

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru July 2014

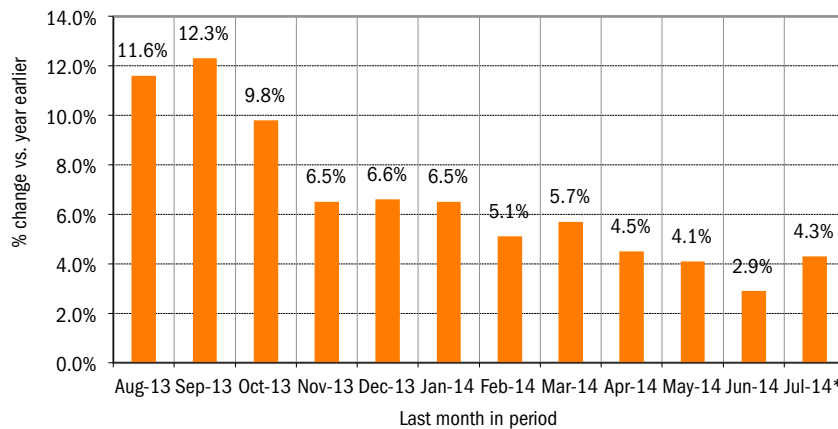
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru July*			YTD Market Share (thru July)*		
	6/13 & 7/13	6/14 & 7/14*	% change	2013	2014	% change	2013	2014	change
	Industry Total	23,703	24,997	5.5%	80,334	84,324	5.0%		
Cars	14,570	14,926	2.4%	49,677	50,525	1.7%	61.8	59.9	-1.9
Light Trucks	9,133	10,071	10.3%	30,657	33,799	10.2%	38.2	40.1	1.9
Japanese Brands	12,085	12,848	6.3%	40,476	43,425	7.3%	50.4	51.5	1.1
Toyota	5,451	5,856	7.4%	18,308	19,766	8.0%	22.8	23.4	0.6
Honda	3,118	2,841	-8.9%	10,227	9,917	-3.0%	12.7	11.8	-0.9
Nissan	2,111	2,420	14.6%	7,416	8,242	11.1%	9.2	9.8	0.6
Other	1,405	1,731	23.2%	4,525	5,500	21.5%	5.6	6.5	0.9
Domestic Brands	6,011	6,356	5.7%	20,692	21,431	3.6%	25.8	25.4	-0.4
General Motors	1,715	1,768	3.1%	5,775	5,901	2.2%	7.2	7.0	-0.2
Ford	2,716	2,790	2.7%	9,874	9,716	-1.6%	12.3	11.5	-0.8
Chrysler	1,445	1,734	20.0%	4,626	5,569	20.4%	5.8	6.6	0.8
Other	135	64	-52.6%	417	245	-41.2%	0.5	0.3	-0.2
European Brands	3,790	3,886	2.5%	12,687	13,025	2.7%	15.8	15.4	-0.4
Volkswagen	1,480	1,358	-8.2%	5,003	4,821	-3.6%	6.2	5.7	-0.5
BMW	1,136	1,216	7.0%	3,745	3,780	0.9%	4.7	4.5	-0.2
Mercedes	627	707	12.8%	2,163	2,449	13.2%	2.7	2.9	0.2
Other	547	605	10.6%	1,776	1,975	11.2%	2.2	2.3	0.1
Korean Brands	1,817	1,907	5.0%	6,479	6,443	-0.6%	8.1	7.6	-0.5

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

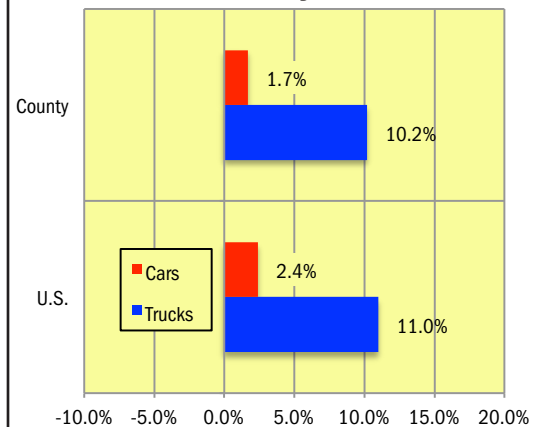
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru July* 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 July 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 July	YTD '14 thru July*	% change	YTD '13 thru July	YTD '14 thru July*
TOTAL	80,334	84,324	5%		
Acura	1,005	999	-1%	1.3%	1.2%
Audi	1,147	1,289	12%	1.4%	1.5%
BMW	3,049	3,196	5%	3.8%	3.8%
Buick	352	292	-17%	0.4%	0.3%
Cadillac	617	589	-5%	0.8%	0.7%
Chevrolet	4,016	4,181	4%	5.0%	5.0%
Chrysler	400	326	-19%	0.5%	0.4%
Dodge	1,546	1,378	-11%	1.9%	1.6%
FIAT	633	799	26%	0.8%	0.9%
Ford	9,562	9,410	-2%	11.9%	11.2%
GMC	790	830	5%	1.0%	1.0%
Honda	9,222	8,892	-4%	11.5%	10.5%
Hyundai	3,155	3,188	1%	3.9%	3.8%
Infiniti	738	737	0%	0.9%	0.9%
Jaguar	109	153	40%	0.1%	0.2%
Jeep	2,064	2,945	43%	2.6%	3.5%
Kia	3,324	3,271	-2%	4.1%	3.9%
Land Rover	513	505	-2%	0.6%	0.6%
Lexus	2,438	3,019	24%	3.0%	3.6%
Lincoln	312	315	1%	0.4%	0.4%
Mazda	2,254	2,587	15%	2.8%	3.1%
Mercedes	2,075	2,314	12%	2.6%	2.7%
MINI	696	582	-16%	0.9%	0.7%
Mitsubishi	293	335	14%	0.4%	0.4%
Nissan	6,678	7,514	13%	8.3%	8.9%
Other	230	362	57%	0.3%	0.4%
Porsche	394	373	-5%	0.5%	0.4%
Ram	616	892	45%	0.8%	1.1%
Subaru	1,972	2,564	30%	2.5%	3.0%
Tesla	385	234	-39%	0.5%	0.3%
Toyota	15,870	16,799	6%	19.8%	19.9%
Volkswagen	3,462	3,119	-10%	4.3%	3.7%
Volvo	417	335	-20%	0.5%	0.4%

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

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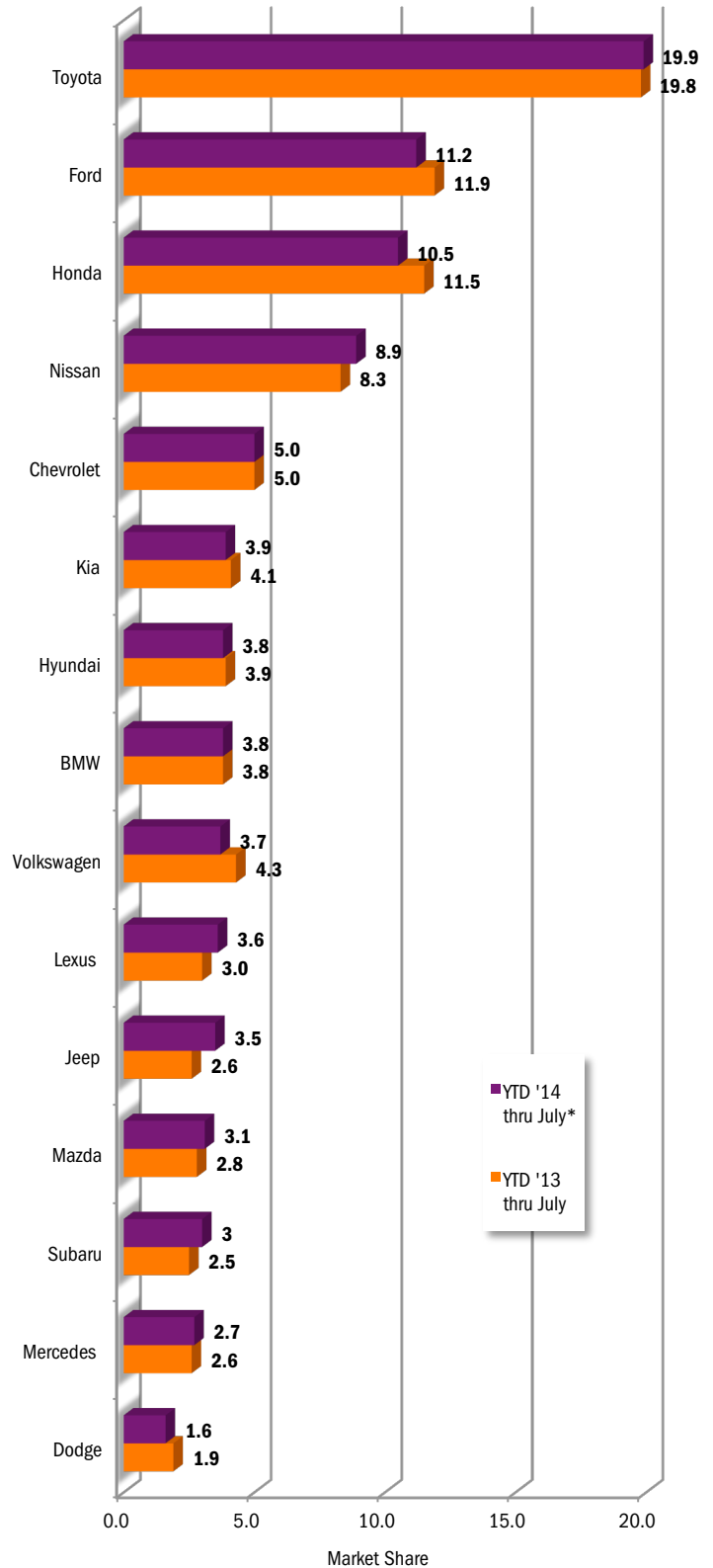
Source: Polk

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



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Source: Polk.