

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

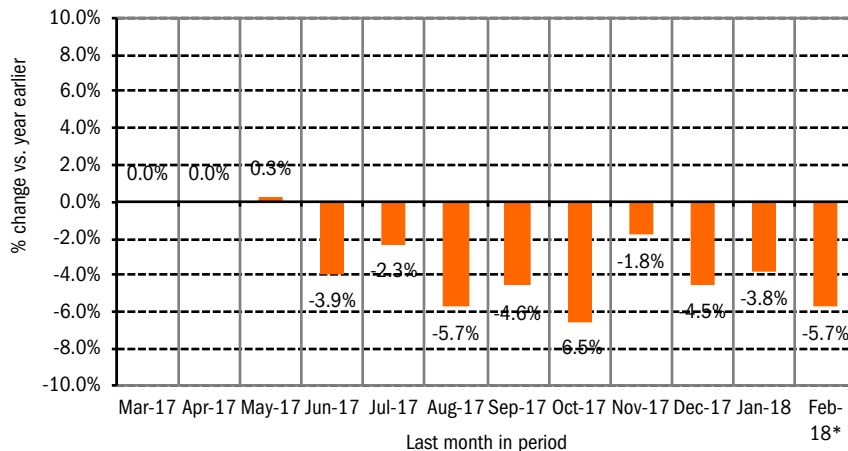
Data thru February 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual Total			YTD Market Share		
	1/17 & 2/17	1/18 & 2/18*	% change	2016	2017	% change	2017	2018	change
Industry Total	24,426	23,627	-3.3%	162,239	156,895	-3.3%			
Cars	11,354	9,860	-13.2%	82,790	71,827	-13.2%	46.5	41.7	-4.8
Light Trucks	13,072	13,767	5.3%	79,449	85,068	7.1%	53.5	58.3	4.8
Japanese Brands	12,039	11,813	-1.9%	83,257	79,303	-4.7%	49.3	50.0	0.7
Honda	3,130	2,993	-4.4%	21,509	21,491	-0.1%	12.8	12.7	-0.1
Nissan	2,134	1,807	-15.3%	15,765	12,859	-18.4%	8.7	7.6	-1.1
Toyota	4,763	4,915	3.2%	34,400	32,934	-4.3%	19.5	20.8	1.3
Other	2,012	2,098	4.3%	11,583	12,019	3.8%	8.2	8.9	0.7
Domestic Brands	6,955	6,615	-4.9%	42,519	41,463	-2.5%	28.5	28.0	-0.5
FCA (excl. FIAT)	1,709	1,573	-8.0%	10,419	9,985	-4.2%	7.0	6.7	-0.3
Ford	2,809	2,642	-5.9%	16,839	16,318	-3.1%	11.5	11.2	-0.3
General Motors	2,175	2,064	-5.1%	13,887	13,749	-1.0%	8.9	8.7	-0.2
Other	262	336	28.2%	1,374	1,411	2.7%	1.1	1.4	0.3
European Brands	3,607	3,475	-3.7%	24,094	23,840	-1.1%	14.8	14.7	-0.1
BMW	881	926	5.1%	6,851	5,826	-15.0%	3.6	3.9	0.3
Mercedes	760	586	-22.9%	5,337	5,348	0.2%	3.1	2.5	-0.6
Volkswagen	1,294	1,344	3.9%	8,077	8,594	6.4%	5.3	5.7	0.4
Other	672	619	-7.9%	3,829	4,072	6.3%	2.8	2.6	-0.2
Korean Brands	1,825	1,724	-5.5%	12,369	12,289	-0.6%	7.5	7.3	-0.2

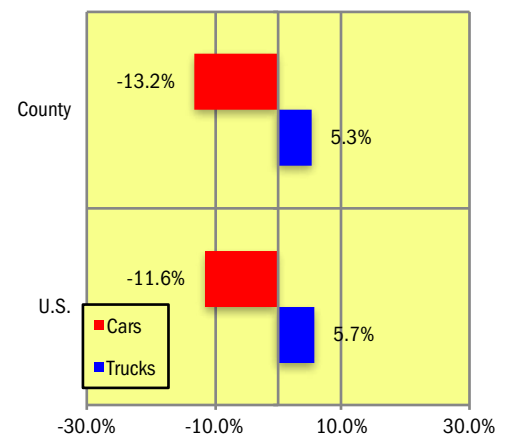
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '18 thru February* vs. YTD '17



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. Figures for February, 2018 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 '17	YTD '18	% change	YTD '17	YTD '18
	thru Feb.	thru Feb.*		thru Feb.	thru Feb.*
TOTAL	24,426	23,627	-3%		
Acura	257	234	-9%	1.1%	1.0%
Alfa Romeo	11	63	473%	0.0%	0.3%
Audi	422	438	4%	1.7%	1.9%
BMW	751	784	4%	3.1%	3.3%
Buick	89	101	13%	0.4%	0.4%
Cadillac	133	143	8%	0.5%	0.6%
Chevrolet	1,616	1,473	-9%	6.6%	6.2%
Chrysler	117	126	8%	0.5%	0.5%
Dodge	296	239	-19%	1.2%	1.0%
FIAT	193	66	-66%	0.8%	0.3%
Ford	2,670	2,537	-5%	10.9%	10.7%
Genesis	39	32	-18%	0.2%	0.1%
GMC	337	347	3%	1.4%	1.5%
Honda	2,873	2,759	-4%	11.8%	11.7%
Hyundai	789	685	-13%	3.2%	2.9%
Infiniti	251	216	-14%	1.0%	0.9%
Jaguar	87	58	-33%	0.4%	0.2%
Jeep	956	872	-9%	3.9%	3.7%
Kia	997	1,007	1%	4.1%	4.3%
Land Rover	197	200	2%	0.8%	0.8%
Lexus	684	696	2%	2.8%	2.9%
Lincoln	139	105	-24%	0.6%	0.4%
Maserati	41	29	-29%	0.2%	0.1%
Mazda	862	876	2%	3.5%	3.7%
Mercedes	743	577	-22%	3.0%	2.4%
MINI	127	140	10%	0.5%	0.6%
Mitsubishi	95	133	40%	0.4%	0.6%
Nissan	1,883	1,591	-16%	7.7%	6.7%
Other	53	30	-43%	0.2%	0.1%
Porsche	157	162	3%	0.6%	0.7%
Ram	340	336	-1%	1.4%	1.4%
Subaru	1,049	1,089	4%	4.3%	4.6%
Tesla	260	335	29%	1.1%	1.4%
Toyota	4,079	4,219	3%	16.7%	17.9%
Volkswagen	715	744	4%	2.9%	3.1%
Volvo	118	185	57%	0.5%	0.8%

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

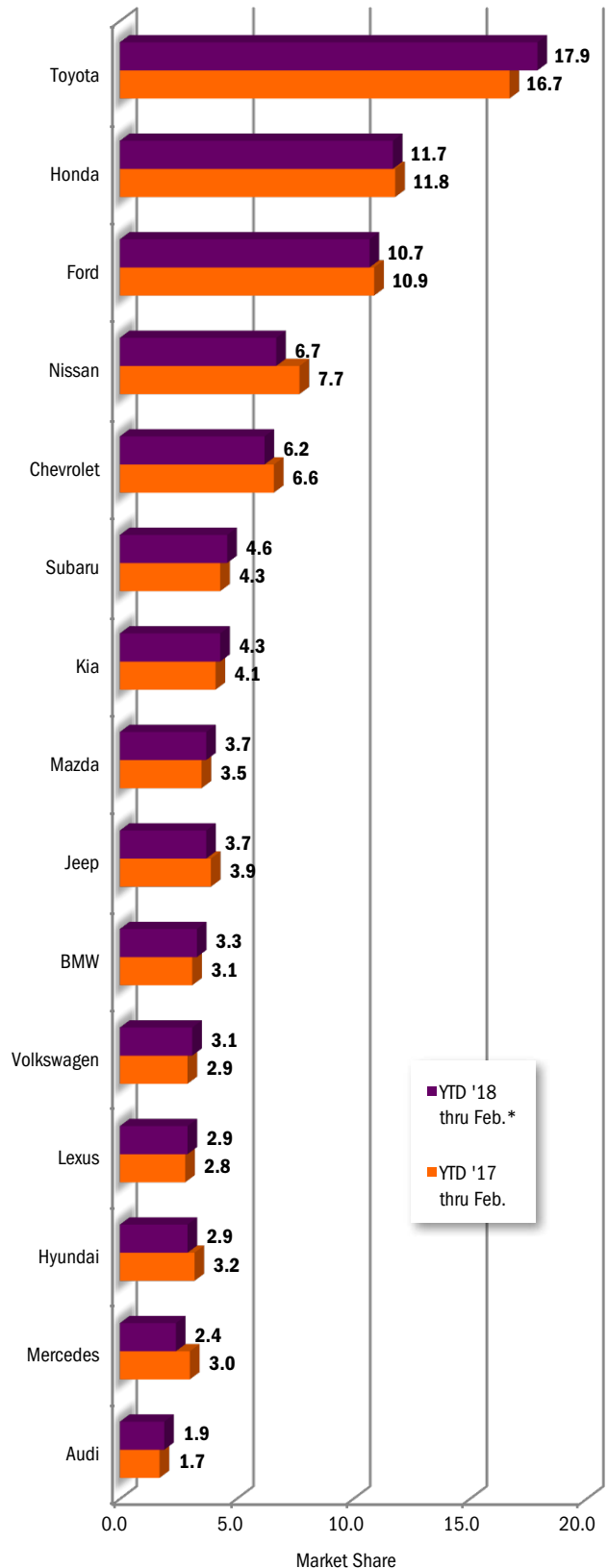
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County Market Share for Top 15 Selling Brands
YTD '18 thru February* vs. YTD '17



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