orange county OCADA automobile dealers association QUARTERLY REPORT

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ORANGE COUNTY AUTO OUTLOOK™ 1st Quarter, 2024

Orange County New Retail Automotive Market Data - Retail Sales *Does Not Include Fleet Sales

FORECAST

County New Vehicle Market Increased Slightly in 1Q '24

Below is a review of key trends in the Orange County new vehicle market.

Results during 1Q 2024
County new light vehicle registrations increased 1.6% during the first three months of 2024 vs. year-earlier levels. National retail market was up 6.9%. As shown on page 2, equivalent U.S. SAAR levels approached 15 million units and improved from the Fourth Quarter of 2023, an indicator that the county market is improving.

2024 Forecast
According to Auto Outlook's forecast, registrations are expected to approach 174,000 units this year and increase 3.1% from 2023. That projection is 14% higher than the total in 2022 when the market was significantly impacted by product shortages, but is still well below the recent high of nearly 200,000 units in 2016.

Key determinants for the market
The shaded box on the right reviews the primary forecast determinants. Pent-up demand is still significant and the county labor market is strong. Vehicle affordability is still a concern, but should improve as the year progresses. As pointed out in the previous release of *Auto Outlook,* barring any unforeseen negative shocks (such as the possible escalation of conflict in the Middle East), we think the new vehicle market could be stronger than expected in 2024.

Tracking alternative powertrain sales
County BEV registrations were up 8% in the First Quarter of this year versus a year earlier, and market share was 26.6%. Gains have levelled off during the past few quarters, however. Hybrid registrations exceeded 5,200 units in 1Q '24 and improved 52% versus year earlier. Plug in hybrid market was up 10% (see page 6).

Brands that fared best in early 2024
Among the top 25 sellers in the county market, Rivian, Lexus, Cadillac, Honda, and Toyota had the largest percentage gains in the First Quarter of this year. Toyota moved ahead of Tesla as the top-selling brand in the county.

Top selling models in Orange County
Tesla Model Y, Toyota RAV4, Tesla Model 3, Toyota Camry, Honda CR-V, Honda Civic, Toyota Corolla, Honda Accord, Tesla Model X, and Ford F-Series were the top 10 sellers so far this year.

Primary Factors Driving the County New Vehicle Market

» County unemployment rate was 4.2% in February and total employment approached 1.6 million.

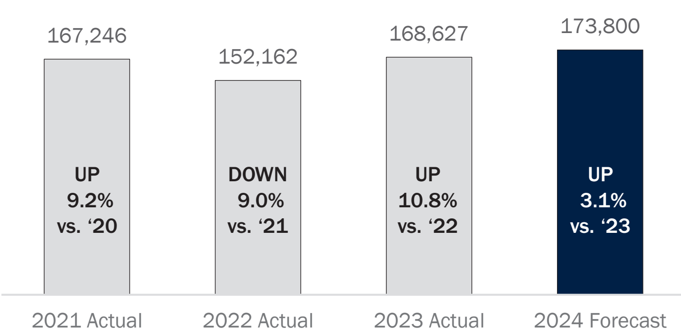
» Growth in personal income has largely kept pace with inflation. Household wealth is at record-high levels.

» Consumer confidence has fluctuated a bit over the past few months, but is well above the lows in 2022 when inflation concerns were paramount.

» High interest rates continue to put a squeeze on affordability, but the possibility for lower rates later this year, falling vehicle prices, and strong wage gains should lead to improvement in the second half of 2024.

» Pent up demand is the biggest positive for the county market. Auto Outlook estimates that nearly 100,000 new vehicle purchases have been postponed since the onset of the pandemic and ensuing supply chain issues.

Forecast for County New Retail Light Vehicle Registrations



The graph above shows annual new retail light vehicle registrations from 2021 through 2023 and Auto Outlook's projection for 2024.
Historical data sourced from Experian Automotive.

Market Summary

	YTD '23 thru Mar.	YTD '24 thru Mar.	% Chg. '23 to '24	Mkt. Share YTD '24
TOTAL	40,142	40,803	1.6%	
Car	11,621	10,617	-8.6%	26.0%
Light Truck	28,521	30,186	5.8%	74.0%
Domestic	14,215	13,194	-7.2%	32.3%
European	7,808	7,744	-0.8%	19.0%
Japanese	14,371	16,159	12.4%	39.6%
Korean	3,748	3,706	-1.1%	9.1%

Domestics consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa Romeo and FIAT), Tesla, Rivian, and Lucid.
Data sourced from Experian Automotive.

KEY TRENDS IN ORANGE COUNTY NEW VEHICLE MARKET

COUNTY MARKET VS. U.S.

% Change In New Retail Market YTD 2024 thru March vs. YTD 2023	Orange County	U.S.
	UP 1.6%	UP 6.9%

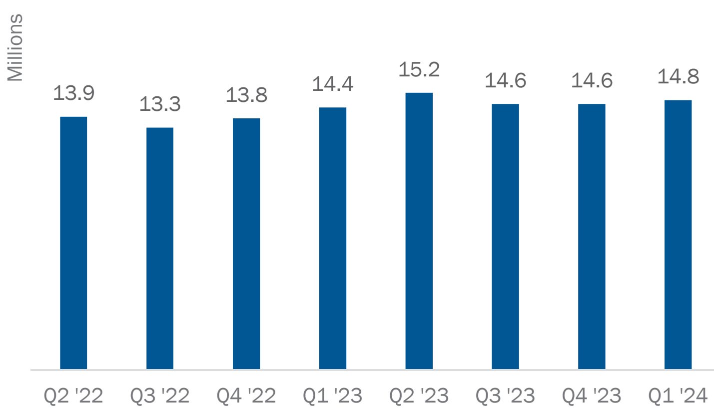
New retail light vehicle registrations in the county increased 1.6% during the first three months of this year vs. year earlier, below the 6.9% improvement in the Nation.

Data sourced from Experian Automotive.

QUARTERLY RESULTS

Orange County Quarterly Registrations

Seasonally Adjusted Annual Rate, Converted to Equivalent U.S. New Vehicle Market SAAR (millions of units)



Data sourced from Experian Automotive. SAAR estimates: Auto Outlook.

The graph on the left provides an easily recognizable way to gauge the strength of the county market. It shows quarterly registrations based on a seasonally adjusted annual rate. These figures are then indexed to SAAR sales figures for the U.S. new vehicle market. So just like in the national market, when the quarterly SAAR is above 17 million units, the county market is strong, 15 million is about average, and below 13 million is weak. Equivalent SAAR levels in the county increased from 14.6 million in the Fourth Quarter of last year to 14.8 million in the First Quarter of this year.

% Change in registrations vs. previous quarter (1Q '24 vs. 4Q '23)

DOWN 0.2%

Orange County Auto Outlook

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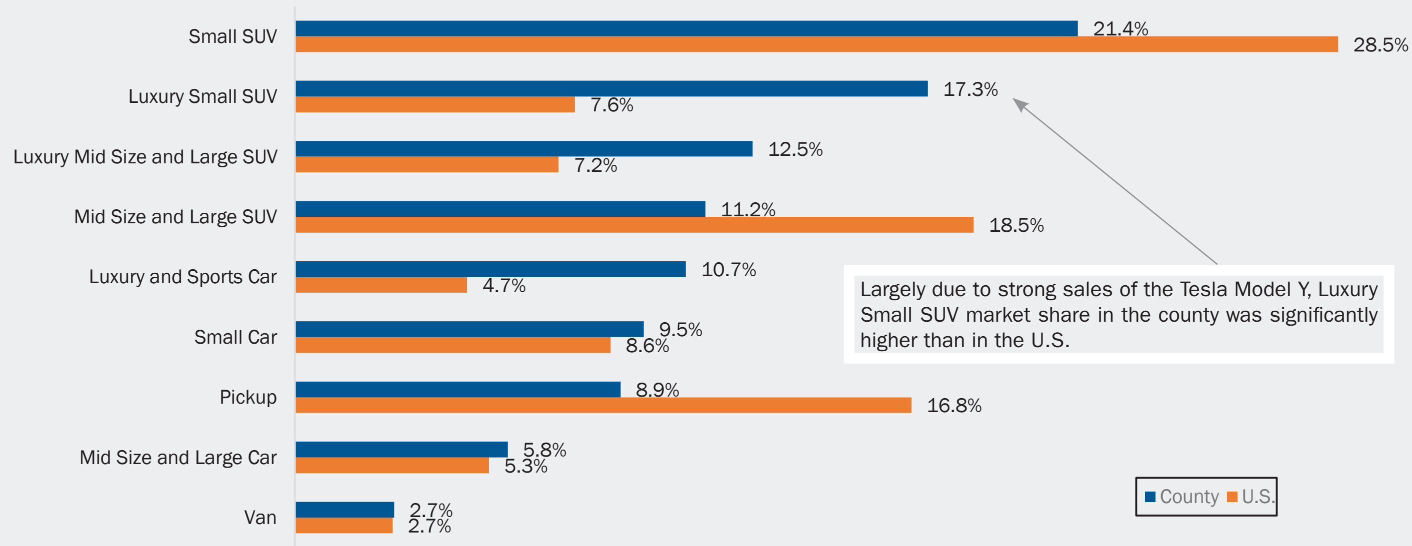
KEY TRENDS IN ORANGE COUNTY NEW VEHICLE MARKET

PRIMARY MARKET SEGMENTS - COUNTY AND U.S.

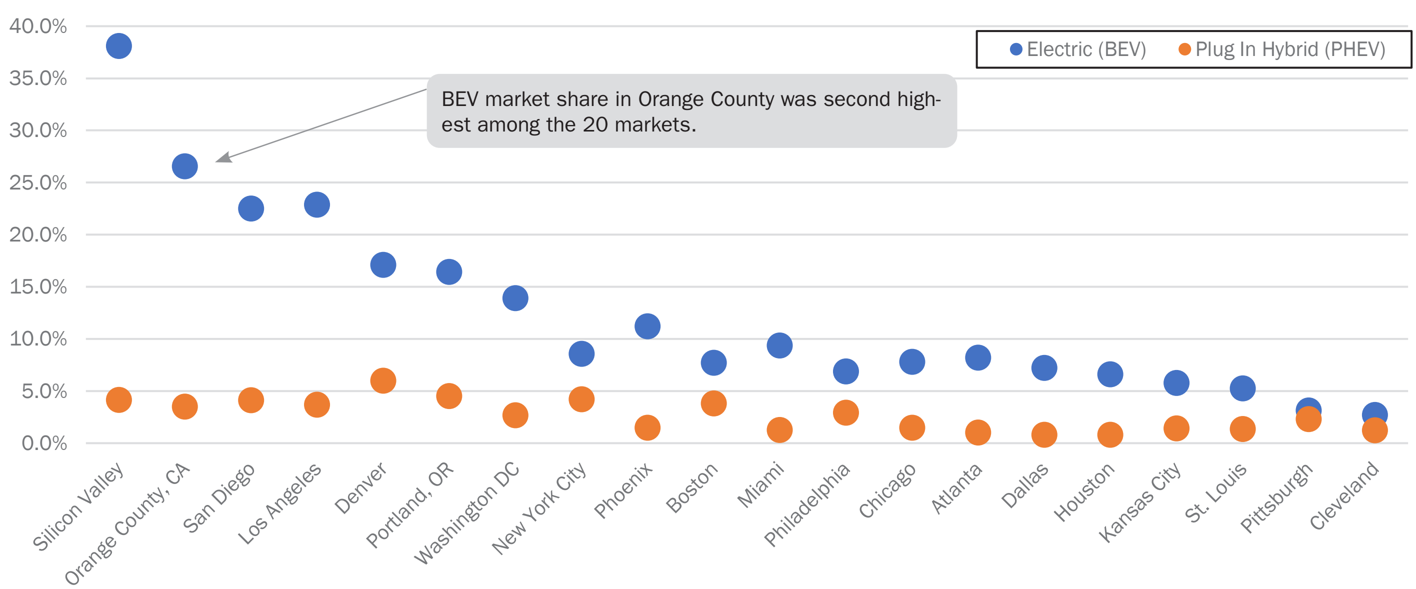
Segment Markets Shares in County and U.S. - YTD 2024 thru March



The graph above shows market shares for nine primary segments in both the county and U.S. markets. County market share is represented by the blue bars. Orange shaded bars show U.S. Data sourced from Experian Automotive.

COMPARISON OF METRO AREA MARKETS

BEV and PHEV Share in Selected Metro Area Markets - YTD 2024 thru March



Markets are shown from left (highest) to right (lowest) based on combined BEV and PHEV market share. Data sourced from Experian Automotive.

BRANDS AND MODELS

TOP SELLING BRANDS IN 7 PRIMARY SEGMENTS

The seven graphs on this page show brand market share in seven key segments during the first three months of 2024 in both the Orange County and U.S. markets. County percent share is depicted by the red bars, U.S. share is light gray. Top ten brands in each segment are ranked from top to bottom based on Orange County share.

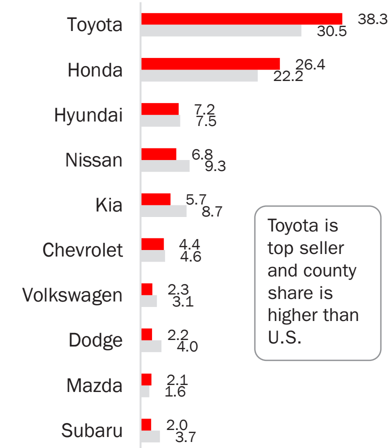
Segments were defined based on model classifications instead of overall brand positioning. For instance, Chevrolet appears on the Luxury and Sports cars graph because of the Corvette. Small SUVs consists of both Sub Compact and Compact models.

Legend for all graphs

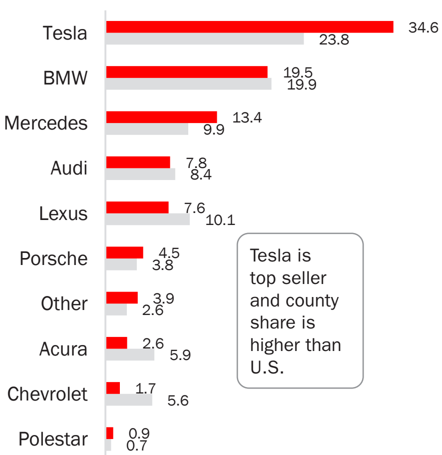
Brand share of segment in Orange county during YTD '24

Brand share of segment in U.S. market during YTD '24

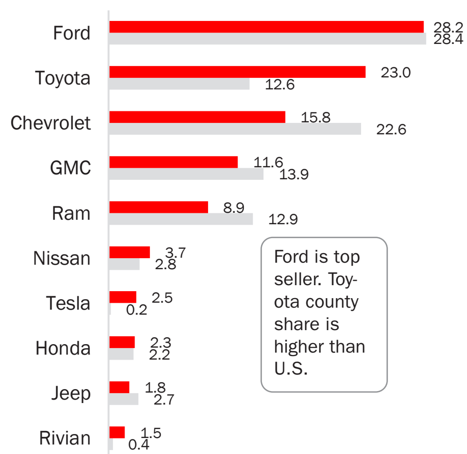
Non Luxury Cars



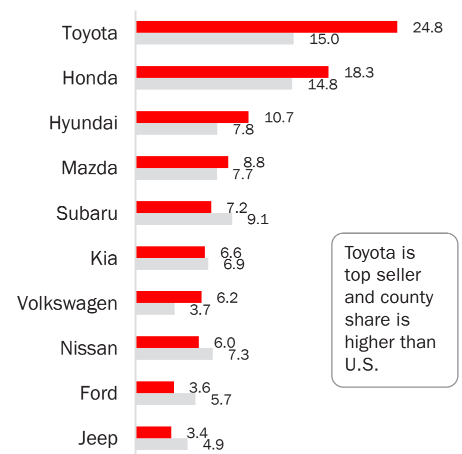
Luxury and Sports Cars



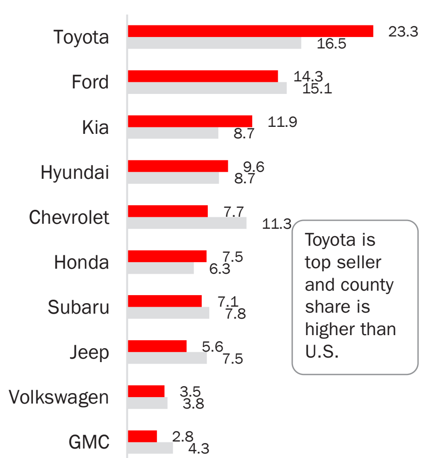
Pickups



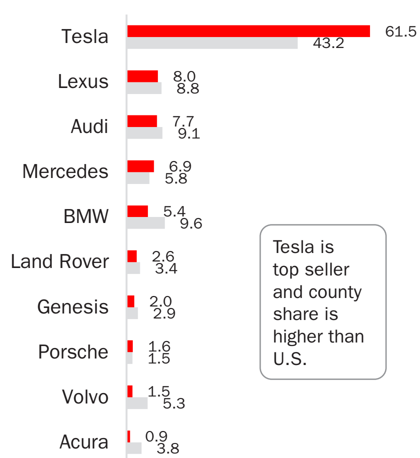
Small Non Luxury SUVs



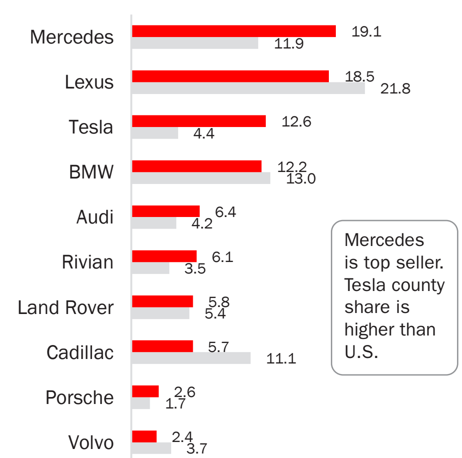
Mid and Full Size Non Luxury SUVs



Small Luxury SUVs



Mid and Full Size Luxury SUVs



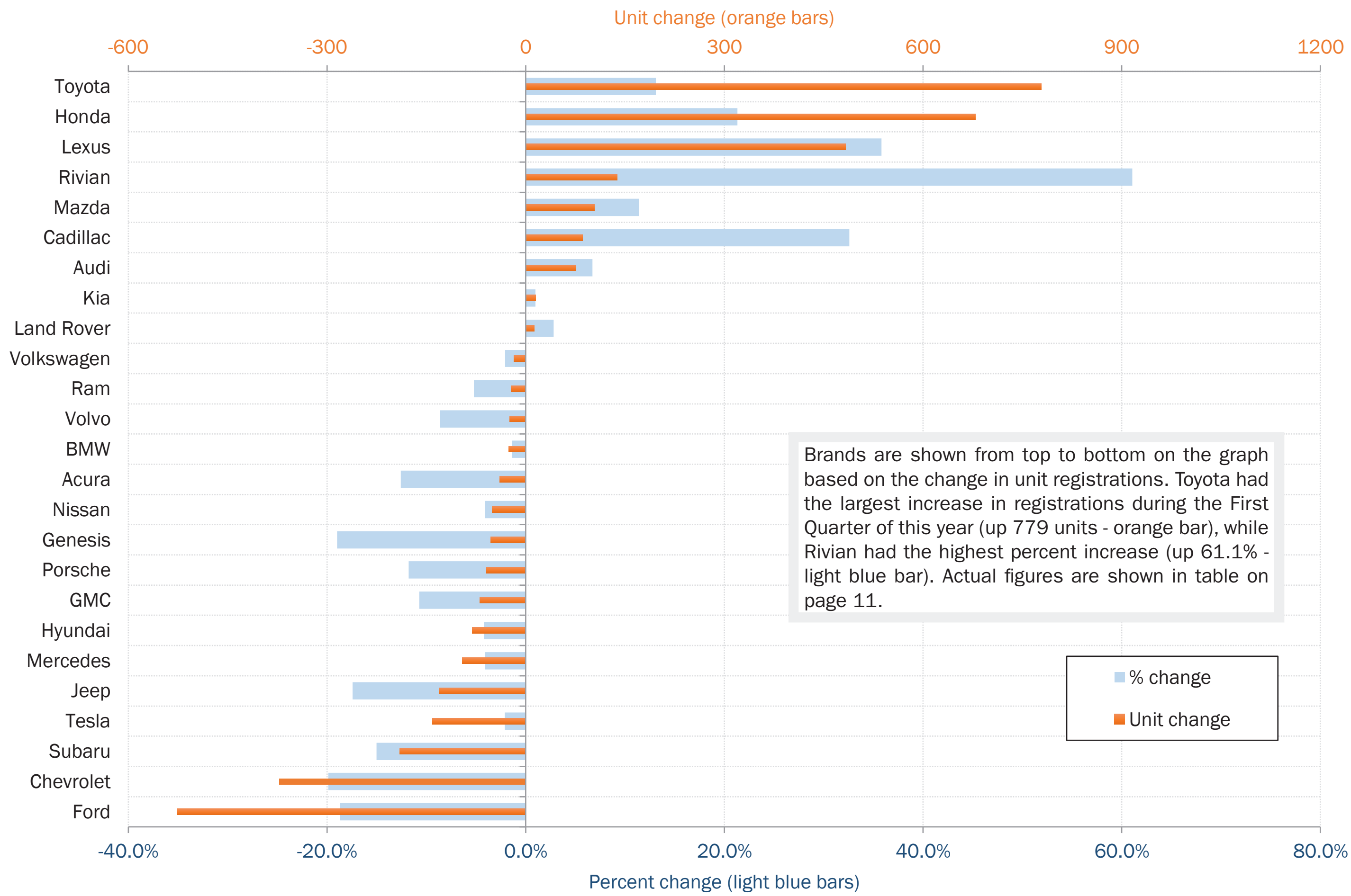
Data sourced from Experian Automotive.

BRANDS AND MODELS

WINNERS AND LOSERS

The graph below shows both the percent and unit change in registrations during the First Quarter of this year versus year earlier. Comparing the percent change in registrations is helpful for establishing the relative change in results, but it can be misleading since it doesn't take into the account the absolute level of registrations. As shown below, Rivian posted a big percentage improvement in the First Quarter (up 61.1%, blue bar) but the unit increase was relatively small (up by 138 units). Toyota's percentage increase was smaller than Rivian (up 13.1%), but the unit total improved by more nearly 800 units.

Percent and Unit Change in New Retail Light Vehicle Registrations for Top 25 Selling Brands - YTD '24 thru Mar. vs. YTD '23



Data sourced from Experian Automotive.

TOP SELLING MODELS

Top 20 Selling Models during YTD '24 thru March - Market Share and % Change in Registrations vs. YTD '23

Rank	Model	Area Share %	% chg. '23 to '24	Rank	Model	Area Share %	% chg. '23 to '24
1	Tesla Model Y	10.6	-1.9	11	Lexus RX	1.3	28.0
2	Toyota RAV4	4.4	44.1	12	Chevrolet Silverado	1.3	6.6
3	Tesla Model 3	3.3	-19.8	13	Honda HR-V	1.3	13.0
4	Toyota Camry	2.8	8.0	14	Lexus NX	1.2	37.7
5	Honda CR-V	2.7	77.1	15	Toyota Tundra	1.1	80.7
6	Honda Civic	2.5	25.1	16	Hyundai Tucson	1.0	-10.8
7	Toyota Corolla	1.9	3.8	17	Mazda CX-5	1.0	4.8
8	Honda Accord	1.6	-9.0	18	Toyota 4Runner	0.9	103.2
9	Tesla Model X	1.6	19.9	19	Toyota Tacoma	0.9	-58.3
10	Ford F-Series	1.5	-19.5	20	Mercedes GLE-Class	0.9	-20.4

Table on the left presents the top 20 selling models in the county during the first three months of this year. Share of industry registrations and the percent change versus the same period a year earlier is also shown. Models with the five largest percentage increase are shaded blue.

Data sourced from Experian Automotive.

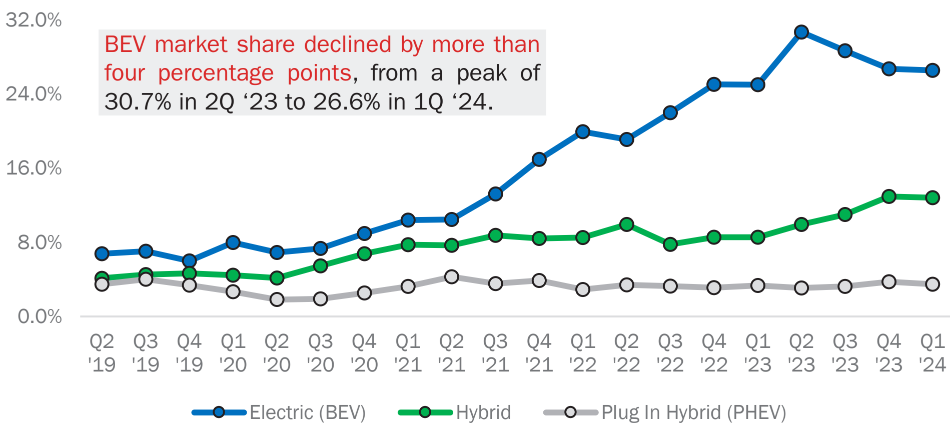
ALTERNATIVE POWERTRAIN MARKET

FIVE KEY TRENDS

1. BEV share increased from 25.0% in 1Q ‘23 to 26.6% in 1Q ‘24.
2. BEV registrations increased by just 1% from 4Q ‘23 to 1Q ‘24.
3. Franchised dealer share of BEV market was 34.1% in 1Q ‘24 vs. 30.1% a year earlier.
4. Hybrid registrations increased 52% so far this year. Plug ins were up 10%.
5. Hybrid registrations were up for each of the top five selling brands.

BEV, PHEV, AND HYBRID MARKET SHARE

Percent Share of Industry Registrations by Powertrain Type



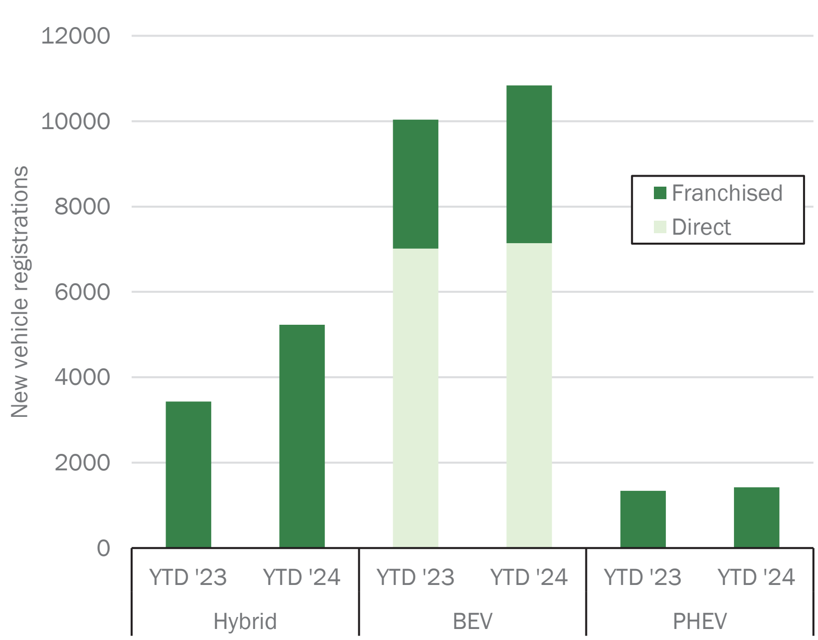
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

YTD thru March	YTD '23	YTD '24	
Electric (BEV)	25.0%	26.6%	↑
Hybrid	8.6%	12.8%	↑
Plug In Hybrid (PHEV)	3.3%	3.5%	↑

Quarterly	4Q '23	1Q '24	
Electric (BEV)	26.7%	26.6%	↓
Hybrid	12.9%	12.8%	↓
Plug In Hybrid (PHEV)	3.8%	3.5%	↓

FRANCHISED DEALERSHIPS AND DIRECT SELLERS

New Hybrid, BEV, and PHEV Registrations in Orange County by Type of Selling Dealership



Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

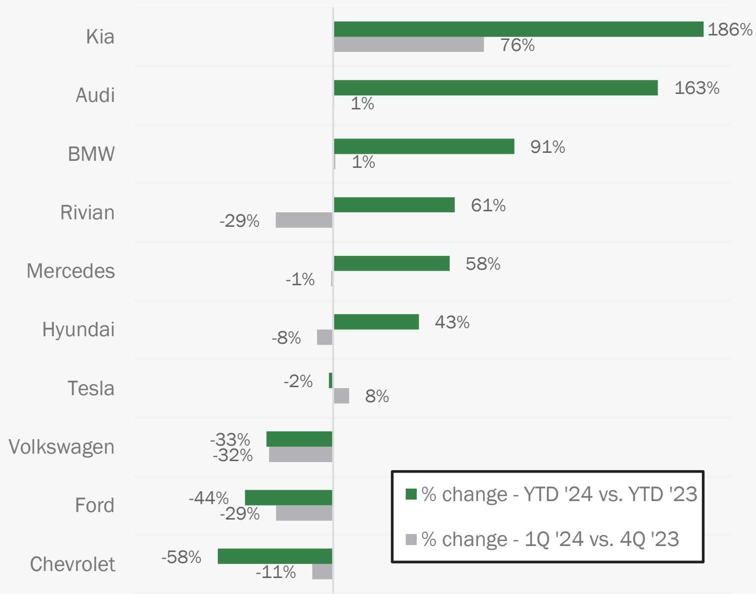
BEV Registrations and Market Share	Franchised Dealerships	Direct Sellers
YTD '23 thru Mar.	3,021	7017
YTD '24 thru Mar.	3,691	7144
% change	22.2%	1.8%
YTD '23 mkt. share %	30.1	69.9
YTD '24 mkt. share %	34.1	65.9
change	4.0	-4.0
4Q '23 registrations	3,899	6,781
1Q '24 registrations	3,691	7,144
% change	-5.3%	5.4%
4Q '23 registrations	36.5	63.5
1Q '24 registrations	34.1	65.9
change	-2.4	2.4

As illustrated on the graph, franchised dealerships accounted for 60% of the combined Hybrid, BEV, and PHEV market. Franchised dealer share of the BEV market increased from 30.1% in 1Q ‘23 to 34.1% in 1Q ‘24.

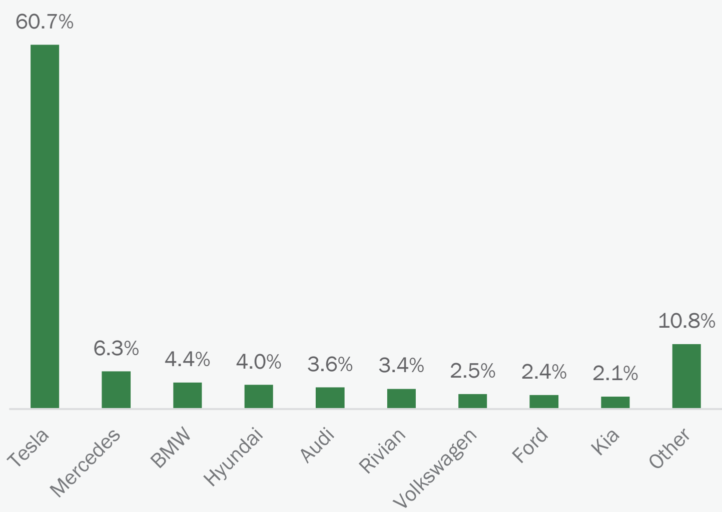
ALTERNATIVE POWERTRAIN MARKET

MAKES AND MODELS

% Change in BEV Registrations for Top 10 Brands YTD '24 thru Mar. vs. YTD '23 and 1Q '24 vs. 4Q '23



Brand Share of Orange County BEV Market (%) YTD '24 thru March



Observations

- Kia had the largest % increase in BEV registrations in the First Quarter of this year versus year earlier (up 186%).
- BEV registrations declined from 4Q '23 to 1Q '24 for six of the top 10 selling brands.
- Tesla share of the BEV market was 60.7% in 1Q '24.

Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

Top Five Brands by type of Powertrain Registrations for YTD '23 and '24 thru March

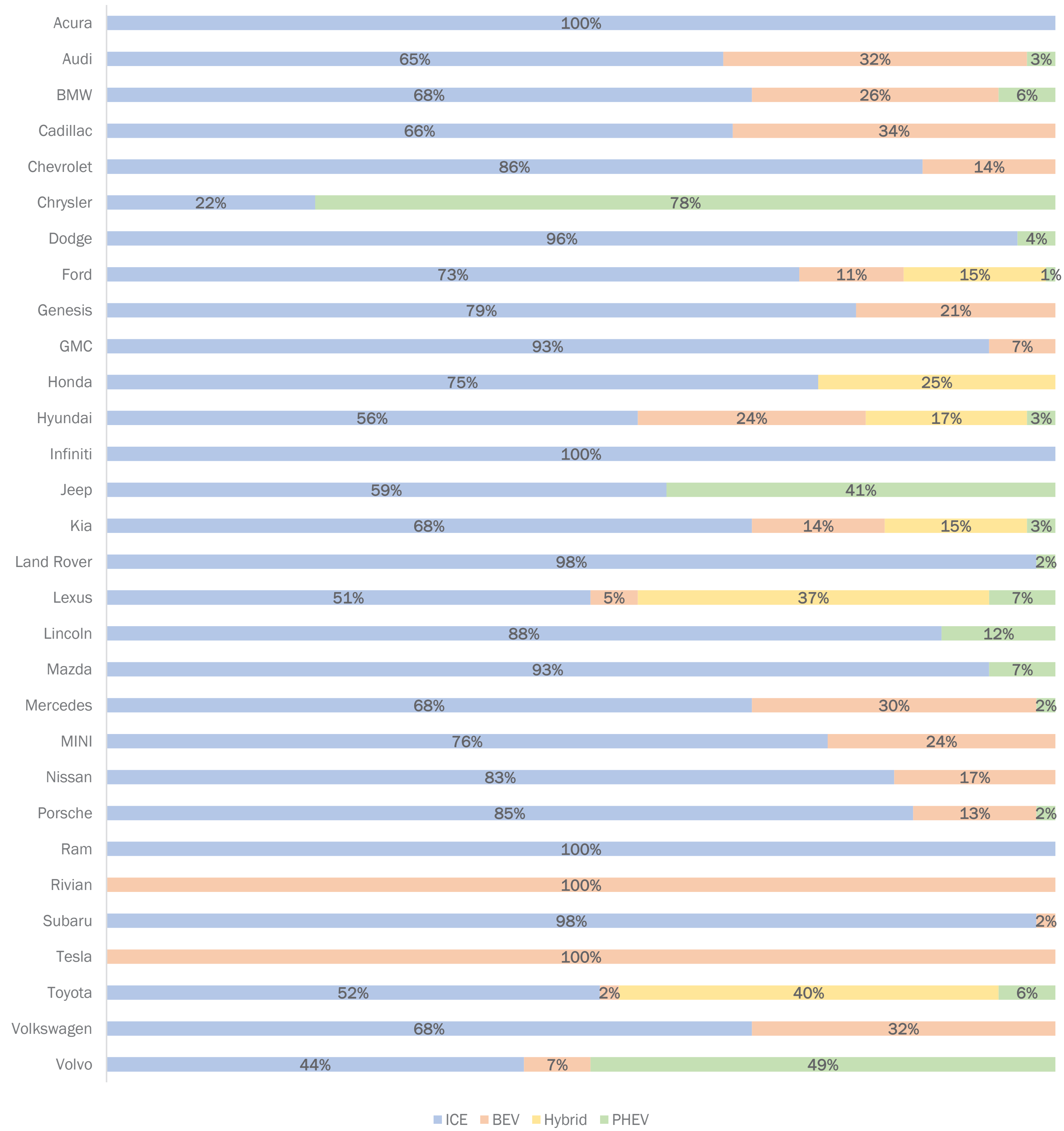
	Rank	Brand	YTD '23 Regs.	YTD '24 Regs.	% chg.	YTD '24 Share
BEV	1	Tesla	6,715	6,574	-2.1%	60.7%
	2	Mercedes	428	678	58.4%	6.3%
	3	BMW	251	479	90.8%	4.4%
	4	Hyundai	305	436	43.0%	4.0%
	5	Audi	148	389	162.8%	3.6%
PHEV	1	Toyota	269	390	45.0%	27.4%
	2	Jeep	265	254	-4.2%	17.8%
	3	Lexus	58	136	134.5%	9.5%
	4	Volvo	112	125	11.6%	8.8%
	5	BMW	329	112	-66.0%	7.9%
HYBRID	1	Toyota	1,490	2,691	80.6%	51.5%
	2	Honda	501	966	92.8%	18.5%
	3	Lexus	485	683	40.8%	13.1%
	4	Ford	264	341	29.2%	6.5%
	5	Hyundai	390	320	-17.9%	6.1%

Market Share for Top 15 Selling BEVs, PHEVs, and Hybrids - YTD '24 thru March

Rank	Model	Type	YTD '24 Share
1	Tesla Model Y	BEV	24.8%
2	Tesla Model 3	BEV	7.6%
3	Toyota RAV4	Hybrid	5.2%
4	Tesla Model X	BEV	3.7%
5	Honda CR-V	Hybrid	3.6%
6	Toyota Corolla	Hybrid	2.1%
7	Honda Accord	Hybrid	2.0%
8	Rivian R1S	BEV	1.8%
9	Lexus NX	Hybrid	1.6%
10	Toyota RAV4	PHEV	1.6%
11	Volkswagen ID.4	BEV	1.5%
12	Toyota Camry	Hybrid	1.5%
13	Hyundai Ioniq 5	BEV	1.5%
14	Toyota Sienna	Hybrid	1.5%
15	Ford Maverick	Hybrid	1.4%

ALTERNATIVE POWERTRAIN MARKET

Share of Brand Registrations by Type of Powertrain - First Quarter 2024 (top 30 brands)



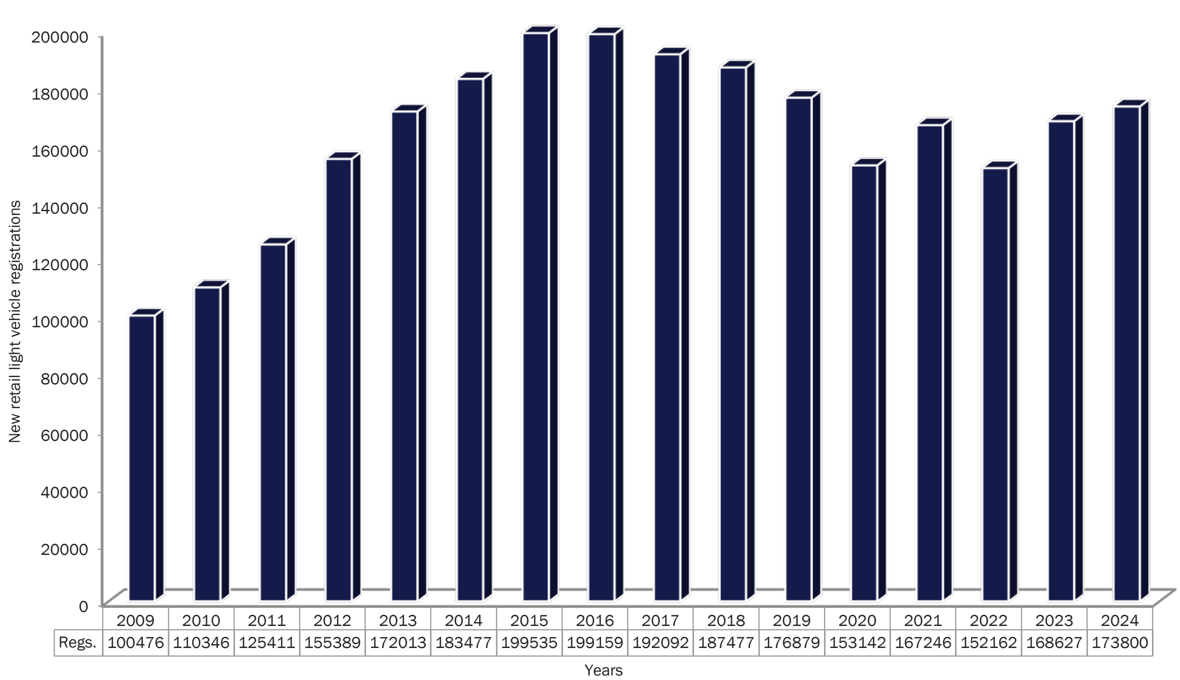
The graph above shows the breakdown of new vehicle registrations by powertrain type for each of the top 30 selling brands in the county during the First Quarter of 2024. Data sourced from Experian Automotive.

LONG TERM TRENDS

New Vehicle Registrations in 2024 Should Approach 2019 Levels

The graph below provides a long term perspective of new vehicle registrations in the Orange County market. The table below shows key trends.

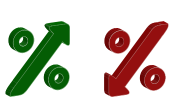
County New Retail Light Vehicle Registrations - 2009 thru 2023, 2024 Forecast



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Regs.	100476	110346	125411	155389	172013	183477	199535	199159	192092	187477	176879	153142	167246	152162	168627	173800

County market improved in 2023 as supply chain issues eased. Registrations reached 168,627 units last year and increased by 10.8% from 2022. Auto Outlook is predicting a 3.1% increase this year.

Key Trends in Orange County Market - 2018 to 2023

		2018	2023	Change
	Light truck market share	55.4%	70.3%	UP 14.9 points
	Domestic brand market share	25.6%	35.6%	UP 10.0 points
	Area new retail vehicle registrations	187,477	168,627	DOWN 10.1%
	U.S. new retail vehicle registrations	13,846,381	12,364,280	DOWN 10.7%
	Battery electric vehicle market share	5.6%	27.9%	UP 22.3 points

Data sourced from Experian Automotive.

COMPARISON OF ORANGE COUNTY AND U.S. MARKET

Orange County and U.S. Markets Increased in 1Q '24

	Orange County Retail Market	U.S. Retail Market
% change in registrations YTD '24 thru March vs. YTD '23	1.6%	6.9%
Car share of industry retail light vehicle market YTD '24 thru March	26.0%	18.6%
Domestic brand market share YTD '24 thru March	32.3%	38.7%

	New Retail Registrations - YTD 2024 thru March				Market Share (YTD '24 thru March)		
	Orange County		U.S.				
Brand	Regs.	% ch. vs. YTD '23	Regs.	% ch. vs. YTD '23	Orange County	U.S.	Variance
Acura	271	-12.6%	27,835	2.2%	0.7	0.9	-0.2
Alfa Romeo	33	-10.8%	2,400	22.4%	0.1	0.1	0.0
Audi	1,206	6.7%	41,852	6.7%	3.0	1.4	1.6
BMW	1,851	-1.4%	78,457	2.9%	4.5	2.6	1.9
Buick	47	-11.3%	35,121	20.4%	0.1	1.2	-1.1
Cadillac	350	32.6%	32,343	10.0%	0.9	1.1	-0.2
Chevrolet	1,499	-19.9%	305,189	3.6%	3.7	10.2	-6.5
Chry Dodge Jeep Ram	1,250	-12.3%	200,993	-6.1%	3.1	6.7	-3.6
Chrysler	65	-25.3%	8,803	-14.6%	0.2	0.3	-0.1
Dodge	164	-0.6%	23,918	6.0%	0.4	0.8	-0.4
Jeep	621	-17.4%	97,759	-12.8%	1.5	3.3	-1.8
Ram	400	-5.2%	70,513	2.1%	1.0	2.3	-1.3
Ford	2,283	-18.7%	305,236	0.5%	5.6	10.2	-4.6
Genesis	226	-19.0%	13,410	1.5%	0.6	0.4	0.2
GMC	576	-10.7%	108,611	-3.4%	1.4	3.6	-2.2
Honda	3,863	21.3%	283,050	25.4%	9.5	9.4	0.1
Hyundai	1,847	-4.2%	153,059	-2.4%	4.5	5.1	-0.6
Infiniti	144	27.4%	12,196	-2.8%	0.4	0.4	0.0
Jaguar	40	42.9%	1,791	-8.9%	0.1	0.1	0.0
Kia	1,556	1.0%	152,879	-3.7%	3.8	5.1	-1.3
Land Rover	476	2.8%	19,500	12.8%	1.2	0.6	0.6
Lexus	1,832	35.8%	81,898	38.1%	4.5	2.7	1.8
Lincoln	122	-5.4%	20,503	18.9%	0.3	0.7	-0.4
Maserati	42	55.6%	1,567	13.1%	0.1	0.1	0.0
Mazda	1,016	11.4%	81,594	22.4%	2.5	2.7	-0.2
Mercedes	2,244	-4.1%	60,747	-1.3%	5.5	2.0	3.5
MINI	103	-9.6%	7,421	5.1%	0.3	0.2	0.1
Mitsubishi	40	-16.7%	17,091	-6.6%	0.1	0.6	-0.5
Nissan	1,197	-4.1%	136,913	1.6%	2.9	4.6	-1.7
Polestar	41	105.0%	961	16.1%	0.1	0.0	0.1
Porsche	442	-11.8%	12,505	-21.6%	1.1	0.4	0.7
Rivian	364	61.1%	9,661	50.8%	0.9	0.3	0.6
Subaru	1,075	-15.0%	137,246	2.8%	2.6	4.6	-2.0
Tesla	6,574	-2.1%	143,483	8.5%	16.1	4.8	11.3
Toyota	6,721	13.1%	423,966	17.9%	16.5	14.1	2.4
Volkswagen	848	-2.1%	66,037	18.4%	2.1	2.2	-0.1
Volvo	255	-8.6%	23,127	4.8%	0.6	0.8	-0.2
Other	369	81.8%	7,866	61.0%	0.9	0.3	0.6

The two tables above provide a comparison of the Orange County and U.S. new light vehicle markets. Data sourced from Experian Automotive.

Orange County New Retail Car and Light Truck Registrations	March			YTD thru March			YTD Market Share (%)		
	2023	2024	% chg.	YTD '23	YTD '24	% chg.	YTD '23	YTD '24	Chg.
MARKET SUMMARY									
TOTAL	12,064	11,682	-3.2%	40,142	40,803	1.6%			
Cars	3,444	2,936	-14.8%	11,621	10,617	-8.6%	29.0	26.0	-2.9
Light Trucks	8,620	8,746	1.5%	28,521	30,186	5.8%	71.1	74.0	2.9
Domestic	4,105	3,584	-12.7%	14,215	13,194	-7.2%	35.4	32.3	-3.1
European	2,244	2,012	-10.3%	7,808	7,744	-0.8%	19.5	19.0	-0.5
Japanese	4,537	4,920	8.4%	14,371	16,159	12.4%	35.8	39.6	3.8
Korean	1,178	1,166	-1.0%	3,748	3,706	-1.1%	9.3	9.1	-0.3
BRAND REGISTRATIONS									
Acura	127	73	-42.5%	310	271	-12.6%	0.8	0.7	-0.1
Alfa Romeo	17	14	-17.6%	37	33	-10.8%	0.1	0.1	0.0
Audi	404	360	-10.9%	1,130	1,206	6.7%	2.8	3.0	0.2
BMW	465	456	-1.9%	1,877	1,851	-1.4%	4.7	4.5	-0.2
Buick	16	17	6.3%	53	47	-11.3%	0.1	0.1	0.0
Cadillac	72	142	97.2%	264	350	32.6%	0.7	0.9	0.2
Chevrolet	505	416	-17.6%	1,871	1,499	-19.9%	4.7	3.7	-1.0
C/D/J/R	471	352	-25.3%	1,426	1,250	-12.3%	3.6	3.1	-0.5
Chrysler	18	17	-5.6%	87	65	-25.3%	0.2	0.2	0.0
Dodge	58	58	0.0%	165	164	-0.6%	0.4	0.4	0.0
Jeep	242	188	-22.3%	752	621	-17.4%	1.9	1.5	-0.4
Ram	153	89	-41.8%	422	400	-5.2%	1.1	1.0	-0.1
Ford	832	729	-12.4%	2,809	2,283	-18.7%	7.0	5.6	-1.4
Genesis	81	53	-34.6%	279	226	-19.0%	0.7	0.6	-0.1
GMC	181	173	-4.4%	645	576	-10.7%	1.6	1.4	-0.2
Honda	1,051	1,231	17.1%	3,184	3,863	21.3%	7.9	9.5	1.6
Hyundai	586	620	5.8%	1,928	1,847	-4.2%	4.8	4.5	-0.3
Infiniti	31	52	67.7%	113	144	27.4%	0.3	0.4	0.1
Jaguar	8	10	25.0%	28	40	42.9%	0.1	0.1	0.0
Kia	511	445	-12.9%	1,541	1,556	1.0%	3.8	3.8	0.0
Land Rover	119	121	1.7%	463	476	2.8%	1.2	1.2	0.0
Lexus	501	465	-7.2%	1,349	1,832	35.8%	3.4	4.5	1.1
Lincoln	29	44	51.7%	129	122	-5.4%	0.3	0.3	0.0
Maserati	11	17	54.5%	27	42	55.6%	0.1	0.1	0.0
Mazda	279	284	1.8%	912	1,016	11.4%	2.3	2.5	0.2
Mercedes	636	573	-9.9%	2,340	2,244	-4.1%	5.8	5.5	-0.3
MINI	27	28	3.7%	114	103	-9.6%	0.3	0.3	0.0
Mitsubishi	15	11	-26.7%	48	40	-16.7%	0.1	0.1	0.0
Nissan	441	425	-3.6%	1,248	1,197	-4.1%	3.1	2.9	-0.2
Polestar	7	9	28.6%	20	41	105.0%	0.0	0.1	0.1
Porsche	148	83	-43.9%	501	442	-11.8%	1.2	1.1	-0.1
Rivian	77	71	-7.8%	226	364	61.1%	0.6	0.9	0.3
Subaru	374	350	-6.4%	1,265	1,075	-15.0%	3.2	2.6	-0.6
Tesla	1,910	1,615	-15.4%	6,715	6,574	-2.1%	16.7	16.1	-0.6
Toyota	1,718	2,029	18.1%	5,942	6,721	13.1%	14.8	16.5	1.7
Volkswagen	272	230	-15.4%	866	848	-2.1%	2.2	2.1	-0.1
Volvo	91	58	-36.3%	279	255	-8.6%	0.7	0.6	-0.1
Other	51	126	147.1%	203	369	81.8%	0.5	0.9	0.4

Other includes Aston Martin, Bentley, Ferrari, Freightliner, GEM, Lamborghini, Lotus, Lucid, McLaren, and Rolls Royce.

Orange County Auto Outlook

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Explanation of Data

Data presented in Auto Outlook measures new vehicle registrations in Orange County. Monthly recording of registrations occurs when vehicle title information is processed.

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