

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

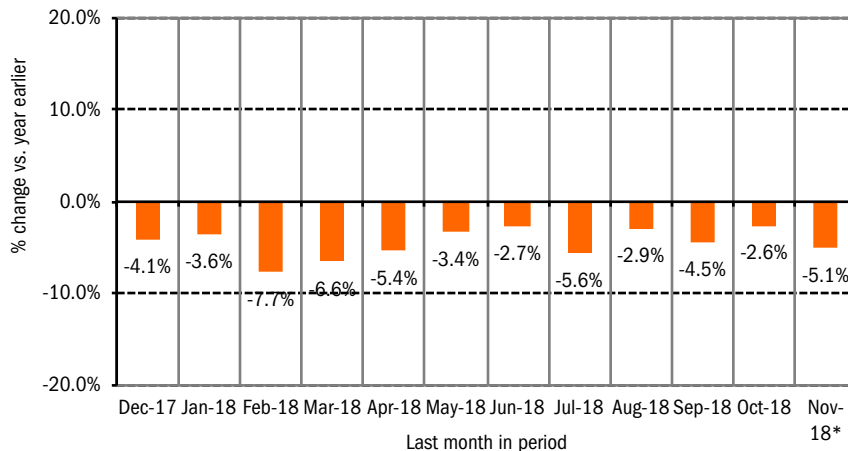
Data thru November 2018

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months*			YTD thru Nov.			YTD Market Share		
	10/17 & 11/17	10/18 & 11/18	% change	YTD '17	YTD '18	% change	2017	2018	change
Industry Total	25,296	24,594	-2.8%	143,149	137,030	-4.3%			
Cars	11,246	10,196	-9.3%	65,977	58,418	-11.5%	46.1	42.6	-3.5
Light Trucks	14,050	14,398	2.5%	77,172	78,612	1.9%	53.9	57.4	3.5
Japanese Brands	12,371	11,608	-6.2%	72,387	67,380	-6.9%	50.6	49.2	-1.4
Honda	3,364	3,053	-9.2%	19,578	18,406	-6.0%	13.7	13.4	-0.3
Nissan	1,847	1,682	-8.9%	11,791	9,581	-18.7%	8.2	7.0	-1.2
Toyota	5,216	5,014	-3.9%	29,844	28,346	-5.0%	20.8	20.7	-0.1
Other	1,944	1,859	-4.4%	11,174	11,047	-1.1%	7.8	8.1	0.3
Domestic Brands	6,898	7,402	7.3%	37,994	38,453	1.2%	26.5	28.1	1.6
FCA (excl. FIAT)	1,635	1,677	2.6%	9,255	8,936	-3.4%	6.5	6.5	0.0
Ford	2,723	2,504	-8.0%	15,186	13,620	-10.3%	10.6	9.9	-0.7
General Motors	2,305	2,122	-7.9%	12,319	11,055	-10.3%	8.6	8.1	-0.5
Other	235	1,099	367.7%	1,234	4,842	292.4%	0.9	3.5	2.6
European Brands	4,042	3,768	-6.8%	21,503	20,515	-4.6%	15.0	15.0	0.0
BMW	997	970	-2.7%	5,262	5,313	1.0%	3.7	3.9	0.2
Mercedes	967	883	-8.7%	4,816	4,528	-6.0%	3.4	3.3	-0.1
Volkswagen	1,412	1,214	-14.0%	7,754	7,061	-8.9%	5.4	5.2	-0.2
Other	666	701	5.3%	3,671	3,613	-1.6%	2.6	2.6	0.0
Korean Brands	1,985	1,816	-8.5%	11,265	10,682	-5.2%	7.9	7.8	-0.1

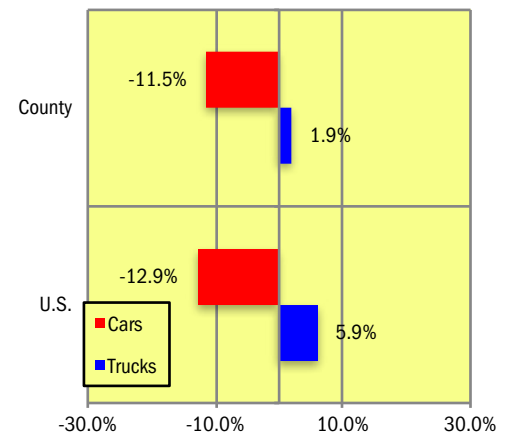
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 November 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 November 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 November* 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 November, 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 Nov.	thru Nov.*		thru Nov.	thru Nov.*
TOTAL	143,149	137,030	-4%		
Acura	1,672	1,589	-5%	1.2%	1.2%
Alfa Romeo	177	409	131%	0.1%	0.3%
Audi	2,820	2,614	-7%	2.0%	1.9%
BMW	4,530	4,656	3%	3.2%	3.4%
Buick	515	406	-21%	0.4%	0.3%
Cadillac	770	687	-11%	0.5%	0.5%
Chevrolet	9,185	8,299	-10%	6.4%	6.1%
Chrysler	678	658	-3%	0.5%	0.5%
Dodge	1,539	1,259	-18%	1.1%	0.9%
FIAT	674	243	-64%	0.5%	0.2%
Ford	14,599	13,094	-10%	10.2%	9.6%
Genesis	191	127	-34%	0.1%	0.1%
GMC	1,849	1,663	-10%	1.3%	1.2%
Honda	17,906	16,817	-6%	12.5%	12.3%
Hyundai	5,068	4,775	-6%	3.5%	3.5%
Infiniti	1,466	1,299	-11%	1.0%	0.9%
Jaguar	503	347	-31%	0.4%	0.3%
Jeep	4,919	4,906	0%	3.4%	3.6%
Kia	6,006	5,780	-4%	4.2%	4.2%
Land Rover	1,180	1,274	8%	0.8%	0.9%
Lexus	4,439	4,022	-9%	3.1%	2.9%
Lincoln	587	526	-10%	0.4%	0.4%
Maserati	201	157	-22%	0.1%	0.1%
Mazda	4,764	4,294	-10%	3.3%	3.1%
Mercedes	4,732	4,437	-6%	3.3%	3.2%
MINI	721	646	-10%	0.5%	0.5%
Mitsubishi	671	639	-5%	0.5%	0.5%
Nissan	10,325	8,282	-20%	7.2%	6.0%
Other	255	274	7%	0.2%	0.2%
Porsche	920	891	-3%	0.6%	0.7%
Ram	2,119	2,113	0%	1.5%	1.5%
Subaru	5,724	6,112	7%	4.0%	4.5%
Tesla	1,207	4,823	300%	0.8%	3.5%
Toyota	25,405	24,324	-4%	17.7%	17.8%
Volkswagen	4,014	3,556	-11%	2.8%	2.6%
Volvo	818	1,032	26%	0.6%	0.8%

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

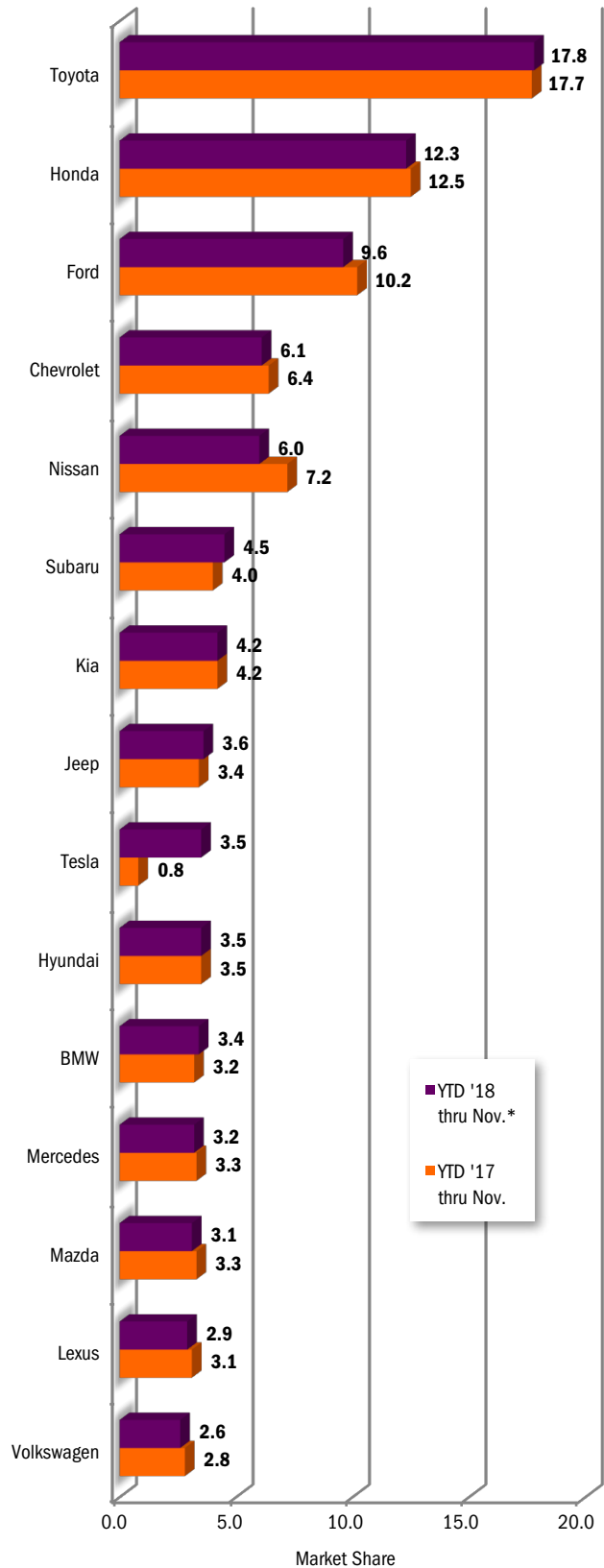
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County Market Share for Top 15 Selling Brands
YTD '18 thru November* vs. YTD '17



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