

# California Auto Outlook™

Comprehensive information on the California vehicle market

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Covering Third Quarter 2019

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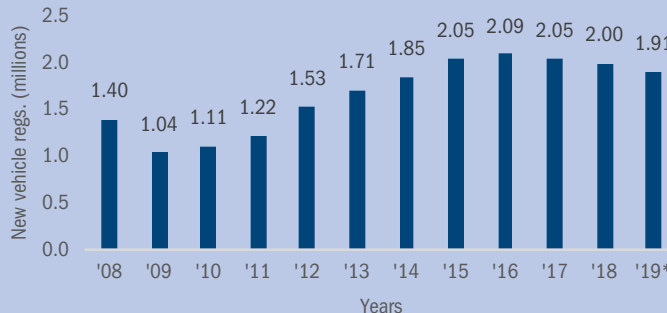


## New Vehicle Registrations in State Predicted To Exceed 1.9 Million Units in 2019

### ANNUAL TRENDS



California Annual New Light Vehicle Registrations - 2008 thru 2019



Historical data source: IHS

\*2019 forecast by Auto Outlook.

New vehicle registrations in California are expected to slip to 1.91 million units in 2019.

The state's new vehicle market is predicted to decline 4.5 percent from 2018 to 2019, which would be the third consecutive annual decline.

Although the market is shifting lower, new vehicle registrations this year should exceed the 2009 total by more than 80 percent.

California and U.S. Total New Light Vehicle Registrations - YTD thru September

	California			U.S.		
	YTD '18	YTD '19	Change	YTD '18	YTD '19	Change
<b>Registrations</b>						
TOTAL	1,504,342	1,427,578	-5.1%	12,857,847	12,767,471	-0.7%
Car	683,697	609,590	-10.8%	4,082,387	3,682,012	-9.8%
Light Truck	820,645	817,988	-0.3%	8,775,460	9,085,459	3.5%
Domestic	456,266	434,344	-4.8%	5,713,490	5,707,903	-0.1%
European	226,577	221,836	-2.1%	1,174,958	1,190,339	1.3%
Japanese	723,403	671,784	-7.1%	5,014,494	4,868,521	-2.9%
Korean	98,096	99,614	1.5%	954,905	1,000,708	4.8%
<b>Market Share</b>						
Car	45.4	42.7	-2.7	31.8	28.8	-3.0
Light Truck	54.6	57.3	2.7	68.2	71.2	3.0
Domestic	30.3	30.4	0.1	44.4	44.7	0.3
European	15.1	15.5	0.4	9.1	9.3	0.2
Japanese	48.1	47.1	-1.0	39.0	38.1	-0.9
Korean	6.5	7.0	0.5	7.4	7.8	0.4

Source: IHS

California new light vehicle market declined 5.1 percent during the first nine months of this year, while the U.S. market fell 0.7 percent.

Light truck registrations in the state were down slightly, while passenger cars fell 10.8 percent.

Light truck market share in California was 57.3 percent vs. 71.2 percent in the Nation.

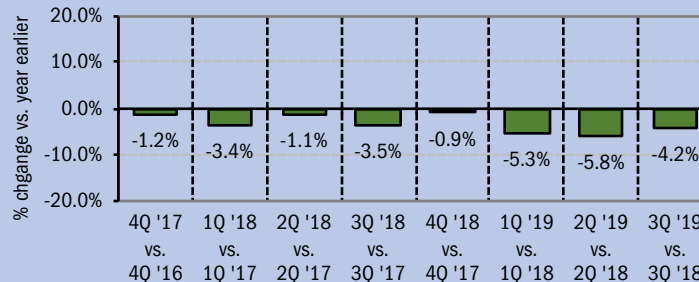
### TWO YEAR PERSPECTIVE



### QUARTERLY RESULTS



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



Source: IHS

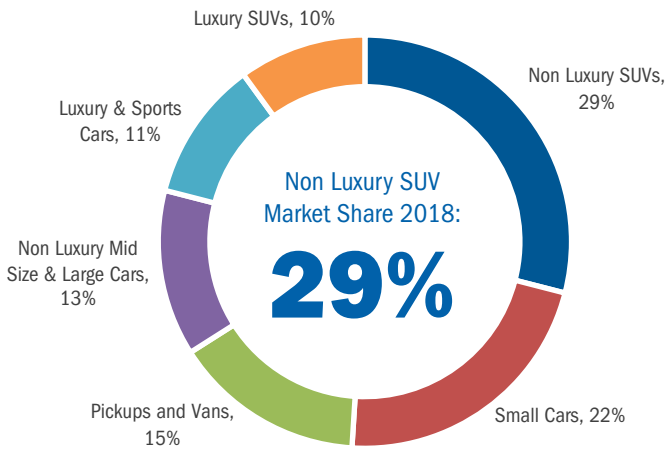
The California new vehicle market recorded its tenth consecutive year-over-year decline in the Third Quarter of 2019.

New vehicle registrations in the state fell 4.2 percent in 3Q '19, an improvement from the 5.8% drop in the Second Quarter.

SEGMENT MARKET SHARE TRENDS

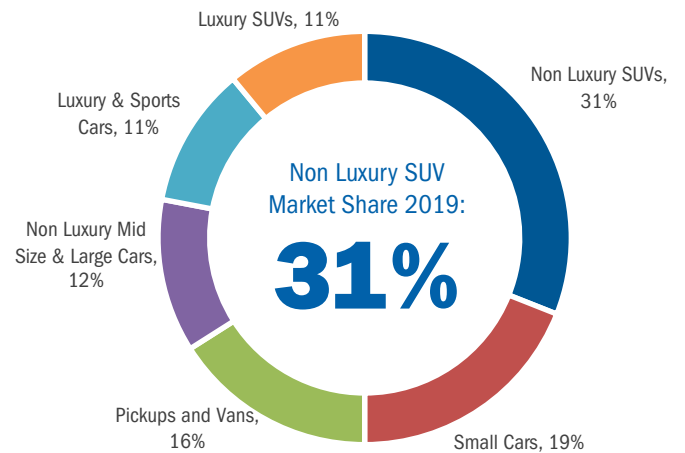
### Non Luxury SUV Market Share in California Exceeded 30% During First Nine Months of 2019

**Segment Market Shares in California  
YTD 2018 thru September**



Source: IHS.

**Segment Market Shares in California  
YTD 2019 thru September**



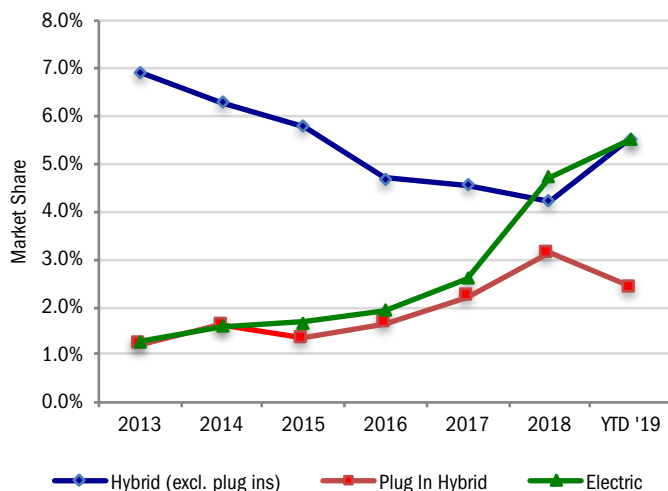
Source: IHS.

The two graphs above show market shares for primary segments during the first nine months of 2018 and 2019.

HYBRID AND ELECTRIC VEHICLES

### Electric Vehicle Market Share in State Reaches 5.5 Percent

**Hybrid and Electric Vehicle Market Share**



Hybrid/electric vehicle market share, YTD '19 thru Sept:  
**13.4 percent**

Hybrid and Electric New Vehicle Registrations and Market Share					YTD
	2015	2016	2017	2018	2019
Hybrid regs.(excl. plug ins)	118981	98124	93338	84322	79017
Hybrid share(excl. plug ins)	5.8%	4.7%	4.6%	4.2%	5.5%
Plug in hybrid regs.	27740	34727	45040	62847	34185
Plug in hybrid share	1.4%	1.7%	2.2%	3.1%	2.4%
Electric regs.	34477	40347	53500	94801	78776
Electric share	1.7%	1.9%	2.6%	4.7%	5.5%

Source: IHS

MODEL RANKINGS

# Honda Civic Is Top-Seller in California New Vehicle Market

The table below shows the top five selling models during the first nine months of 2019 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 Mid Size SUV: Lexus RX

### Top Selling Models in Each Segment - New Light Vehicle Registrations (YTD '19 thru September)

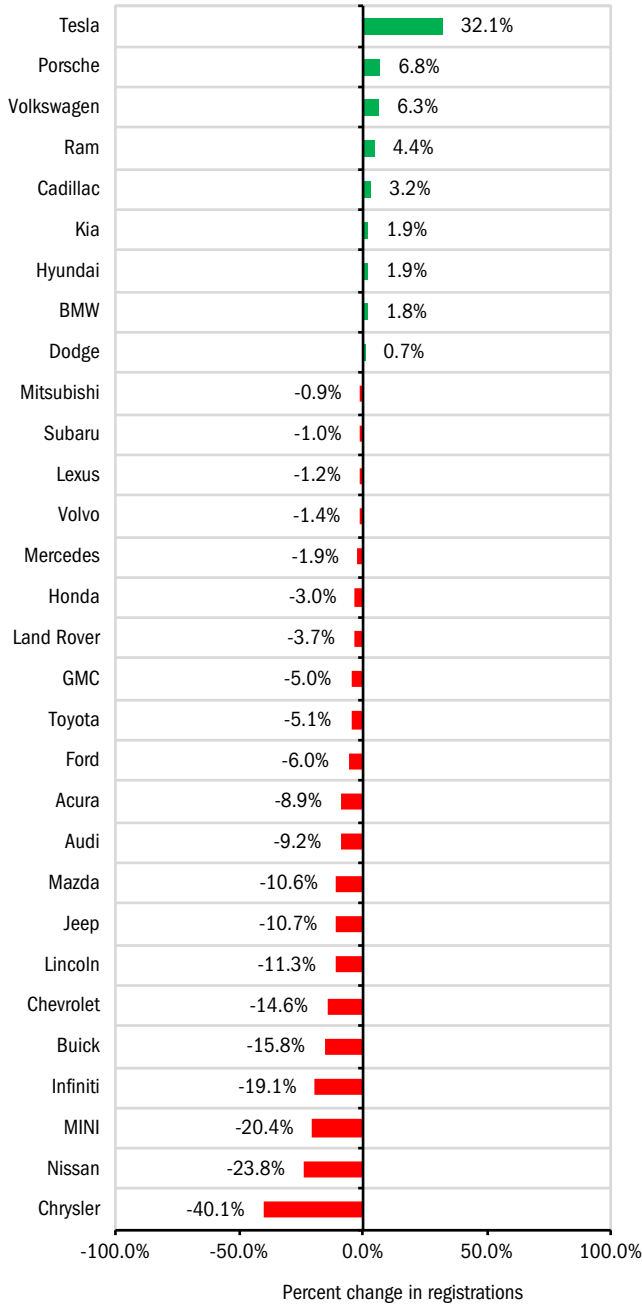
Cars											
Subcompact			Compact			Sports/Pony Cars			Mid Size		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Kia Soul	6904	16.3	Honda Civic	58967	28.2	Ford Mustang	6472	29.6	Toyota Camry	48760	31.1
Chevrolet Bolt	6723	15.9	Toyota Corolla	40928	19.6	Dodge Challenger	6301	28.9	Honda Accord	43709	27.9
Ford Fiesta	5304	12.6	Toyota Prius	18723	9.0	Chevrolet Camaro	3845	17.6	Ford Fusion	18082	11.5
Honda Fit	5294	12.5	Nissan Sentra	15387	7.4	Hyundai Veloster	1988	9.1	Nissan Altima	11407	7.3
Nissan Versa	5046	11.9	Hyundai Elantra	11392	5.4	Mazda MX5	1157	5.3	Kia Optima	10334	6.6
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	8472	48.9	Mercedes CLA-Class	3094	23.6	Tesla Model 3	48483	45.4	BMW 5-Series	8141	19.2
Chevrolet Impala	2683	15.5	Mercedes A-Class	3078	23.5	Mercedes C-Class	10855	10.2	Mercedes E-Class	7007	16.5
Toyota Avalon	2448	14.1	BMW I3	1968	15.0	Lexus ES	8513	8.0	Tesla Model S	4756	11.2
Chrysler 300	1808	10.4	Audi A3	1949	14.9	BMW 3-Series	8039	7.5	Audi A6	2147	5.1
Nissan Maxima	1121	6.5	Acura ILX	1850	14.1	BMW 4-Series	5164	4.8	Mercedes S-Class	2128	5.0
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	33930	58.9	Ford F Series	37872	33.8	Honda Odyssey	9490	33.7	Ford Transit Connect Van	12731	46.9
Chevrolet Colorado	8052	14.0	Chevrolet Silverado	28028	25.0	Toyota Sienna	8188	29.1	Ram Promaster	3577	13.2
Ford Ranger	6228	10.8	Ram Pickup	25756	23.0	Chrysler Pacifica	4826	17.2	Mercedes Sprinter	3313	12.2
Nissan Frontier /Xe	3853	6.7	GMC Sierra	10386	9.3	Dodge Caravan	4572	16.3	Nissan NV	3306	12.2
GMC Canyon	2084	3.6	Toyota Tundra	8800	7.9	Kia Sedona	1045	3.7	Chevrolet Express	2741	10.1
Subcompact SUV			Compact SUV			Mid Size SUV			Large SUV		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda HR-V	9750	16.6	Toyota RAV4	40029	19.6	Toyota Highlander	18706	12.5	Chevrolet Tahoe	5260	26.8
Toyota C-HR	8646	14.7	Honda CR-V	29671	14.5	Subaru Outback	15107	10.1	Ford Expedition	3382	17.2
Nissan Kicks	7007	11.9	Mazda CX-5	15961	7.8	Ford Explorer	12582	8.4	Chevrolet Suburban	3169	16.1
Hyundai Kona	6269	10.7	Jeep Wrangler	15371	7.5	Jeep Grand Cherokee	11424	7.6	Ford Flex	2311	11.8
Kia Niro	5454	9.3	Subaru Forester	13156	6.4	Honda Pilot	11168	7.4	GMC Yukon	2038	10.4
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 GLA-Class	3545	22.6	Mercedes GLC-Class	11869	18.2	Lexus RX	14994	23.0	Land Rover Range Rover	2817	19.8
BMW X1	3326	21.2	Lexus NX	9700	14.9	Mercedes GLE-Class	5770	8.8	Cadillac Escalade	2372	16.7
Lexus UX	3289	21.0	Audi Q5	9140	14.0	BMW X5	5691	8.7	Mercedes GLS-Class	1890	13.3
BMW X2	2111	13.5	BMW X3	8754	13.4	Tesla Model X	5388	8.2	BMW X7	1832	12.9
Volvo XC40	1533	9.8	Acura RDX	6078	9.3	Acura MDX	4678	7.2	Audi Q8	1491	10.5

Source: IHS

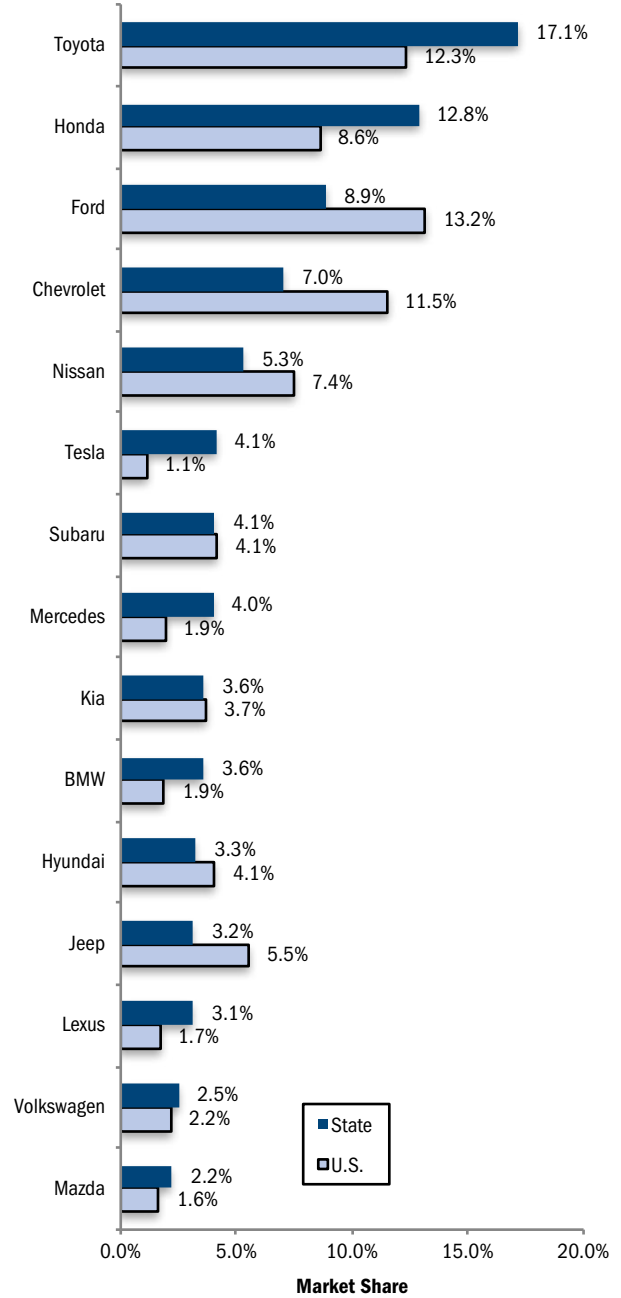
BRAND SUMMARY

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

Percent Change in Brand Registrations - YTD '19 thru Sept. vs. YTD '18  
(Top 30 selling brands in state)



California and U.S. Market Share - YTD '19 thru Sept.  
(Top 15 selling brands in state)



Registrations increased for Tesla, Porsche, Volkswagen, Ram, Cadillac, Kia, Hyundai, BMW, and Dodge



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											
	Third Quarter 2018 and 2019				Year-to-date thru September				YTD Market Share		
	California			U.S.	California			U.S.	California		
	3Q '18	3Q '19	% chg.	% chg.	YTD '18	YTD '19	% chg.	% chg.	YTD '18	YTD '19	Chg.
TOTAL	499,672	478,752	-4.2%	2.5%	1,504,342	1,427,578	-5.1%	-0.7%			
Acura	6,244	5,060	-19.0%	-7.3%	16,952	15,442	-8.9%	-1.7%	1.1	1.1	0.0
Alfa Romeo	1,305	980	-24.9%	-27.0%	3,863	2,799	-27.5%	-24.4%	0.3	0.2	-0.1
Audi	11,119	10,441	-6.1%	1.2%	31,727	28,810	-9.2%	-3.7%	2.1	2.0	-0.1
BMW	15,802	18,584	17.6%	25.8%	50,260	51,152	1.8%	11.9%	3.3	3.6	0.3
Buick	1,885	1,432	-24.0%	15.2%	6,321	5,324	-15.8%	3.0%	0.4	0.4	0.0
Cadillac	2,653	2,951	11.2%	7.8%	8,008	8,265	3.2%	3.0%	0.5	0.6	0.1
Chevrolet	37,242	30,916	-17.0%	4.3%	117,373	100,247	-14.6%	-2.8%	7.8	7.0	-0.8
Chrysler	2,856	1,390	-51.3%	-24.4%	11,079	6,634	-40.1%	-25.2%	0.7	0.5	-0.2
Dodge	7,625	8,119	6.5%	-4.2%	26,205	26,385	0.7%	-4.6%	1.7	1.8	0.1
FIAT	915	434	-52.6%	-37.8%	2,146	1,143	-46.7%	-39.3%	0.1	0.1	0.0
Ford	44,396	40,176	-9.5%	-2.9%	134,574	126,497	-6.0%	-3.8%	8.9	8.9	0.0
Genesis	369	822	122.8%	105.7%	1,906	1,619	-15.1%	23.3%	0.1	0.1	0.0
GMC	7,991	7,635	-4.5%	14.0%	24,271	23,047	-5.0%	5.5%	1.6	1.6	0.0
Honda	63,019	62,642	-0.6%	3.9%	189,074	183,391	-3.0%	-0.1%	12.6	12.8	0.2
Hyundai	15,409	15,976	3.7%	8.6%	45,682	46,532	1.9%	4.6%	3.0	3.3	0.3
Infiniti	4,096	3,123	-23.8%	-20.0%	13,658	11,043	-19.1%	-15.5%	0.9	0.8	-0.1
Jaguar	1,125	1,015	-9.8%	-6.8%	3,930	4,018	2.2%	-0.3%	0.3	0.3	0.0
Jeep	16,764	14,754	-12.0%	-1.6%	50,514	45,089	-10.7%	-4.4%	3.4	3.2	-0.2
Kia	16,363	18,975	16.0%	11.8%	50,508	51,463	1.9%	4.6%	3.4	3.6	0.2
Land Rover	4,174	3,532	-15.4%	-2.3%	12,938	12,462	-3.7%	-0.8%	0.9	0.9	0.0
Lexus	16,606	15,467	-6.9%	-3.4%	45,456	44,916	-1.2%	-1.0%	3.0	3.1	0.1
Lincoln	1,766	1,646	-6.8%	8.8%	5,140	4,557	-11.3%	2.3%	0.3	0.3	0.0
Maserati	572	319	-44.2%	-32.9%	1,808	1,058	-41.5%	-33.7%	0.1	0.1	0.0
Mazda	11,771	10,922	-7.2%	-1.7%	35,734	31,959	-10.6%	-11.1%	2.4	2.2	-0.2
Mercedes	18,442	20,026	8.6%	11.7%	58,008	56,881	-1.9%	-0.3%	3.9	4.0	0.1
MINI	2,015	1,765	-12.4%	-10.4%	6,856	5,460	-20.4%	-16.8%	0.5	0.4	-0.1
Mitsubishi	1,875	1,611	-14.1%	-0.4%	6,521	6,463	-0.9%	4.9%	0.4	0.5	0.1
Nissan	27,147	22,956	-15.4%	-1.0%	99,638	75,884	-23.8%	-8.3%	6.6	5.3	-1.3
Other	864	953	10.3%	11.8%	2,712	2,990	10.3%	6.8%	0.2	0.2	0.0
Porsche	3,055	4,109	34.5%	25.6%	9,993	10,671	6.8%	9.0%	0.7	0.7	0.0
Ram	10,297	9,775	-5.1%	18.9%	28,084	29,333	4.4%	26.3%	1.9	2.1	0.2
Subaru	20,375	20,450	0.4%	2.6%	58,501	57,930	-1.0%	4.9%	3.9	4.1	0.2
Tesla	22,744	18,542	-18.5%	-1.4%	44,365	58,627	32.1%	50.8%	2.9	4.1	1.2
Toyota	86,909	86,115	-0.9%	-0.9%	257,684	244,644	-5.1%	-2.5%	17.1	17.1	0.0
Volkswagen	10,753	11,933	11.0%	1.4%	33,626	35,747	6.3%	3.5%	2.2	2.5	0.3
Volvo	3,129	3,206	2.5%	8.9%	9,227	9,096	-1.4%	1.0%	0.6	0.6	0.0

The table above shows new retail light vehicle (car and light truck) registrations in California. Figures are shown for the Third Quarters of 2018 and 2019, and ytd totals. The top ten ranked brands in each category are shaded yellow Source: IHS Markit.

## California Auto Outlook

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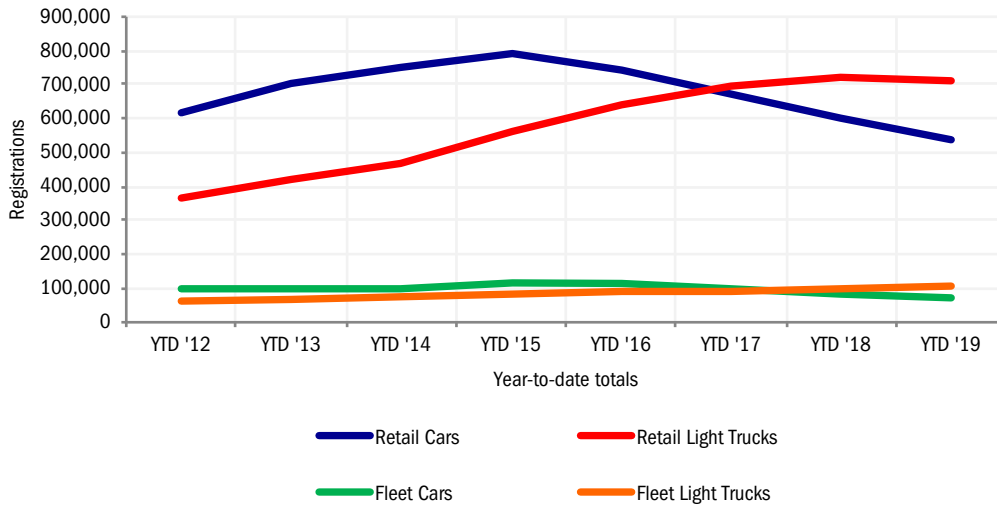
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BREAKDOWN OF RETAIL AND FLEET MARKETS

# Retail Passenger Car Registrations Likely to Decline for Fourth Consecutive Year in 2019

California New Car and Light Truck Retail and Fleet Registrations - 2012 thru 2019, YTD thru Sept.



Data Source: IHS.

**PERCENT CHANGE:**  
YTD '19 vs. YTD '18 (September)

Retail cars: **DOWN 10.2%**

Retail light trucks: **DOWN 1.4%**

Fleet cars: **DOWN 15.5%**

Fleet light trucks: **UP 7.7%**

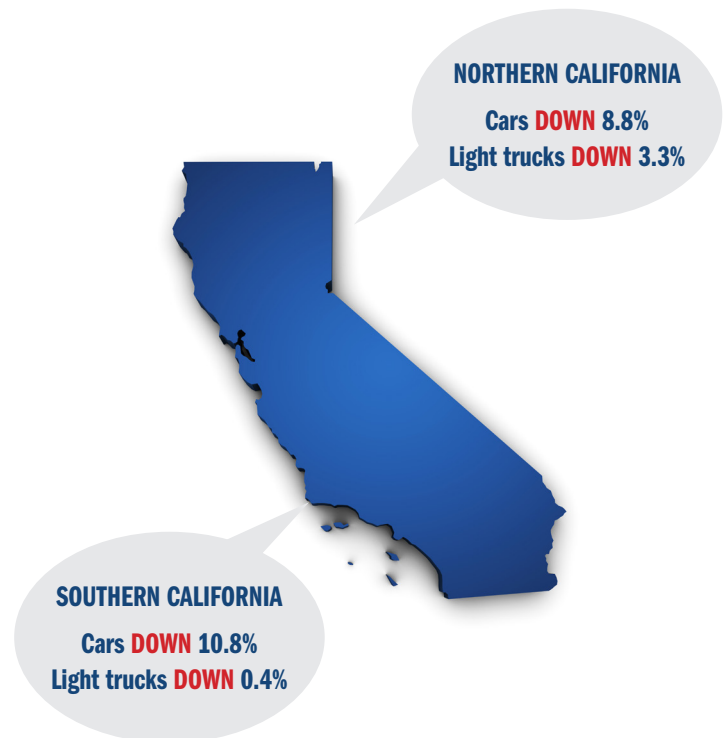
REGIONAL MARKETS IN CALIFORNIA

## Los Angeles and Orange County Retail Market Declined by 5%

New Retail Light Vehicle Registrations (excluding fleets) YTD thru Sept.			
North and South California	YTD '18	YTD '19	% chg.
Statewide Total	1,320,274	1,249,092	-5.4%
Cars	598,613	537,682	-10.2%
Light Trucks	721,661	711,410	-1.4%
Northern California	453,712	428,144	-5.6%
Cars	194,075	176,956	-8.8%
Light Trucks	259,637	251,188	-3.3%
Southern California	866,562	820,948	-5.3%
Cars	404,538	360,726	-10.8%
Light Trucks	462,024	460,222	-0.4%
Selected Regional Markets			
San Francisco Bay	258,901	242,849	-6.2%
Cars	119,141	108,675	-8.8%
Light Trucks	139,760	134,174	-4.0%
LA and Orange Counties	518,360	492,485	-5.0%
Cars	251,539	224,870	-10.6%
Light Trucks	266,821	267,615	0.3%
San Diego County	112,212	105,754	-5.8%
Cars	48,168	42,178	-12.4%
Light Trucks	64,044	63,576	-0.7%

Data Source: IHS .

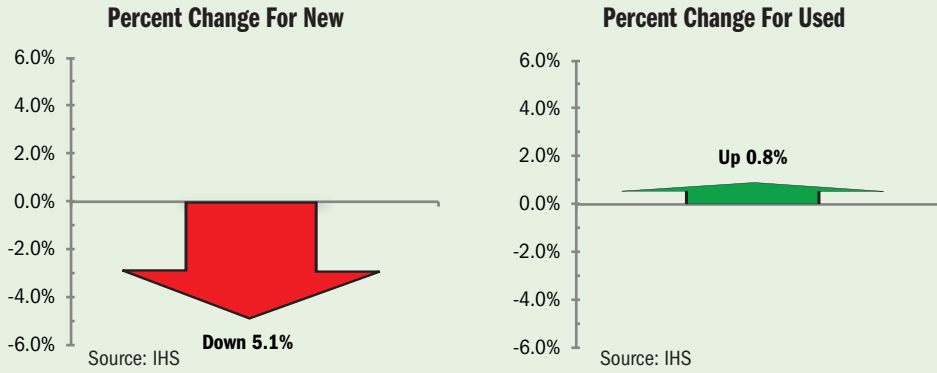
### Percent Change in New Retail Registrations - YTD '19 vs. YTD '18



TRACKING THE CALIFORNIA USED VEHICLE MARKET

# Used Vehicle Market Increased By Less Than 1 Percent During First Nine Months of 2019

Comparison of California New and Used Vehicle Markets -  
Percent change in registrations (YTD '19 thru September vs. YTD '18)



**5 KEY TRENDS IN USED MARKET**



01. Used light vehicle registrations in the state were up 0.8 percent thru September of 2019.
02. Used light truck registrations were up 3.8 percent. Cars declined by 1.4 percent.
03. Registrations for 6 year old or newer vehicles were up 5.0 percent so far this year.
04. Honda Civic was the best seller in the six year old or newer market, while Toyota RAV4 had a big increase.
05. Toyota was the brand leader in the six year old or newer market. Ford was second.

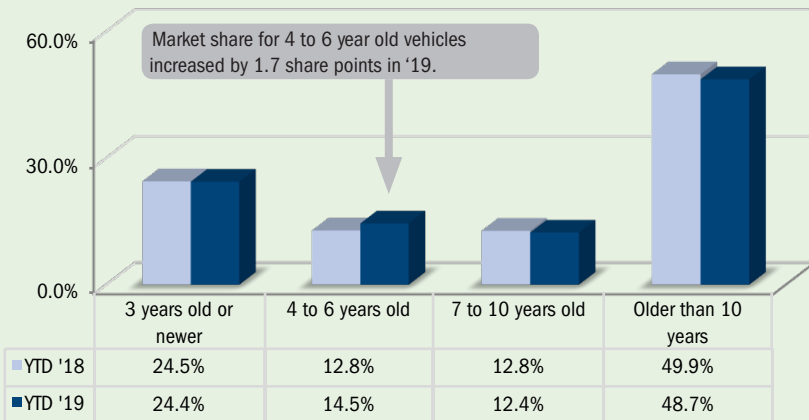
California Used Light Vehicle Registrations - YTD thru September					
	Registrations		% Change '18 TO '19	Market Share	
	YTD '18	YTD '19		YTD '18	YTD '19
TOTAL	2,888,943	2,911,268	0.8%		
Cars	1,691,533	1,667,925	-1.4%	58.6%	57.3%
Light Trucks	1,197,410	1,243,343	3.8%	41.4%	42.7%
Domestic	1,019,290	1,013,650	-0.6%	35.3%	34.8%
European	405,515	417,675	3.0%	14.0%	14.3%
Japanese	1,327,886	1,341,586	1.0%	46.0%	46.1%
Korean	136,252	138,357	1.5%	4.7%	4.8%

Source: IHS

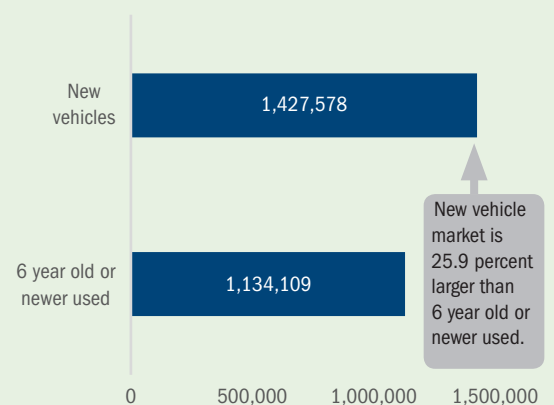
ANALYSIS OF USED VEHICLE REGISTRATIONS BY VEHICLE AGE

## Market Share for 4 to 6 Year Old Vehicles Increases

Used Vehicle Market Share by Age of Vehicle  
YTD '19 thru September vs. YTD '18



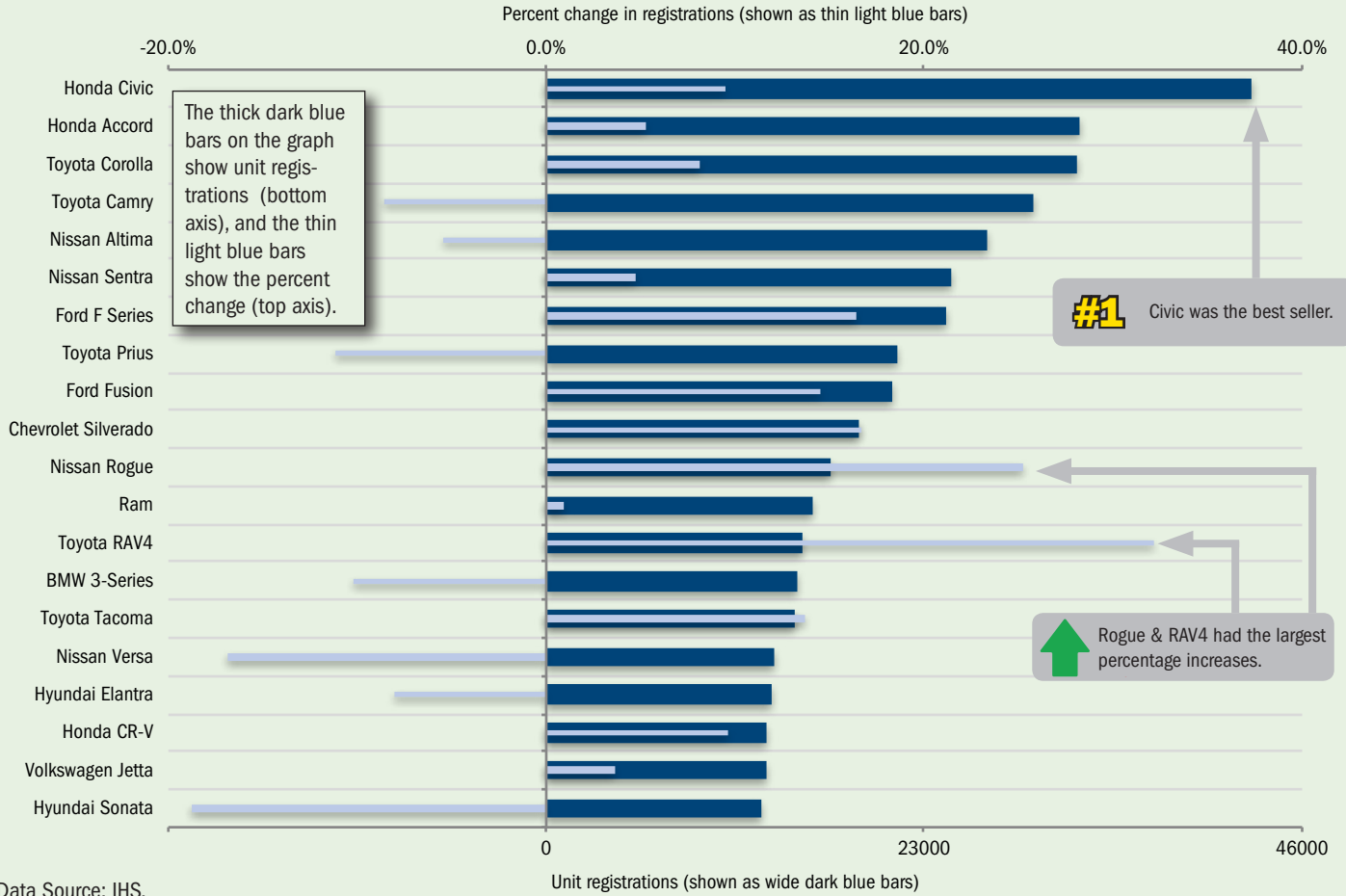
6 Year Old or Newer Used and New Vehicle Registrations  
YTD '19 thru September



TOP SELLING USED VEHICLES

**Civic is Best-Seller in State Used Vehicle Market; RAV4 and Rogue Had Largest Percentage Gains**

Registrations (YTD '19 thru September) and Percent Change in registrations (YTD '19 thru September vs. YTD '18)  
Top 20 Selling Models (6 years old or newer)



TOP SELLING BRANDS

**Toyota Market Share in Six Year Old or Newer Used Vehicle Market is 13.9 Percent**

Top 15 Selling Brands in California Used Vehicle Market (vehicles 6 years old or newer)  
YTD '19 thru September

