

California Auto Outlook™

Comprehensive information on the California vehicle market

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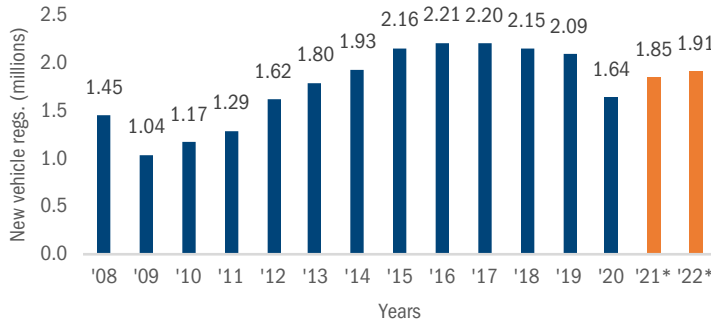


Tight Supplies Could Keep State New Vehicle Registrations Below 2 Million Units in 2022

ANNUAL TRENDS



California Annual New Light Vehicle Registrations - 2008 thru 2022



Historical data source: AutoCount data from Experian. *2021 and 2022 forecasts by Auto Outlook.

OUTLOOK FOR CALIFORNIA NEW VEHICLE MARKET



- California new vehicle registrations are predicted to reach 1.85 million units for all of 2021, a 12.9 percent increase versus 2020. Fourth Quarter registrations this year are expected to decline by approximately 17 percent versus 4Q '20.
- The market is predicted to increase slightly in 2022, with registrations improving to 1.91 million units, up 3.2 percent from 2021.

California Total New Light Vehicle Registrations - YTD 2020 and 2021, thru Sep.

	California			U.S.		
	YTD '20	YTD '21	Change	YTD '20	YTD '21	Change
Registrations						
TOTAL	1,199,446	1,484,862	23.8%	10,393,042	11,772,441	13.3%
Car	435,366	509,554	17.0%	2,524,076	2,731,147	8.2%
Light Truck	764,080	975,308	27.6%	7,868,966	9,041,294	14.9%
Domestic	390,159	454,480	16.5%	4,711,747	4,739,135	0.6%
European	178,736	225,279	26.0%	996,783	1,224,672	22.9%
Japanese	543,445	682,790	25.6%	3,801,452	4,633,154	21.9%
Korean	87,106	122,313	40.4%	883,060	1,175,480	33.1%
Market Share						
Car	36.3	34.3	-2.0	24.3	23.2	-1.1
Light Truck	63.7	65.7	2.0	75.7	76.8	1.1
Domestic	32.5	30.6	-1.9	45.3	40.3	-5.0
European	14.9	15.2	0.3	9.6	10.4	0.8
Japanese	45.4	46.0	0.6	36.6	39.4	2.8
Korean	7.3	8.2	0.9	8.5	10.0	1.5

Source for CA registrations: AutoCount data from Experian. Source for U.S. data: Automotive News.

- Typically, forecasts for California new vehicle registrations are a function of key factors related to demand, such as employment, household income, consumer sentiment, and interest rates. For perhaps the next 15 months, however, sales levels will likely be linked to how many vehicles can be produced.
- Pinpointing production volume is a complex puzzle impacted by several inter-related pieces: the chip shortage, COVID induced labor cutbacks, tight supplies of other key components, and transportation logistics.
- Due to this elevated uncertainty, an alternative forecasting approach was used to derive the above forecasts. The methodology translates expected levels for the U.S. seasonally adjusted annual rate of sales (SAAR) into new vehicle registrations in the state.

- Although analyst predictions for U.S. new vehicle sales vary, the consensus outlook for 4Q '21 SAAR is roughly 13 million units. Based on historical trends, a Fourth Quarter SAAR of 13 million units is equivalent to 365,000 new vehicle registrations in California, down 17 percent from 4Q '20.
- Early predictions for SAAR in 2022 are in the vicinity of 15.4 million units, which is equivalent to 1.91 million new vehicle registrations in the state.

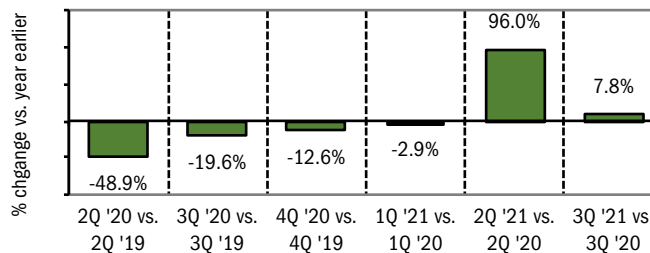
TWO YEAR PERSPECTIVE



QUARTERLY RESULTS



California Quarterly New Light Vehicle Registrations Percent Change vs. Year Earlier

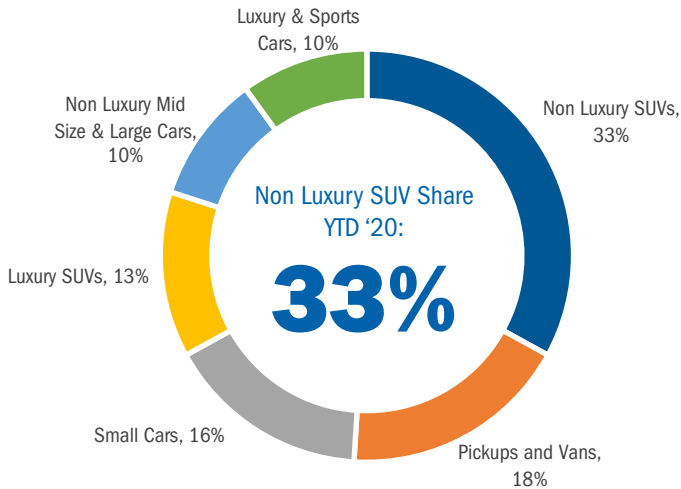


Data source: AutoCount data from Experian.

SEGMENT MARKET SHARE TRENDS

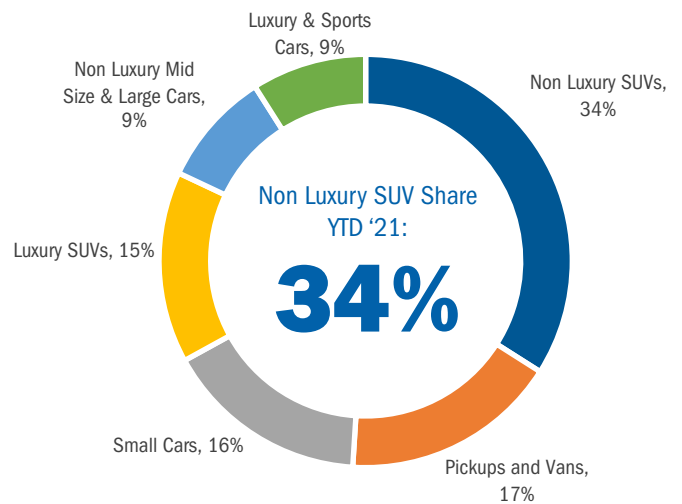
Small Car Market Share Holds Steady During 2021

Segment Market Shares in California
YTD 2020 thru September



Data Source: AutoCount data from Experian.

Segment Market Shares in California
YTD 2021 thru September



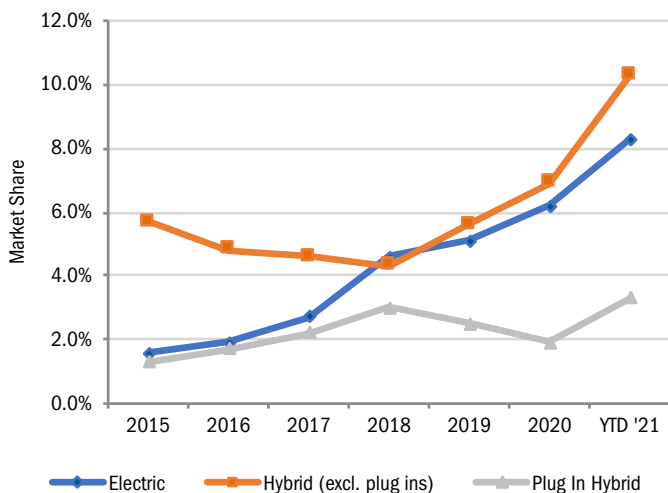
Data Source: AutoCount data from Experian.

The two graphs above show market shares for primary segments during the first nine months of 2020 and 2021.

HYBRID AND ELECTRIC VEHICLES

Estimated Electric Vehicle Market Share Increased to 8.3 Percent During First Nine Months of 2021

Estimated Hybrid and Electric Vehicle Market Share



Hybrid/electric vehicle market share
YTD '21 thru September:
21.9 percent

Estimated Hybrid and Electric New Vehicle Registrations and Market Share					
	2017	2018	2019	2020	YTD '21
Electric registrations	59388	99121	106752	101628	123244
Electric share	2.7%	4.6%	5.1%	6.2%	8.3%
Hybrid regs. (excl. plug ins)	101180	92658	117218	113103	152941
Hybrid share (excl. plug ins)	4.6%	4.3%	5.6%	6.9%	10.3%
Plug in hybrid regs.	48391	64644	52329	31144	49000
Plug in hybrid share	2.2%	3.0%	2.5%	1.9%	3.3%

The graph above shows estimated hybrid powertrain and electric vehicle market share in the state. Registrations by powertrain for vehicles equipped with multiple engine types were estimated by Auto Outlook. The estimates are based on model registrations compiled by Experian, and engine installation rates collected from other sources.

MODEL RANKINGS

Toyota Camry Retains Top Spot in California New Vehicle Market; RAV4 is Best-Selling Light Truck

The table below shows the top five selling models during the first nine months of 2021 in 20 segments. In addition to unit registrations, it also shows each model's market share in its respective segment.



BEST SELLERS IN PRIMARY SEGMENTS

- Compact Car: Honda Civic
- Mid Size Car: Toyota Camry
- Near Luxury Car: Tesla Model 3
- Luxury Car: BMW 5-Series
- Full Size Pickup: Chevrolet Silverado
- Compact SUV: Toyota RAV4
- Mid Size SUV: Toyota Highlander
- Luxury Compact SUV: Tesla Model Y

Top Selling Models in Each Segment - New Light Vehicle Registrations (YTD 2021 thru September)

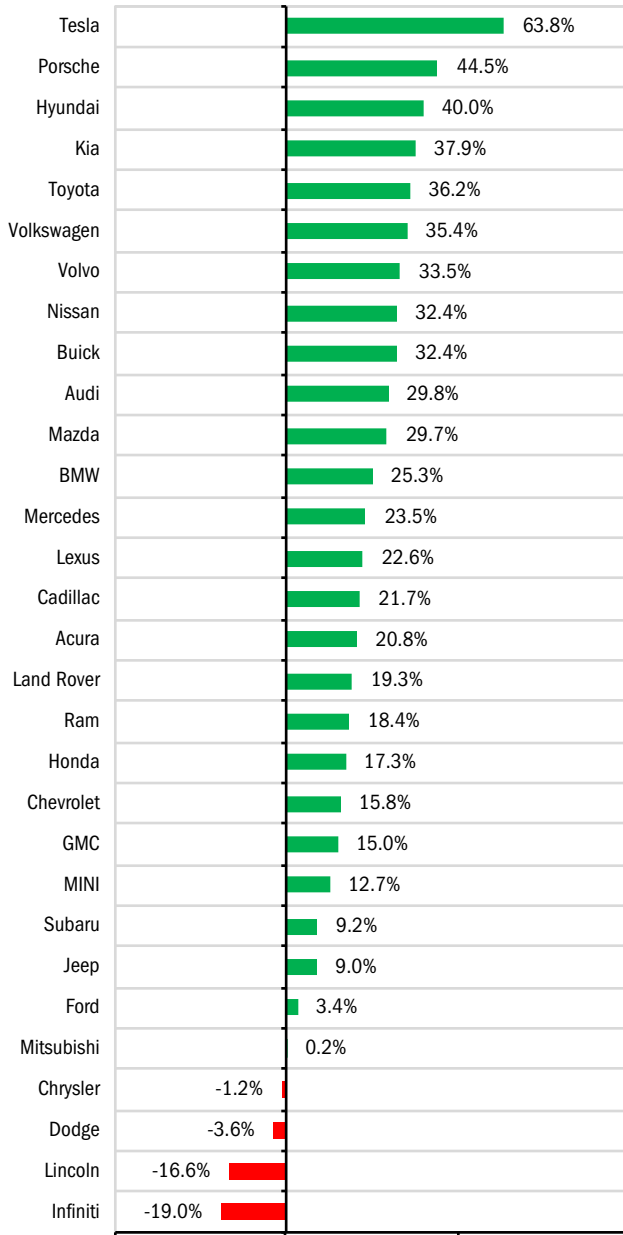
Cars											
Subcompact			Compact			Sports/Pony Cars			Mid Size		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Chevrolet Bolt	9945	35.2	Honda Civic	50159	26.7	Ford Mustang	6244	35.3	Toyota Camry	51111	39.8
Nissan Versa	6973	24.7	Toyota Corolla	43832	23.3	Dodge Challenger	6005	34.0	Honda Accord	36028	28.1
Chevrolet Spark	3016	10.7	Toyota Prius	19943	10.6	Chevrolet Camaro	1787	10.1	Kia K5/Optima	10357	8.1
Honda Fit	1959	6.9	Nissan Sentra	15041	8.0	Mazda MX5	1634	9.2	Nissan Altima	9460	7.4
Kia Rio	1881	6.7	Kia Forte	12091	6.4	Toyota Supra	1201	6.8	Hyundai Sonata	8702	6.8
Large			Entry Luxury			Near Luxury			Luxury and High End Sports Cars		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Dodge Charger	8871	65.1	BMW 2-Series	2744	28.1	Tesla Model 3	34995	40.8	BMW 5-Series	5005	13.9
Toyota Avalon	1996	14.6	Mercedes A-Class	2061	21.1	BMW 3-Series	9417	11.0	Mercedes E-Class	4677	13.0
Chrysler 300	1545	11.3	Acura ILX	1849	19.0	Lexus ES	8221	9.6	Chevrolet Corvette	2683	7.5
Nissan Maxima	1152	8.5	Mercedes CLA-Class	1669	17.1	Mercedes C-Class	7927	9.2	Tesla Model S	2231	6.2
Chevrolet Impala	34	0.2	BMW i3	888	9.1	Lexus IS	4212	4.9	Mercedes S-Class	2223	6.2
Light Trucks											
Compact/Mid Size Pickup			Full Size Pickup			Mini Van			Large Van		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Toyota Tacoma	35122	54.4	Chevrolet Silverado	36494	28.5	Toyota Sienna	12800	44.9	Ford Transit Connect	12835	41.7
Ford Ranger	9487	14.7	Ford F-Series	35252	27.5	Honda Odyssey	7163	25.1	Ram Promaster	6080	19.8
Jeep Gladiator	5915	9.2	Ram Pickup	32619	25.4	Chrysler Pacifica	4508	15.8	Mercedes Sprinter	4318	14.0
Chevrolet Colorado	5555	8.6	GMC Sierra	15781	12.3	Chrysler Voyager	2477	8.7	Nissan NV	3930	12.8
Nissan Frontier	3993	6.2	Toyota Tundra	6704	5.2	Kia Carnival	1193	4.2	Chevrolet Express	2458	8.0
Subcompact SUV			Compact SUV			Mid Size SUV			Large SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Subaru Crosstrek	14965	15.0	Toyota RAV4	48182	23.4	Toyota Highlander	23472	13.5	Chevrolet Tahoe	5920	27.0
Honda HR-V	13871	13.9	Honda CR-V	32841	15.9	Ford Explorer	15201	8.7	Ford Expedition	4286	19.6
Nissan Kicks	8661	8.7	Mazda CX5	18154	8.8	Subaru Outback	13350	7.7	GMC Yukon	2888	13.2
Hyundai Kona	7502	7.5	Jeep Wrangler	16921	8.2	Toyota 4Runner	11604	6.7	Chevrolet Suburban	2841	13.0
Toyota C-HR	6589	6.6	Subaru Forester	14094	6.8	Honda Pilot	11406	6.5	GMC Yukon XL	1723	7.9
Luxury Subcompact SUV			Luxury Compact SUV			Luxury Mid Size SUV			Luxury Large SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Mercedes GLB-Class	4923	20.5	Tesla Model Y	42624	40.9	Lexus RX	13791	19.4	Cadillac Escalade	3723	21.4
Audi Q3	4852	20.2	Lexus NX	10341	9.9	Mercedes GLE-Class	10121	14.3	Mercedes GLS-Class	3167	18.2
Lexus UX	4056	16.9	Audi Q5	9397	9.0	BMW X5	7467	10.5	Land Rover Range Rover	2606	15.0
Mercedes GLA-Class	3273	13.6	BMW X3	8470	8.1	Acura MDX	4972	7.0	BMW X7	2387	13.7
BMW X1	2738	11.4	Mercedes GLC-Class	8413	8.1	Volvo XC90	4348	6.1	Mercedes G-Class	2009	11.5

Data Source: AutoCount data from Experian. Figures for Prius include Prius Prime.

BRAND SUMMARY

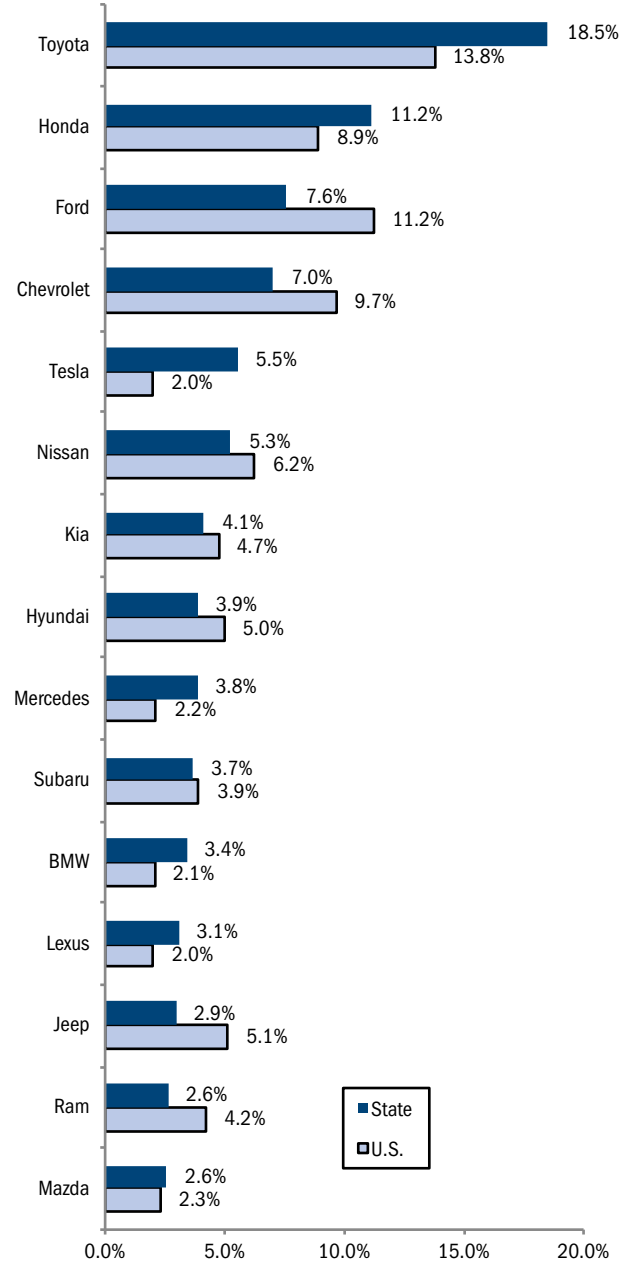
Most Brands Had Big Percentage Increases During First Three Quarters of 2021

Percent Change in Brand Registrations - YTD '21 thru Sep. vs. YTD '20
(Top 30 selling brands in state)



Percent change in registrations

California and U.S. Market Share - YTD '21 thru September
(Top 15 selling brands in state)



Market Share



Registrations increased by more than 30 percent for Tesla, Porsche, Hyundai, Kia, Toyota, Volkswagen, Volvo, Nissan, and Buick



Toyota, Honda, Ford, Chevrolet, and Tesla were market share leaders in California

Source for California new vehicle registrations: AutoCount data from Experian. Source for U.S. market share: Automotive News.

BRAND REGISTRATIONS

Detailed Results for All Brands in California Market

California New Car and Light Truck Registrations												
	Third Quarter						Year to date thru September					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	3Q '20	3Q '21	% change	3Q '20	3Q '21	Change	YTD '20	YTD '21	% change	YTD '20	YTD '21	Change
TOTAL	413,227	445,633	7.8				1,199,446	1,484,862	23.8			
Acura	4,358	5,036	15.6	1.1	1.1	0.0	11,973	14,459	20.8	1.0	1.0	0.0
Alfa Romeo	807	736	-8.8	0.2	0.2	0.0	2,590	2,499	-3.5	0.2	0.2	0.0
Audi	8,380	8,017	-4.3	2.0	1.8	-0.2	24,218	31,442	29.8	2.0	2.1	0.1
BMW	13,583	16,112	18.6	3.3	3.6	0.3	40,076	50,207	25.3	3.3	3.4	0.1
Buick	1,215	1,401	15.3	0.3	0.3	0.0	4,188	5,543	32.4	0.3	0.4	0.1
Cadillac	2,254	2,247	-0.3	0.5	0.5	0.0	7,008	8,528	21.7	0.6	0.6	0.0
Chevrolet	28,502	27,142	-4.8	6.9	6.1	-0.8	89,901	104,123	15.8	7.5	7.0	-0.5
Chrysler	2,266	1,223	-46.0	0.5	0.3	-0.2	8,650	8,543	-1.2	0.7	0.6	-0.1
Dodge	6,243	5,339	-14.5	1.5	1.2	-0.3	19,833	19,115	-3.6	1.7	1.3	-0.4
FIAT	104	26	-75.0	0.0	0.0	0.0	345	124	-64.1	0.0	0.0	0.0
Ford	35,451	27,362	-22.8	8.6	6.1	-2.5	109,397	113,066	3.4	9.1	7.6	-1.5
Genesis	609	1,661	172.7	0.1	0.4	0.3	1,739	3,738	115.0	0.1	0.3	0.2
GMC	7,348	7,948	8.2	1.8	1.8	0.0	23,776	27,339	15.0	2.0	1.8	-0.2
Honda	51,237	52,066	1.6	12.4	11.7	-0.7	141,206	165,633	17.3	11.8	11.2	-0.6
Hyundai	14,397	17,431	21.1	3.5	3.9	0.4	40,888	57,254	40.0	3.4	3.9	0.5
Infiniti	2,057	1,469	-28.6	0.5	0.3	-0.2	7,970	6,458	-19.0	0.7	0.4	-0.3
Jaguar	1,051	605	-42.4	0.3	0.1	-0.2	3,089	2,454	-20.6	0.3	0.2	-0.1
Jeep	14,434	14,223	-1.5	3.5	3.2	-0.3	40,098	43,710	9.0	3.3	2.9	-0.4
Kia	16,250	20,295	24.9	3.9	4.6	0.7	44,479	61,321	37.9	3.7	4.1	0.4
Land Rover	3,673	3,410	-7.2	0.9	0.8	-0.1	10,924	13,037	19.3	0.9	0.9	0.0
Lexus	13,685	14,610	6.8	3.3	3.3	0.0	36,964	45,308	22.6	3.1	3.1	0.0
Lincoln	1,480	771	-47.9	0.4	0.2	-0.2	4,527	3,774	-16.6	0.4	0.3	-0.1
Maserati	312	336	7.7	0.1	0.1	0.0	930	988	6.2	0.1	0.1	0.0
Mazda	10,956	11,846	8.1	2.7	2.7	0.0	29,443	38,187	29.7	2.5	2.6	0.1
Mercedes	17,419	16,519	-5.2	4.2	3.7	-0.5	46,232	57,074	23.5	3.9	3.8	-0.1
MINI	1,594	1,516	-4.9	0.4	0.3	-0.1	3,887	4,381	12.7	0.3	0.3	0.0
Mitsubishi	981	1,469	49.7	0.2	0.3	0.1	5,049	5,057	0.2	0.4	0.3	-0.1
Nissan	17,011	20,733	21.9	4.1	4.7	0.6	58,948	78,030	32.4	4.9	5.3	0.4
Other	713	828	16.1	0.2	0.2	0.0	2,336	2,655	13.7	0.2	0.2	0.0
Porsche	3,687	4,219	14.4	0.9	0.9	0.0	9,410	13,595	44.5	0.8	0.9	0.1
Ram	11,445	11,498	0.5	2.8	2.6	-0.2	32,675	38,696	18.4	2.7	2.6	-0.1
Subaru	18,315	16,485	-10.0	4.4	3.7	-0.7	49,879	54,465	9.2	4.2	3.7	-0.5
Tesla	17,017	32,165	89.0	4.1	7.2	3.1	50,100	82,040	63.8	4.2	5.5	1.3
Toyota	71,669	83,384	16.3	17.3	18.7	1.4	202,013	275,193	36.2	16.8	18.5	1.7
Volkswagen	9,127	11,262	23.4	2.2	2.5	0.3	25,958	35,152	35.4	2.2	2.4	0.2
Volvo	3,597	4,243	18.0	0.9	1.0	0.1	8,747	11,674	33.5	0.7	0.8	0.1

Source: AutoCount data from Experian.

The table above shows new light vehicle (car and light truck) registrations in California. Figures are shown for the Third Quarters of 2020 and 2021, and year to date totals. Vehicle registrations are recorded based on when the vehicle title information is processed by the state, which typically occurs after the vehicle is sold. The top ten ranked brands in each category are shaded yellow

California Auto Outlook

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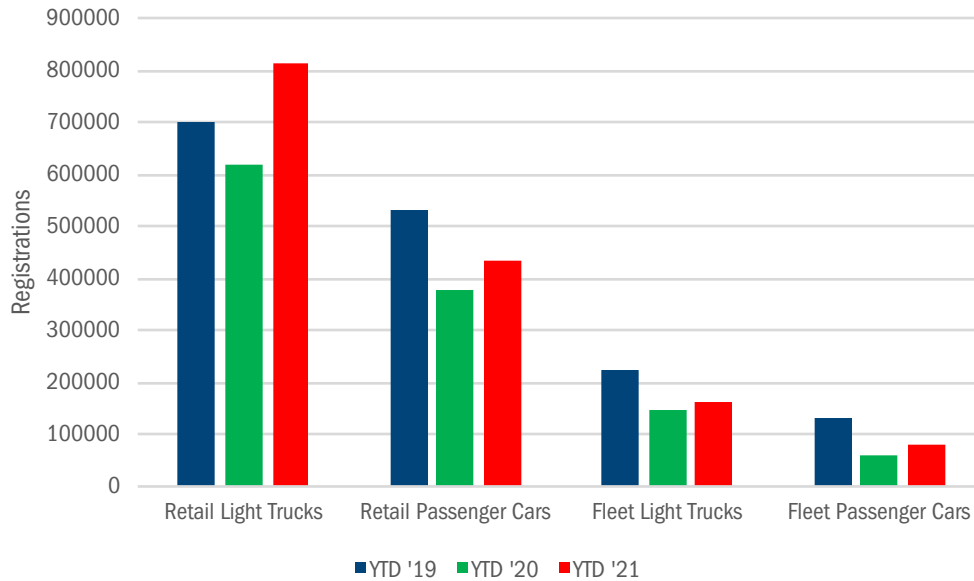
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BREAKDOWN OF RETAIL AND FLEET MARKETS

New Retail Light Truck Registrations Have Increased 31.4% So Far This Year

California New Car and Light Truck Retail and Fleet Registrations - YTD '19, '20, & '21 thru Sept.



Data Source: AutoCount data from Experian.

PERCENT CHANGE:
YTD '21 thru Sept. vs. YTD '20

Retail cars: **UP 14.9%**

Retail light trucks: **UP 31.4%**

Fleet cars: **UP 11.9%**

Fleet light trucks: **UP 30.5%**

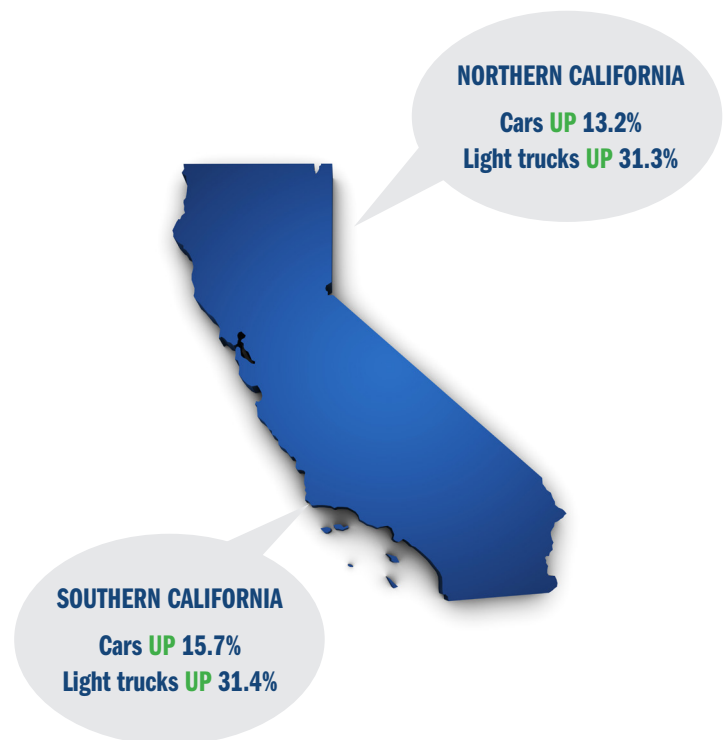
REGIONAL MARKETS IN CALIFORNIA

All Markets in State Post Big Increases

New Retail Light Vehicle Registrations (excluding fleets) YTD thru Sept.			
North and South California	YTD '20	YTD '21	% chg.
Statewide Total	994,308	1,244,271	25.1%
Cars	375,607	431,598	14.9%
Light Trucks	618,701	812,673	31.4%
Northern California	335,196	418,615	24.9%
Cars	119,064	134,803	13.2%
Light Trucks	216,132	283,812	31.3%
Southern California	659,112	825,656	25.3%
Cars	256,543	296,795	15.7%
Light Trucks	402,569	528,861	31.4%
Selected Regional Markets			
San Francisco Bay	178,266	216,907	21.7%
Cars	68,142	72,905	7.0%
Light Trucks	110,124	144,002	30.8%
LA and Orange Counties	380,908	468,282	22.9%
Cars	155,457	175,453	12.9%
Light Trucks	225,451	292,829	29.9%
San Diego County	87,088	110,369	26.7%
Cars	29,412	33,928	15.4%
Light Trucks	57,676	76,441	32.5%

Data Source: AutoCount data from Experian.

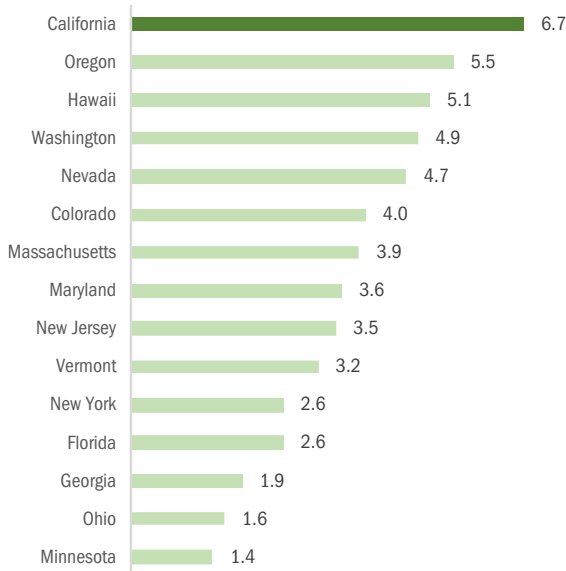
Percent Change in New Retail Registrations - YTD '21 vs. YTD '20



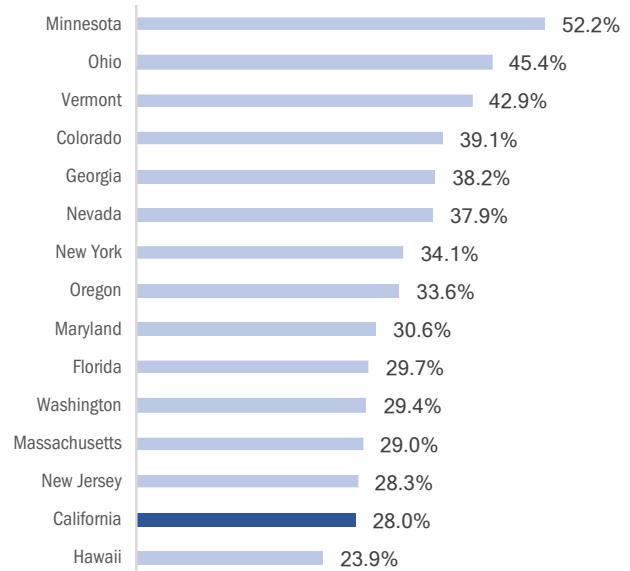
Comparison of Selected State Markets

The graphs and table below compare three primary indicators for selected state markets: change in electric and plug in hybrid vehicle market share between 2017 and this year, domestic brand market share, and the top five selling models during the first nine months of this year. California was ranked first out of the 15 markets for growth in electric/plug in hybrid market share, and 14th for domestic brand share.

Growth in Combined Electric/Plug In Hybrid Vehicle Market Share 2017 to 2021 (YTD thru Sept.)



Domestic Brand Share of New Retail Vehicle Market YTD 2021 thru September



Note: registrations by powertrain for vehicles equipped with multiple engine types were estimated by Auto Outlook. The estimates are based on model registrations compiled by Experian, and engine installation rates collected from other sources. Domestic brands consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa and FIAT), and Tesla. Data Source: AutoCount data from Experian.

Top Five Selling Models in Selected State Markets - YTD 2021 thru September

California		Colorado		Florida		Georgia		Hawaii	
Model	Share	Model	Share	Model	Share	Model	Share	Model	Share
Toyota Camry	3.5	Ram Pickup	4.5	Toyota Corolla	3.5	Ford F-Series	4.4	Toyota Tacoma	7.5
Honda Civic	3.4	Ford F-Series	4.4	Toyota RAV4	3.1	Chevrolet Silverado	3.7	Toyota 4Runner	4.4
Toyota RAV4	3.3	Toyota RAV4	3.1	Toyota Camry	2.7	Toyota Camry	3.3	Toyota RAV4	3.8
Toyota Corolla	3.0	Toyota Tacoma	2.8	Ford F-Series	2.4	Ram Pickup	3.3	Toyota Corolla	3.2
Tesla Model Y	2.9	Chevrolet Silverado	2.7	Honda CR-V	2.4	Toyota RAV4	2.9	Honda CR-V	3.2
Maryland		Massachusetts		Minnesota		Nevada		New Jersey	
Model	Share	Model	Share	Model	Share	Model	Share	Model	Share
Toyota RAV4	3.7	Toyota RAV4	5.1	Chevrolet Silverado	5.5	Ram Pickup	4.7	Honda CR-V	3.2
Honda CR-V	3.6	Honda CR-V	4.2	Ram Pickup	5.4	Toyota RAV4	3.1	Honda Civic	2.6
Ford F-Series	2.9	Toyota Highlander	3.0	Ford F Series	4.6	Chevrolet Silverado	2.9	Toyota RAV4	2.3
Toyota Camry	2.5	Ford F-Series	2.4	Honda CR-V	3.6	Ford F-Series	2.8	Nissan Rogue	2.3
Toyota Highlander	2.5	Jeep Grand Cherokee	2.3	Toyota RAV4	2.9	Toyota Tacoma	2.7	Jeep Grand Cherokee	1.9
New York		Ohio		Oregon		Vermont		Washington	
Model	Share	Model	Share	Model	Share	Model	Share	Model	Share
Honda CR-V	3.4	Ram Pickup	4.3	Toyota RAV4	5.2	Ram Pickup	5.6	Toyota RAV4	4.6
Ram Pickup	2.9	Honda CR-V	3.8	Ram Pickup	4.7	Ford F-Series	5.6	Honda CR-V	4.0
Toyota RAV4	2.8	Chevrolet Silverado	3.5	Toyota Tacoma	4.2	Toyota RAV4	4.8	Ram Pickup	3.4
Jeep Grand Cherokee	2.7	Ford F-Series	3.5	Ford F-Series	3.9	Chevrolet Silverado	4.0	Toyota Tacoma	3.1
Nissan Rogue	2.6	Honda Civic	2.8	Honda CR-V	3.5	GMC Sierra	3.7	Ford F-Series	2.9

Data Source: AutoCount data from Experian. Figures for some states include retail transactions only.

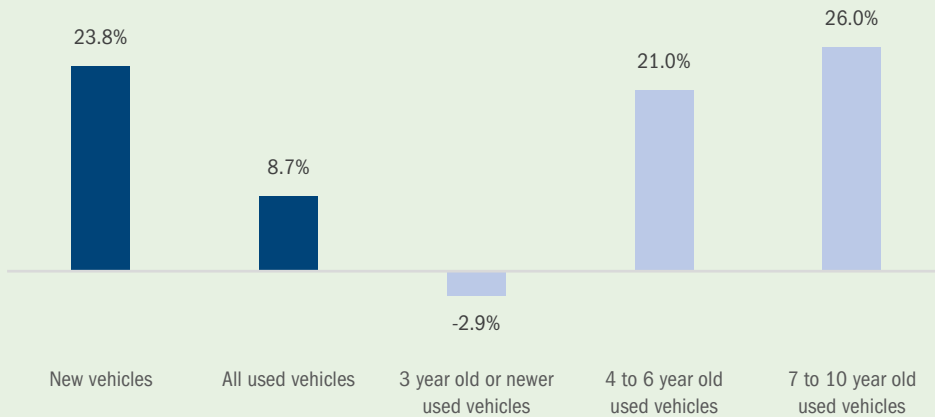
CALIFORNIA USED VEHICLE MARKET

California Used Vehicle Market is Up 8.7% So Far This Year; Registrations for Older Vehicles Up Sharply

THREE KEY TRENDS IN USED VEHICLE MARKET



Percent Change in New and Used Vehicle Registrations - YTD 2021 thru Sept. vs. YTD '20



01.

Used vehicle registrations in California were up 8.7% during the first nine months of this year versus a year earlier, below the 23.8% increase in the new vehicle market.

02.

Used vehicle sales should hold up considerably better than new vehicles for the remainder of the year.

03.

Three year old or newer used vehicle registrations declined slightly during the first nine months of this, while registrations of older vehicles increased sharply

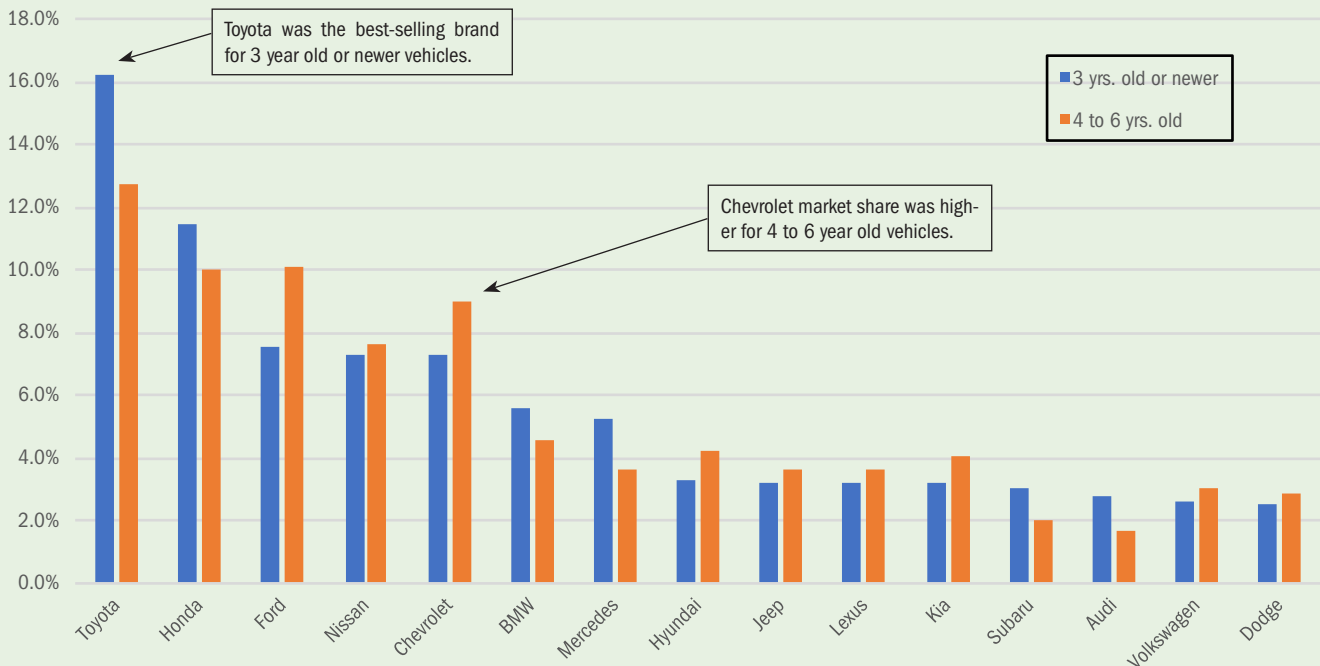
Data Source: AutoCount data from Experian.

USED VEHICLE BRAND MARKET SHARE

Toyota is Top Seller in California Used Vehicle Market

The graph below shows used light vehicle registrations by brand for two age categories: vehicles newer than three years old, and vehicles four to six years old. Brands are positioned from left to right based on market share for three year old or newer vehicles.

Brand Market Share for Top 15 Selling Brands, by Vehicle Age (YTD '21 thru September)



Toyota was the best-selling brand for 3 year old or newer vehicles.

Chevrolet market share was higher for 4 to 6 year old vehicles.

Data Source: AutoCount data from Experian.