

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

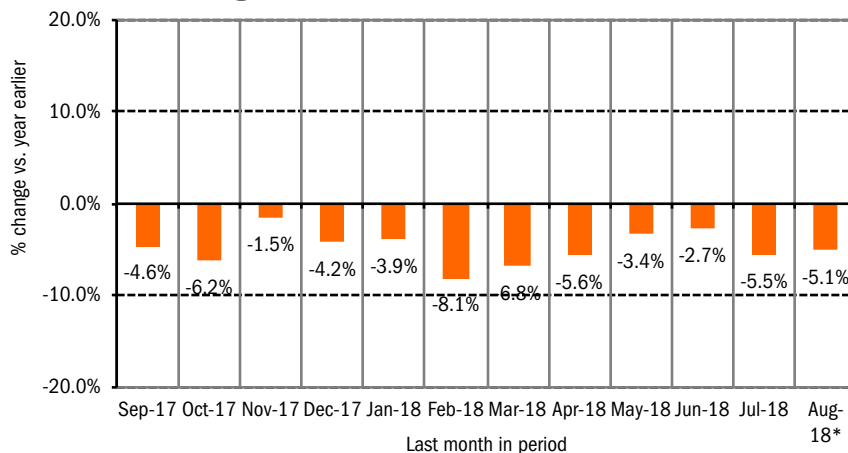
Data thru August 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Aug.			YTD Market Share		
	7/17 & 8/17	7/18 & 8/18*	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	26,570	25,167	-5.3%	103,954	98,882	-4.9%			
Cars	12,296	10,238	-16.7%	48,303	42,114	-12.8%	46.5	42.6	-3.9
Light Trucks	14,274	14,929	4.6%	55,651	56,768	2.0%	53.5	57.4	3.9
Japanese Brands	13,870	12,748	-8.1%	52,852	49,318	-6.7%	50.8	49.9	-0.9
Honda	3,815	3,474	-8.9%	14,177	13,651	-3.7%	13.6	13.8	0.2
Nissan	2,072	1,759	-15.1%	8,820	7,056	-20.0%	8.5	7.1	-1.4
Toyota	5,917	5,452	-7.9%	21,683	20,462	-5.6%	20.9	20.7	-0.2
Other	2,066	2,063	-0.1%	8,172	8,149	-0.3%	7.9	8.2	0.3
Domestic Brands	6,706	6,869	2.4%	27,496	27,111	-1.4%	26.5	27.4	0.9
FCA (excl. FIAT)	1,659	1,738	4.8%	6,813	6,498	-4.6%	6.6	6.6	0.0
Ford	2,673	2,644	-1.1%	11,035	10,006	-9.3%	10.6	10.1	-0.5
General Motors	2,172	1,896	-12.7%	8,749	7,946	-9.2%	8.4	8.0	-0.4
Other	202	591	192.6%	899	2,661	196.0%	0.9	2.7	1.8
European Brands	3,910	3,531	-9.7%	15,354	14,589	-5.0%	14.8	14.8	0.0
BMW	898	812	-9.6%	3,705	3,760	1.5%	3.6	3.8	0.2
Mercedes	895	730	-18.4%	3,412	2,965	-13.1%	3.3	3.0	-0.3
Volkswagen	1,474	1,336	-9.4%	5,604	5,271	-5.9%	5.4	5.3	-0.1
Other	643	653	1.6%	2,633	2,593	-1.5%	2.5	2.6	0.1
Korean Brands	2,084	2,019	-3.1%	8,252	7,864	-4.7%	7.9	8.0	0.1

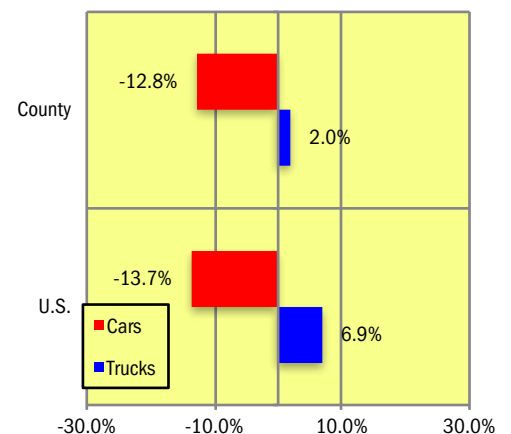
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 August 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 August 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 August* 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 August, 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 Aug.	thru Aug.*		thru Aug.	thru Aug.*
TOTAL	103,954	98,882	-5%		
Acura	1,223	1,130	-8%	1.2%	1.1%
Alfa Romeo	105	320	205%	0.1%	0.3%
Audi	2,072	1,960	-5%	2.0%	2.0%
BMW	3,152	3,276	4%	3.0%	3.3%
Buick	376	304	-19%	0.4%	0.3%
Cadillac	568	467	-18%	0.5%	0.5%
Chevrolet	6,521	6,059	-7%	6.3%	6.1%
Chrysler	474	452	-5%	0.5%	0.5%
Dodge	1,173	904	-23%	1.1%	0.9%
FIAT	571	168	-71%	0.5%	0.2%
Ford	10,593	9,616	-9%	10.2%	9.7%
Genesis	144	116	-19%	0.1%	0.1%
GMC	1,284	1,116	-13%	1.2%	1.1%
Honda	12,954	12,521	-3%	12.5%	12.7%
Hyundai	3,767	3,439	-9%	3.6%	3.5%
Infiniti	1,104	875	-21%	1.1%	0.9%
Jaguar	359	241	-33%	0.3%	0.2%
Jeep	3,675	3,635	-1%	3.5%	3.7%
Kia	4,341	4,309	-1%	4.2%	4.4%
Land Rover	838	923	10%	0.8%	0.9%
Lexus	3,213	2,841	-12%	3.1%	2.9%
Lincoln	442	390	-12%	0.4%	0.4%
Maserati	151	117	-23%	0.1%	0.1%
Mazda	3,526	3,252	-8%	3.4%	3.3%
Mercedes	3,357	2,897	-14%	3.2%	2.9%
MINI	545	476	-13%	0.5%	0.5%
Mitsubishi	468	486	4%	0.5%	0.5%
Nissan	7,716	6,181	-20%	7.4%	6.3%
Other	185	176	-5%	0.2%	0.2%
Porsche	631	642	2%	0.6%	0.6%
Ram	1,491	1,507	1%	1.4%	1.5%
Subaru	4,166	4,409	6%	4.0%	4.5%
Tesla	879	2,650	201%	0.8%	2.7%
Toyota	18,470	17,621	-5%	17.8%	17.8%
Volkswagen	2,901	2,669	-8%	2.8%	2.7%
Volvo	519	737	42%	0.5%	0.7%

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

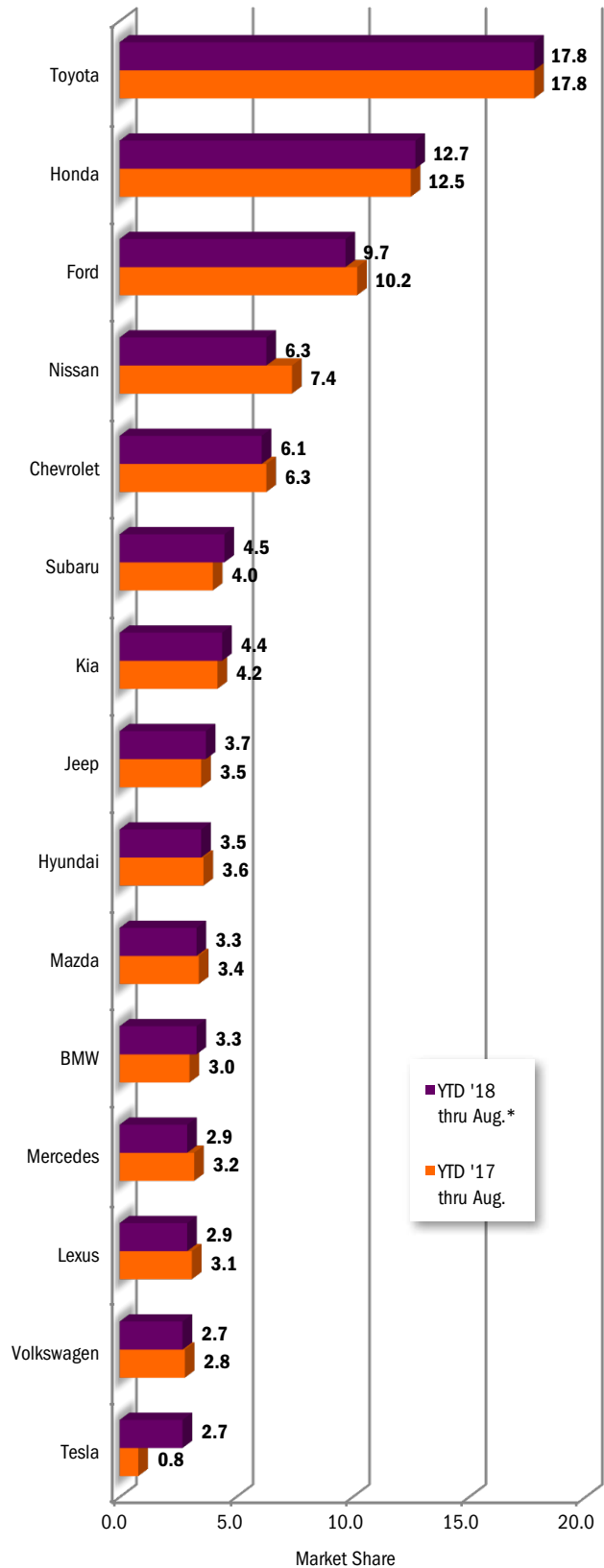
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County Market Share for Top 15 Selling Brands
YTD '18 thru August* vs. YTD '17



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