

# San Diego Outlook

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Covering the San Diego County automotive market

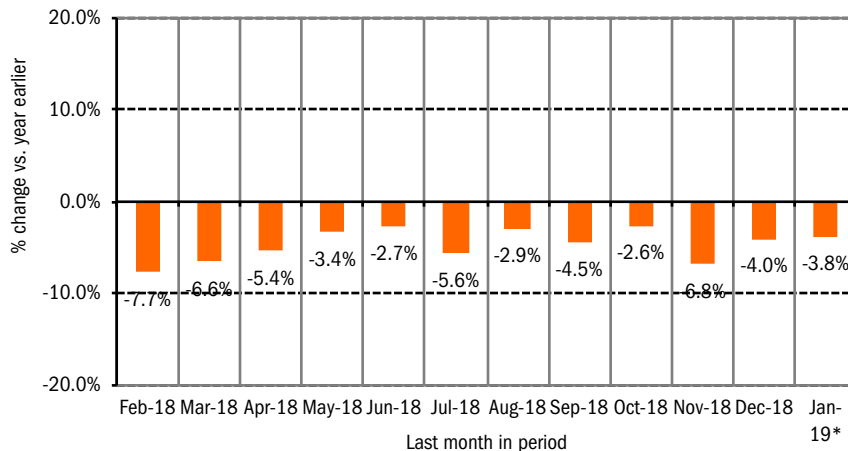
Data thru January 2019

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

	Most Recent Two Months*			Annual Totals			Annual Market Share		
	12/17 & 1/18	12/18 & 1/19	% change	2017	2018	% change	2017	2018	change
Industry Total	25,537	25,110	-1.7%	157,070	150,100	-4.4%			
Cars	10,738	10,047	-6.4%	71,891	63,555	-11.6%	45.8	42.3	-3.5
Light Trucks	14,799	15,063	1.8%	85,179	86,545	1.6%	54.2	57.7	3.5
Japanese Brands	12,633	11,963	-5.3%	79,480	73,783	-7.2%	50.6	49.2	-1.4
Honda	3,324	3,403	2.4%	21,492	20,269	-5.7%	13.7	13.5	-0.2
Nissan	1,854	1,573	-15.2%	12,857	10,548	-18.0%	8.2	7.0	-1.2
Toyota	5,346	4,921	-7.9%	32,925	30,953	-6.0%	21.0	20.6	-0.4
Other	2,109	2,066	-2.0%	12,206	12,013	-1.6%	7.8	8.0	0.2
Domestic Brands	6,816	7,347	7.8%	41,378	42,081	1.7%	26.3	28.0	1.7
FCA (excl. FIAT)	1,520	1,613	6.1%	9,974	9,633	-3.4%	6.4	6.4	0.0
Ford	2,439	2,553	4.7%	16,266	14,628	-10.1%	10.4	9.7	-0.7
General Motors	2,401	2,070	-13.8%	13,727	12,116	-11.7%	8.7	8.1	-0.6
Other	456	1,111	143.6%	1,411	5,704	304.3%	0.9	3.8	2.9
European Brands	4,141	4,028	-2.7%	23,918	22,757	-4.9%	15.2	15.2	0.0
BMW	1,106	1,161	5.0%	5,904	5,968	1.1%	3.8	4.0	0.2
Mercedes	860	830	-3.5%	5,341	5,005	-6.3%	3.4	3.3	-0.1
Volkswagen	1,439	1,303	-9.5%	8,591	7,825	-8.9%	5.5	5.2	-0.3
Other	736	734	-0.3%	4,082	3,959	-3.0%	2.6	2.6	0.0
Korean Brands	1,947	1,772	-9.0%	12,294	11,479	-6.6%	7.8	7.6	-0.2

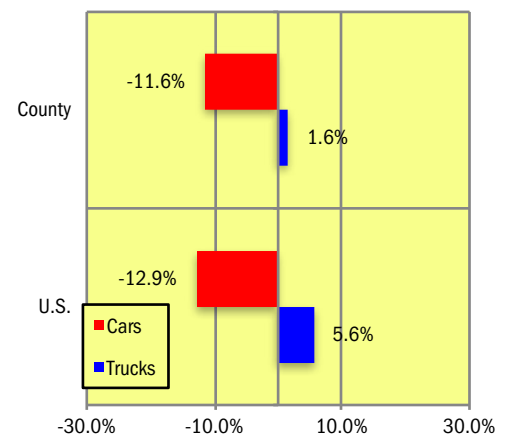
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 January 2019 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 January 2019 were estimated by Auto Outlook. Data Source: IHS Markit.

**Percent Change in County and U.S. New Retail Light Vehicle Markets 2018 vs. 2017**



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets.  
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.

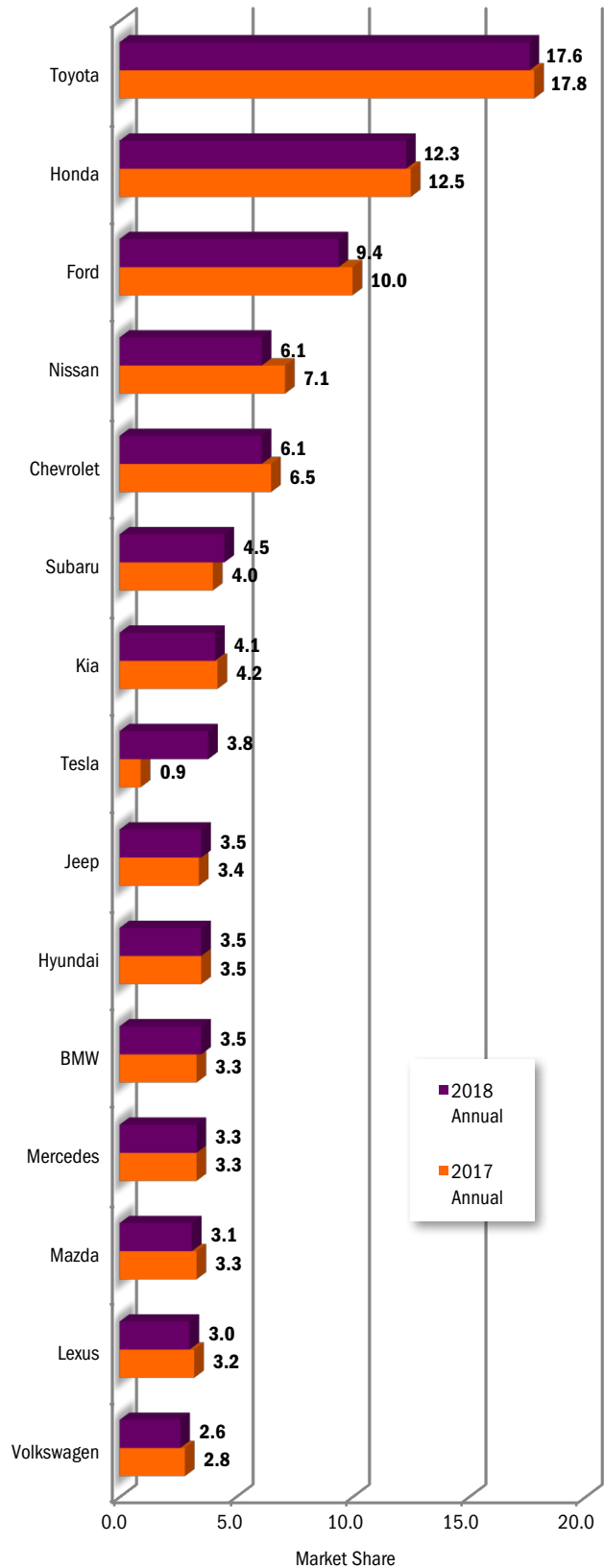
San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	2017	2018	% change	2017	2018
	Annual	Annual		Annual	Annual
TOTAL	157,070	150,100	-4%		
Acura	1,824	1,820	0%	1.2%	1.2%
Alfa Romeo	217	455	110%	0.1%	0.3%
Audi	3,191	2,908	-9%	2.0%	1.9%
BMW	5,110	5,245	3%	3.3%	3.5%
Buick	579	457	-21%	0.4%	0.3%
Cadillac	852	779	-9%	0.5%	0.5%
Chevrolet	10,205	9,100	-11%	6.5%	6.1%
Chrysler	752	702	-7%	0.5%	0.5%
Dodge	1,638	1,330	-19%	1.0%	0.9%
FIAT	713	261	-63%	0.5%	0.2%
Ford	15,640	14,068	-10%	10.0%	9.4%
Genesis	214	129	-40%	0.1%	0.1%
GMC	2,091	1,780	-15%	1.3%	1.2%
Honda	19,668	18,449	-6%	12.5%	12.3%
Hyundai	5,499	5,227	-5%	3.5%	3.5%
Infiniti	1,629	1,405	-14%	1.0%	0.9%
Jaguar	559	372	-33%	0.4%	0.2%
Jeep	5,281	5,299	0%	3.4%	3.5%
Kia	6,581	6,123	-7%	4.2%	4.1%
Land Rover	1,290	1,430	11%	0.8%	1.0%
Lexus	5,001	4,575	-9%	3.2%	3.0%
Lincoln	626	560	-11%	0.4%	0.4%
Maserati	222	181	-18%	0.1%	0.1%
Mazda	5,195	4,668	-10%	3.3%	3.1%
Mercedes	5,248	4,889	-7%	3.3%	3.3%
MINI	783	709	-9%	0.5%	0.5%
Mitsubishi	744	647	-13%	0.5%	0.4%
Nissan	11,228	9,143	-19%	7.1%	6.1%
Other	283	301	6%	0.2%	0.2%
Porsche	997	994	0%	0.6%	0.7%
Ram	2,303	2,302	0%	1.5%	1.5%
Subaru	6,252	6,692	7%	4.0%	4.5%
Tesla	1,378	5,679	312%	0.9%	3.8%
Toyota	27,924	26,378	-6%	17.8%	17.6%
Volkswagen	4,403	3,923	-11%	2.8%	2.6%
Volvo	950	1,120	18%	0.6%	0.7%

Top ten ranked brands in each percent change category are shaded green.  
Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands  
2018 vs. 2017



Data Source: IHS Markit.