

San Diego Outlook

Released by:
New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru January 2014

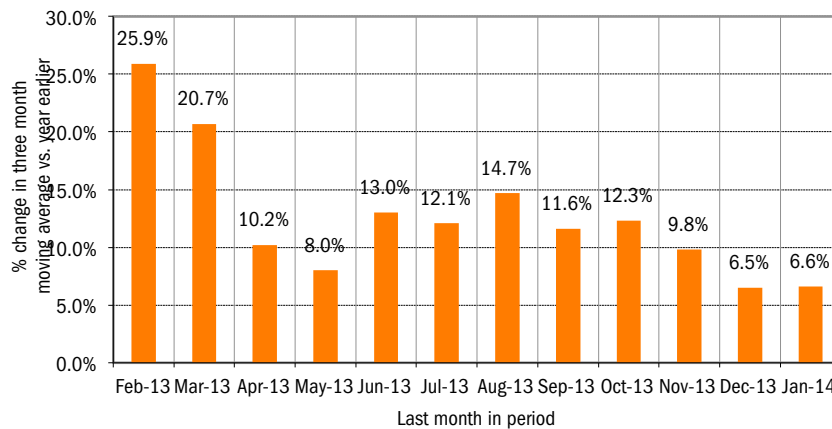
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual			Annual Market Share		
	12/12 &	12/13 &	%	2012	2013	%	2012	2013	change
	1/13	1/14*	change						
Industry Total	22,109	22,750	2.9%	126,570	139,593	10.3%			
Cars	13,565	13,301	-1.9%	78,922	85,630	8.5%	62.4	61.3	-1.1
Light Trucks	8,544	9,449	10.6%	47,648	53,963	13.3%	37.6	38.7	1.1
Japanese Brands	10,685	11,298	5.7%	62,888	70,683	12.4%	49.7	50.6	0.9
Toyota	5,106	5,047	-1.2%	30,098	32,227	7.1%	23.8	23.1	-0.7
Honda	2,637	2,818	6.9%	15,651	17,793	13.7%	12.4	12.7	0.3
Nissan	1,806	2,061	14.1%	11,228	12,602	12.2%	8.9	9.0	0.1
Other	1,136	1,372	20.8%	5,911	8,061	36.4%	4.7	5.8	1.1
Domestic Brands	5,502	5,672	3.1%	29,798	35,180	18.1%	23.5	25.2	1.7
General Motors	1,637	1,491	-8.9%	8,977	10,079	12.3%	7.1	7.2	0.1
Ford	2,629	2,614	-0.6%	14,041	16,476	17.3%	11.1	11.8	0.7
Chrysler	1,144	1,457	27.4%	6,686	7,930	18.6%	5.3	5.7	0.4
Other	92	110		94	695	639.4%	0.1	0.5	0.4
European Brands	4,087	4,012	-1.8%	21,636	22,842	5.6%	17.1	16.4	-0.7
Volkswagen	1,601	1,408	-12.1%	8,968	8,856	-1.2%	7.1	6.3	-0.8
BMW	1,170	1,175	0.4%	5,798	6,572	13.3%	4.6	4.7	0.1
Mercedes	830	858	3.4%	4,063	4,356	7.2%	3.2	3.1	-0.1
Other	486	571	17.5%	2,807	3,058	8.9%	2.2	2.2	0.0
Korean Brands	1,835	1,768	-3.7%	12,248	10,888	-11.1%	9.7	7.8	-1.9

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

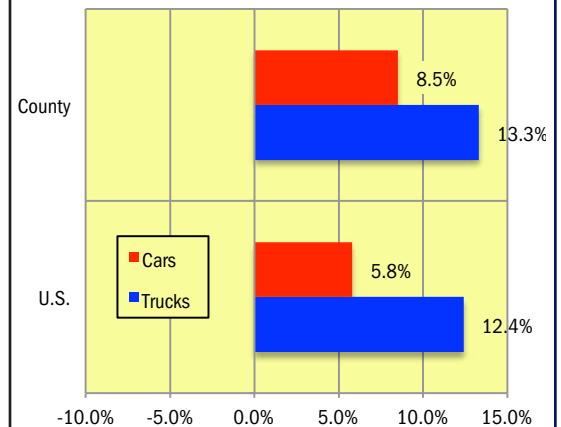
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets 2013 vs. 2012



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets.

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	
	2012	2013	% change	2012	2013
	Annual	Annual		Annual	Annual
TOTAL	126,570	139,593	10%		
Acura	1,581	1,863	18%	1.2%	1.3%
Audi	2,015	2,106	5%	1.6%	1.5%
BMW	4,551	5,426	19%	3.6%	3.9%
Buick	560	597	7%	0.4%	0.4%
Cadillac	825	1,090	32%	0.7%	0.8%
Chevrolet	6,414	6,973	9%	5.1%	5.0%
Chrysler	756	609	-19%	0.6%	0.4%
Dodge	1,661	2,373	43%	1.3%	1.7%
FIAT	1,041	1,050	1%	0.8%	0.8%
Ford	13,579	15,944	17%	10.7%	11.4%
GMC	1,178	1,419	20%	0.9%	1.0%
Honda	14,070	15,930	13%	11.1%	11.4%
Hyundai	6,444	5,457	-15%	5.1%	3.9%
Infiniti	1,408	1,407	0%	1.1%	1.0%
Jaguar	170	226	33%	0.1%	0.2%
Jeep	3,391	3,777	11%	2.7%	2.7%
Kia	5,804	5,431	-6%	4.6%	3.9%
Land Rover	662	851	29%	0.5%	0.6%
Lexus	4,222	4,888	16%	3.3%	3.5%
Lincoln	462	532	15%	0.4%	0.4%
Mazda	3,122	3,962	27%	2.5%	2.8%
Mercedes	3,861	4,190	9%	3.1%	3.0%
MINI	1,247	1,146	-8%	1.0%	0.8%
Mitsubishi	526	483	-8%	0.4%	0.3%
Nissan	9,820	11,195	14%	7.8%	8.0%
Other	445	447	0%	0.4%	0.3%
Porsche	586	720	23%	0.5%	0.5%
Ram	878	1,171	33%	0.7%	0.8%
Subaru	2,247	3,610	61%	1.8%	2.6%
Tesla	86	653		0.1%	0.5%
Toyota	25,876	27,339	6%	20.4%	19.6%
Volkswagen	6,367	6,030	-5%	5.0%	4.3%
Volvo	715	698	-2%	0.6%	0.5%

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

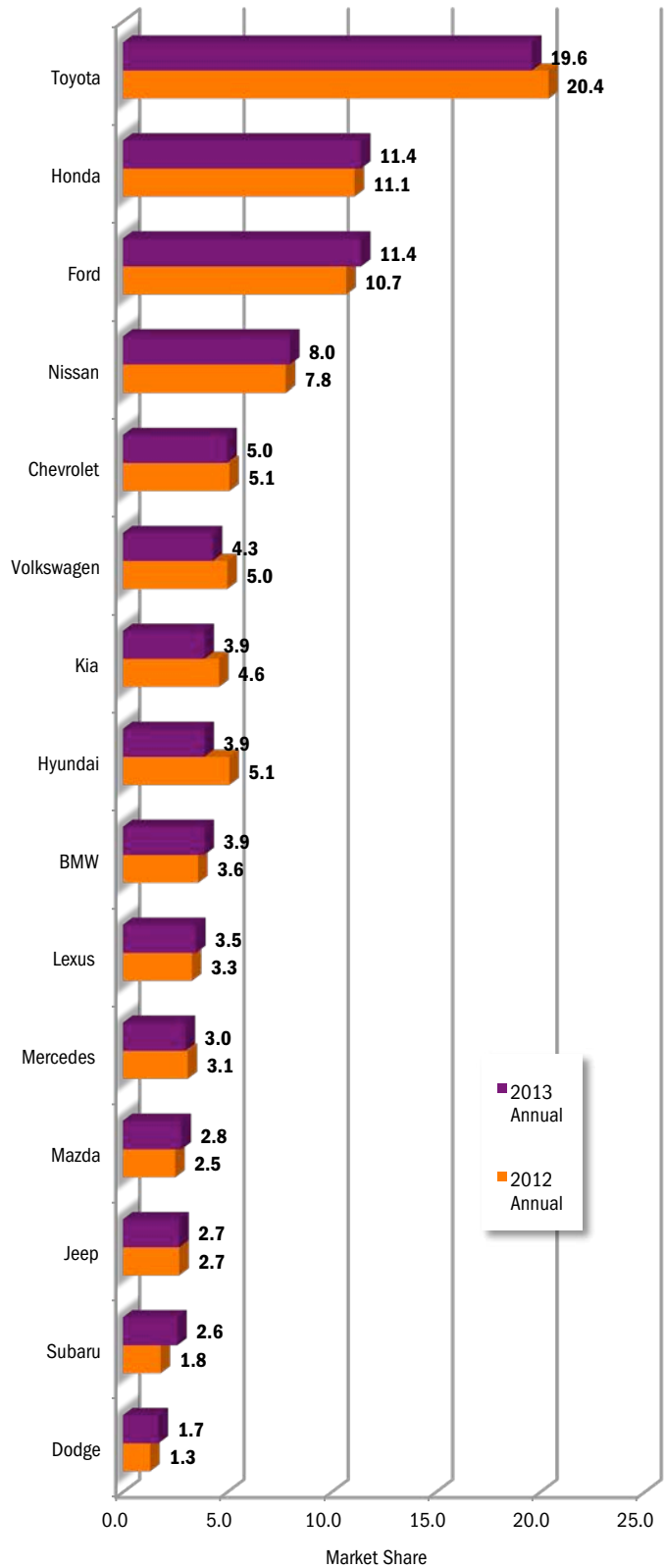
Source: Polk

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County Market Share for Top 15 Selling Brands
2013 vs. 2012



Source: Polk.