

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

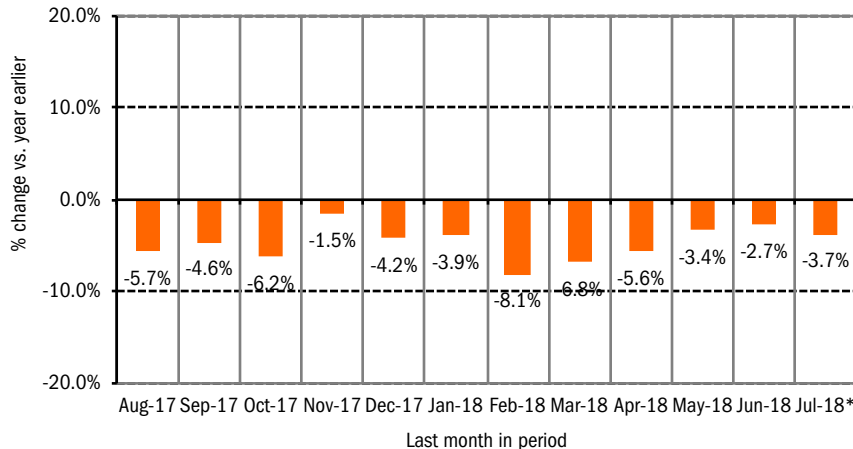
Data thru July 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru July			YTD Market Share		
	6/17 & 7/17	6/18 & 7/18*	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	25,623	24,660	-3.8%	91,112	87,031	-4.5%			
Cars	11,704	10,340	-11.7%	42,325	37,297	-11.9%	46.5	42.9	-3.6
Light Trucks	13,919	14,320	2.9%	48,787	49,734	1.9%	53.5	57.1	3.6
Japanese Brands	13,215	12,771	-3.4%	46,223	43,372	-6.2%	50.7	49.8	-0.9
Honda	3,620	3,613	-0.2%	12,390	12,062	-2.6%	13.6	13.9	0.3
Nissan	2,087	1,911	-8.4%	7,864	6,255	-20.5%	8.6	7.2	-1.4
Toyota	5,466	5,287	-3.3%	18,788	17,883	-4.8%	20.6	20.5	-0.1
Other	2,042	1,960	-4.0%	7,181	7,172	-0.1%	7.9	8.2	0.3
Domestic Brands	6,606	6,168	-6.6%	24,284	23,812	-1.9%	26.7	27.4	0.7
FCA (excl. FIAT)	1,569	1,520	-3.1%	5,994	5,677	-5.3%	6.6	6.5	-0.1
Ford	2,669	2,350	-12.0%	9,789	8,760	-10.5%	10.7	10.1	-0.6
General Motors	2,138	1,947	-8.9%	7,673	7,136	-7.0%	8.4	8.2	-0.2
Other	230	351	52.6%	828	2,239	170.4%	0.9	2.6	1.7
European Brands	3,760	3,794	0.9%	13,375	12,986	-2.9%	14.7	14.9	0.2
BMW	874	978	11.9%	3,251	3,394	4.4%	3.6	3.9	0.3
Mercedes	921	770	-16.4%	2,986	2,612	-12.5%	3.3	3.0	-0.3
Volkswagen	1,351	1,402	3.8%	4,841	4,706	-2.8%	5.3	5.4	0.1
Other	614	644	4.9%	2,297	2,274	-1.0%	2.5	2.6	0.1
Korean Brands	2,042	1,927	-5.6%	7,230	6,861	-5.1%	7.9	7.9	0.0

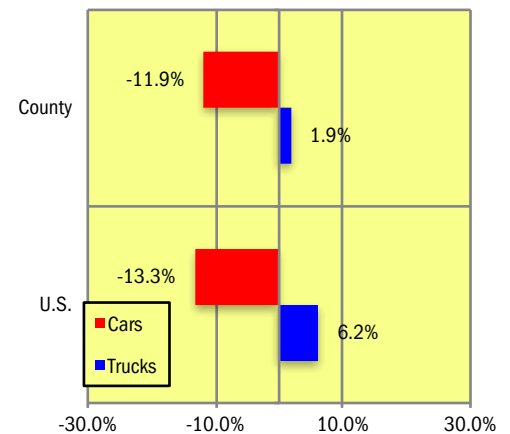
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 July 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 July 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 July* 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 July, 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 July	thru July*		thru July	thru July*
TOTAL	91,112	87,031	-4%		
Acura	1,069	979	-8%	1.2%	1.1%
Alfa Romeo	85	288	239%	0.1%	0.3%
Audi	1,775	1,728	-3%	1.9%	2.0%
BMW	2,767	2,948	7%	3.0%	3.4%
Buick	334	268	-20%	0.4%	0.3%
Cadillac	510	419	-18%	0.6%	0.5%
Chevrolet	5,687	5,419	-5%	6.2%	6.2%
Chrysler	420	405	-4%	0.5%	0.5%
Dodge	1,043	819	-21%	1.1%	0.9%
FIAT	528	147	-72%	0.6%	0.2%
Ford	9,395	8,445	-10%	10.3%	9.7%
Genesis	122	107	-12%	0.1%	0.1%
GMC	1,142	1,030	-10%	1.3%	1.2%
Honda	11,321	11,083	-2%	12.4%	12.7%
Hyundai	3,347	2,968	-11%	3.7%	3.4%
Infiniti	994	769	-23%	1.1%	0.9%
Jaguar	325	205	-37%	0.4%	0.2%
Jeep	3,246	3,184	-2%	3.6%	3.7%
Kia	3,761	3,786	1%	4.1%	4.4%
Land Rover	713	799	12%	0.8%	0.9%
Lexus	2,744	2,448	-11%	3.0%	2.8%
Lincoln	394	315	-20%	0.4%	0.4%
Maserati	131	94	-28%	0.1%	0.1%
Mazda	3,122	2,889	-7%	3.4%	3.3%
Mercedes	2,941	2,551	-13%	3.2%	2.9%
MINI	478	440	-8%	0.5%	0.5%
Mitsubishi	417	466	12%	0.5%	0.5%
Nissan	6,870	5,486	-20%	7.5%	6.3%
Other	159	179	13%	0.2%	0.2%
Porsche	560	575	3%	0.6%	0.7%
Ram	1,285	1,269	-1%	1.4%	1.5%
Subaru	3,630	3,815	5%	4.0%	4.4%
Tesla	813	2,231	174%	0.9%	2.6%
Toyota	16,044	15,435	-4%	17.6%	17.7%
Volkswagen	2,506	2,403	-4%	2.8%	2.8%
Volvo	434	639	47%	0.5%	0.7%

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

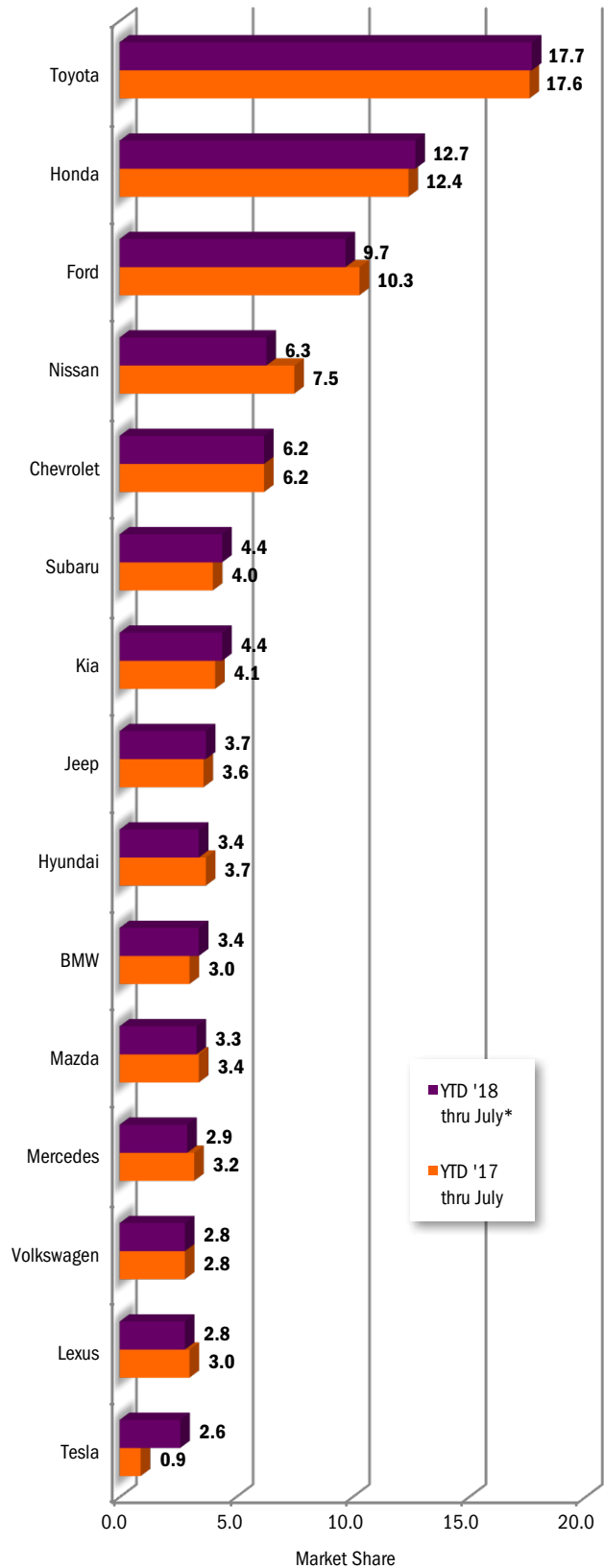
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County Market Share for Top 15 Selling Brands
YTD '18 thru July* vs. YTD '17



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