,543	-8.9%	10,419	9,985	-4.2%	6.4	6.4	0.0
Ford	2,740	2,338	-14.7%	16,839	16,318	-3.1%	10.4	10.4	0.0
General Motors	2,381	2,384	0.1%	13,887	13,749	-1.0%	8.6	8.8	0.2
Other	341	461	35.2%	1,374	1,411	2.7%	0.8	0.9	0.1
European Brands	4,590	4,217	-8.1%	24,094	23,840	-1.1%	14.9	15.2	0.3
BMW	1,220	1,061	-13.0%	6,851	5,826	-15.0%	4.2	3.7	-0.5
Mercedes	986	917	-7.0%	5,337	5,348	0.2%	3.3	3.4	0.1
Volkswagen	1,601	1,451	-9.4%	8,077	8,594	6.4%	5.0	5.5	0.5
Other	783	788	0.6%	3,829	4,072	6.3%	2.4	2.6	0.2
Korean Brands	2,033	1,863	-8.4%	12,369	12,289	-0.6%	7.6	7.8	0.2

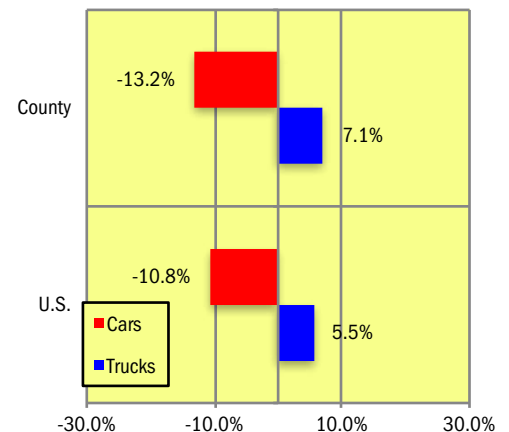
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 January 2018 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 January 2018 were estimated by Auto Outlook. Data Source: IHS Markit.

Percent Change in County and U.S. New Retail Light Vehicle Markets 2017 vs. 2016



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets.
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	
	2016	2017	% change	2016	2017
	Annual	Annual		Annual	Annual
TOTAL	162,239	156,895	-3%		
Acura	1,874	1,824	-3%	1.2%	1.2%
Alfa Romeo	8	216	2600%	0.0%	0.1%
Audi	2,897	3,196	10%	1.8%	2.0%
BMW	5,981	5,033	-16%	3.7%	3.2%
Buick	684	579	-15%	0.4%	0.4%
Cadillac	1,001	851	-15%	0.6%	0.5%
Chevrolet	9,935	10,229	3%	6.1%	6.5%
Chrysler	636	752	18%	0.4%	0.5%
Dodge	1,943	1,645	-15%	1.2%	1.0%
FIAT	734	713	-3%	0.5%	0.5%
Ford	16,172	15,692	-3%	10.0%	10.0%
Genesis	40	210	425%	0.0%	0.1%
GMC	2,267	2,090	-8%	1.4%	1.3%
Honda	19,635	19,667	0%	12.1%	12.5%
Hyundai	5,551	5,498	-1%	3.4%	3.5%
Infiniti	1,307	1,629	25%	0.8%	1.0%
Jaguar	432	559	29%	0.3%	0.4%
Jeep	5,465	5,285	-3%	3.4%	3.4%
Kia	6,778	6,581	-3%	4.2%	4.2%
Land Rover	1,351	1,283	-5%	0.8%	0.8%
Lexus	5,474	4,996	-9%	3.4%	3.2%
Lincoln	667	626	-6%	0.4%	0.4%
Maserati	186	222	19%	0.1%	0.1%
Mazda	5,018	5,199	4%	3.1%	3.3%
Mercedes	5,156	5,255	2%	3.2%	3.3%
MINI	853	782	-8%	0.5%	0.5%
Mitsubishi	612	744	22%	0.4%	0.5%
Nissan	14,458	11,230	-22%	8.9%	7.2%
Other	398	283	-29%	0.2%	0.2%
Porsche	945	995	5%	0.6%	0.6%
Ram	2,375	2,303	-3%	1.5%	1.5%
Subaru	5,942	6,061	2%	3.7%	3.9%
Tesla	1,338	1,378	3%	0.8%	0.9%
Toyota	28,926	27,938	-3%	17.8%	17.8%
Volkswagen	4,235	4,403	4%	2.6%	2.8%
Volvo	965	948	-2%	0.6%	0.6%

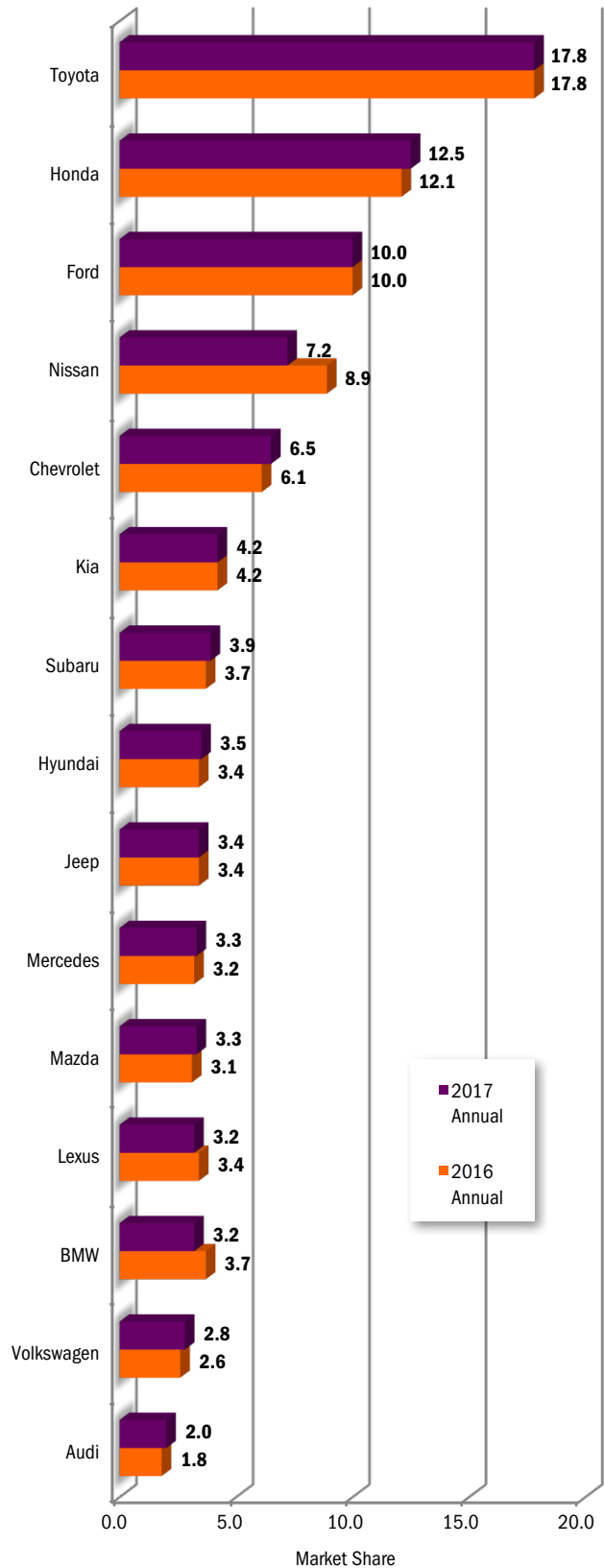
Top ten ranked brands in each percent change category are shaded green.

Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands
2017 vs. 2016



Data Source: IHS Markit.