

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru August 2014

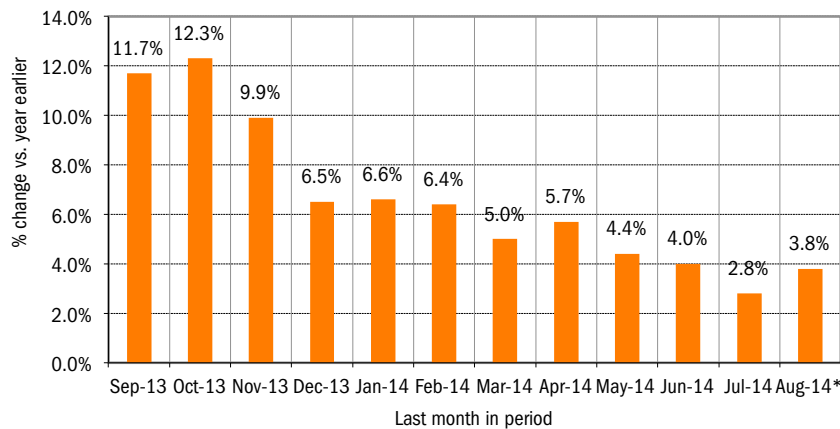
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Aug.*			YTD Market Share (thru Aug.)*		
	7/13 & 8/13	7/14 & 8/14*	% change	2013	2014	% change	2013	2014	change
	Industry Total	25,459	26,807	5.3%	93,412	97,574	4.5%		
Cars	15,570	16,014	2.9%	57,640	58,464	1.4%	61.7	59.9	-1.8
Light Trucks	9,889	10,793	9.1%	35,772	39,110	9.3%	38.3	40.1	1.8
Japanese Brands	13,362	14,313	7.1%	47,465	50,791	7.0%	50.8	52.1	1.3
Toyota	6,127	6,559	7.1%	21,535	23,110	7.3%	23.1	23.7	0.6
Honda	3,518	3,523	0.1%	12,136	11,860	-2.3%	13.0	12.2	-0.8
Nissan	2,261	2,494	10.3%	8,551	9,494	11.0%	9.2	9.7	0.5
Other	1,456	1,737	19.3%	5,243	6,327	20.7%	5.6	6.5	0.9
Domestic Brands	6,120	6,386	4.3%	23,715	24,248	2.2%	25.4	24.9	-0.5
General Motors	1,769	1,717	-2.9%	6,667	6,642	-0.4%	7.1	6.8	-0.3
Ford	2,861	2,858	-0.1%	11,259	10,938	-2.9%	12.1	11.2	-0.9
Chrysler	1,397	1,681	20.3%	5,311	6,333	19.2%	5.7	6.5	0.8
Other	93	130	39.8%	478	335	-29.9%	0.5	0.3	-0.2
European Brands	4,057	4,159	2.5%	14,801	15,140	2.3%	15.8	15.5	-0.3
Volkswagen	1,639	1,645	0.4%	5,902	5,745	-2.7%	6.3	5.9	-0.4
BMW	1,156	1,150	-0.5%	4,306	4,289	-0.4%	4.6	4.4	-0.2
Mercedes	683	788	15.4%	2,540	2,877	13.3%	2.7	2.9	0.2
Other	579	576	-0.5%	2,053	2,229	8.6%	2.2	2.3	0.1
Korean Brands	1,920	1,949	1.5%	7,431	7,395	-0.5%	8.0	7.6	-0.4

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, and Subaru). European: VW (Audi, Bentley, Porsche, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz and smart), Other (Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.

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

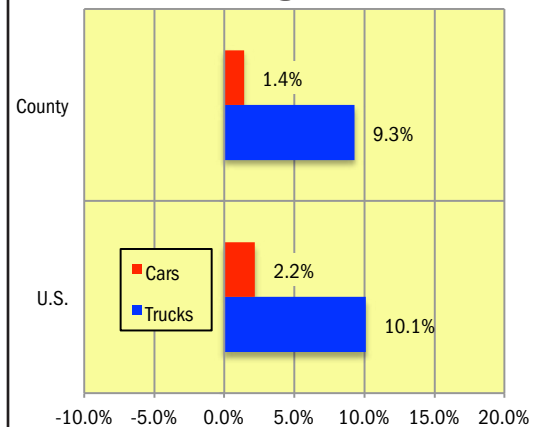
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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 August 2014 were estimated by Auto Outlook. Data Source: Polk.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru August* 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 August 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 Aug	YTD '14 thru Aug*	% change	YTD '13 thru Aug	YTD '14 thru Aug*
TOTAL	93,412	97,574	4%		
Acura	1,207	1,181	-2%	1.3%	1.2%
Audi	1,346	1,543	15%	1.4%	1.6%
BMW	3,506	3,641	4%	3.8%	3.7%
Buick	400	327	-18%	0.4%	0.3%
Cadillac	714	649	-9%	0.8%	0.7%
Chevrolet	4,647	4,805	3%	5.0%	4.9%
Chrysler	440	344	-22%	0.5%	0.4%
Dodge	1,753	1,530	-13%	1.9%	1.6%
FIAT	722	847	17%	0.8%	0.9%
Ford	10,895	10,600	-3%	11.7%	10.9%
GMC	906	955	5%	1.0%	1.0%
Honda	10,929	10,653	-3%	11.7%	10.9%
Hyundai	3,629	3,726	3%	3.9%	3.8%
Infiniti	888	808	-9%	1.0%	0.8%
Jaguar	138	165	20%	0.1%	0.2%
Jeep	2,401	3,348	39%	2.6%	3.4%
Kia	3,802	3,667	-4%	4.1%	3.8%
Land Rover	595	580	-3%	0.6%	0.6%
Lexus	2,937	3,579	22%	3.1%	3.7%
Lincoln	364	362	-1%	0.4%	0.4%
Mazda	2,643	3,032	15%	2.8%	3.1%
Mercedes	2,437	2,717	11%	2.6%	2.8%
MINI	800	648	-19%	0.9%	0.7%
Mitsubishi	333	360	8%	0.4%	0.4%
Nissan	7,663	8,676	13%	8.2%	8.9%
Other	272	420	54%	0.3%	0.4%
Porsche	446	479	7%	0.5%	0.5%
Ram	717	1,050	46%	0.8%	1.1%
Subaru	2,261	2,917	29%	2.4%	3.0%
Tesla	444	339	-24%	0.5%	0.3%
Toyota	18,598	19,541	5%	19.9%	20.0%
Volkswagen	4,110	3,695	-10%	4.4%	3.8%
Volvo	469	390	-17%	0.5%	0.4%

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

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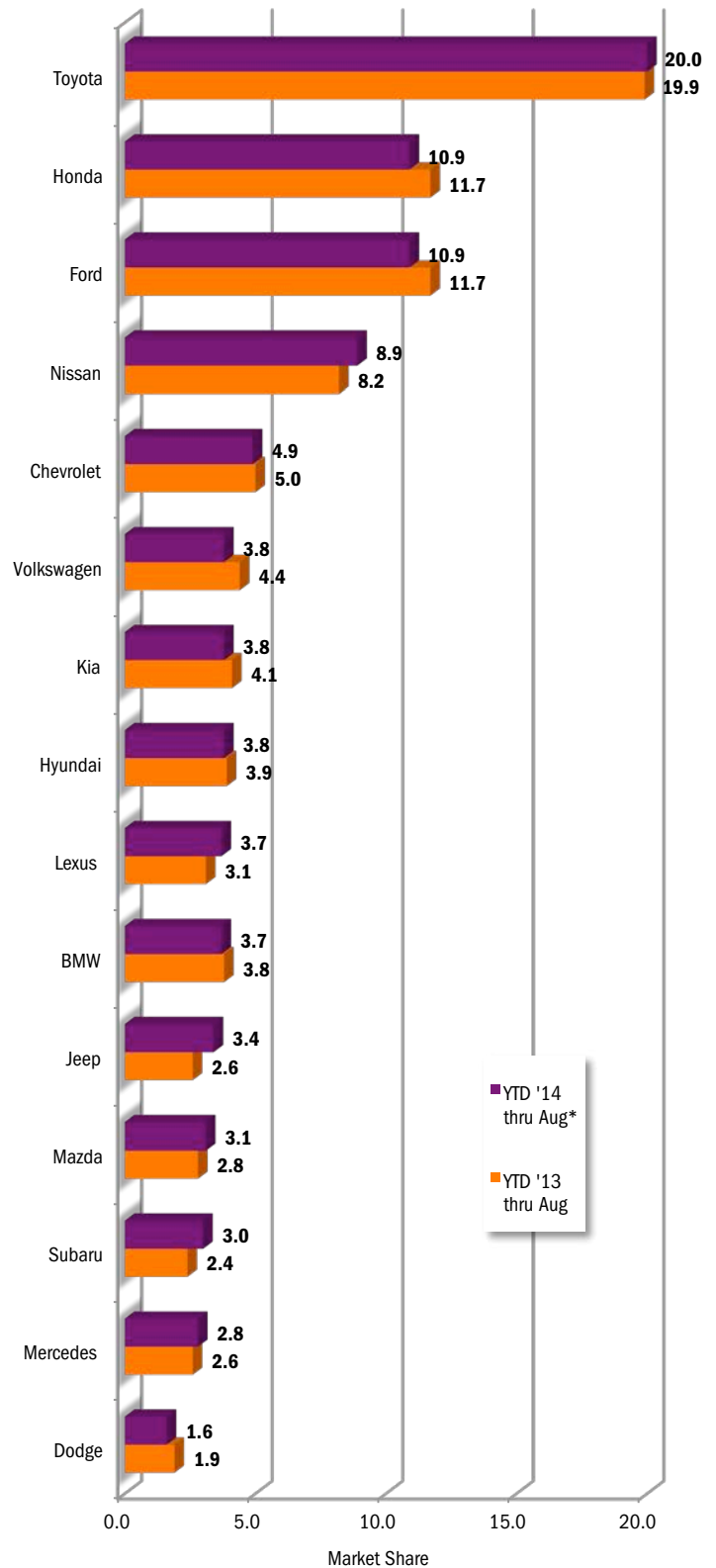
Source: Polk

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



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Source: Polk.