

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

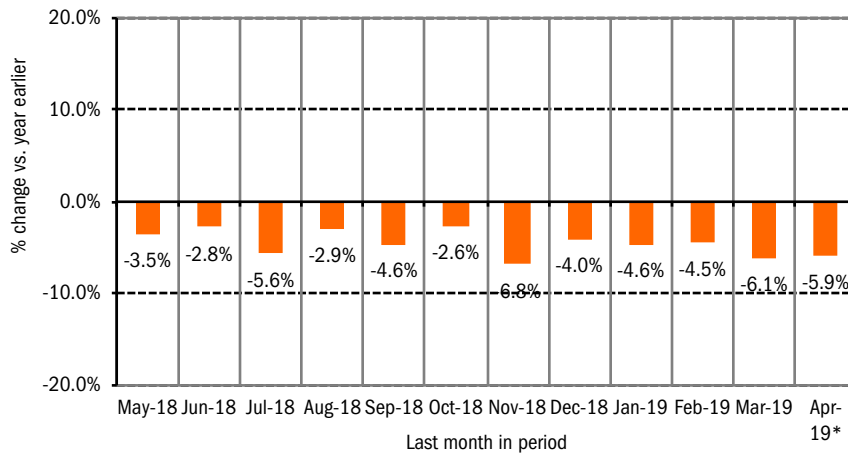
Data thru April 2019

San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months*			YTD thru Apr.			YTD Market Share		
	3/18 & 4/18	3/19 & 4/19*	% change	YTD '18	YTD '19*	% change	2018	2019	change
Industry Total	25,385	24,157	-4.8%	48,164	45,492	-5.5%			
Cars	11,159	10,206	-8.5%	20,832	18,688	-10.3%	43.3	41.1	-2.2
Light Trucks	14,226	13,951	-1.9%	27,332	26,804	-1.9%	56.7	58.9	2.2
Japanese Brands	12,510	12,044	-3.7%	23,758	22,565	-5.0%	49.3	49.6	0.3
Honda	3,428	3,464	1.1%	6,475	6,376	-1.5%	13.4	14.0	0.6
Nissan	1,763	1,628	-7.7%	3,390	3,100	-8.6%	7.0	6.8	-0.2
Toyota	5,252	5,083	-3.2%	9,837	9,457	-3.9%	20.4	20.8	0.4
Other	2,067	1,869	-9.6%	4,056	3,632	-10.5%	8.4	8.0	-0.4
Domestic Brands	7,083	6,371	-10.1%	13,353	12,638	-5.4%	27.7	27.8	0.1
FCA (excl. FIAT)	1,668	1,608	-3.6%	3,141	3,061	-2.5%	6.5	6.7	0.2
Ford	2,356	2,115	-10.2%	4,847	4,323	-10.8%	10.1	9.5	-0.6
General Motors	2,188	1,895	-13.4%	4,102	3,412	-16.8%	8.5	7.5	-1.0
Other	871	753	-13.5%	1,263	1,842	45.8%	2.6	4.0	1.4
European Brands	3,924	3,728	-5.0%	7,354	6,666	-9.4%	15.3	14.7	-0.6
BMW	1,067	1,027	-3.7%	1,979	1,690	-14.6%	4.1	3.7	-0.4
Mercedes	800	755	-5.6%	1,508	1,401	-7.1%	3.1	3.1	0.0
Volkswagen	1,397	1,283	-8.2%	2,602	2,329	-10.5%	5.4	5.1	-0.3
Other	660	663	0.5%	1,265	1,246	-1.5%	2.6	2.7	0.1
Korean Brands	1,868	2,014	7.8%	3,699	3,623	-2.1%	7.7	8.0	0.3

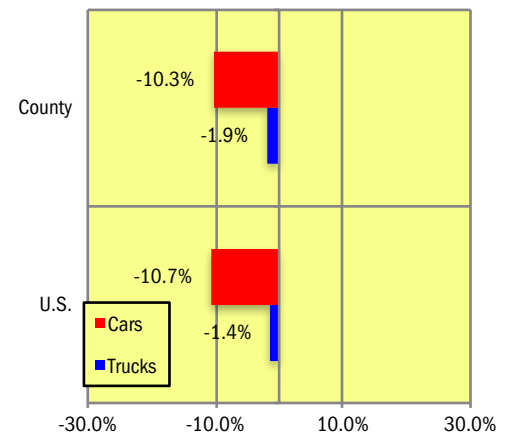
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '19 thru April* 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 April, 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 Apr.	thru Apr.*		thru Apr.	thru Apr.*
TOTAL	48,164	45,492	-6%		
Acura	494	526	6%	1.0%	1.2%
Alfa Romeo	147	122	-17%	0.3%	0.3%
Audi	929	760	-18%	1.9%	1.7%
BMW	1,714	1,501	-12%	3.6%	3.3%
Buick	179	142	-21%	0.4%	0.3%
Cadillac	264	246	-7%	0.5%	0.5%
Chevrolet	2,991	2,536	-15%	6.2%	5.6%
Chrysler	238	155	-35%	0.5%	0.3%
Dodge	468	368	-21%	1.0%	0.8%
FIAT	95	39	-59%	0.2%	0.1%
Ford	4,675	4,131	-12%	9.7%	9.1%
Genesis	75	33	-56%	0.2%	0.1%
GMC	668	488	-27%	1.4%	1.1%
Honda	5,981	5,850	-2%	12.4%	12.9%
Hyundai	1,502	1,656	10%	3.1%	3.6%
Infiniti	441	446	1%	0.9%	1.0%
Jaguar	118	120	2%	0.2%	0.3%
Jeep	1,699	1,645	-3%	3.5%	3.6%
Kia	2,122	1,934	-9%	4.4%	4.3%
Land Rover	452	502	11%	0.9%	1.1%
Lexus	1,330	1,399	5%	2.8%	3.1%
Lincoln	172	192	12%	0.4%	0.4%
Maserati	48	48	0%	0.1%	0.1%
Mazda	1,602	1,332	-17%	3.3%	2.9%
Mercedes	1,470	1,376	-6%	3.1%	3.0%
MINI	261	189	-28%	0.5%	0.4%
Mitsubishi	258	145	-44%	0.5%	0.3%
Nissan	2,949	2,654	-10%	6.1%	5.8%
Other	106	127	20%	0.2%	0.3%
Porsche	357	359	1%	0.7%	0.8%
Ram	736	893	21%	1.5%	2.0%
Subaru	2,195	2,152	-2%	4.6%	4.7%
Tesla	1,257	1,831	46%	2.6%	4.0%
Toyota	8,507	8,058	-5%	17.7%	17.7%
Volkswagen	1,316	1,210	-8%	2.7%	2.7%
Volvo	348	327	-6%	0.7%	0.7%

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

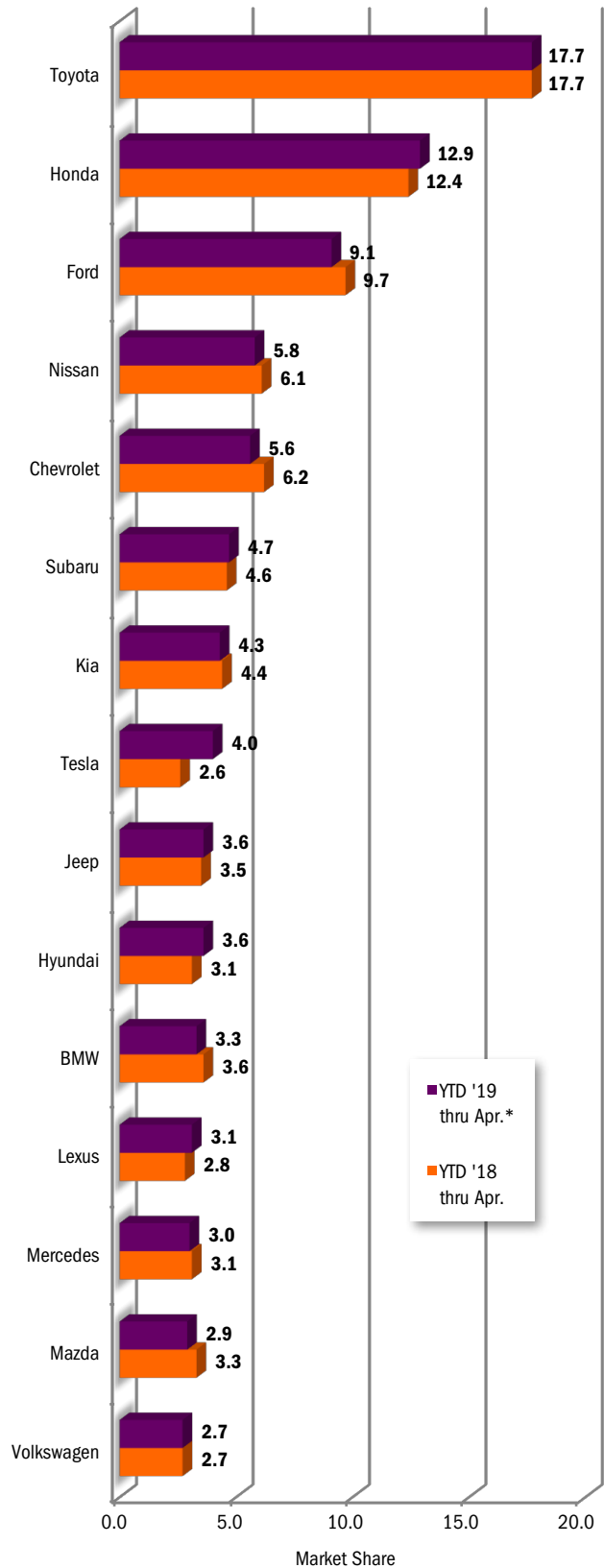
*Figures for April 2019 were estimated by Auto Outlook.

Data Source: IHS.

This report is sponsored by the New Car Dealers Association San Diego County (858-550-0080) and produced by Auto Outlook (610-640-1233). Auto Outlook, Inc. is not responsible for management decisions based on the content of San Diego Auto Outlook. Copyright Auto Outlook, May 2019.

Reproduction, including photocopying of this publication in whole or in part, is prohibited without the express permission of Auto Outlook, Inc. Any material quoted must be attributed to San Diego Auto Outlook, published by Auto Outlook, Inc. on behalf of the New Car Dealers Association San Diego County and must also include the statement: "Data Source: IHS."

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



*Figures for April 2019 were estimated by Auto Outlook.

Data Source: IHS.