

San Diego Outlook

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New Car
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San Diego County

Covering the San Diego County automotive market

Data thru October 2014

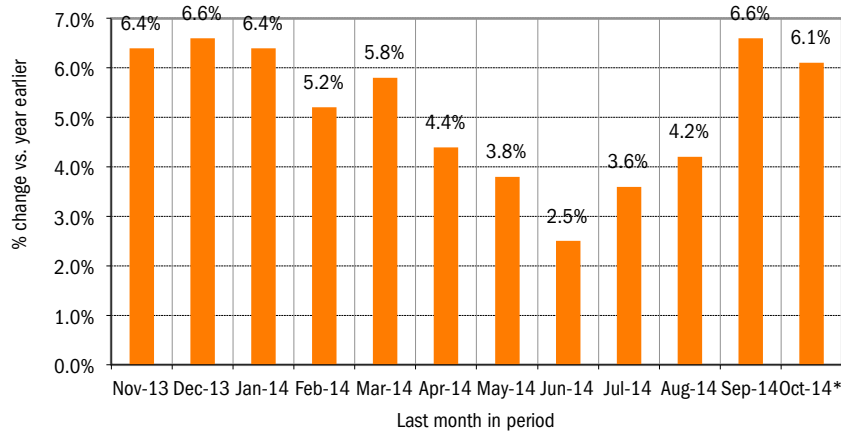
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Oct*			YTD Market Share (thru Oct)*		
	9/13 & 10/13	9/14 & 10/14*	% change	2013	2014	% change	2013	2014	change
Industry Total	21,777	23,374	7.3%	115,169	120,949	5.0%			
Cars	13,428	13,982	4.1%	71,055	72,728	2.4%	61.7	60.1	-1.6
Light Trucks	8,349	9,392	12.5%	44,114	48,221	9.3%	38.3	39.9	1.6
Japanese Brands	11,164	12,296	10.1%	58,618	63,325	8.0%	50.9	52.4	1.5
Toyota	5,333	5,461	2.4%	26,858	28,672	6.8%	23.3	23.7	0.4
Honda	2,558	2,732	6.8%	14,694	14,752	0.4%	12.8	12.2	-0.6
Nissan	1,945	2,506	28.8%	10,495	11,917	13.5%	9.1	9.9	0.8
Other	1,328	1,597	20.3%	6,571	7,984	21.5%	5.7	6.6	0.9
Domestic Brands	5,310	5,665	6.7%	29,025	29,893	3.0%	25.2	24.7	-0.5
General Motors	1,632	1,614	-1.1%	8,299	8,420	1.5%	7.2	7.0	-0.2
Ford	2,406	2,285	-5.0%	13,665	13,269	-2.9%	11.9	11.0	-0.9
Chrysler	1,170	1,695	44.9%	6,481	7,860	21.3%	5.6	6.5	0.9
Other	102	71	-30.4%	580	344	-40.7%	0.5	0.3	-0.2
European Brands	3,558	3,765	5.8%	18,350	18,779	2.3%	15.9	15.5	-0.4
Volkswagen	1,352	1,416	4.7%	7,254	7,053	-2.8%	6.3	5.8	-0.5
BMW	1,014	1,076	6.1%	5,320	5,391	1.3%	4.6	4.5	-0.1
Mercedes	745	781	4.8%	3,276	3,625	10.7%	2.8	3.0	0.2
Other	447	492	10.1%	2,500	2,710	8.4%	2.2	2.2	0.0
Korean Brands	1,745	1,648	-5.6%	9,176	8,952	-2.4%	8.0	7.4	-0.6

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

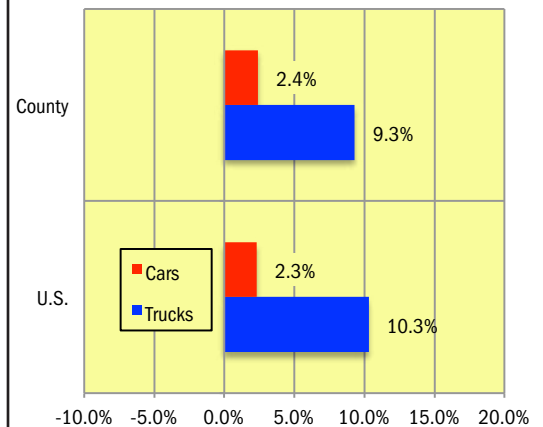
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru October* 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 October 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 Oct	thru Oct*		thru Oct	thru Oct*
TOTAL	115,169	120,949	5%		
Acura	1,485	1,444	-3%	1.3%	1.2%
Audi	1,692	1,866	10%	1.5%	1.5%
BMW	4,338	4,582	6%	3.8%	3.8%
Buick	507	440	-13%	0.4%	0.4%
Cadillac	865	849	-2%	0.8%	0.7%
Chevrolet	5,787	5,967	3%	5.0%	4.9%
Chrysler	532	476	-11%	0.5%	0.4%
Dodge	2,024	1,808	-11%	1.8%	1.5%
FIAT	882	1,056	20%	0.8%	0.9%
Ford	13,216	12,844	-3%	11.5%	10.6%
GMC	1,140	1,229	8%	1.0%	1.0%
Honda	13,209	13,301	1%	11.5%	11.0%
Hyundai	4,539	4,507	-1%	3.9%	3.7%
Infiniti	1,121	972	-13%	1.0%	0.8%
Jaguar	171	195	14%	0.1%	0.2%
Jeep	2,996	4,152	39%	2.6%	3.4%
Kia	4,637	4,451	-4%	4.0%	3.7%
Land Rover	703	690	-2%	0.6%	0.6%
Lexus	3,732	4,465	20%	3.2%	3.7%
Lincoln	449	464	3%	0.4%	0.4%
Mazda	3,292	3,714	13%	2.9%	3.1%
Mercedes	3,156	3,408	8%	2.7%	2.8%
MINI	982	813	-17%	0.9%	0.7%
Mitsubishi	396	448	13%	0.3%	0.4%
Nissan	9,374	10,945	17%	8.1%	9.0%
Other	332	490	48%	0.3%	0.4%
Porsche	548	589	7%	0.5%	0.5%
Ram	929	1,376	48%	0.8%	1.1%
Subaru	2,877	3,779	31%	2.5%	3.1%
Tesla	540	327	-39%	0.5%	0.3%
Toyota	23,126	24,202	5%	20.1%	20.0%
Volkswagen	5,014	4,604	-8%	4.4%	3.8%
Volvo	578	496	-14%	0.5%	0.4%

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

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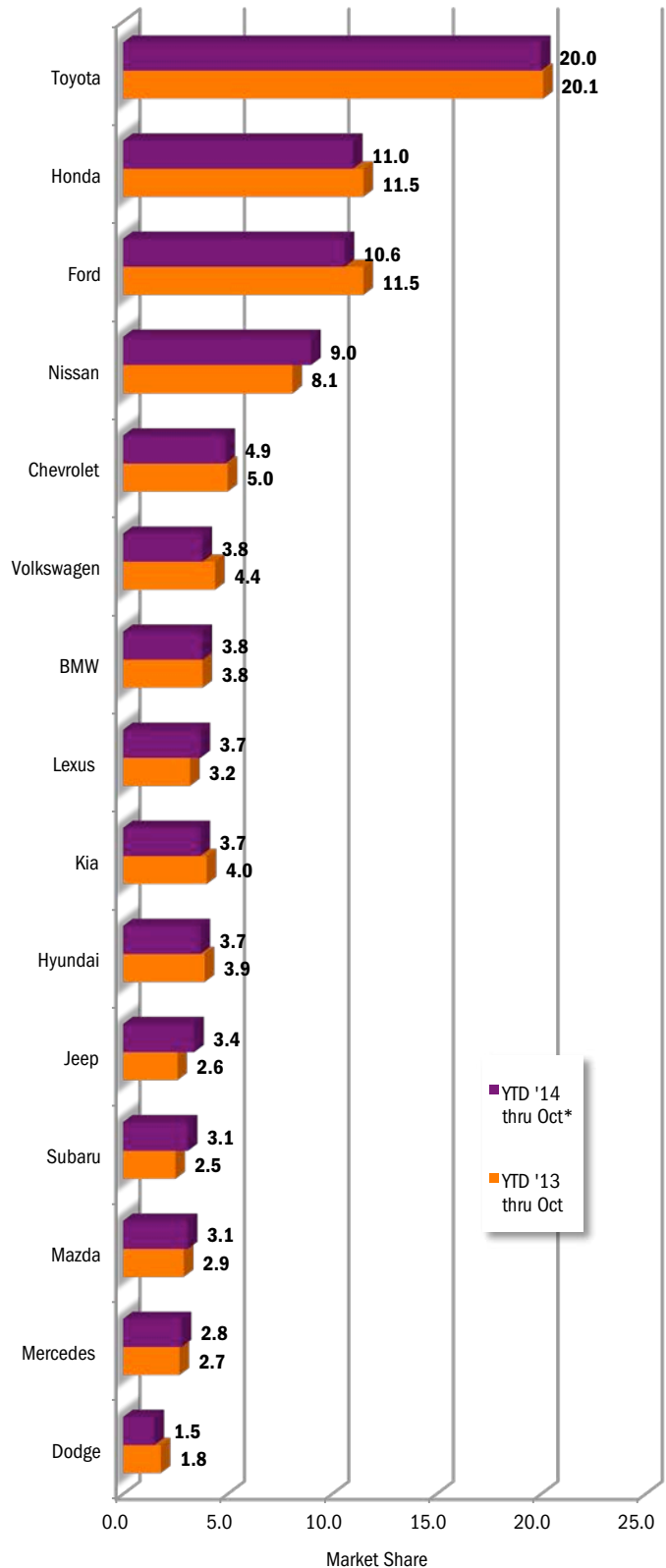
Source: Polk

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



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Source: Polk.