

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru February 2014

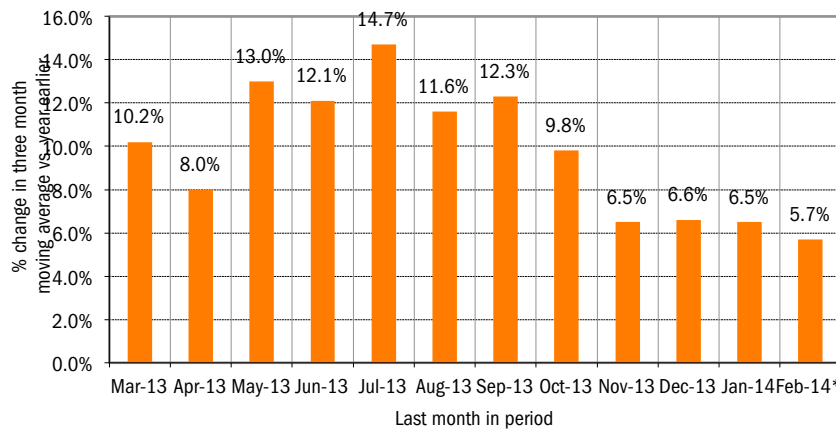
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru February*			YTD Market Share (thru February)*		
	1/13 & 2/13	1/14 & 2/14*	% change	2013	2014*	% change	2013	2014*	change
	Industry Total	19,748	21,130	7.0%	19,748	21,130	7.0%		
Cars	12,073	12,392	2.6%	12,073	12,392	2.6%	61.1	58.6	-2.5
Light Trucks	7,675	8,738	13.9%	7,675	8,738	13.9%	38.9	41.4	2.5
Japanese Brands	9,702	10,795	11.3%	9,702	10,795	11.3%	49.1	51.1	2.0
Toyota	4,465	4,920	10.2%	4,465	4,920	10.2%	22.6	23.3	0.7
Honda	2,341	2,439	4.2%	2,341	2,439	4.2%	11.9	11.5	-0.4
Nissan	1,835	2,159	17.7%	1,835	2,159	17.7%	9.3	10.2	0.9
Other	1,061	1,277	20.4%	1,061	1,277	20.4%	5.4	6.0	0.6
Domestic Brands	5,177	5,441	5.1%	5,177	5,441	5.1%	26.2	25.8	-0.4
General Motors	1,434	1,459	1.7%	1,434	1,459	1.7%	7.3	6.9	-0.4
Ford	2,597	2,515	-3.2%	2,597	2,515	-3.2%	13.2	11.9	-1.3
Chrysler	1,075	1,419	32.0%	1,075	1,419	32.0%	5.4	6.7	1.3
Other	71	48	-32.4%	71	48	-32.4%	0.4	0.2	-0.2
European Brands	3,182	3,288	3.3%	3,182	3,288	3.3%	16.1	15.6	-0.5
Volkswagen	1,235	1,200	-2.8%	1,235	1,200	-2.8%	6.3	5.7	-0.6
BMW	944	950	0.6%	944	950	0.6%	4.8	4.5	-0.3
Mercedes	548	604	10.2%	548	604	10.2%	2.8	2.9	0.1
Other	455	534	17.4%	455	534	17.4%	2.3	2.5	0.2
Korean Brands	1,687	1,606	-4.8%	1,687	1,606	-4.8%	8.5	7.6	-0.9

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

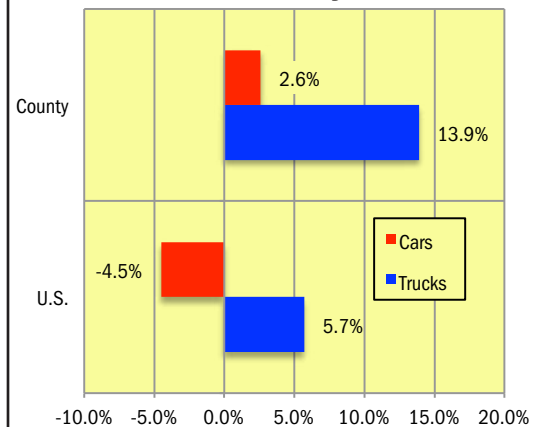
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru February* 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 February 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	YTD '14	% change	YTD '13	YTD '14
	thru Feb	thru Feb*		thru Feb	thru Feb*
TOTAL	19,748	21,130	7%		
Acura	242	282	17%	1.2%	1.3%
Audi	323	307	-5%	1.6%	1.5%
BMW	784	803	2%	4.0%	3.8%
Buick	100	134	34%	0.5%	0.6%
Cadillac	171	151	-12%	0.9%	0.7%
Chevrolet	964	979	2%	4.9%	4.6%
Chrysler	94	88	-6%	0.5%	0.4%
Dodge	366	317	-13%	1.9%	1.5%
FIAT	140	178	27%	0.7%	0.8%
Ford	2,521	2,405	-5%	12.8%	11.4%
GMC	199	194	-3%	1.0%	0.9%
Honda	2,099	2,157	3%	10.6%	10.2%
Hyundai	868	831	-4%	4.4%	3.9%
Infiniti	206	225	9%	1.0%	1.1%
Jaguar	32	47	47%	0.2%	0.2%
Jeep	468	769	64%	2.4%	3.6%
Kia	819	774	-5%	4.1%	3.7%
Land Rover	159	179	13%	0.8%	0.8%
Lexus	519	691	33%	2.6%	3.3%
Lincoln	76	110	45%	0.4%	0.5%
Mazda	495	576	16%	2.5%	2.7%
Mercedes	526	569	8%	2.7%	2.7%
MINI	160	146	-9%	0.8%	0.7%
Mitsubishi	74	77	4%	0.4%	0.4%
Nissan	1,629	1,933	19%	8.2%	9.1%
Other	55	71	29%	0.3%	0.3%
Porsche	88	97	10%	0.4%	0.5%
Ram	147	244	66%	0.7%	1.2%
Subaru	487	619	27%	2.5%	2.9%
Tesla	63	42		0.3%	0.2%
Toyota	3,946	4,249	8%	20.0%	20.1%
Volkswagen	824	795	-4%	4.2%	3.8%
Volvo	104	91	-13%	0.5%	0.4%

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

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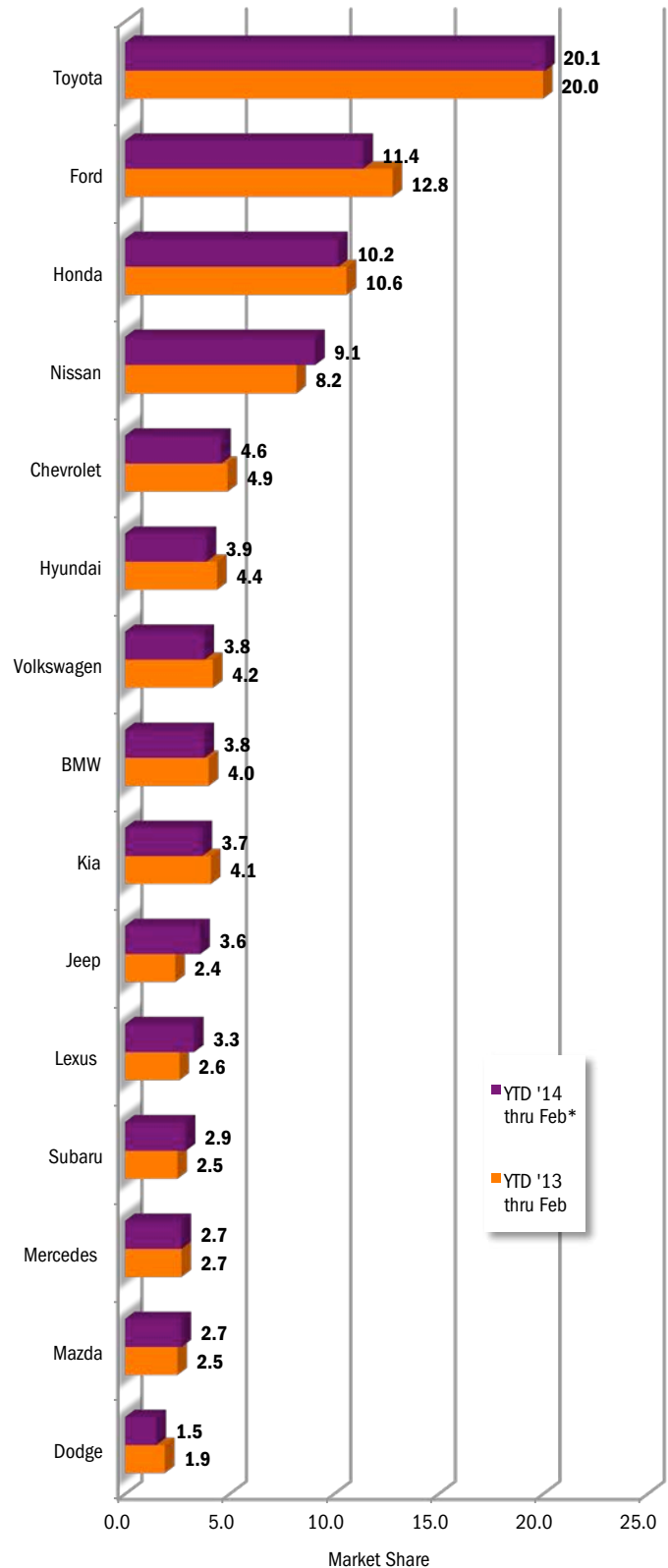
Source: Polk

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



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Source: Polk.