

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

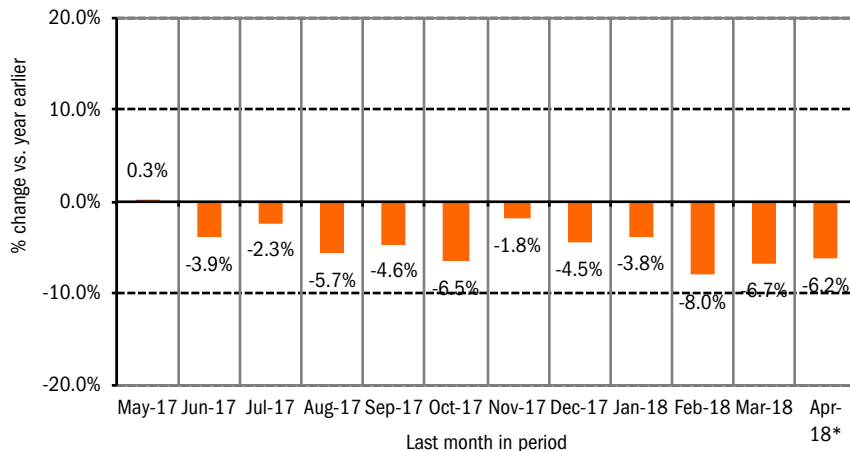
Data thru April 2018

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

	Most Recent Two Months			YTD thru April			YTD Market Share		
	3/17 & 4/17	3/18 & 4/18*	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	26,266	25,171	-4.2%	50,692	47,864	-5.6%			
Cars	12,530	10,631	-15.2%	23,884	20,238	-15.3%	47.1	42.3	-4.8
Light Trucks	13,736	14,540	5.9%	26,808	27,626	3.1%	52.9	57.7	4.8
Japanese Brands	13,647	12,933	-5.2%	25,686	24,224	-5.7%	50.7	50.6	-0.1
Honda	3,713	3,504	-5.6%	6,843	6,556	-4.2%	13.5	13.7	0.2
Nissan	2,380	1,903	-20.0%	4,514	3,555	-21.2%	8.9	7.4	-1.5
Toyota	5,601	5,456	-2.6%	10,364	10,053	-3.0%	20.4	21.0	0.6
Other	1,953	2,070	6.0%	3,965	4,060	2.4%	7.8	8.5	0.7
Domestic Brands	6,563	6,366	-3.0%	13,518	12,657	-6.4%	26.7	26.4	-0.3
FCA (excl. FIAT)	1,626	1,579	-2.9%	3,335	3,053	-8.5%	6.6	6.4	-0.2
Ford	2,421	2,169	-10.4%	5,230	4,674	-10.6%	10.3	9.8	-0.5
General Motors	2,238	2,211	-1.2%	4,413	4,129	-6.4%	8.7	8.6	-0.1
Other	278	407	46.4%	540	801	48.3%	1.1	1.7	0.6
European Brands	3,971	4,015	1.1%	7,578	7,300	-3.7%	14.9	15.3	0.4
BMW	992	1,015	2.3%	1,873	1,919	2.5%	3.7	4.0	0.3
Mercedes	865	834	-3.6%	1,625	1,408	-13.4%	3.2	2.9	-0.3
Volkswagen	1,433	1,510	5.4%	2,727	2,718	-0.3%	5.4	5.7	0.3
Other	681	656	-3.7%	1,353	1,255	-7.2%	2.7	2.6	-0.1
Korean Brands	2,085	1,857	-10.9%	3,910	3,683	-5.8%	7.7	7.7	0.0

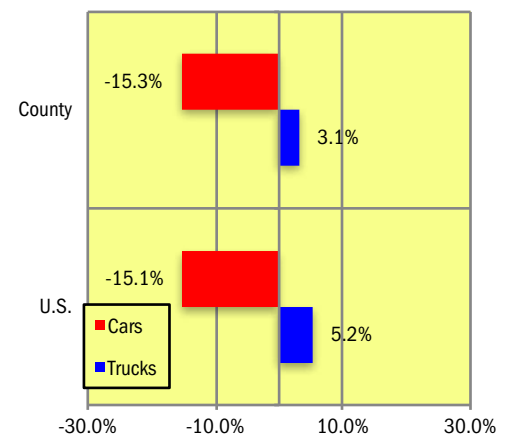
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 April 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 April 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 April\* 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 April, 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 Apr.	thru Apr.*		thru Apr.	thru Apr.*
TOTAL	50,692	47,864	-6%		
Acura	566	515	-9%	1.1%	1.1%
Alfa Romeo	30	134	347%	0.1%	0.3%
Audi	953	979	3%	1.9%	2.0%
BMW	1,605	1,664	4%	3.2%	3.5%
Buick	202	197	-2%	0.4%	0.4%
Cadillac	290	272	-6%	0.6%	0.6%
Chevrolet	3,244	2,992	-8%	6.4%	6.3%
Chrysler	229	228	0%	0.5%	0.5%
Dodge	605	476	-21%	1.2%	1.0%
FIAT	376	116	-69%	0.7%	0.2%
Ford	5,009	4,525	-10%	9.9%	9.5%
Genesis	65	67	3%	0.1%	0.1%
GMC	677	668	-1%	1.3%	1.4%
Honda	6,277	6,041	-4%	12.4%	12.6%
Hyundai	1,772	1,525	-14%	3.5%	3.2%
Infiniti	560	454	-19%	1.1%	0.9%
Jaguar	180	117	-35%	0.4%	0.2%
Jeep	1,785	1,685	-6%	3.5%	3.5%
Kia	2,073	2,091	1%	4.1%	4.4%
Land Rover	397	460	16%	0.8%	1.0%
Lexus	1,490	1,355	-9%	2.9%	2.8%
Lincoln	221	149	-33%	0.4%	0.3%
Maserati	89	57	-36%	0.2%	0.1%
Mazda	1,728	1,700	-2%	3.4%	3.6%
Mercedes	1,597	1,375	-14%	3.2%	2.9%
MINI	263	252	-4%	0.5%	0.5%
Mitsubishi	202	239	18%	0.4%	0.5%
Nissan	3,954	3,101	-22%	7.8%	6.5%
Other	98	109	11%	0.2%	0.2%
Porsche	317	343	8%	0.6%	0.7%
Ram	716	664	-7%	1.4%	1.4%
Subaru	2,026	2,121	5%	4.0%	4.4%
Tesla	536	798	49%	1.1%	1.7%
Toyota	8,874	8,698	-2%	17.5%	18.2%
Volkswagen	1,457	1,396	-4%	2.9%	2.9%
Volvo	229	301	31%	0.5%	0.6%

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

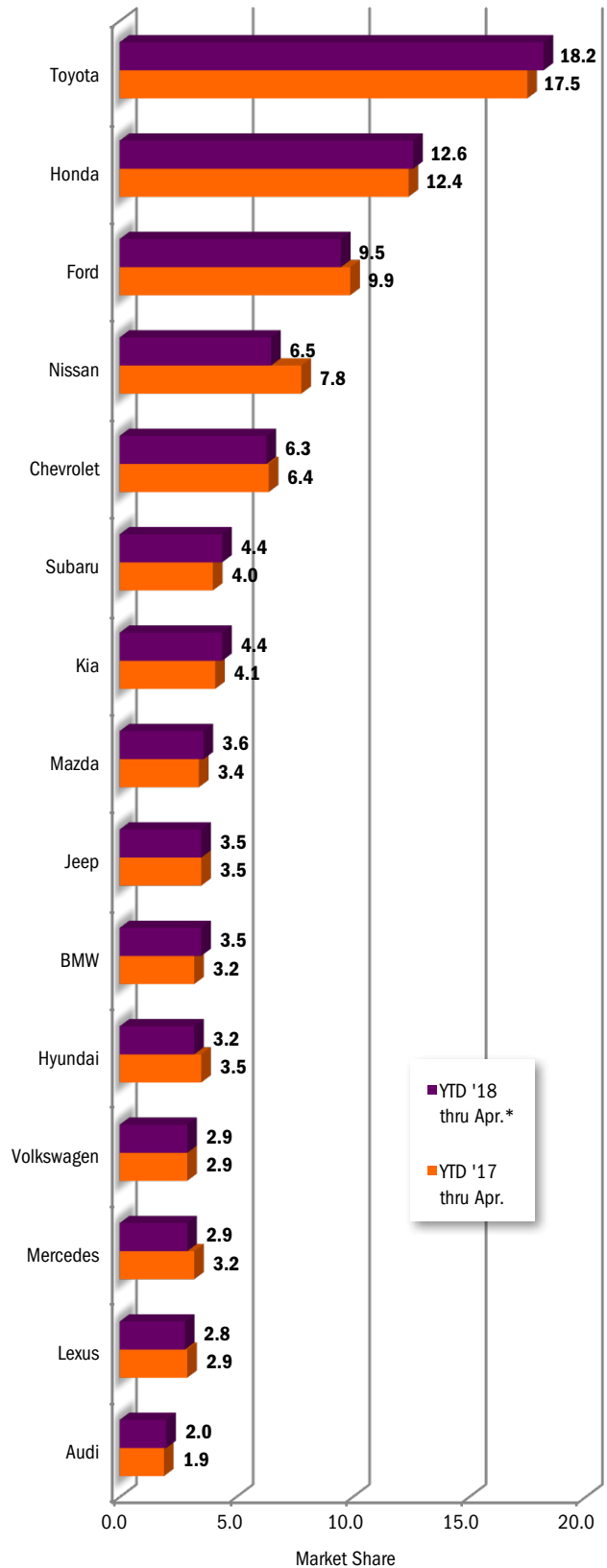
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County Market Share for Top 15 Selling Brands  
YTD '18 thru April\* vs. YTD '17



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