

Colorado Auto Outlook™

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Comprehensive information on the Colorado new and used vehicle market

Colorado Automobile Dealers Association



YTD '18 thru July
% Change In
New Retail Market vs.
Year Earlier

Colorado
-1.4%

U.S.
-0.9%

Colorado New and Used Retail Light Vehicle Registrations (Used registrations only include vehicles seven years old or newer)

	New vehicles	Used Vehicles
YTD '17 thru July	118,937	129,604
YTD '18 thru July	117,303	137,229
% change	-1.4%	5.9%
May '17 thru July '17	52,121	59,005
May '18 thru July '18	47,654	58,306
% change	-8.6%	-1.2%

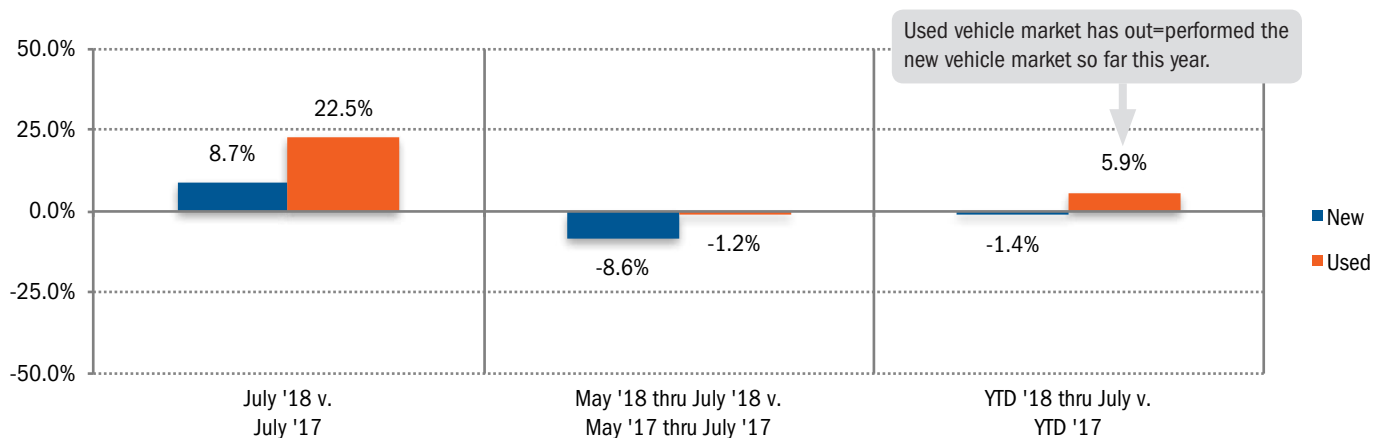
QUICK FACTS

State new vehicle market slipped 1.4% during the first seven months of this year versus a year earlier. U.S. market was off 0.9%.

July '18 registrations in the state were up 8.7% vs. year earlier.

Light truck registrations increased 2.8% so far this year, while passenger cars were off 11.7%.

Percent Change in Colorado New and Used Vehicle Markets (Used registrations only include vehicles seven years old or newer)



Source: AutoCount data from Experian.

Data Information

All data represents new and used retail registrations in Colorado and excludes fleet transactions. Monthly recording of registrations occurs when the data is processed by the DMV. This can impact the measurement of registrations in individual months. Year-to-date figures are more reflective of market results.

Source: AutoCount data from Experian.

Change in Year-to-date
New Retail Light Vehicle
Registrations

LIGHT TRUCKS



UP
2.8%

PASSENGER CARS

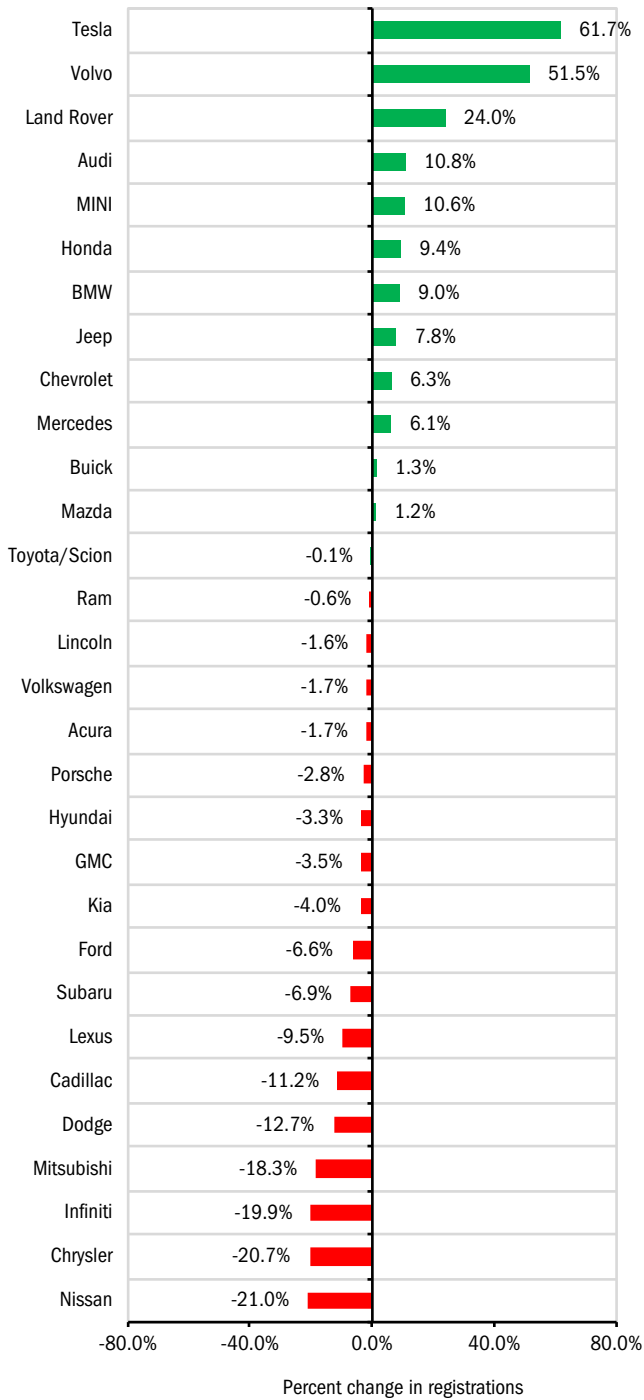


DOWN
11.7%

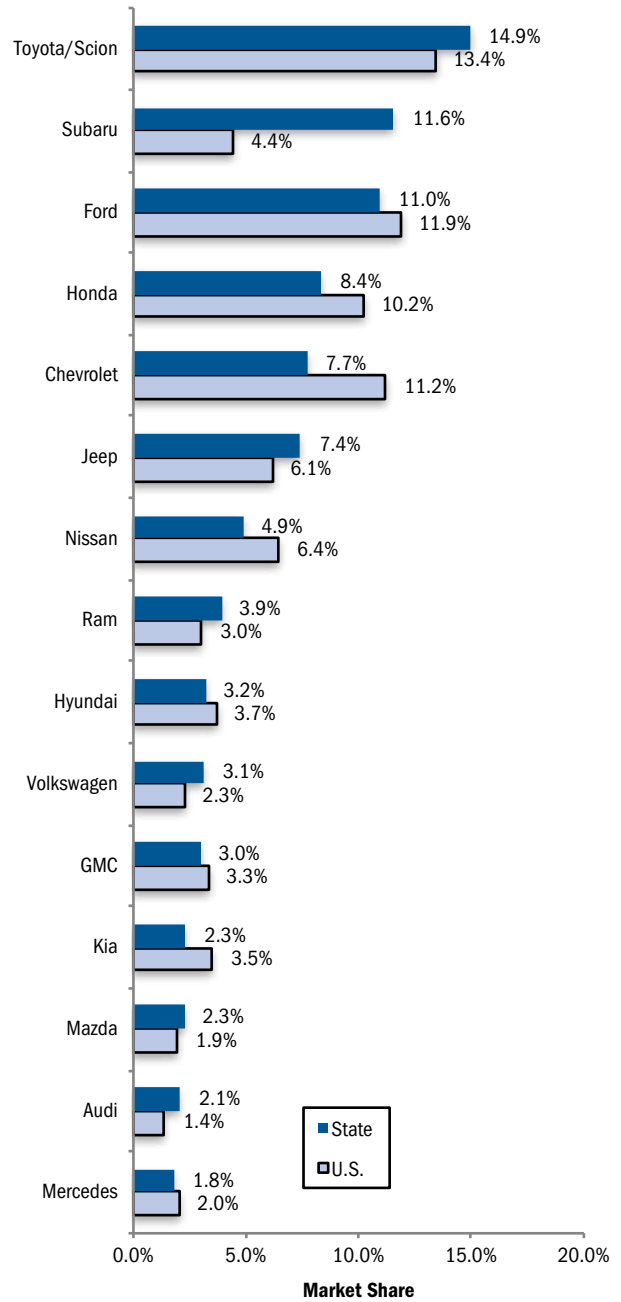
Colorado New Retail Car and Light Truck Registrations												
	July			Three Month Period May '18 thru July '18			Year to date thru July			Year-to-date Market Share (%)		
	Colorado			Colorado			Colorado			Colorado		
	2017	2018	% chg.	Yr. Ago	Current	% chg.	2017	2018	% chg.	2017	2018	Chg.
MARKET SUMMARY												
TOTAL	18,686	20,312	8.7%	52,121	47,654	-8.6%	118,937	117,303	-1.4%			
Cars	5,595	5,602	0.1%	16,036	12,733	-20.6%	34,353	30,324	-11.7%	28.9	25.9	-3.0
Light Trucks	13,091	14,710	12.4%	36,085	34,921	-3.2%	84,584	86,979	2.8%	71.1	74.1	3.0
Domestic	6,914	7,654	10.7%	19,239	18,163	-5.6%	43,939	43,868	-0.2%	36.9	37.4	0.5
European	1,918	2,286	19.2%	5,489	5,341	-2.7%	12,587	13,453	6.9%	10.6	11.5	0.9
Japanese	8,723	9,186	5.3%	24,121	21,510	-10.8%	55,689	53,503	-3.9%	46.8	45.6	-1.2
Korean	1,131	1,186	4.9%	3,272	2,640	-19.3%	6,722	6,479	-3.6%	5.7	5.5	-0.1
BRAND REGISTRATIONS												
Acura	163	155	-4.9%	407	355	-12.8%	934	918	-1.7%	0.8	0.8	0.0
Audi	292	400	37.0%	931	927	-0.4%	2,222	2,463	10.8%	1.9	2.1	0.2
BMW	253	298	17.8%	795	714	-10.2%	1,900	2,071	9.0%	1.6	1.8	0.2
Buick	135	147	8.9%	434	390	-10.1%	972	985	1.3%	0.8	0.8	0.0
Cadillac	84	82	-2.4%	253	214	-15.4%	627	557	-11.2%	0.5	0.5	-0.1
Chevrolet	1,359	1,458	7.3%	3,744	3,637	-2.9%	8,494	9,025	6.3%	7.1	7.7	0.6
Chrysler	81	77	-4.9%	288	188	-34.7%	648	514	-20.7%	0.5	0.4	-0.1
Dodge	340	403	18.5%	1,051	882	-16.1%	2,114	1,845	-12.7%	1.8	1.6	-0.2
Fiat	22	26	18.2%	62	50	-19.4%	137	123	-10.2%	0.1	0.1	0.0
Ford	2,289	2,276	-0.6%	6,085	5,417	-11.0%	13,762	12,849	-6.6%	11.6	11.0	-0.6
GMC	493	574	16.4%	1,470	1,300	-11.6%	3,593	3,468	-3.5%	3.0	3.0	-0.1
Honda	1,457	1,749	20.0%	4,097	4,200	2.5%	8,969	9,816	9.4%	7.5	8.4	0.8
Hyundai	654	731	11.8%	1,905	1,571	-17.5%	3,860	3,732	-3.3%	3.2	3.2	-0.1
Infiniti	124	118	-4.8%	359	289	-19.5%	905	725	-19.9%	0.8	0.6	-0.1
Jaguar	38	26	-31.6%	120	64	-46.7%	293	182	-37.9%	0.2	0.2	-0.1
Jeep	1,256	1,606	27.9%	3,442	3,576	3.9%	8,085	8,715	7.8%	6.8	7.4	0.6
Kia	477	455	-4.6%	1,367	1,069	-21.8%	2,862	2,747	-4.0%	2.4	2.3	-0.1
Land Rover	88	93	5.7%	223	277	24.2%	538	667	24.0%	0.5	0.6	0.1
Lexus	340	352	3.5%	972	849	-12.7%	2,330	2,109	-9.5%	2.0	1.8	-0.2
Lincoln	76	106	39.5%	241	234	-2.9%	561	552	-1.6%	0.5	0.5	0.0
Maserati	10	14	40.0%	34	29	-14.7%	85	66	-22.4%	0.1	0.1	0.0
Mazda	491	464	-5.5%	1,183	1,085	-8.3%	2,616	2,647	1.2%	2.2	2.3	0.1
Mercedes	338	397	17.5%	903	931	3.1%	1,997	2,119	6.1%	1.7	1.8	0.1
MINI	79	90	13.9%	216	202	-6.5%	454	502	10.6%	0.4	0.4	0.0
Mitsubishi	96	91	-5.2%	266	194	-27.1%	567	463	-18.3%	0.5	0.4	-0.1
Nissan	1,256	1,042	-17.0%	3,333	2,240	-32.8%	7,223	5,705	-21.0%	6.1	4.9	-1.2
Porsche	94	77	-18.1%	244	205	-16.0%	500	486	-2.8%	0.4	0.4	0.0
Ram	732	769	5.1%	2,040	1,875	-8.1%	4,589	4,560	-0.6%	3.9	3.9	0.0
smart	2	4	100.0%	19	6	-68.4%	35	17	-51.4%	0.0	0.0	0.0
Subaru	1,995	2,223	11.4%	5,796	5,215	-10.0%	14,598	13,585	-6.9%	12.3	11.6	-0.7
Tesla	68	156	129.4%	190	449	136.3%	493	797	61.7%	0.4	0.7	0.3
Toyota/Scion	2,801	2,991	6.8%	7,708	7,082	-8.1%	17,546	17,532	-0.1%	14.8	14.9	0.2
Volkswagen	591	664	12.4%	1,670	1,488	-10.9%	3,757	3,694	-1.7%	3.2	3.1	0.0
Volvo	81	154	90.1%	212	367	73.1%	581	880	51.5%	0.5	0.8	0.3
Other	31	44	41.9%	61	83	36.1%	90	187	107.8%	0.1	0.2	0.1

Top ten brands shaded gray. Source: AutoCount data from Experian.

**Percent Change in Brand Registrations
YTD '18 thru July vs. YTD 2017
(Top 30 selling brands)**



**Colorado and U.S. Market Share
YTD '18 thru July
(Top 20 selling brands in state)**



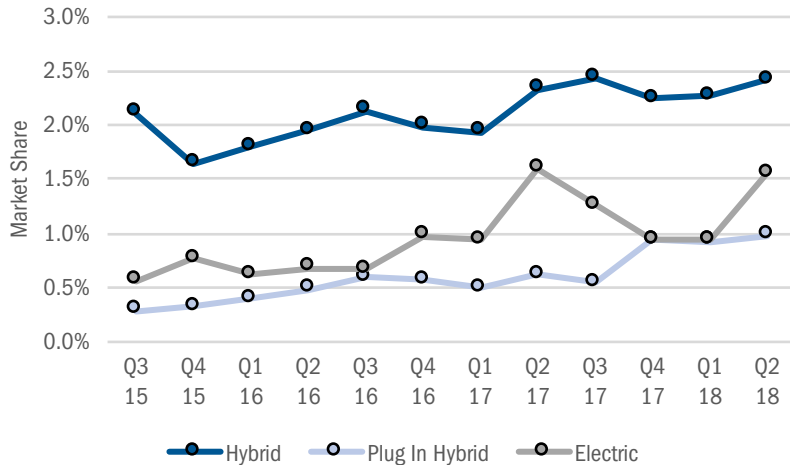
Registrations increased by more than 10% for Tesla, Volvo, Land Rover, Audi, and MINI



Toyota, Subaru, Ford, Honda, and Chevrolet were market share leaders in Colorado

HYBRID AND ELECTRIC VEHICLES

**Quarterly Alternative Powertrain Market Share
(includes hybrid and electric vehicles)**



**New Retail Hybrid and Electric Vehicle Registrations
Top 20 Selling Models in Colorado - YTD '18 thru June**

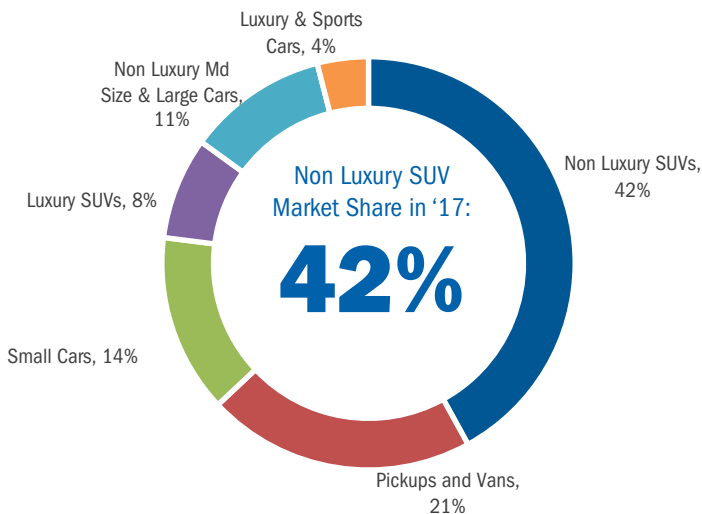
Rank	Model	Regs.
1	Toyota RAV4 PHEV	595
2	Toyota Prius PHEV	468
3	Nissan Leaf	338
4	Toyota Highlander PHEV	270
5	Tesla Model 3	244
6	Tesla Model X	235
7	Tesla Model S	214
8	Lexus RX PHEV	188
9	Chevrolet Bolt	176
10	Kia Niro	157
11	Toyota Camry PHEV	151
12	BMW X5 PHEV	125
13	Hyundai Ioniq	125
14	Chevrolet Volt	87
15	Ford Fusion PHEV	80
16	Hyundai Sonata PHEV	73
17	Lexus NX	71
18	Honda Clarity PHEV	69
19	Chrysler Pacifica PHEV	65
20	Mitsubishi Outlander PHEV	60

The graph above shows hybrid powertrain and electric vehicle quarterly market share in the state. Source: IHS Markit.

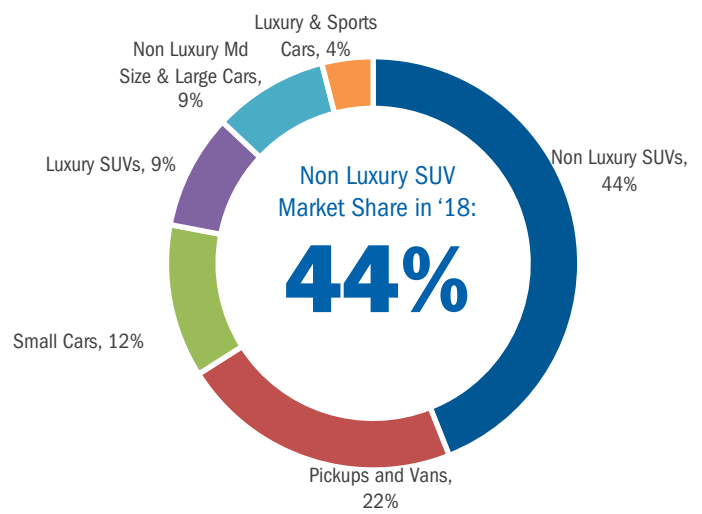
Source: IHS Markit.

VEHICLE SEGMENTS

**Segment Market Shares
YTD '17 thru July**



**Segment Market Shares
YTD '18 thru July**



Source: AutoCount data from Experian

The two graphs above show market shares for primary segments during the first seven months of 2017 and 2018.