

# California Auto Outlook™

Comprehensive information on the California vehicle market

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Covering Second Quarter 2020

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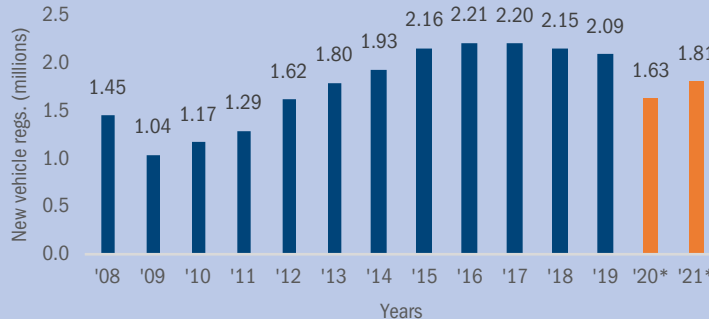


## Sales Low Point Likely Reached in Second Quarter; 11 Percent Increase Predicted for 2021

### ANNUAL TRENDS



California Annual New Light Vehicle Registrations - 2008 thru 2021



Historical data source: AutoCount data from Experian. \*'20 and '21 forecasts by Auto Outlook.

New vehicle registrations in California are expected to decline to 1.63 million units in 2020, down 22 percent from last year.

Latest projections are for the market to exceed 1.8 million units in 2021, an increase of more than 10 percent from this year.

Although the trend is positive, sales will be subject to periods of ups and downs due to possible surges in the virus and any business shutdowns.

California Total New Light Vehicle Registrations and U.S. New Vehicle Sales - YTD 2019 & 2020, thru June

### TWO YEAR PERSPECTIVE



	California			U.S.		
	YTD '19	YTD '20	Change	YTD '19	YTD '20	Change
<b>Registrations</b>						
TOTAL	1,075,658	786,219	-26.9%	8,471,317	6,480,506	-23.5%
Car	457,835	294,783	-35.6%	2,523,734	1,620,012	-35.8%
Light Truck	617,823	491,436	-20.5%	5,947,583	4,860,494	-18.3%
Domestic	349,741	262,501	-24.9%	3,837,523	2,951,304	-23.1%
European	160,049	114,692	-28.3%	790,296	620,992	-21.4%
Japanese	494,172	353,176	-28.5%	3,195,319	2,364,736	-26.0%
Korean	71,696	55,850	-22.1%	648,179	543,474	-16.2%
<b>Market Share</b>						
Car	42.6	37.5	-5.1	29.8	25.0	-4.8
Light Truck	57.4	62.5	5.1	70.2	75.0	4.8
Domestic	32.5	33.4	0.9	45.3	45.5	0.2
European	14.9	14.6	-0.3	9.3	9.6	0.3
Japanese	45.9	44.9	-1.0	37.7	36.5	-1.2
Korean	6.7	7.1	0.4	7.7	8.4	0.7

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

California new light vehicle market declined 26.9 percent during the first six months of this year versus a year earlier. The U.S. market fell 23.5 percent.

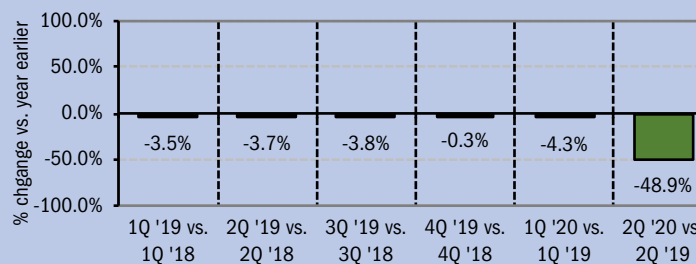
Light truck registrations in the state declined 20.5 percent versus the 35.6 percent drop for passenger cars.

Light truck market share in California was 62.5 percent in the first half of this year vs. 75.0 percent in the Nation.

### QUARTERLY RESULTS



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



Data source: AutoCount data from Experian.

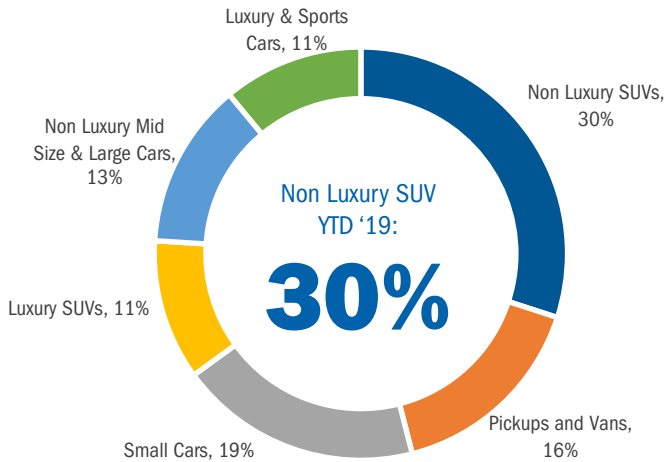
The California new vehicle market felt the full impact of the COVID-19 pandemic in the Second Quarter of this year, as new vehicle registrations declined by nearly 50 percent versus year earlier.

The market showed signs of stabilizing as the quarter progressed. June registrations fell by less than 20 percent compared to 2019.

SEGMENT MARKET SHARE TRENDS

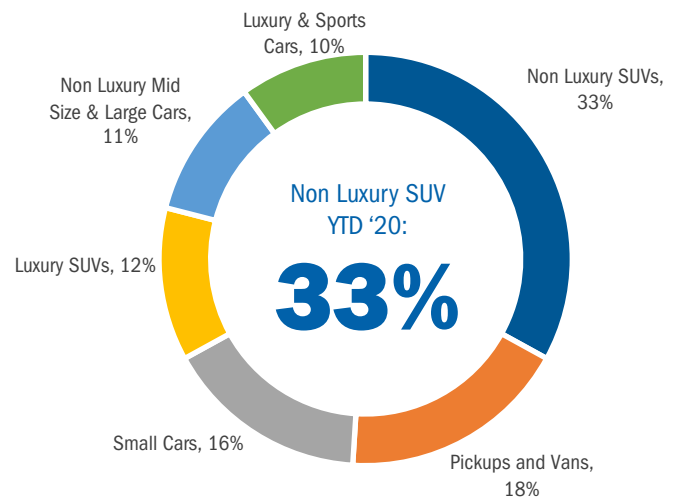
### Non Luxury SUV Market Share in California Increases to 33 Percent

Segment Market Shares in California  
YTD 2019 thru June



Data Source: AutoCount data from Experian.

Segment Market Shares in California  
YTD 2020 thru June



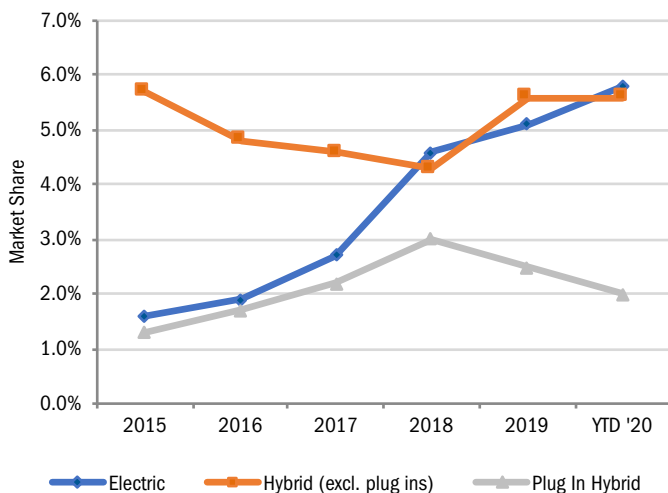
Data Source: AutoCount data from Experian.

The two graphs above show market shares for primary segments during the first six months of 2019 and 2020.

HYBRID AND ELECTRIC VEHICLES

### Electric Vehicle Market Share Moved Higher During First Half of 2020

Estimated Hybrid and Electric Vehicle Market Share



Hybrid/electric vehicle market share in 1st half of 2020:  
**13.4 percent**

Estimated Hybrid and Electric New Vehicle Registrations and Market Share					
	2016	2017	2018	2019	YTD 2020
Electric registrations	41932	59388	99121	106752	45601
Electric share	1.9%	2.7%	4.6%	5.1%	5.8%
Hybrid regs. (excl. plug ins)	105934	101180	92658	117218	44028
Hybrid share (excl. plug ins)	4.8%	4.6%	4.3%	5.6%	5.6%
Plug in hybrid regs.	37518	48391	64644	52329	15724
Plug in hybrid share	1.7%	2.2%	3.0%	2.5%	2.0%

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

# Honda Civic Regains Top Spot in California New Vehicle Market; RAV4 is Second

The table below shows the top five selling models during the first six 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: Mercedes E-Class
- Full Size Pickup: Ford F-Series
- Compact SUV: Toyota RAV4
- Mid Size SUV: Toyota Highlander
- Luxury Mid Size SUV: Lexus RX

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

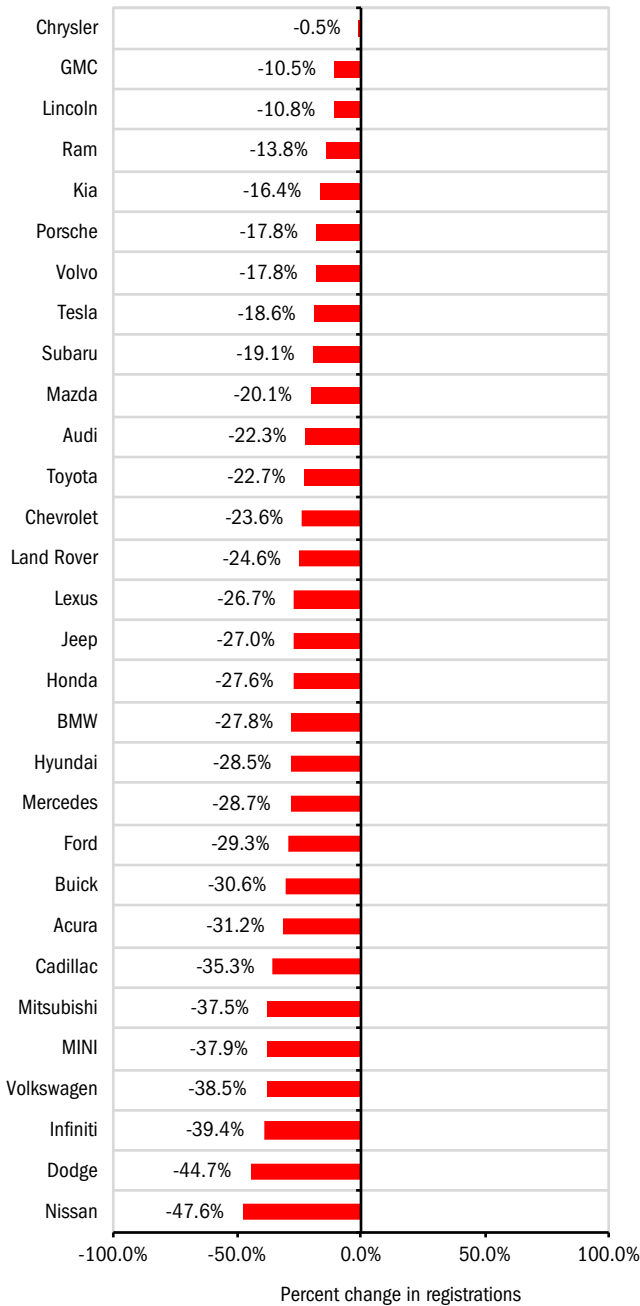
Cars											
Subcompact			Compact			Sports/Pony Cars			Mid Size		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Chevrolet Bolt	3575	20.8	Honda Civic	29974	31.0	Ford Mustang	4764	37.6	Toyota Camry	25950	32.6
Nissan Versa	2865	16.7	Toyota Corolla	21771	22.5	Dodge Challenger	4208	33.2	Honda Accord	19962	25.0
Kia Soul	2854	16.6	Toyota Prius	7511	7.8	Chevrolet Camaro	2015	15.9	Nissan Altima	8452	10.6
Honda Fit	2615	15.2	Nissan Sentra	6694	6.9	Mazda MX5	599	4.7	Ford Fusion	6607	8.3
Chevrolet Spark	1249	7.3	Kia Forte	5407	5.6	Hyundai Veloster	521	4.1	Kia Optima	5400	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	5658	65.9	Mercedes CLA-Class	1447	24.0	Tesla Model 3	24850	48.5	Mercedes E-Class	2913	13.3
Nissan Maxima	849	9.9	Mercedes A-Class	1389	23.0	BMW 3-Series	4893	9.6	BMW 5-Series	2767	12.7
Toyota Avalon	830	9.7	Audi A3	1043	17.3	Lexus ES	4050	7.9	Tesla Model S	2398	11.0
Chrysler 300	674	7.9	BMW 2-Series	986	16.3	Mercedes C-Class	3410	6.7	Audi A6	1237	5.7
Chevrolet Impala	493	5.7	Acura ILX	911	15.1	Audi A4	1693	3.3	Porsche 911	1225	5.6
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	18165	52.8	Ford F-Series	24204	31.0	Honda Odyssey	4211	30.6	Ford Transit Connect	8136	49.2
Ford Ranger	5556	16.2	Chevrolet Silverado	21132	27.1	Chrysler Pacifica	3913	28.4	Mercedes Sprinter	2354	14.2
Chevrolet Colorado	4055	11.8	Ram Pickup	19306	24.7	Toyota Sienna	2712	19.7	Ram Promaster	1925	11.6
Jeep Gladiator	2677	7.8	GMC Sierra	8192	10.5	Chrysler Voyager	1737	12.6	Nissan NV	1808	10.9
Nissan Frontier	1980	5.8	Toyota Tundra	4766	6.1	Dodge Caravan	606	4.4	Chevrolet Express	1226	7.4
Subcompact SUV			Compact SUV			Mid Size SUV			Large SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda HR-V	5674	15.3	Toyota RAV4	27076	22.9	Toyota Highlander	9009	10.4	Chevrolet Tahoe	3023	25.1
Toyota C-HR	4548	12.3	Honda CR-V	15346	13.0	Ford Explorer	8960	10.4	Ford Expedition	2317	19.3
Hyundai Kona	3887	10.5	Mazda CX5	9223	7.8	Subaru Outback	7774	9.0	Chevrolet Suburban	1718	14.3
Nissan Kicks	3058	8.2	Jeep Wrangler	9184	7.8	Jeep Grand Cherokee	6079	7.0	GMC Yukon	1498	12.5
Kia Niro	3058	8.2	Subaru Forester	8549	7.2	Toyota 4Runner	5477	6.3	Nissan Armada	1364	11.3
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
Lexus UX	2317	19.1	Lexus NX	5272	16.8	Lexus RX	7610	18.9	Mercedes GLS-Class	2059	21.4
Audi Q3	2129	17.6	BMW X3	4230	13.4	Mercedes GLE-Class	4433	11.0	Land Rover Range Rover	1628	16.9
BMW X1	1972	16.3	Mercedes GLC-Class	3757	11.9	BMW X5	3967	9.9	BMW X7	1600	16.6
Mercedes GLA-Class	1764	14.5	Audi Q5	3387	10.8	Tesla Model X	3933	9.8	Cadillac Escalade	1203	12.5
Mercedes GLB-Class	1507	12.4	Acura RDX	2934	9.3	Acura MDX	2320	5.8	Infiniti QX80/QX56	964	10.0

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

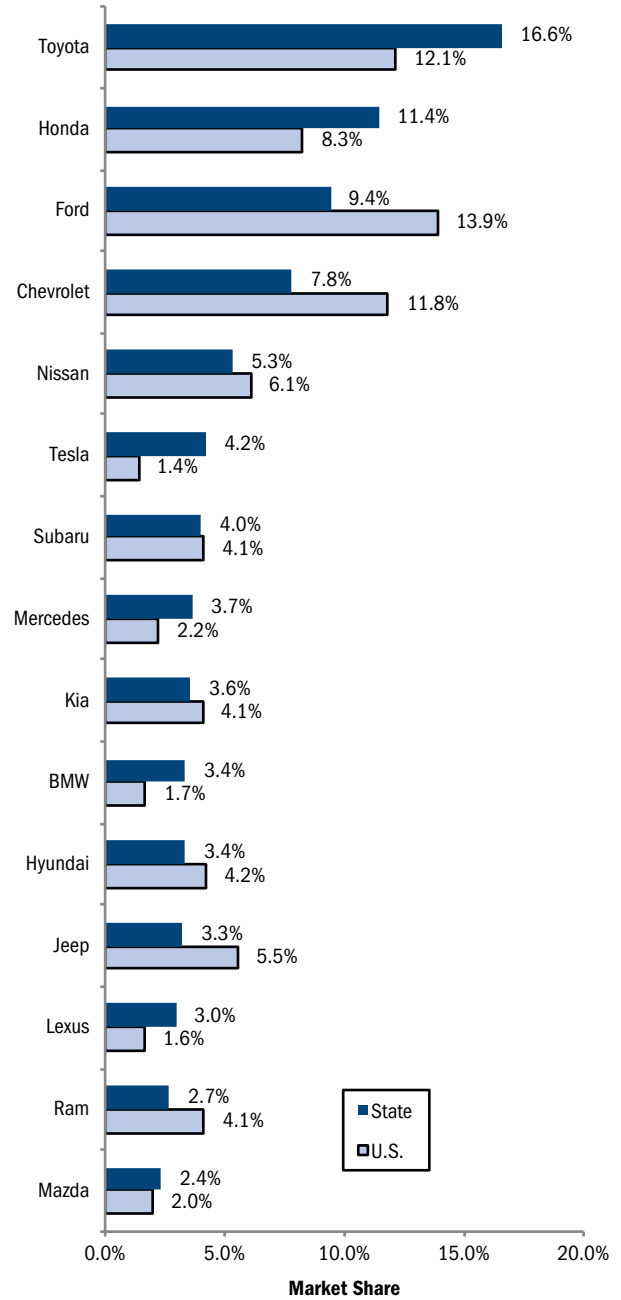
BRAND SUMMARY

# Toyota, Honda, and Ford Are Top Three Selling Brands in California

Percent Change in Brand Registrations - YTD '20 thru June vs. YTD '19  
(Top 30 selling brands in state)



California and U.S. Market Share - YTD '20 thru June  
(Top 15 selling brands in state)



Registrations declined by less than 20 percent for Chrysler, GMC, Lincoln, Ram, Kia, Porsche, Volvo, Tesla, and Subaru



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

## BRAND REGISTRATIONS

## Detailed Results for All Brands in California Market

California New Car and Light Truck Registrations												
	Second Quarter						Year to date thru June					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	2Q '19	2Q '20	% change	2Q '19	2Q '20	Change	YTD '19	YTD '20	% change	YTD '19	YTD '20	Change
TOTAL	545,256	278,573	-48.9				1,075,658	786,219	-26.9			
Acura	5,215	2,582	-50.5	1.0	0.9	-0.1	11,065	7,615	-31.2	1.0	1.0	0.0
Alfa Romeo	887	691	-22.1	0.2	0.2	0.0	1,925	1,783	-7.4	0.2	0.2	0.0
Audi	10,254	4,840	-52.8	1.9	1.7	-0.2	20,385	15,838	-22.3	1.9	2.0	0.1
BMW	19,254	8,649	-55.1	3.5	3.1	-0.4	36,671	26,493	-27.8	3.4	3.4	0.0
Buick	2,143	916	-57.3	0.4	0.3	-0.1	4,281	2,973	-30.6	0.4	0.4	0.0
Cadillac	3,523	1,379	-60.9	0.6	0.5	-0.1	7,347	4,754	-35.3	0.7	0.6	-0.1
Chevrolet	40,668	22,298	-45.2	7.5	8.0	0.5	80,377	61,399	-23.6	7.5	7.8	0.3
Chrysler	3,071	1,101	-64.1	0.6	0.4	-0.2	6,419	6,384	-0.5	0.6	0.8	0.2
Dodge	13,255	4,461	-66.3	2.4	1.6	-0.8	24,563	13,590	-44.7	2.3	1.7	-0.6
FIAT	355	77	-78.3	0.1	0.0	-0.1	791	241	-69.5	0.1	0.0	-0.1
Ford	53,300	29,970	-43.8	9.8	10.8	1.0	104,524	73,946	-29.3	9.7	9.4	-0.3
Genesis	698	330	-52.7	0.1	0.1	0.0	887	1,130	27.4	0.1	0.1	0.0
GMC	9,724	6,618	-31.9	1.8	2.4	0.6	18,365	16,428	-10.5	1.7	2.1	0.4
Honda	63,188	33,548	-46.9	11.6	12.0	0.4	124,202	89,969	-27.6	11.5	11.4	-0.1
Hyundai	18,619	9,141	-50.9	3.4	3.3	-0.1	37,028	26,491	-28.5	3.4	3.4	0.0
Infiniti	4,029	1,840	-54.3	0.7	0.7	0.0	9,763	5,913	-39.4	0.9	0.8	-0.1
Jaguar	1,349	500	-62.9	0.2	0.2	0.0	3,141	2,038	-35.1	0.3	0.3	0.0
Jeep	18,877	10,001	-47.0	3.5	3.6	0.1	35,164	25,664	-27.0	3.3	3.3	0.0
Kia	16,890	9,790	-42.0	3.1	3.5	0.4	33,781	28,229	-16.4	3.1	3.6	0.5
Land Rover	4,430	2,274	-48.7	0.8	0.8	0.0	9,611	7,251	-24.6	0.9	0.9	0.0
Lexus	15,498	7,577	-51.1	2.8	2.7	-0.1	31,774	23,279	-26.7	3.0	3.0	0.0
Lincoln	1,618	975	-39.7	0.3	0.3	0.0	3,415	3,047	-10.8	0.3	0.4	0.1
Maserati	403	217	-46.2	0.1	0.1	0.0	909	618	-32.0	0.1	0.1	0.0
Mazda	10,798	6,236	-42.2	2.0	2.2	0.2	23,149	18,487	-20.1	2.2	2.4	0.2
Mercedes	20,733	11,904	-42.6	3.8	4.3	0.5	40,438	28,813	-28.7	3.8	3.7	-0.1
MINI	1,893	796	-58.0	0.3	0.3	0.0	3,692	2,293	-37.9	0.3	0.3	0.0
Mitsubishi	3,543	828	-76.6	0.6	0.3	-0.3	6,505	4,068	-37.5	0.6	0.5	-0.1
Nissan	39,050	13,831	-64.6	7.2	5.0	-2.2	80,013	41,937	-47.6	7.4	5.3	-2.1
Other	958	621	-35.2	0.2	0.2	0.0	1,897	1,623	-14.4	0.2	0.2	0.0
Porsche	3,242	2,359	-27.2	0.6	0.8	0.2	6,965	5,723	-17.8	0.6	0.7	0.1
Ram	12,650	8,163	-35.5	2.3	2.9	0.6	24,621	21,230	-13.8	2.3	2.7	0.4
Subaru	20,058	12,282	-38.8	3.7	4.4	0.7	39,001	31,564	-19.1	3.6	4.0	0.4
Tesla	19,393	9,833	-49.3	3.6	3.5	-0.1	40,663	33,083	-18.6	3.8	4.2	0.4
Toyota	87,585	44,287	-49.4	16.1	15.9	-0.2	168,700	130,344	-22.7	15.7	16.6	0.9
Volkswagen	14,769	5,756	-61.0	2.7	2.1	-0.6	27,357	16,831	-38.5	2.5	2.1	-0.4
Volvo	3,336	1,902	-43.0	0.6	0.7	0.1	6,269	5,150	-17.8	0.6	0.7	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 Second Quarters of 2019 and 2020, 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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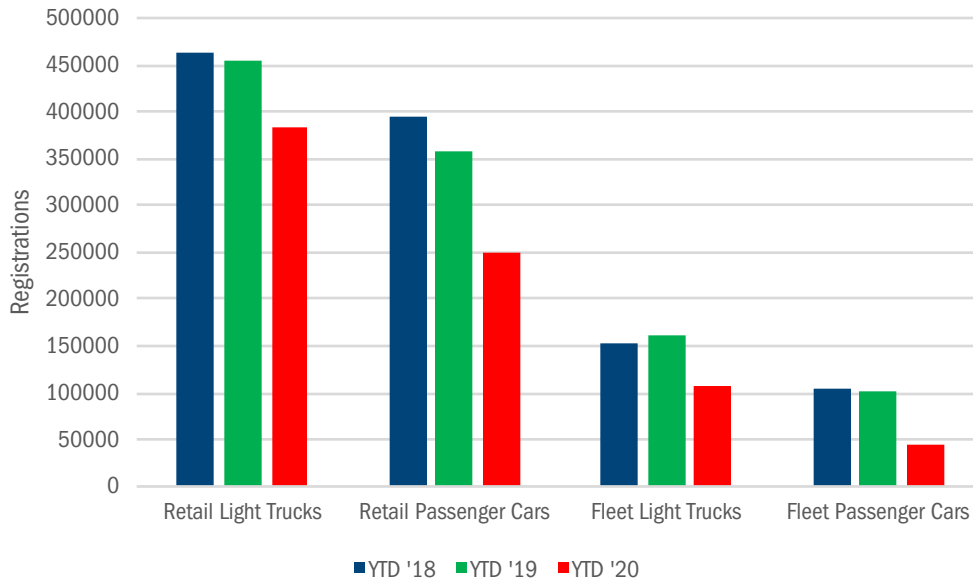
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BREAKDOWN OF RETAIL AND FLEET MARKETS

### State Retail Registrations Declined 22.3 Percent in First Half of '20 vs. 41.1 Percent Drop for Fleets

California New Car and Light Truck Retail and Fleet Registrations - YTD '18, '19, & '20 thru June



**PERCENT CHANGE:  
YTD '20 vs. YTD '19**

Retail cars: **DOWN 30.4%**

Retail light trucks: **DOWN 16.0%**

Fleet cars: **DOWN 54.2%**

Fleet light trucks: **DOWN 33.1%**

Data Source: AutoCount data from Experian.

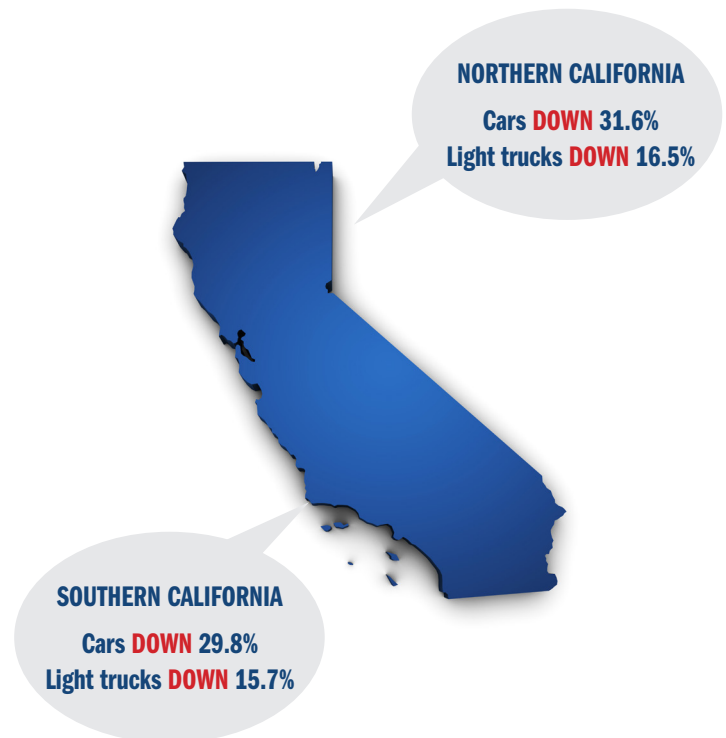
REGIONAL MARKETS IN CALIFORNIA

### Northern and Southern California Markets Posts Similar Results

New Retail Light Vehicle Registrations (excluding fleets) YTD '20, June			
North and South California	YTD '19	YTD '20	% chg.
Statewide Total	813,207	631,806	-22.3%
Cars	357,564	248,879	-30.4%
Light Trucks	455,643	382,927	-16.0%
Northern California	275,549	212,433	-22.9%
Cars	116,632	79,777	-31.6%
Light Trucks	158,917	132,656	-16.5%
Southern California	537,658	419,373	-22.0%
Cars	240,932	169,102	-29.8%
Light Trucks	296,726	250,271	-15.7%
Selected Regional Markets			
San Francisco Bay	157,517	113,782	-27.8%
Cars	72,482	46,563	-35.8%
Light Trucks	85,035	67,219	-21.0%
LA and Orange Counties	323,860	242,806	-25.0%
Cars	150,400	102,747	-31.7%
Light Trucks	173,460	140,059	-19.3%
San Diego County	69,048	55,677	-19.4%
Cars	28,307	19,820	-30.0%
Light Trucks	40,741	35,857	-12.0%

Data Source: AutoCount data from Experian.

Percent Change in New Retail Registrations - YTD '20 vs. YTD '19

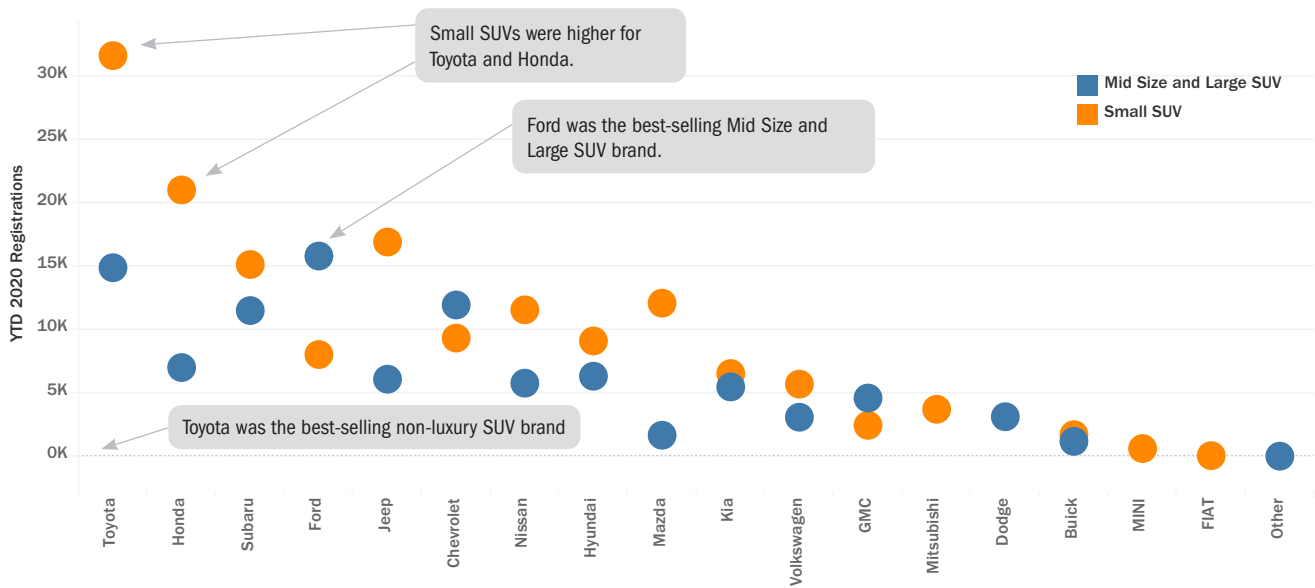


SUV CLOSE UP

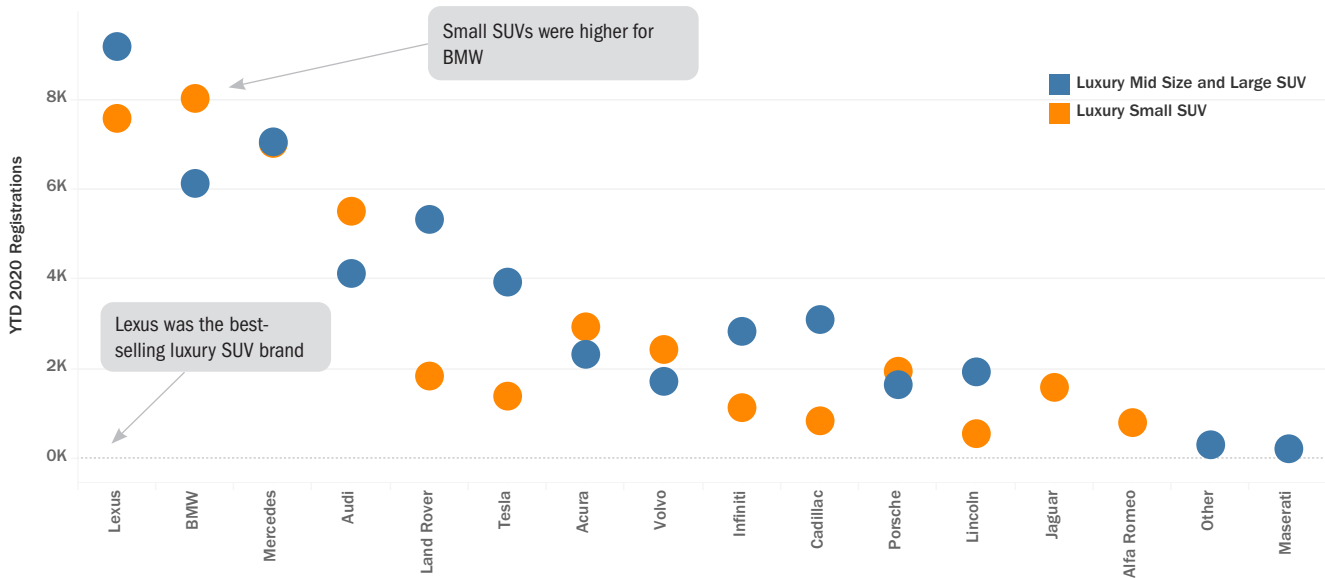
# Toyota is Top Selling Non-Luxury SUV Brand

The two graphs below show new retail light vehicle registrations for Non Luxury and Luxury SUV brands. Each graph shows Small SUV registrations and Mid Size and Large registrations. Brands are positioned from left to right based on total registrations. Each circle corresponds to brand registrations for Small SUVs (orange circle) and Mid Size and Large SUVs (blue circle). Note: Small SUVs consist of subcompact and compact models.

**New Retail Light Vehicle Registrations in Non Luxury SUV Segments - YTD 2020 thru June**



**New Retail Light Vehicle Registrations in Luxury SUV Segments - YTD 2020 thru June**

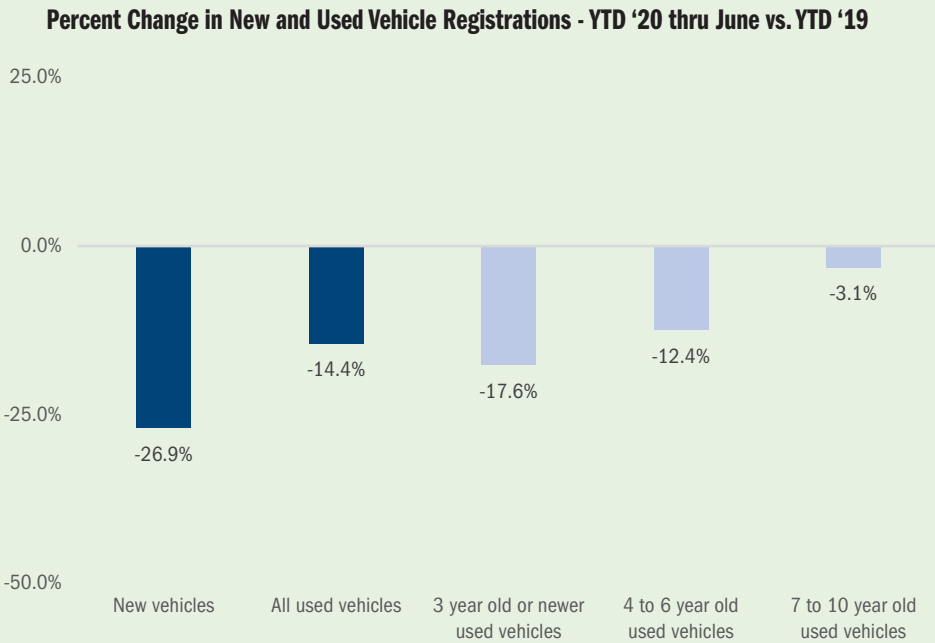


Data Source: AutoCount data from Experian.

Note: Small SUVs consist of subcompact and compact models.

CALIFORNIA USED VEHICLE MARKET

### Used Vehicle Market Holds Up Relatively Well in First Half of '20



Data Source: AutoCount data from Experian.

### 3 KEY TRENDS IN USED VEHICLE MARKET

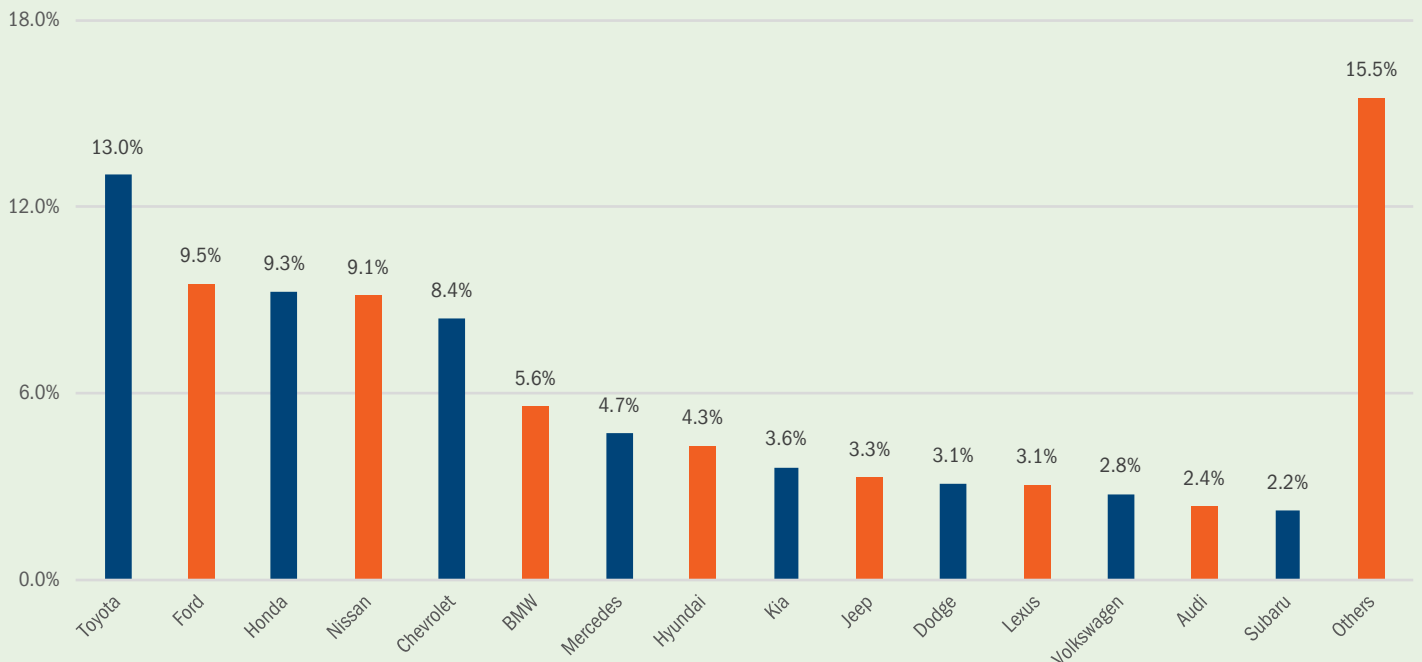


- 01.** Used vehicle registrations in California declined 14.4 percent in the first half of '20, better than the 26.9 percent drop for new vehicles.
- 02.** The nearly new used vehicle market (3 years old or newer) declined at a faster pace than older vehicles.
- 03.** Used vehicle market has been given a boost by sparse new vehicle inventories and cost conscious consumers. Used vehicle market should remain relatively strong for the remainder of 2020.

CALIFORNIA USED VEHICLE MARKET

### Toyota Is Best-Selling Brand in Six Year Old Or Newer Used Vehicle Market

**Top 15 Selling Brands in California Used Vehicle Market (vehicles 6 years old or newer) YTD 2020 thru June**



Data Source: AutoCount data from Experian.