

# San Diego Outlook

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Covering the San Diego County automotive market

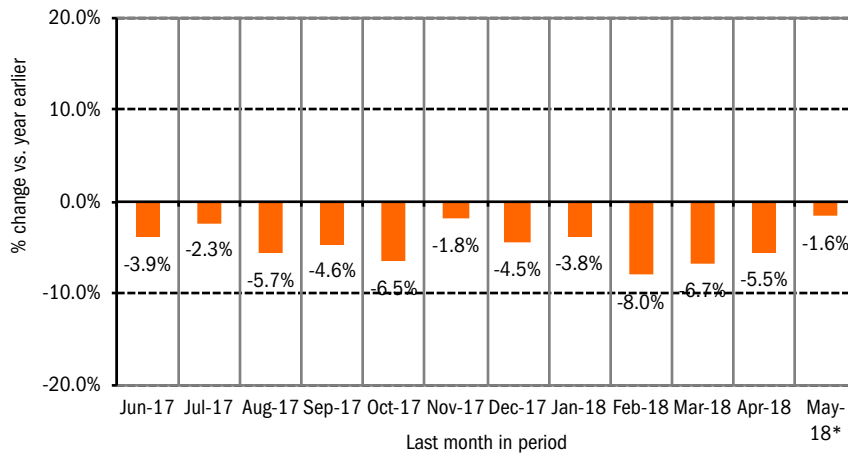
Data thru May 2018

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

	Most Recent Two Months			YTD thru May			YTD Market Share		
	4/17 & 5/17	4/18 & 5/18*	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	27,135	27,309	0.6%	65,494	63,087	-3.7%			
Cars	12,603	11,442	-9.2%	30,617	26,708	-12.8%	46.7	42.3	-4.4
Light Trucks	14,532	15,867	9.2%	34,877	36,379	4.3%	53.3	57.7	4.4
Japanese Brands	13,950	13,014	-6.7%	33,012	31,056	-5.9%	50.4	49.2	-1.2
Honda	3,717	3,537	-4.8%	8,770	8,417	-4.0%	13.4	13.3	-0.1
Nissan	2,371	1,875	-20.9%	5,777	4,607	-20.3%	8.8	7.3	-1.5
Toyota	5,731	5,365	-6.4%	13,326	12,700	-4.7%	20.3	20.1	-0.2
Other	2,131	2,237	5.0%	5,139	5,332	3.8%	7.8	8.5	0.7
Domestic Brands	7,086	8,168	15.3%	17,685	17,769	0.5%	27.0	28.2	1.2
FCA (excl. FIAT)	1,791	2,087	16.5%	4,425	4,363	-1.4%	6.8	6.9	0.1
Ford	2,945	3,093	5.0%	7,122	6,731	-5.5%	10.9	10.7	-0.2
General Motors	2,122	2,210	4.1%	5,540	5,333	-3.7%	8.5	8.5	0.0
Other	228	778	241.2%	598	1,342	124.4%	0.9	2.1	1.2
European Brands	3,872	3,905	0.9%	9,612	9,258	-3.7%	14.7	14.7	0.0
BMW	928	998	7.5%	2,375	2,461	3.6%	3.6	3.9	0.3
Mercedes	849	800	-5.8%	2,065	1,782	-13.7%	3.2	2.8	-0.4
Volkswagen	1,469	1,412	-3.9%	3,490	3,381	-3.1%	5.3	5.4	0.1
Other	626	695	11.0%	1,682	1,634	-2.9%	2.6	2.6	0.0
Korean Brands	2,227	2,222	-0.2%	5,185	5,004	-3.5%	7.9	7.9	0.0

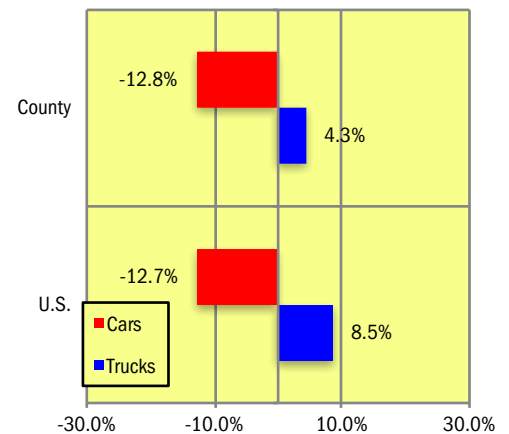
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 May 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 May 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 May\* 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 May, 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 May	thru May*		thru May	thru May*
TOTAL	65,494	63,087	-4%		
Acura	744	654	-12%	1.1%	1.0%
Alfa Romeo	41	175	327%	0.1%	0.3%
Audi	1,235	1,222	-1%	1.9%	1.9%
BMW	2,031	2,125	5%	3.1%	3.4%
Buick	254	227	-11%	0.4%	0.4%
Cadillac	386	365	-5%	0.6%	0.6%
Chevrolet	4,054	3,883	-4%	6.2%	6.2%
Chrysler	311	302	-3%	0.5%	0.5%
Dodge	791	656	-17%	1.2%	1.0%
FIAT	449	133	-70%	0.7%	0.2%
Ford	6,813	6,479	-5%	10.4%	10.3%
Genesis	78	82	5%	0.1%	0.1%
GMC	846	858	1%	1.3%	1.4%
Honda	8,026	7,763	-3%	12.3%	12.3%
Hyundai	2,425	2,205	-9%	3.7%	3.5%
Infiniti	727	596	-18%	1.1%	0.9%
Jaguar	229	150	-34%	0.3%	0.2%
Jeep	2,376	2,440	3%	3.6%	3.9%
Kia	2,682	2,717	1%	4.1%	4.3%
Land Rover	507	604	19%	0.8%	1.0%
Lexus	1,877	1,709	-9%	2.9%	2.7%
Lincoln	309	252	-18%	0.5%	0.4%
Maserati	104	58	-44%	0.2%	0.1%
Mazda	2,240	2,175	-3%	3.4%	3.4%
Mercedes	2,029	1,743	-14%	3.1%	2.8%
MINI	338	332	-2%	0.5%	0.5%
Mitsubishi	266	339	27%	0.4%	0.5%
Nissan	5,050	4,011	-21%	7.7%	6.4%
Other	120	140	17%	0.2%	0.2%
Porsche	405	446	10%	0.6%	0.7%
Ram	947	965	2%	1.4%	1.5%
Subaru	2,621	2,817	7%	4.0%	4.5%
Tesla	594	1,336	125%	0.9%	2.1%
Toyota	11,449	10,991	-4%	17.5%	17.4%
Volkswagen	1,850	1,713	-7%	2.8%	2.7%
Volvo	290	424	46%	0.4%	0.7%

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

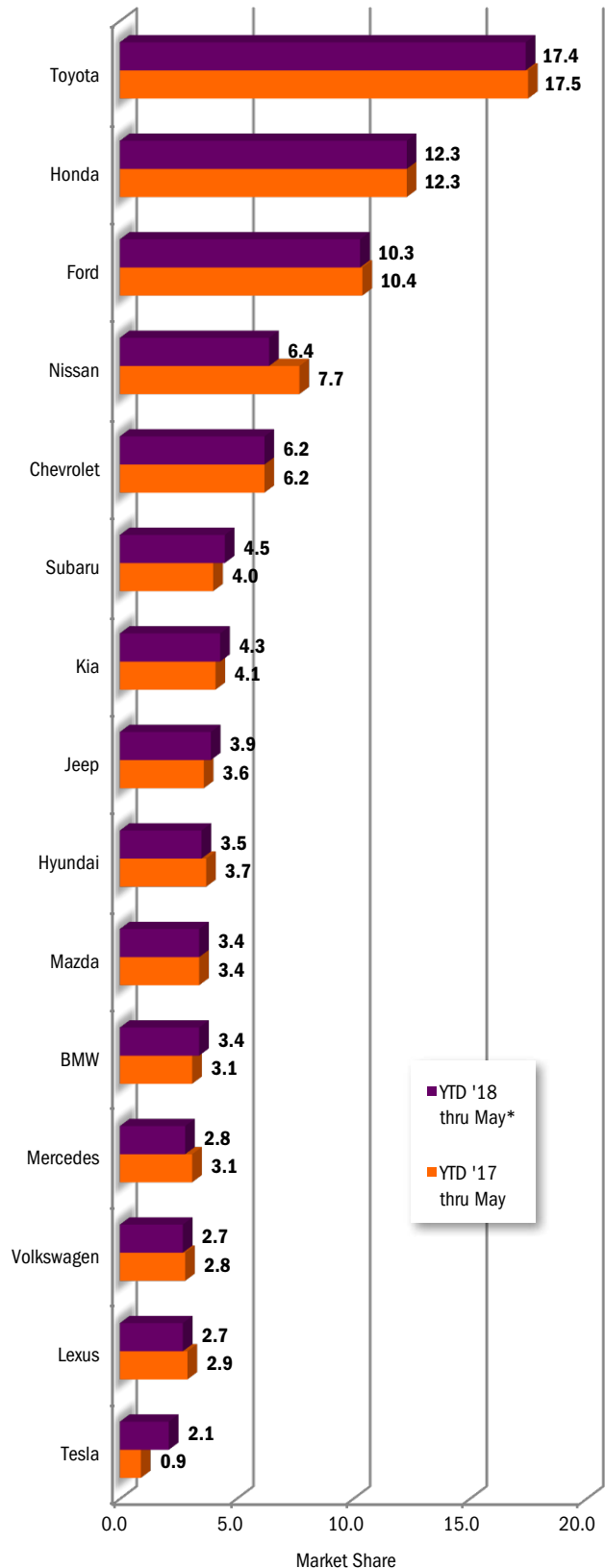
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County Market Share for Top 15 Selling Brands  
YTD '18 thru May\* vs. YTD '17



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