

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

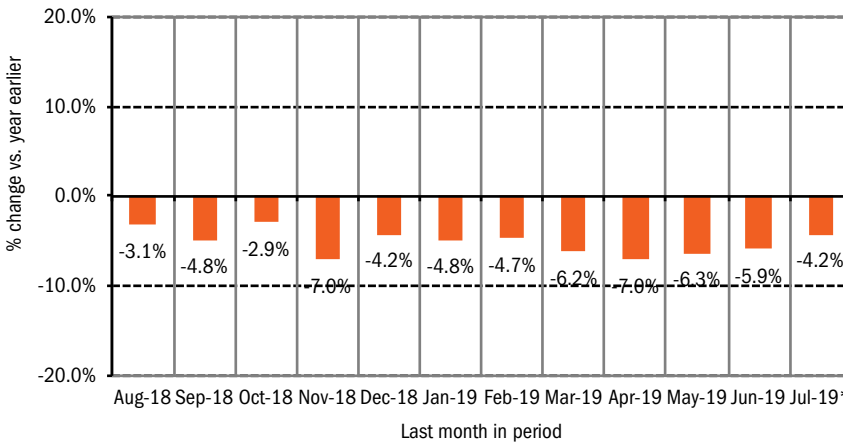
Data thru June/July 2019

San Diego County New Retail Car and Light Truck Registrations

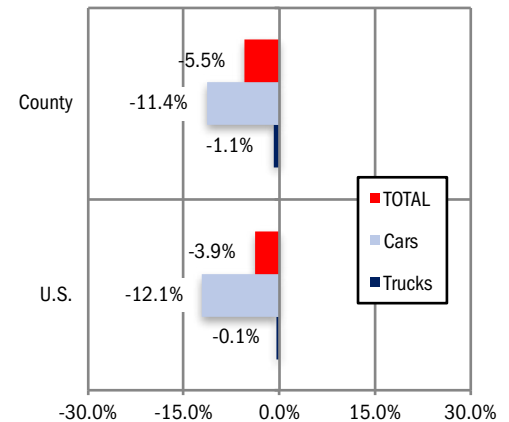
	Most Recent Two Months*			YTD thru July*			YTD Market Share		
	6/18 & 7/18	6/19 & 7/19*	% change	YTD '18	YTD '19*	% change	2018	2019	change
Industry Total	23,892	23,157	-3.1%	86,253	81,513	-5.5%			
Cars	10,121	9,232	-8.8%	37,122	32,904	-11.4%	43.0	40.4	-2.6
Light Trucks	13,771	13,925	1.1%	49,131	48,609	-1.1%	57.0	59.6	2.6

*Figures for July, 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



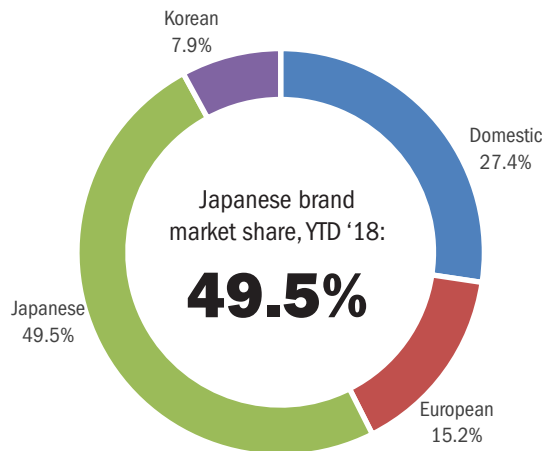
Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '19 thru July* vs. YTD '18



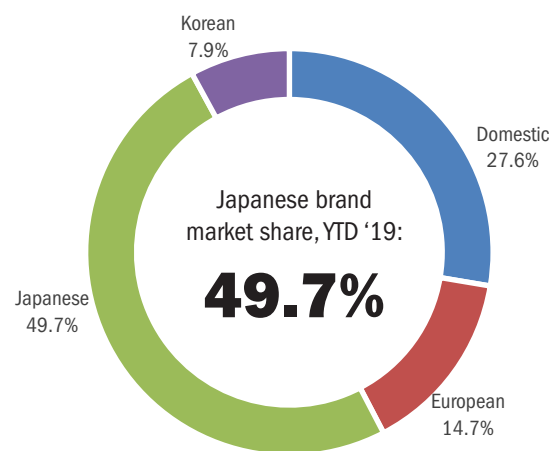
The graph above provides a clear picture of the trending direction of the county market. It shows the year-over-year percent change in the three month moving average of new retail light vehicle registrations. The three month moving average is less erratic than monthly registrations, which can fluctuate due to such factors as the timing of manufacturer incentive programs, weather and title processing delays by governmental agencies. *Figures for July 2019 were estimated by Auto Outlook. Data Source: IHS.

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

Japanese, Domestic, European, and Korean Brand Market Shares in County - YTD '18 thru June



Japanese, Domestic, European, and Korean Brand Market Shares in County - YTD '19 thru June



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.

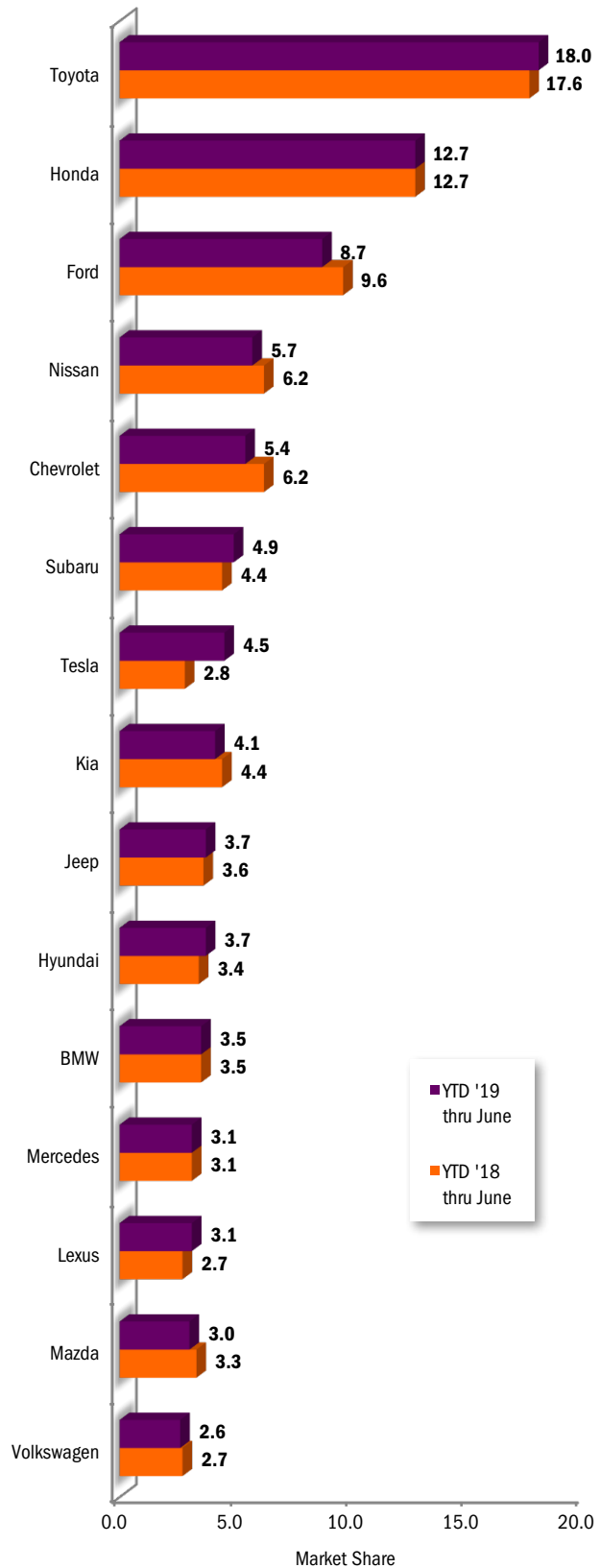
San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '18	YTD '19	% change	YTD '18	YTD '19
	thru June	thru June		thru June	thru June
Acura	799	762	-5%	1.1%	1.1%
Alfa Romeo	244	184	-25%	0.3%	0.3%
Audi	1,434	1,174	-18%	1.9%	1.7%
BMW	2,579	2,403	-7%	3.5%	3.5%
Buick	232	198	-15%	0.3%	0.3%
Cadillac	364	337	-7%	0.5%	0.5%
Chevrolet	4,541	3,769	-17%	6.2%	5.4%
Chrysler	354	251	-29%	0.5%	0.4%
Dodge	687	550	-20%	0.9%	0.8%
FIAT	125	69	-45%	0.2%	0.1%
Ford	7,044	6,034	-14%	9.6%	8.7%
Genesis	100	79	-21%	0.1%	0.1%
GMC	891	727	-18%	1.2%	1.1%
Honda	9,368	8,775	-6%	12.7%	12.7%
Hyundai	2,492	2,561	3%	3.4%	3.7%
Infiniti	647	612	-5%	0.9%	0.9%
Jaguar	181	164	-9%	0.2%	0.2%
Jeep	2,626	2,591	-1%	3.6%	3.7%
Kia	3,258	2,855	-12%	4.4%	4.1%
Land Rover	685	683	0%	0.9%	1.0%
Lexus	2,004	2,176	9%	2.7%	3.1%
Lincoln	271	254	-6%	0.4%	0.4%
Maserati	81	70	-14%	0.1%	0.1%
Mazda	2,447	2,082	-15%	3.3%	3.0%
Mercedes	2,311	2,178	-6%	3.1%	3.1%
MINI	369	250	-32%	0.5%	0.4%
Mitsubishi	369	181	-51%	0.5%	0.3%
Nissan	4,591	3,944	-14%	6.2%	5.7%
Other	143	198	38%	0.2%	0.3%
Porsche	495	513	4%	0.7%	0.7%
Ram	1,088	1,272	17%	1.5%	1.8%
Subaru	3,264	3,385	4%	4.4%	4.9%
Tesla	2,059	3,137	52%	2.8%	4.5%
Toyota	12,978	12,480	-4%	17.6%	18.0%
Volkswagen	2,003	1,785	-11%	2.7%	2.6%
Volvo	564	517	-8%	0.8%	0.7%

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

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



Data Source: IHS.