

# California Auto Outlook™

Comprehensive information on the California vehicle market

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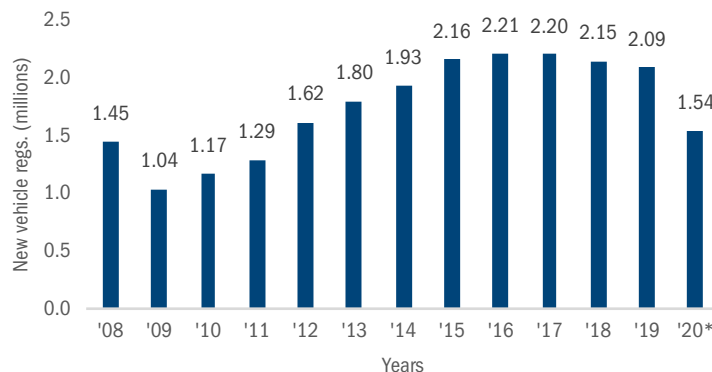
Covering First Quarter 2020

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## COVID-19 Pandemic Puts the Brakes on State New Vehicle Market

California Annual New Light Vehicle Registrations-2008 thru 2020



Historical Data Source: AutoCount data from Experian. \*2020 forecast by Auto Outlook.

### KEY TRENDS IN NEW VEHICLE MARKET



The California new vehicle market got off to a good start in the first two months of this year, and then the bottom fell out when the COVID-19 crisis took hold in March. Reported new vehicle registrations in the state declined by less than 10 percent from a year earlier, but the reporting of registrations lags actual sales at dealerships. Auto Outlook estimates that the state new vehicle market fell by 24 percent during the first four months of 2020 versus a year earlier.

New light vehicle registrations this year are predicted to fall to 1,540,000 units, a 26% decline from 2019. This projection, however, is subject to an above average level of variability, due to uncertainties surrounding the spread of the virus and changes in governmental policies regarding business operations.

Barring a scientific breakthrough resulting in a vaccine or effective treatment for the virus, the auto sales recovery will be gradual. Any growth in employment levels are likely to proceed slowly and many households will be dealing with the financial consequences of a significant interruption in income, which will crimp spending on big ticket items, like new vehicles.

As shown on the graph to the left, Non Luxury SUV market moved above 30 percent in the First Quarter of 2020. Small car market share continued to decline.

### ANNUAL TRENDS



California Total New Light Vehicle Registrations - 2019 and 2020 Forecast

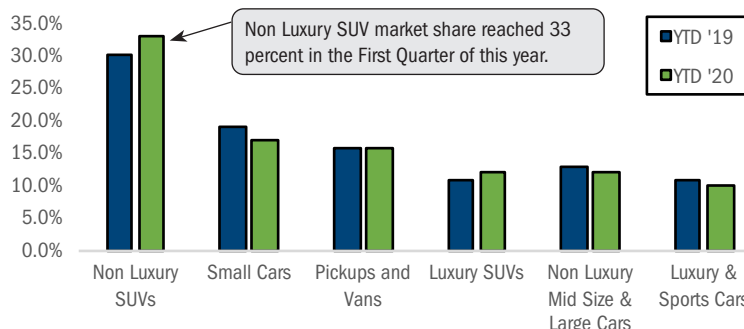
	Annual Totals		Change
	2019	2020 Forecast	
<b>Registrations</b>			
TOTAL	2,093,173	1,540,000	-26.4%
Car	869,744	581,810	-33.1%
Light Truck	1,223,429	958,190	-21.7%
Domestic	656,882	491,519	-25.2%
European	324,704	236,505	-27.2%
Japanese	962,592	694,680	-27.8%
Korean	148,995	117,296	-21.3%
<b>Market Share</b>			
Car	41.6	37.8	-3.8
Light Truck	58.4	62.2	3.8
Domestic	31.4	31.9	0.5
European	15.5	15.4	-0.1
Japanese	46.0	45.1	-0.9
Korean	7.1	7.6	0.5

Historical Data Source: AutoCount data from Experian. \*2020 forecast by Auto Outlook.

### TWO YEAR PERSPECTIVE



Segment Market Shares in State: YTD 2019 and 2020, thru March



Data Source: AutoCount data from Experian.

### SEGMENTS



MODEL RANKINGS

# Tesla Model 3 Is Best Selling Car in California New Vehicle Market; RAV4 is Light Truck Leader

The table below shows the top five selling models during the first three months of 2020 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: Ford F-Series
- Compact SUV: Toyota RAV4
- Mid Size SUV: Toyota Highlander
- Luxury Compact SUV: Lexus NX

### Top Selling Models in Each Segment - New Light Vehicle Registrations (YTD 2020, thru March)

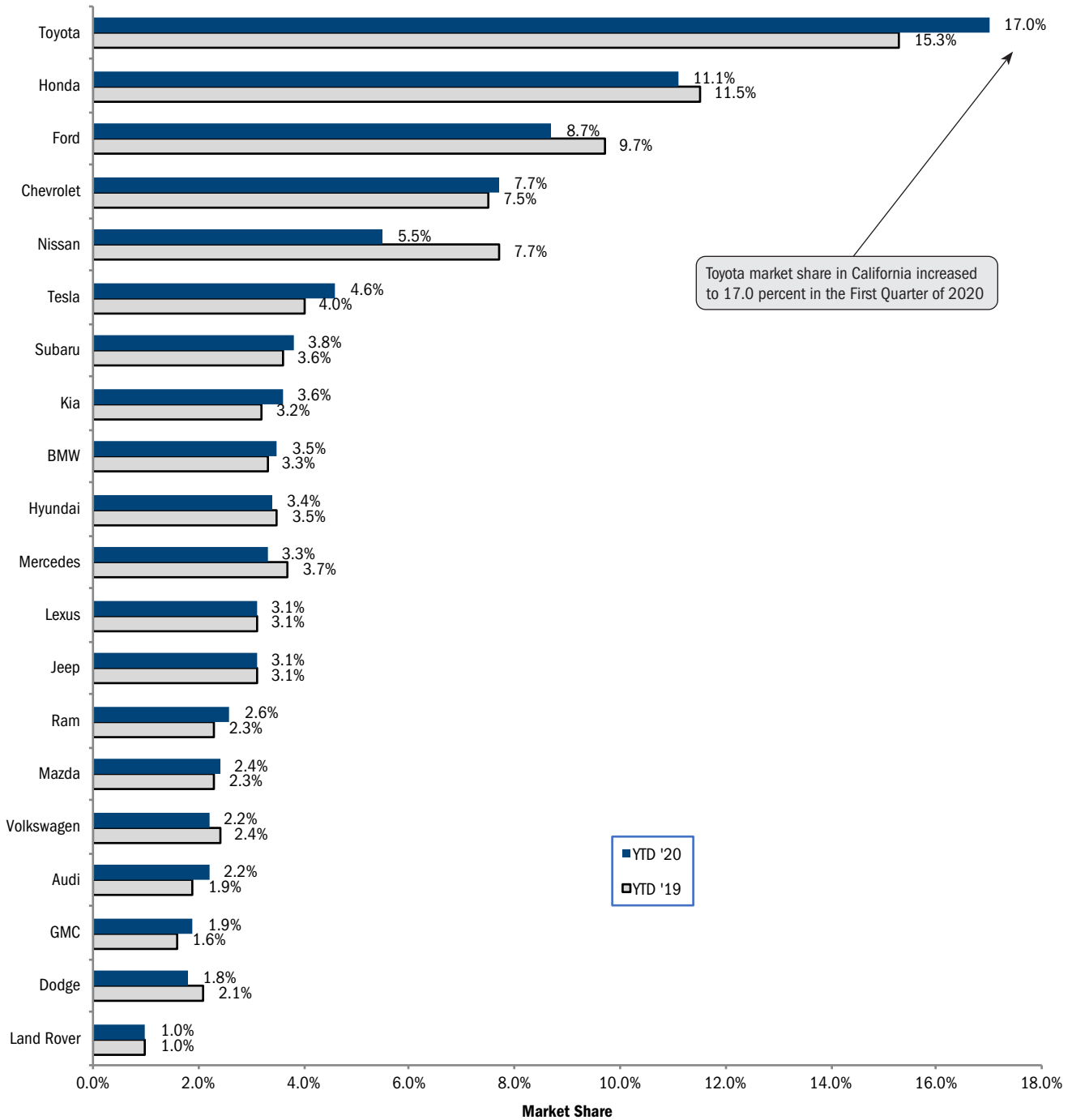
Cars											
Subcompact			Compact			Sports/Pony Cars			Mid Size		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Chevrolet Bolt	2654	22.2	Honda Civic	18001	28.3	Ford Mustang	3014	37.5	Toyota Camry	17871	32.9
Nissan Versa	1854	15.5	Toyota Corolla	15575	24.5	Dodge Challenger	2716	33.8	Honda Accord	12551	23.1
Kia Soul	1853	15.5	Toyota Prius	5209	8.2	Chevrolet Camaro	1363	17.0	Nissan Altima	6116	11.3
Honda Fit	1688	14.1	Nissan Sentra	3895	6.1	Mazda MX5	326	4.1	Ford Fusion	4305	7.9
Chevrolet Spark	1008	8.4	Kia Forte	3811	6.0	Hyundai Veloster	306	3.8	Chevrolet Malibu	4040	7.4
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	3814	64.6	Mercedes CLA-Class	730	23.5	Tesla Model 3	18856	52.2	BMW 5-Series	1840	13.8
Nissan Maxima	630	10.7	Audi A3	688	22.1	BMW 3-Series	3473	9.6	Mercedes E-Class	1701	12.8
Toyota Avalon	536	9.1	Mercedes A-Class	595	19.1	Lexus ES	2703	7.5	Tesla Model S	1561	11.7
Chrysler 300	459	7.8	Acura ILX	582	18.7	Mercedes C-Class	2199	6.1	Audi A6	809	6.1
Chevrolet Impala	409	6.9	BMW 2-Series	374	12.0	Audi A4	1099	3.0	Mercedes S-Class	709	5.3
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	10498	53.6	Ford F-Series	12981	29.9	Chrysler Pacifica	3096	29.2	Ford Transit Connect	4579	46.7
Ford Ranger	3017	15.4	Chevrolet Silverado	11896	27.4	Honda Odyssey	2766	26.1	Mercedes Sprinter	1447	14.8
Chevrolet Colorado	2249	11.5	Ram Pickup	11858	27.3	Toyota Sienna	2205	20.8	Ram Promaster	1210	12.3
Jeep Gladiator	1448	7.4	GMC Sierra	4073	9.4	Chrysler T & C	1671	15.8	Nissan NV	1083	11.0
Nissan Frontier	1169	6.0	Toyota Tundra	2444	5.6	Dodge Caravan	471	4.4	Chevrolet Express	762	7.8
Subcompact SUV			Compact SUV			Mid Size SUV			Large SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda HR-V	3733	15.4	Toyota RAV4	17261	22.4	Toyota Highlander	6554	11.9	Chevrolet Tahoe	1893	22.7
Toyota C-HR	2757	11.3	Honda CR-V	9770	12.7	Ford Explorer	5468	9.9	Ford Expedition	1665	20.0
Hyundai Kona	2755	11.3	Mazda CX5	6407	8.3	Subaru Outback	4908	8.9	Chevrolet Suburban	1281	15.4
Kia Niro	2285	9.4	Subaru Forester	5045	6.6	Jeep Grand Cherokee	3645	6.6	GMC Yukon	1156	13.9
Nissan Kicks	2056	8.5	Jeep Wrangler	4847	6.3	Toyota 4Runner	3450	6.3	Nissan Armada	982	11.8
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
Audi Q3	1566	19.2	Lexus NX	3616	18.4	Lexus RX	5387	19.5	Mercedes GLS-Class	1349	21.2
Lexus UX	1556	19.1	BMW X3	2888	14.7	Mercedes GLE-Class	2913	10.6	Land Rover Range Rover	1058	16.6
BMW X1	1529	18.8	Mercedes GLC-Class	2272	11.5	Tesla Model X	2826	10.3	BMW X7	1051	16.5
Mercedes GLA-Class	1228	15.1	Audi Q5	2054	10.4	BMW X5	2626	9.5	Cadillac Escalade	884	13.9
BMW X2	794	9.8	Acura RDX	1924	9.8	Audi Q7	1568	5.7	Infiniti QX80/QX56	746	11.7

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

MARKET SHARE FOR NEW VEHICLE BRANDS

# Toyota, Honda, and Ford are Market Share Leaders in California

California New Vehicle Market Share - YTD 2019 and 2020, thru March  
(Based on new light vehicle registrations)



**Market Share Leaders: Toyota, Honda, Ford, Chevrolet, and Nissan**

**Largest increases in First Quarter: Toyota, Tesla, Kia, Chrysler, Audi, Ram, and GMC**

Data Source: AutoCount data from Experian.

## BRAND REGISTRATIONS

## Detailed Results for All Brands in California Market

California New Car and Light Truck Registrations												
	First Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	1Q '19	1Q '20	% change	1Q '19	1Q '20	Change	2018	2019	% change	2018	2019	Change
TOTAL	530,402	507,646	-4.3				2,154,813	2,093,173	-2.9			
Acura	5,850	5,033	-14.0	1.1	1.0	-0.1	23,125	21,580	-6.7	1.1	1.0	-0.1
Alfa Romeo	1,038	1,092	5.2	0.2	0.2	0.0	5,006	3,937	-21.4	0.2	0.2	0.0
Audi	10,131	10,998	8.6	1.9	2.2	0.3	45,483	41,818	-8.1	2.1	2.0	-0.1
BMW	17,417	17,844	2.5	3.3	3.5	0.2	72,646	76,592	5.4	3.4	3.7	0.3
Buick	2,138	2,057	-3.8	0.4	0.4	0.0	9,832	8,058	-18.0	0.5	0.4	-0.1
Cadillac	3,824	3,375	-11.7	0.7	0.7	0.0	14,754	14,010	-5.0	0.7	0.7	0.0
Chevrolet	39,709	39,101	-1.5	7.5	7.7	0.2	177,297	153,535	-13.4	8.2	7.3	-0.9
Chrysler	3,348	5,283	57.8	0.6	1.0	0.4	15,839	10,697	-32.5	0.7	0.5	-0.2
Dodge	11,308	9,129	-19.3	2.1	1.8	-0.3	46,049	45,601	-1.0	2.1	2.2	0.1
FIAT	436	164	-62.4	0.1	0.0	-0.1	2,892	1,537	-46.9	0.1	0.1	0.0
Ford	51,224	43,976	-14.1	9.7	8.7	-1.0	198,847	192,219	-3.3	9.2	9.2	0.0
Genesis	189	800	323.3	0.0	0.2	0.2	1,946	2,867	47.3	0.1	0.1	0.0
GMC	8,641	9,810	13.5	1.6	1.9	0.3	37,001	35,108	-5.1	1.7	1.7	0.0
Honda	61,014	56,421	-7.5	11.5	11.1	-0.4	247,550	246,695	-0.3	11.5	11.8	0.3
Hyundai	18,409	17,350	-5.8	3.5	3.4	-0.1	72,622	74,596	2.7	3.4	3.6	0.2
Infiniti	5,734	4,073	-29.0	1.1	0.8	-0.3	21,277	17,049	-19.9	1.0	0.8	-0.2
Jaguar	1,792	1,538	-14.2	0.3	0.3	0.0	5,948	5,477	-7.9	0.3	0.3	0.0
Jeep	16,287	15,663	-3.8	3.1	3.1	0.0	69,201	65,498	-5.4	3.2	3.1	-0.1
Kia	16,891	18,439	9.2	3.2	3.6	0.4	68,175	71,532	4.9	3.2	3.4	0.2
Land Rover	5,181	4,977	-3.9	1.0	1.0	0.0	18,414	18,380	-0.2	0.9	0.9	0.0
Lexus	16,276	15,702	-3.5	3.1	3.1	0.0	62,432	63,559	1.8	2.9	3.0	0.1
Lincoln	1,797	2,072	15.3	0.3	0.4	0.1	7,171	6,881	-4.0	0.3	0.3	0.0
Maserati	506	401	-20.8	0.1	0.1	0.0	2,604	2,064	-20.7	0.1	0.1	0.0
Mazda	12,351	12,251	-0.8	2.3	2.4	0.1	48,494	44,817	-7.6	2.3	2.1	-0.2
Mercedes	19,705	16,909	-14.2	3.7	3.3	-0.4	85,153	84,917	-0.3	4.0	4.1	0.1
MINI	1,799	1,497	-16.8	0.3	0.3	0.0	10,314	7,517	-27.1	0.5	0.4	-0.1
Mitsubishi	2,962	3,240	9.4	0.6	0.6	0.0	9,962	10,240	2.8	0.5	0.5	0.0
Nissan	40,963	28,106	-31.4	7.7	5.5	-2.2	157,495	139,857	-11.2	7.3	6.7	-0.6
Other	939	1,002	6.7	0.2	0.2	0.0	2,874	3,820	32.9	0.1	0.2	0.1
Porsche	3,723	3,364	-9.6	0.7	0.7	0.0	13,879	15,094	8.8	0.6	0.7	0.1
Ram	11,971	13,067	9.2	2.3	2.6	0.3	42,152	50,445	19.7	2.0	2.4	0.4
Subaru	18,943	19,282	1.8	3.6	3.8	0.2	78,154	77,725	-0.5	3.6	3.7	0.1
Tesla	21,270	23,250	9.3	4.0	4.6	0.6	69,507	74,821	7.6	3.2	3.6	0.4
Toyota	81,115	86,057	6.1	15.3	17.0	1.7	348,390	341,068	-2.1	16.2	16.3	0.1
Volkswagen	12,588	11,075	-12.0	2.4	2.2	-0.2	49,037	50,700	3.4	2.3	2.4	0.1
Volvo	2,933	3,248	10.7	0.6	0.6	0.0	13,291	12,862	-3.2	0.6	0.6	0.0

Source: AutoCount data from Experian.

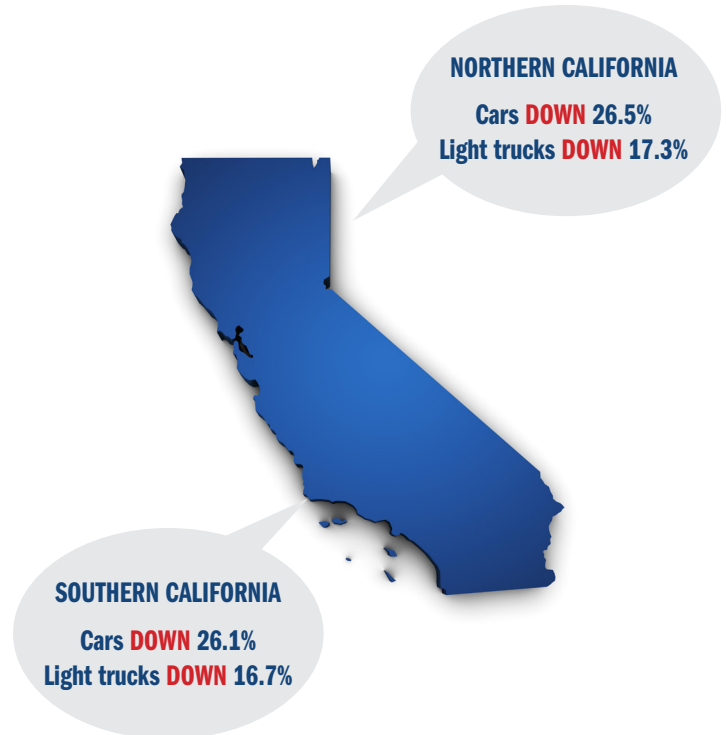
The table above shows new light vehicle (car and light truck) registrations in California. Figures are shown for the First Quarters of 2019 and 2020, and annual totals for 2018 and 2019. Vehicle registrations are recorded based on when the vehicle title information is processed by the state, which typically occurs after the vehicle is sold. As a result, the data presented above lags the actual sales results at dealerships. New vehicle sales in the state likely declined by more than 10% in the First Quarter of this year. The top ten ranked brands in each category are shaded yellow

REGIONAL MARKETS IN CALIFORNIA

# State New Retail Light Vehicle Market Declined by 21 Percent During First Four Months of 2020

New Retail Light Vehicle Registrations (excluding fleets) YTD '20, April			
North and South California	YTD '19	YTD '20	% chg.
Statewide Total	556,134	439,182	-21.0%
Cars	245,686	181,252	-26.2%
Light Trucks	310,448	257,930	-16.9%
Northern California	188,710	148,725	-21.2%
Cars	80,287	59,013	-26.5%
Light Trucks	108,423	89,712	-17.3%
Southern California	367,424	290,457	-20.9%
Cars	165,399	122,239	-26.1%
Light Trucks	202,025	168,218	-16.7%
Selected Regional Markets			
San Francisco Bay	108,669	83,719	-23.0%
Cars	50,514	36,064	-28.6%
Light Trucks	58,155	47,655	-18.1%
LA and Orange Counties	222,574	172,485	-22.5%
Cars	103,873	75,661	-27.2%
Light Trucks	118,701	96,824	-18.4%
San Diego County	47,162	38,370	-18.6%
Cars	19,301	14,537	-24.7%
Light Trucks	27,861	23,833	-14.5%

Percent Change in New Retail Registrations  
YTD 2020 thru April vs. YTD 2019



Data Source: AutoCount data from Experian.

### California Auto Outlook

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