

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

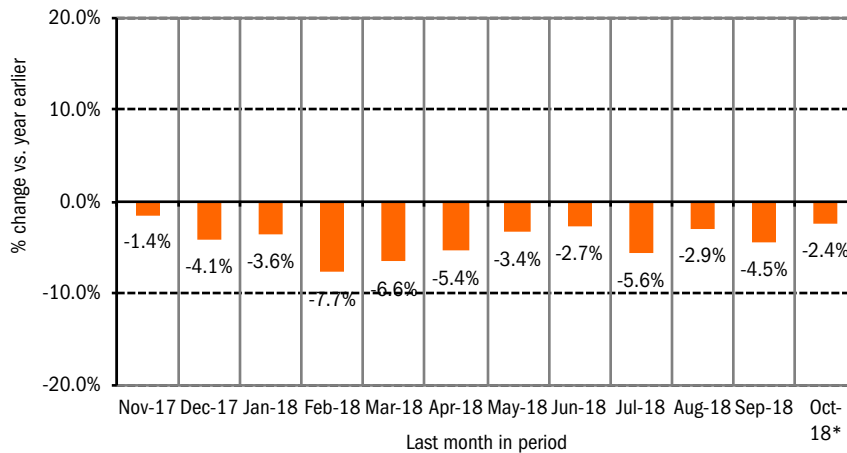
Data thru October 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Oct.			YTD Market Share		
	9/17 & 10/17	9/18 & 10/18*	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	25,931	24,393	-5.9%	129,893	124,235	-4.4%			
Cars	11,744	10,059	-14.3%	60,056	53,065	-11.6%	46.2	42.7	-3.5
Light Trucks	14,187	14,334	1.0%	69,837	71,170	1.9%	53.8	57.3	3.5
Japanese Brands	12,882	11,499	-10.7%	65,734	60,961	-7.3%	50.6	49.1	-1.5
Honda	3,541	3,041	-14.1%	17,718	16,692	-5.8%	13.6	13.4	-0.2
Nissan	1,945	1,622	-16.6%	10,765	8,589	-20.2%	8.3	6.9	-1.4
Toyota	5,365	5,058	-5.7%	27,048	25,608	-5.3%	20.8	20.6	-0.2
Other	2,031	1,778	-12.5%	10,203	10,072	-1.3%	7.9	8.1	0.2
Domestic Brands	7,027	7,288	3.7%	34,523	34,935	1.2%	26.6	28.1	1.5
FCA (excl. FIAT)	1,680	1,790	6.5%	8,493	8,196	-3.5%	6.5	6.6	0.1
Ford	2,705	2,189	-19.1%	13,740	12,255	-10.8%	10.6	9.9	-0.7
General Motors	2,366	1,919	-18.9%	11,115	9,901	-10.9%	8.6	8.0	-0.6
Other	276	1,390	403.6%	1,175	4,583	290.0%	0.9	3.7	2.8
European Brands	4,000	3,708	-7.3%	19,362	18,540	-4.2%	14.9	14.9	0.0
BMW	990	872	-11.9%	4,709	4,750	0.9%	3.6	3.8	0.2
Mercedes	902	895	-0.8%	4,314	4,075	-5.5%	3.3	3.3	0.0
Volkswagen	1,423	1,282	-9.9%	7,021	6,453	-8.1%	5.4	5.2	-0.2
Other	685	659	-3.8%	3,318	3,262	-1.7%	2.6	2.6	0.0
Korean Brands	2,022	1,898	-6.1%	10,274	9,799	-4.6%	7.9	7.9	0.0

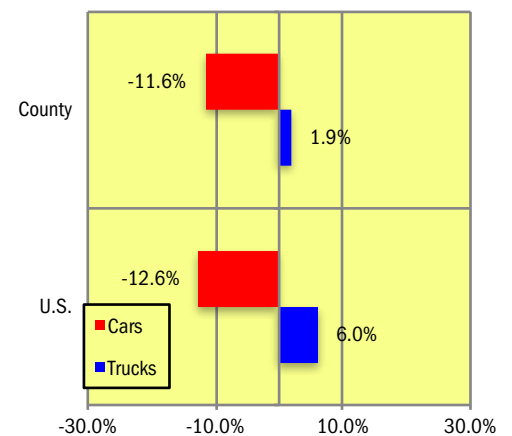
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 October 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 October 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 October* 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 October, 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 Oct.	thru Oct.*		thru Oct.	thru Oct.*
TOTAL	129,893	124,235	-4%		
Acura	1,534	1,450	-5%	1.2%	1.2%
Alfa Romeo	148	371	151%	0.1%	0.3%
Audi	2,543	2,363	-7%	2.0%	1.9%
BMW	4,047	4,163	3%	3.1%	3.4%
Buick	480	383	-20%	0.4%	0.3%
Cadillac	699	613	-12%	0.5%	0.5%
Chevrolet	8,281	7,443	-10%	6.4%	6.0%
Chrysler	593	628	6%	0.5%	0.5%
Dodge	1,427	1,178	-17%	1.1%	0.9%
FIAT	644	217	-66%	0.5%	0.2%
Ford	13,206	11,793	-11%	10.2%	9.5%
Genesis	168	122	-27%	0.1%	0.1%
GMC	1,655	1,462	-12%	1.3%	1.2%
Honda	16,184	15,242	-6%	12.5%	12.3%
Hyundai	4,631	4,315	-7%	3.6%	3.5%
Infiniti	1,314	1,106	-16%	1.0%	0.9%
Jaguar	448	313	-30%	0.3%	0.3%
Jeep	4,531	4,475	-1%	3.5%	3.6%
Kia	5,475	5,362	-2%	4.2%	4.3%
Land Rover	1,062	1,160	9%	0.8%	0.9%
Lexus	4,000	3,602	-10%	3.1%	2.9%
Lincoln	534	462	-13%	0.4%	0.4%
Maserati	187	135	-28%	0.1%	0.1%
Mazda	4,365	3,954	-9%	3.4%	3.2%
Mercedes	4,238	3,990	-6%	3.3%	3.2%
MINI	653	578	-11%	0.5%	0.5%
Mitsubishi	607	631	4%	0.5%	0.5%
Nissan	9,451	7,483	-21%	7.3%	6.0%
Other	230	237	3%	0.2%	0.2%
Porsche	829	837	1%	0.6%	0.7%
Ram	1,942	1,915	-1%	1.5%	1.5%
Subaru	5,216	5,485	5%	4.0%	4.4%
Tesla	1,152	4,568	297%	0.9%	3.7%
Toyota	23,048	22,006	-5%	17.7%	17.7%
Volkswagen	3,649	3,253	-11%	2.8%	2.6%
Volvo	722	940	30%	0.6%	0.8%

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

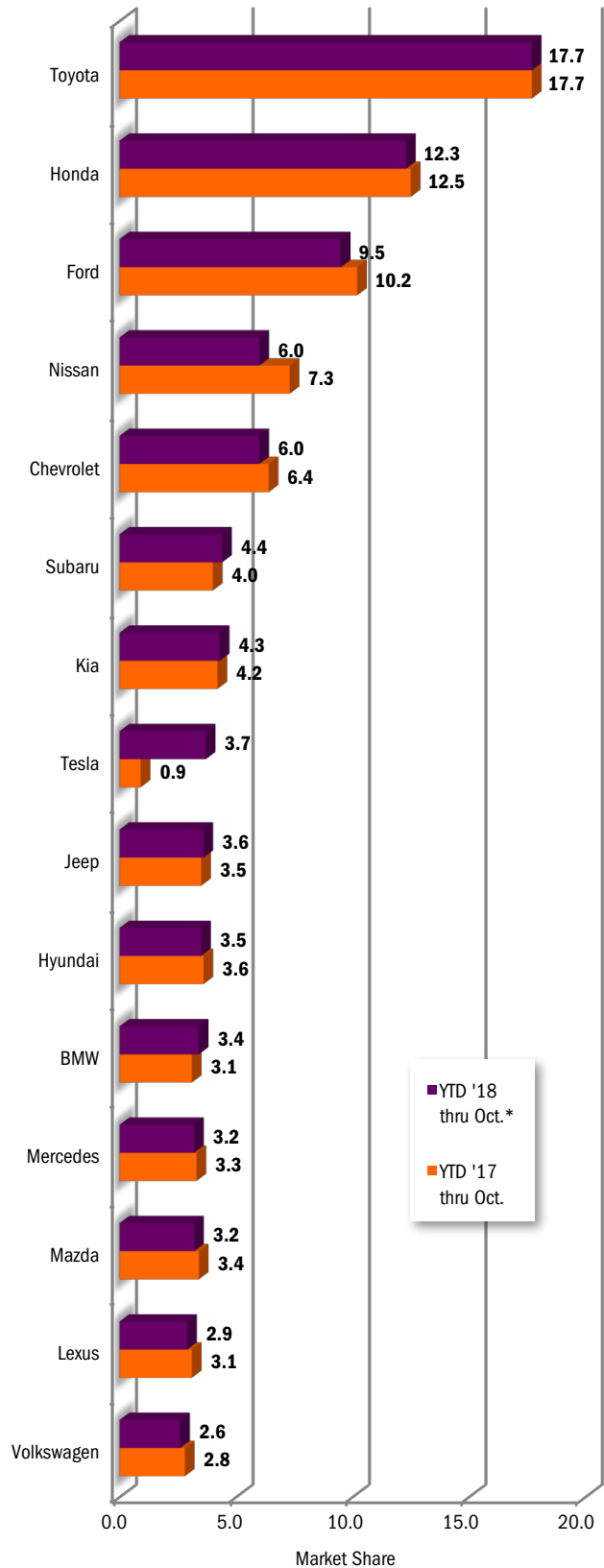
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County Market Share for Top 15 Selling Brands
YTD '18 thru October* vs. YTD '17



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