

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

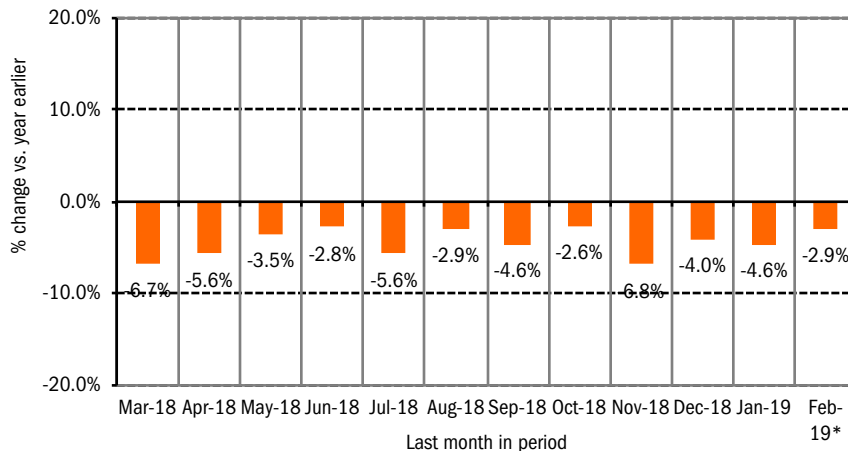
Data thru February 2019

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months*			Annual Totals			Annual Market Share		
	1/18 & 2/18	1/19 & 2/19	% change	2017	2018	% change	2017	2018	change
Industry Total	22,779	21,915	-3.8%	157,070	150,001	-4.5%			
Cars	9,673	8,949	-7.5%	71,891	63,533	-11.6%	45.8	42.4	-3.4
Light Trucks	13,106	12,966	-1.1%	85,179	86,468	1.5%	54.2	57.6	3.4
Japanese Brands	11,248	10,632	-5.5%	79,480	73,755	-7.2%	50.6	49.2	-1.4
Honda	3,047	3,043	-0.1%	21,492	20,260	-5.7%	13.7	13.5	-0.2
Nissan	1,627	1,481	-9.0%	12,857	10,547	-18.0%	8.2	7.0	-1.2
Toyota	4,585	4,339	-5.4%	32,925	30,937	-6.0%	21.0	20.6	-0.4
Other	1,989	1,769	-11.1%	12,206	12,011	-1.6%	7.8	8.0	0.2
Domestic Brands	6,270	6,430	2.6%	41,378	42,015	1.5%	26.3	28.0	1.7
FCA (excl. FIAT)	1,473	1,436	-2.5%	9,974	9,626	-3.5%	6.4	6.4	0.0
Ford	2,491	2,184	-12.3%	16,266	14,587	-10.3%	10.4	9.7	-0.7
General Motors	1,914	1,603	-16.2%	13,727	12,101	-11.8%	8.7	8.1	-0.6
Other	392	1,207	207.9%	1,411	5,701	304.0%	0.9	3.8	2.9
European Brands	3,430	3,081	-10.2%	23,918	22,752	-4.9%	15.2	15.2	0.0
BMW	912	755	-17.2%	5,904	5,966	1.1%	3.8	4.0	0.2
Mercedes	708	601	-15.1%	5,341	5,004	-6.3%	3.4	3.3	-0.1
Volkswagen	1,205	1,116	-7.4%	8,591	7,825	-8.9%	5.5	5.2	-0.3
Other	605	609	0.7%	4,082	3,957	-3.1%	2.6	2.6	0.0
Korean Brands	1,831	1,772	-3.2%	12,294	11,479	-6.6%	7.8	7.7	-0.1

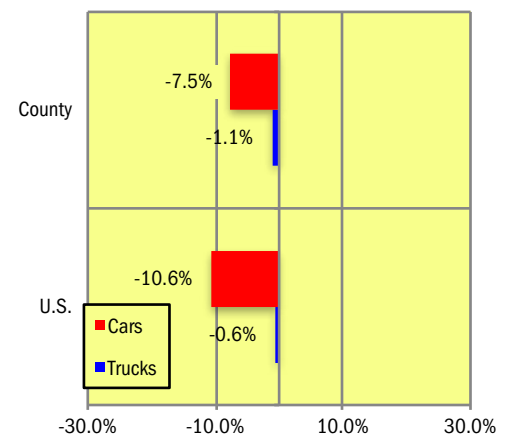
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

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 February 2019 were estimated by Auto Outlook. Data Source: IHS.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '19 thru February* vs. YTD '18



The graph above compares the change in new retail car and light truck registrations in both the area and U.S. markets. *Figures for February, 2019 were estimated by Auto Outlook.
Data Source: IHS.

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.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '18	YTD '19	% change	YTD '18	YTD '19
	thru Feb.	thru Feb.*		thru Feb.	thru Feb.*
TOTAL	22,779	21,915	-4%		
Acura	230	294	28%	1.0%	1.3%
Alfa Romeo	63	50	-21%	0.3%	0.2%
Audi	402	376	-6%	1.8%	1.7%
BMW	801	661	-17%	3.5%	3.0%
Buick	87	73	-16%	0.4%	0.3%
Cadillac	114	115	1%	0.5%	0.5%
Chevrolet	1,386	1,184	-15%	6.1%	5.4%
Chrysler	123	75	-39%	0.5%	0.3%
Dodge	217	178	-18%	1.0%	0.8%
FIAT	55	27	-51%	0.2%	0.1%
Ford	2,405	2,093	-13%	10.6%	9.6%
Genesis	43	27	-37%	0.2%	0.1%
GMC	327	231	-29%	1.4%	1.1%
Honda	2,817	2,749	-2%	12.4%	12.5%
Hyundai	750	790	5%	3.3%	3.6%
Infiniti	158	195	23%	0.7%	0.9%
Jaguar	56	66	18%	0.2%	0.3%
Jeep	777	763	-2%	3.4%	3.5%
Kia	1,038	955	-8%	4.6%	4.4%
Land Rover	199	251	26%	0.9%	1.1%
Lexus	612	636	4%	2.7%	2.9%
Lincoln	86	91	6%	0.4%	0.4%
Maserati	23	20	-13%	0.1%	0.1%
Mazda	789	639	-19%	3.5%	2.9%
Mercedes	683	592	-13%	3.0%	2.7%
MINI	108	94	-13%	0.5%	0.4%
Mitsubishi	120	100	-17%	0.5%	0.5%
Nissan	1,469	1,286	-12%	6.4%	5.9%
Other	59	68	15%	0.3%	0.3%
Porsche	174	192	10%	0.8%	0.9%
Ram	356	420	18%	1.6%	1.9%
Subaru	1,080	1,028	-5%	4.7%	4.7%
Tesla	391	1,202	207%	1.7%	5.5%
Toyota	3,973	3,703	-7%	17.4%	16.9%
Volkswagen	629	548	-13%	2.8%	2.5%
Volvo	179	143	-20%	0.8%	0.7%

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

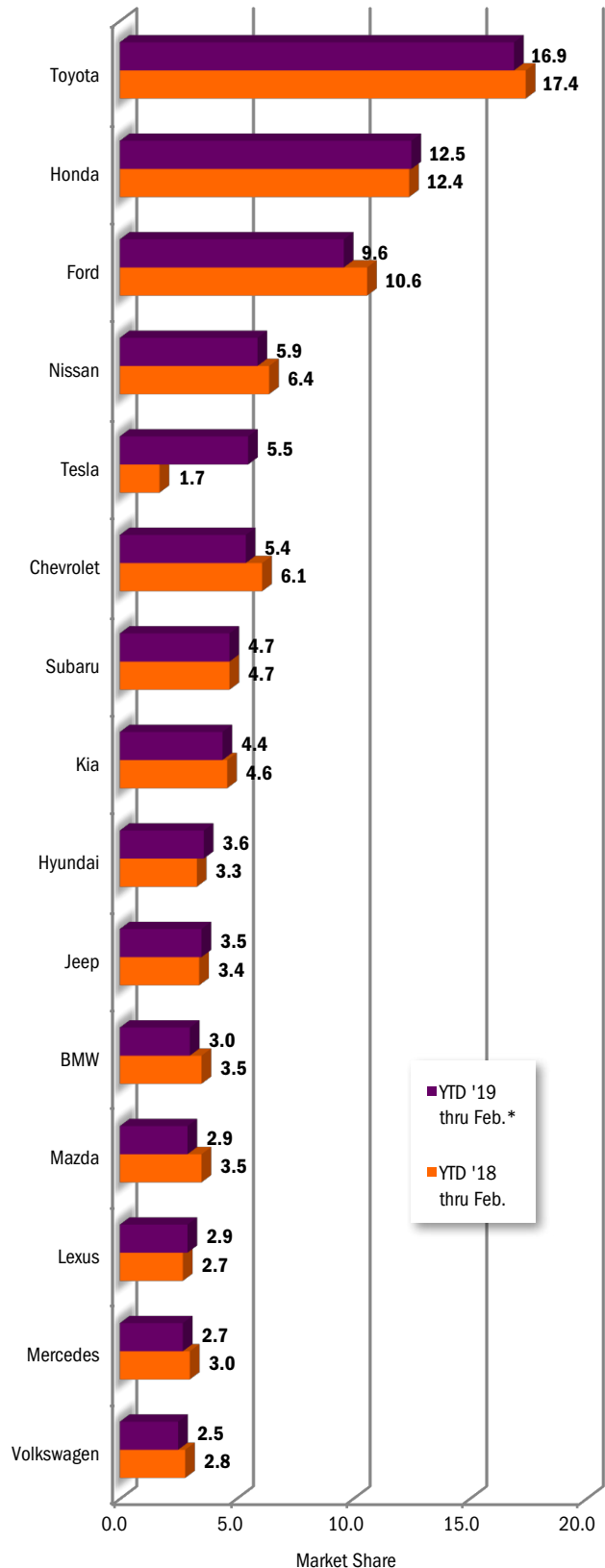
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County Market Share for Top 15 Selling Brands
YTD '19 thru February* vs. YTD '18



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