

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

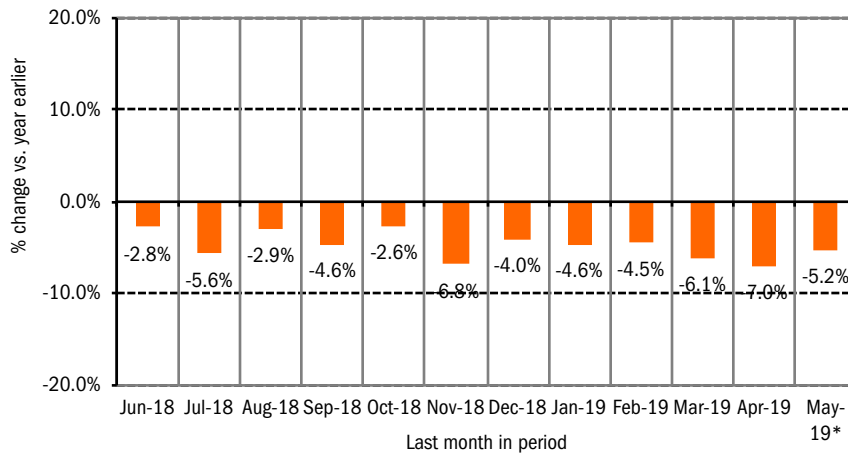
Data thru May 2019

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

	Most Recent Two Months*			YTD thru May			YTD Market Share		
	4/18 & 5/18	4/19 & 5/19*	% change	YTD '18	YTD '19*	% change	2018	2019	change
Industry Total	26,619	25,284	-5.0%	62,405	58,894	-5.6%			
Cars	11,693	10,278	-12.1%	27,016	23,894	-11.6%	43.3	40.6	-2.7
Light Trucks	14,926	15,006	0.5%	35,389	35,000	-1.1%	56.7	59.4	2.7
Japanese Brands	12,554	12,241	-2.5%	30,531	29,043	-4.9%	48.9	49.3	0.4
Honda	3,568	3,408	-4.5%	8,439	8,120	-3.8%	13.5	13.8	0.3
Nissan	1,608	1,538	-4.4%	4,306	3,907	-9.3%	6.9	6.6	-0.3
Toyota	5,259	5,228	-0.6%	12,576	12,237	-2.7%	20.2	20.8	0.6
Other	2,119	2,067	-2.5%	5,210	4,779	-8.3%	8.3	8.1	-0.2
Domestic Brands	8,038	7,338	-8.7%	17,595	16,564	-5.9%	28.2	28.1	-0.1
FCA (excl. FIAT)	1,878	1,861	-0.9%	4,152	4,087	-1.6%	6.7	6.9	0.2
Ford	2,762	2,356	-14.7%	6,375	5,434	-14.8%	10.2	9.2	-1.0
General Motors	2,075	1,850	-10.8%	5,183	4,325	-16.6%	8.3	7.3	-1.0
Other	1,323	1,271	-3.9%	1,885	2,718	44.2%	3.0	4.6	1.6
European Brands	3,875	3,571	-7.8%	9,340	8,499	-9.0%	15.0	14.4	-0.6
BMW	951	832	-12.5%	2,423	2,044	-15.6%	3.9	3.5	-0.4
Mercedes	888	797	-10.2%	1,978	1,855	-6.2%	3.2	3.1	-0.1
Volkswagen	1,353	1,335	-1.3%	3,302	3,063	-7.2%	5.3	5.2	-0.1
Other	683	607	-11.1%	1,637	1,537	-6.1%	2.6	2.6	0.0
Korean Brands	2,152	2,134	-0.8%	4,939	4,788	-3.1%	7.9	8.1	0.2

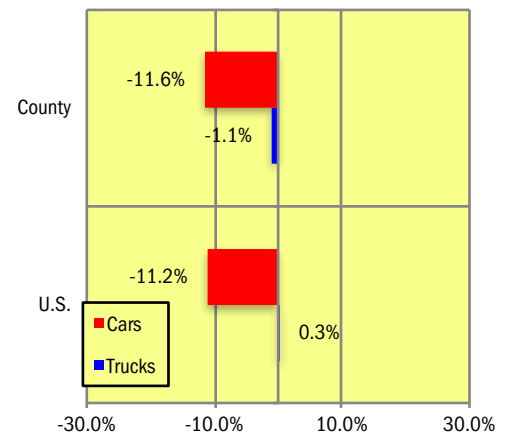
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

**Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '19 thru May\* 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 May, 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 May	thru May*		thru May	thru May*
TOTAL	62,405	58,894	-6%		
Acura	637	679	7%	1.0%	1.2%
Alfa Romeo	205	147	-28%	0.3%	0.2%
Audi	1,176	1,024	-13%	1.9%	1.7%
BMW	2,125	1,870	-12%	3.4%	3.2%
Buick	207	169	-18%	0.3%	0.3%
Cadillac	319	290	-9%	0.5%	0.5%
Chevrolet	3,863	3,260	-16%	6.2%	5.5%
Chrysler	318	225	-29%	0.5%	0.4%
Dodge	599	510	-15%	1.0%	0.9%
FIAT	111	56	-50%	0.2%	0.1%
Ford	6,133	5,194	-15%	9.8%	8.8%
Genesis	88	58	-34%	0.1%	0.1%
GMC	794	606	-24%	1.3%	1.0%
Honda	7,802	7,441	-5%	12.5%	12.6%
Hyundai	2,089	2,269	9%	3.3%	3.9%
Infiniti	542	504	-7%	0.9%	0.9%
Jaguar	151	143	-5%	0.2%	0.2%
Jeep	2,276	2,236	-2%	3.6%	3.8%
Kia	2,762	2,461	-11%	4.4%	4.2%
Land Rover	569	601	6%	0.9%	1.0%
Lexus	1,697	1,801	6%	2.7%	3.1%
Lincoln	242	240	-1%	0.4%	0.4%
Maserati	71	67	-6%	0.1%	0.1%
Mazda	2,097	1,754	-16%	3.4%	3.0%
Mercedes	1,931	1,810	-6%	3.1%	3.1%
MINI	293	174	-41%	0.5%	0.3%
Mitsubishi	329	174	-47%	0.5%	0.3%
Nissan	3,764	3,403	-10%	6.0%	5.8%
Other	119	153	29%	0.2%	0.3%
Porsche	428	417	-3%	0.7%	0.7%
Ram	959	1,116	16%	1.5%	1.9%
Subaru	2,783	2,848	2%	4.5%	4.8%
Tesla	1,879	2,707	44%	3.0%	4.6%
Toyota	10,879	10,436	-4%	17.4%	17.7%
Volkswagen	1,698	1,622	-4%	2.7%	2.8%
Volvo	470	429	-9%	0.8%	0.7%

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

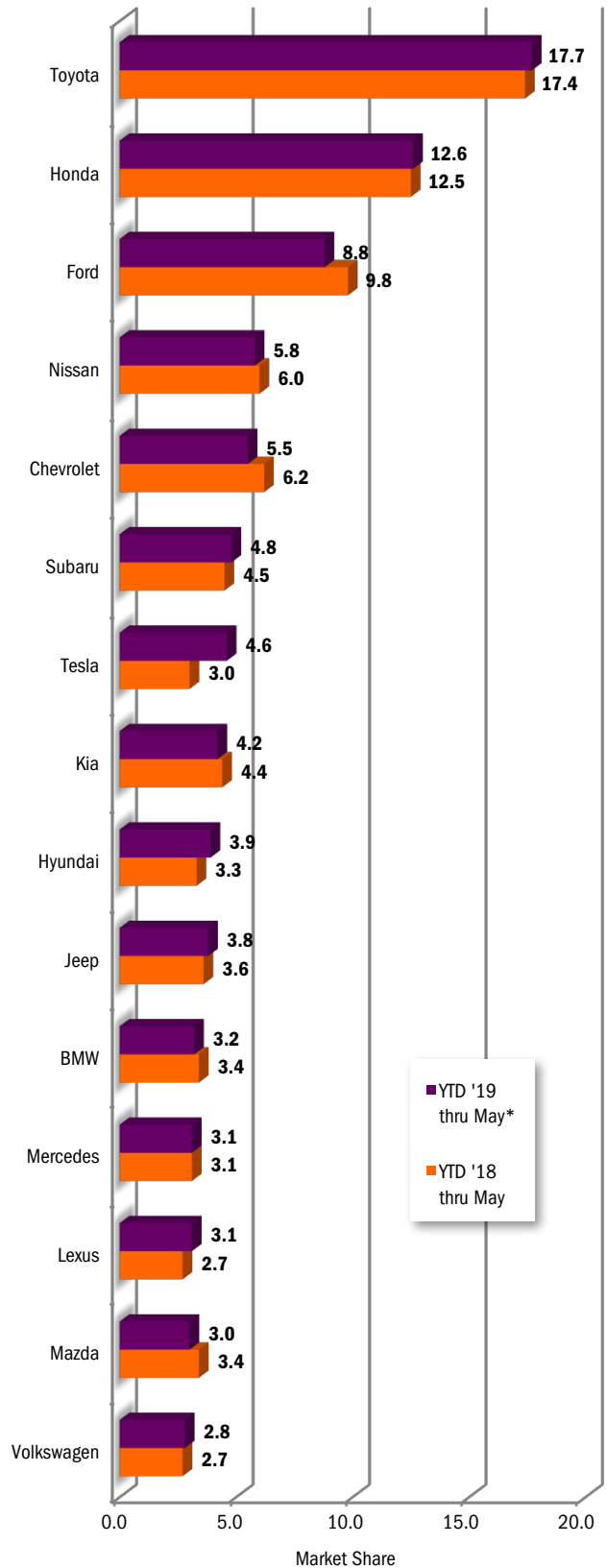
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County Market Share for Top 15 Selling Brands  
YTD '19 thru May\* vs. YTD '18



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