

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru April 2013

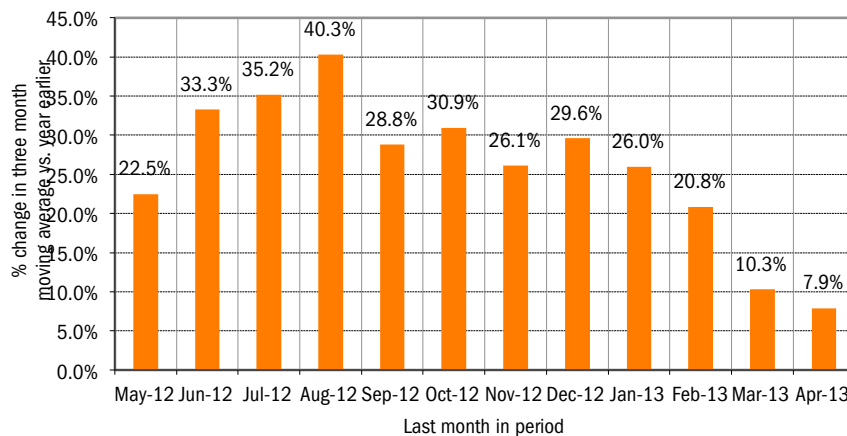
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru April*			YTD Market Share		
	3/12 & 4/12	3/13 & 4/13*	% change	2012	2013	% change	2012	2013	change
	Industry Total	21,871	23,203	6.1%	39,135	42,983	9.8%	62.3	61.3
Cars	13,822	14,262	3.2%	24,381	26,354	8.1%	37.7	38.7	1.0
Light Trucks	8,049	8,941	11.1%	14,754	16,629	12.7%	24.6	22.6	-2.0
Japanese Brands	11,106	11,898	7.1%	19,567	21,618	10.5%	50.0	50.3	0.3
Toyota	5,319	5,426	2.0%	9,317	9,899	6.2%	23.8	23.0	-0.8
Honda	2,729	2,998	9.9%	4,908	5,347	8.9%	12.5	12.4	-0.1
Nissan	2,047	2,300	12.4%	3,538	4,137	16.9%	9.0	9.6	0.6
Other	1,011	1,174	16.1%	1,804	2,235	23.9%	4.6	5.2	0.6
Domestic Brands	4,972	5,674	14.1%	9,210	10,860	17.9%	23.5	25.3	1.8
General Motors	1,552	1,637	5.5%	2,717	3,075	13.2%	6.9	7.2	0.3
Ford	2,204	2,621	18.9%	4,274	5,223	22.2%	10.9	12.2	1.3
Chrysler	1,213	1,316	8.5%	2,215	2,391	7.9%	5.7	5.6	-0.1
Other	3	100	3233.3%	4	171	4175.0%	0.0	0.4	0.4
European Brands	3,493	3,567	2.1%	6,292	6,754	7.3%	16.1	15.7	-0.4
Volkswagen	1,466	1,427	-2.7%	2,654	2,665	0.4%	6.8	6.2	-0.6
BMW	869	986	13.5%	1,625	1,930	18.8%	4.2	4.5	0.3
Mercedes	647	635	-1.9%	1,161	1,182	1.8%	3.0	2.7	-0.3
Other	511	519	1.6%	852	977	14.7%	2.2	2.3	0.1
Korean Brands	2,300	2,064	-10.3%	4,066	3,751	-7.7%	10.4	8.7	-1.7

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 2013 were estimated by Auto Outlook. Data Source: Polk.

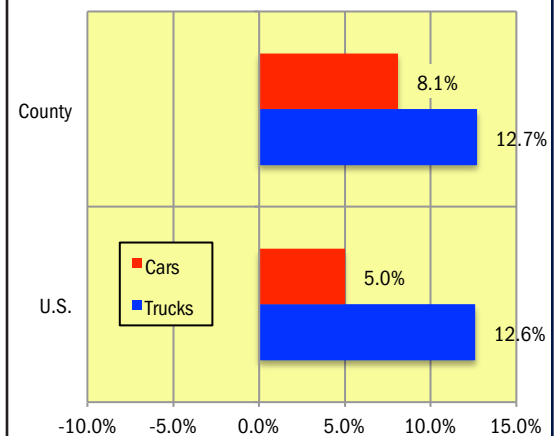
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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 2013 were estimated by Auto Outlook. Data Source: Polk.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '13 thru April* vs. YTD '12



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 2013 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 '12 thru Apr	YTD '13 thru Apr*	% change	YTD '12 thru Apr	YTD '13 thru Apr*
TOTAL	39,135	42,983	10%		
Acura	416	519	25%	1.1%	1.2%
Audi	609	635	4%	1.6%	1.5%
BMW	1,240	1,566	26%	3.2%	3.6%
Buick	142	187	32%	0.4%	0.4%
Cadillac	250	362	45%	0.6%	0.8%
Chevrolet	1,969	2,133	8%	5.0%	5.0%
Chrysler	281	177	-37%	0.7%	0.4%
Dodge	559	783	40%	1.4%	1.8%
FIAT	276	317	15%	0.7%	0.7%
Ford	4,131	5,068	23%	10.6%	11.8%
GMC	356	392	10%	0.9%	0.9%
Honda	4,492	4,827	7%	11.5%	11.2%
Hyundai	2,097	1,893	-10%	5.4%	4.4%
Infiniti	401	453	13%	1.0%	1.1%
Jaguar	69	66	-4%	0.2%	0.2%
Jeep	1,104	1,047	-5%	2.8%	2.4%
Kia	1,969	1,857	-6%	5.0%	4.3%
Land Rover	224	298	33%	0.6%	0.7%
Lexus	1,100	1,250	14%	2.8%	2.9%
Lincoln	143	154	8%	0.4%	0.4%
Mazda	986	1,077	9%	2.5%	2.5%
Mercedes	1,087	1,125	3%	2.8%	2.6%
MINI	385	363	-6%	1.0%	0.8%
Mitsubishi	174	158	-9%	0.4%	0.4%
Nissan	3,137	3,683	17%	8.0%	8.6%
Other	163	298	83%	0.4%	0.7%
Porsche	157	195	24%	0.4%	0.5%
Ram	271	382	41%	0.7%	0.9%
Subaru	638	1,011	58%	1.6%	2.4%
Toyota	8,217	8,643	5%	21.0%	20.1%
Volkswagen	1,888	1,835	-3%	4.8%	4.3%
Volvo	204	229	12%	0.5%	0.5%

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

*Figures for April 2013 were estimated.

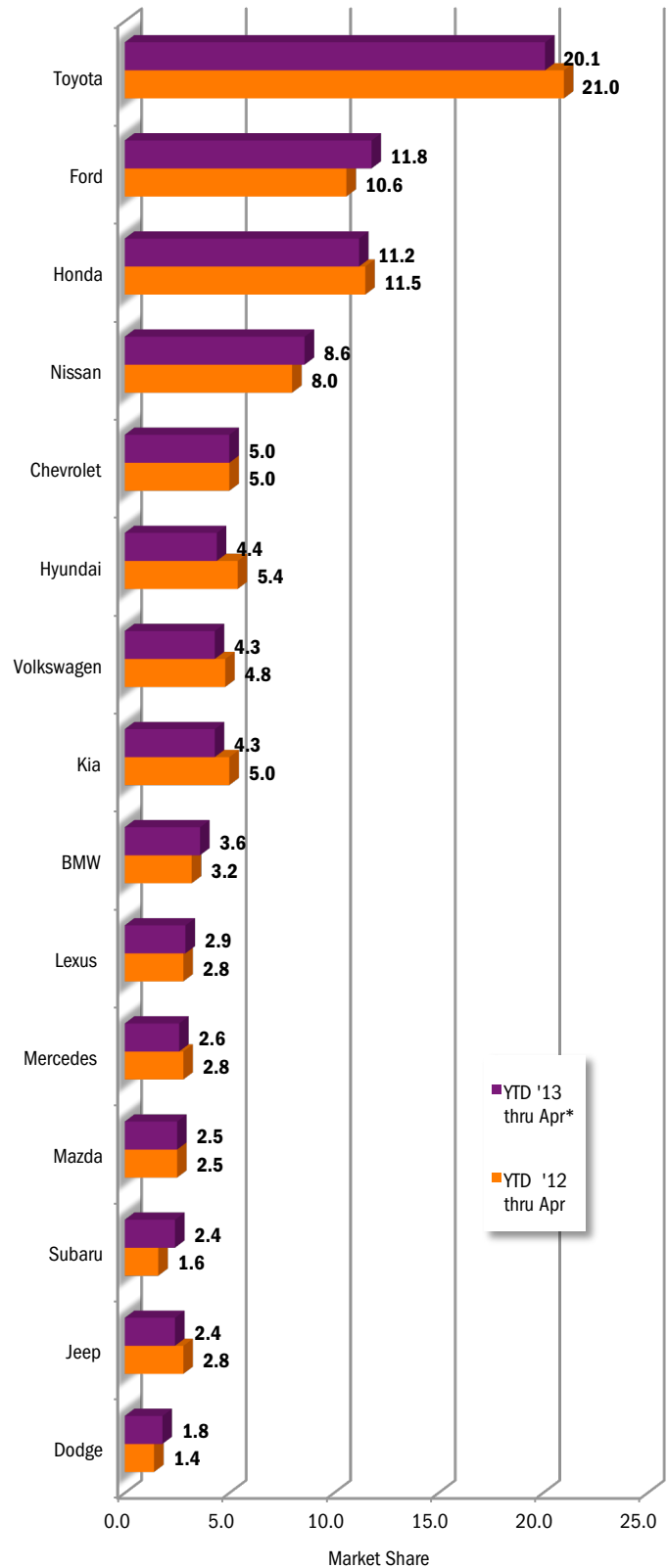
Source: Polk

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County Market Share for Top 15 Selling Brands
YTD '13 thru April* vs. YTD '12



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Source: Polk.