

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru April 2014

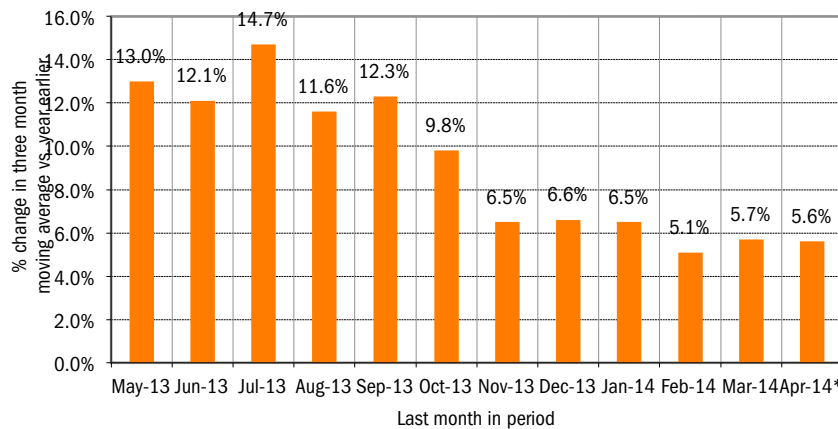
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru April*			YTD Market Share (thru April)*		
	3/13 & 4/13	3/14 & 4/14*	% change	2013	2014*	% change	2013	2014*	change
	Industry Total	23,263	24,813	6.7%	43,011	45,742	6.3%		
Cars	14,621	14,993	2.5%	26,694	27,274	2.2%	62.1	59.6	-2.5
Light Trucks	8,642	9,820	13.6%	16,317	18,468	13.2%	37.9	40.4	2.5
Japanese Brands	11,862	12,761	7.6%	21,564	23,484	8.9%	50.1	51.3	1.2
Toyota	5,312	5,760	8.4%	9,777	10,790	10.4%	22.7	23.6	0.9
Honda	3,100	2,945	-5.0%	5,441	5,327	-2.1%	12.7	11.6	-1.1
Nissan	2,155	2,446	13.5%	3,990	4,436	11.2%	9.3	9.7	0.4
Other	1,295	1,610	24.3%	2,356	2,931	24.4%	5.5	6.4	0.9
Domestic Brands	5,863	6,164	5.1%	11,040	11,599	5.1%	25.7	25.4	-0.3
General Motors	1,662	1,782	7.2%	3,096	3,228	4.3%	7.2	7.1	-0.1
Ford	2,722	2,600	-4.5%	5,319	5,148	-3.2%	12.4	11.3	-1.1
Chrysler	1,349	1,649	22.2%	2,424	3,065	26.4%	5.6	6.7	1.1
Other	130	133	2.3%	201	158	-21.4%	0.5	0.3	-0.2
European Brands	3,610	3,836	6.3%	6,792	7,118	4.8%	15.8	15.6	-0.2
Volkswagen	1,413	1,467	3.8%	2,648	2,697	1.9%	6.2	5.9	-0.3
BMW	1,084	1,134	4.6%	2,028	2,013	-0.7%	4.7	4.4	-0.3
Mercedes	614	674	9.8%	1,162	1,313	13.0%	2.7	2.9	0.2
Other	499	561	12.4%	954	1,095	14.8%	2.2	2.4	0.2
Korean Brands	1,928	2,052	6.4%	3,615	3,541	-2.0%	8.4	7.7	-0.7

Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, Subaru, and Suzuki). European: VW (Audi, Bentley, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz), Other (Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.

*Figures for April 2014 were estimated by Auto Outlook. Data Source: Polk.

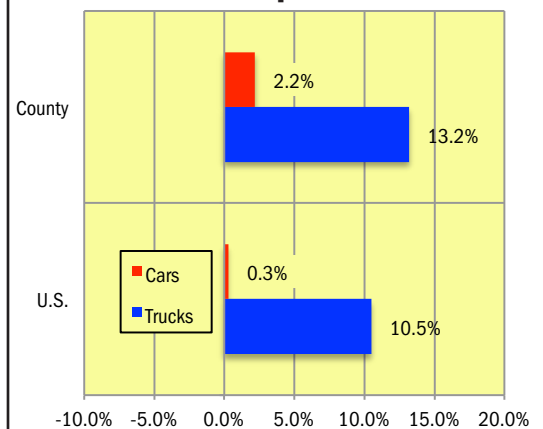
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



The graph above provides a clear picture of the trending direction of the county market. It shows the year-over-year percent change in the three month moving average of new retail light vehicle registrations. The three month moving average is less erratic than monthly registrations, which can fluctuate due to such factors as the timing of manufacturer incentive programs, weather and title processing delays by governmental agencies.

*Figures for April 2014 were estimated by Auto Outlook. Data Source: Polk.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru April* vs. YTD '13



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets.

*Figures for April 2014 were estimated by Auto Outlook.

Data Source: Polk.

Data Information

All data represents new vehicle retail registrations in San Diego County and excludes fleet and wholesale transactions. Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental agencies. For this reason, the year-to-date figures will typically be more reflective of market results.

Data Source: Polk.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '13 thru Apr	YTD '14 thru Apr*	% change	YTD '13 thru Apr	YTD '14 thru Apr*
TOTAL	43,011	45,742	6%		
Acura	565	612	8%	1.3%	1.3%
Audi	629	694	10%	1.5%	1.5%
BMW	1,652	1,681	2%	3.8%	3.7%
Buick	202	189	-6%	0.5%	0.4%
Cadillac	353	338	-4%	0.8%	0.7%
Chevrolet	2,128	2,238	5%	4.9%	4.9%
Chrysler	216	126	-42%	0.5%	0.3%
Dodge	830	786	-5%	1.9%	1.7%
FIAT	314	408	30%	0.7%	0.9%
Ford	5,140	4,971	-3%	12.0%	10.9%
GMC	413	461	12%	1.0%	1.0%
Honda	4,876	4,714	-3%	11.3%	10.3%
Hyundai	1,795	1,734	-3%	4.2%	3.8%
Infiniti	416	409	-2%	1.0%	0.9%
Jaguar	58	81	40%	0.1%	0.2%
Jeep	1,040	1,645	58%	2.4%	3.6%
Kia	1,820	1,806	-1%	4.2%	3.9%
Land Rover	317	325	3%	0.7%	0.7%
Lexus	1,248	1,651	32%	2.9%	3.6%
Lincoln	179	176	-2%	0.4%	0.4%
Mazda	1,157	1,390	20%	2.7%	3.0%
Mercedes	1,119	1,239	11%	2.6%	2.7%
MINI	376	332	-12%	0.9%	0.7%
Mitsubishi	160	193	21%	0.4%	0.4%
Nissan	3,574	4,027	13%	8.3%	8.8%
Other	125	212	70%	0.3%	0.5%
Porsche	218	252	16%	0.5%	0.6%
Ram	338	507	50%	0.8%	1.1%
Subaru	1,034	1,325	28%	2.4%	2.9%
Tesla	182	145	-20%	0.4%	0.3%
Toyota	8,529	9,138	7%	19.8%	20.0%
Volkswagen	1,801	1,751	-3%	4.2%	3.8%
Volvo	207	186	-10%	0.5%	0.4%

Top ten ranked brands in each percent change category are shaded green.

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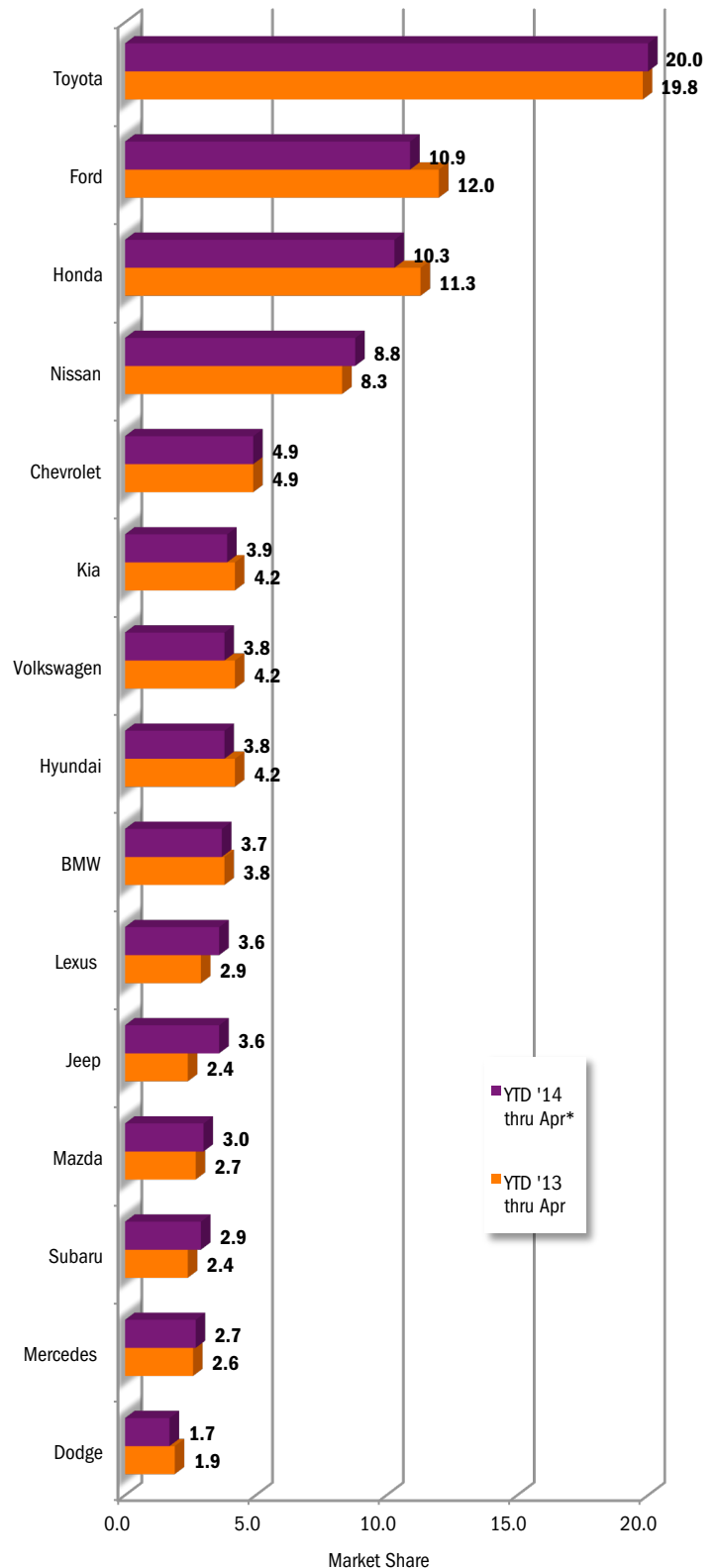
Source: Polk

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County Market Share for Top 15 Selling Brands
YTD '14 thru April* vs. YTD '13



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Source: Polk.