

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru May 2014

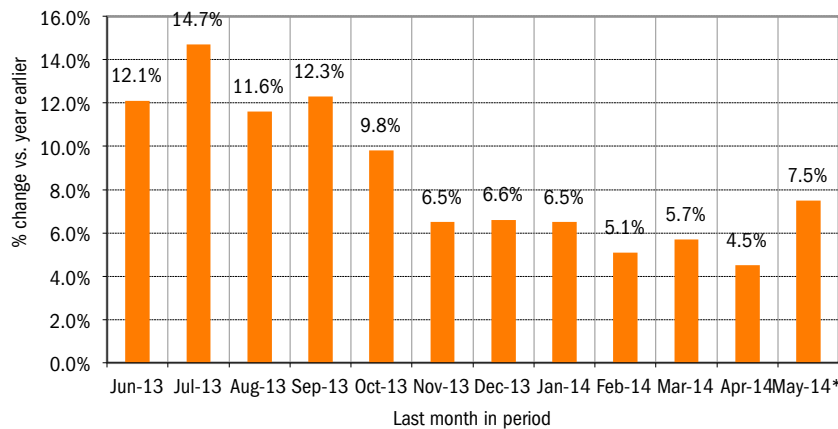
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru May*			YTD Market Share (thru May)*		
	4/13 & 5/13	4/14 & 5/14*	% change	2013	2014*	% change	2013	2014*	change
	Industry Total	24,824	26,961	8.6%	56,631	60,577	7.0%		
Cars	15,463	16,416	6.2%	35,107	36,336	3.5%	62.0	60.0	-2.0
Light Trucks	9,361	10,545	12.6%	21,524	24,241	12.6%	38.0	40.0	2.0
Japanese Brands	12,397	13,891	12.1%	28,391	31,194	9.9%	50.1	51.5	1.4
Toyota	5,609	6,215	10.8%	12,857	14,190	10.4%	22.7	23.4	0.7
Honda	3,134	3,336	6.4%	7,109	7,158	0.7%	12.6	11.8	-0.8
Nissan	2,279	2,652	16.4%	5,305	5,968	12.5%	9.4	9.9	0.5
Other	1,375	1,688	22.8%	3,120	3,878	24.3%	5.5	6.4	0.9
Domestic Brands	6,521	6,823	4.6%	14,681	15,417	5.0%	25.9	25.5	-0.4
General Motors	1,802	1,916	6.3%	4,060	4,265	5.0%	7.2	7.0	-0.2
Ford	3,141	3,087	-1.7%	7,158	6,993	-2.3%	12.6	11.5	-1.1
Chrysler	1,467	1,697	15.7%	3,181	3,916	23.1%	5.6	6.5	0.9
Other	111	123	10.8%	282	243	-13.8%	0.5	0.4	-0.1
European Brands	3,905	4,112	5.3%	8,897	9,320	4.8%	15.7	15.4	-0.3
Volkswagen	1,565	1,602	2.4%	3,523	3,592	2.0%	6.2	5.9	-0.3
BMW	1,149	1,187	3.3%	2,609	2,602	-0.3%	4.6	4.3	-0.3
Mercedes	682	761	11.6%	1,536	1,732	12.8%	2.7	2.9	0.2
Other	509	562	10.4%	1,229	1,394	13.4%	2.2	2.3	0.1
Korean Brands	2,001	2,135	6.7%	4,662	4,646	-0.3%	8.2	7.7	-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 May 2014 were estimated by Auto Outlook. Data Source: Polk.

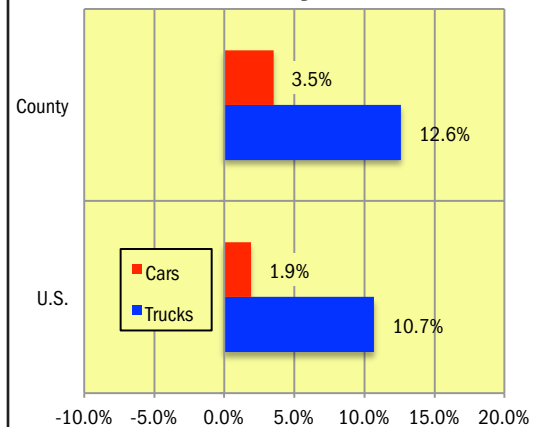
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru May* 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 May 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 May	YTD '14 thru May*	% change	YTD '13 thru May	YTD '14 thru May*
TOTAL	56,631	60,577	7%		
Acura	707	741	5%	1.2%	1.2%
Audi	837	938	12%	1.5%	1.5%
BMW	2,130	2,211	4%	3.8%	3.6%
Buick	255	209	-18%	0.5%	0.3%
Cadillac	427	435	2%	0.8%	0.7%
Chevrolet	2,813	3,018	7%	5.0%	5.0%
Chrysler	286	144	-50%	0.5%	0.2%
Dodge	1,102	1,007	-9%	1.9%	1.7%
FIAT	414	556	34%	0.7%	0.9%
Ford	6,932	6,760	-2%	12.2%	11.2%
GMC	565	601	6%	1.0%	1.0%
Honda	6,402	6,416	0%	11.3%	10.6%
Hyundai	2,297	2,251	-2%	4.1%	3.7%
Infiniti	525	557	6%	0.9%	0.9%
Jaguar	75	108	44%	0.1%	0.2%
Jeep	1,375	2,160	57%	2.4%	3.6%
Kia	2,365	2,395	1%	4.2%	4.0%
Land Rover	387	377	-3%	0.7%	0.6%
Lexus	1,638	2,087	27%	2.9%	3.4%
Lincoln	226	233	3%	0.4%	0.4%
Mazda	1,544	1,845	19%	2.7%	3.0%
Mercedes	1,481	1,638	11%	2.6%	2.7%
MINI	479	390	-19%	0.8%	0.6%
Mitsubishi	194	245	26%	0.3%	0.4%
Nissan	4,780	5,411	13%	8.4%	8.9%
Other	156	270	73%	0.3%	0.4%
Porsche	284	311	10%	0.5%	0.5%
Ram	418	604	44%	0.7%	1.0%
Subaru	1,376	1,755	28%	2.4%	2.9%
Tesla	262	235	-10%	0.5%	0.4%
Toyota	11,219	12,103	8%	19.8%	20.0%
Volkswagen	2,402	2,342	-2%	4.2%	3.9%
Volvo	278	224	-19%	0.5%	0.4%

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

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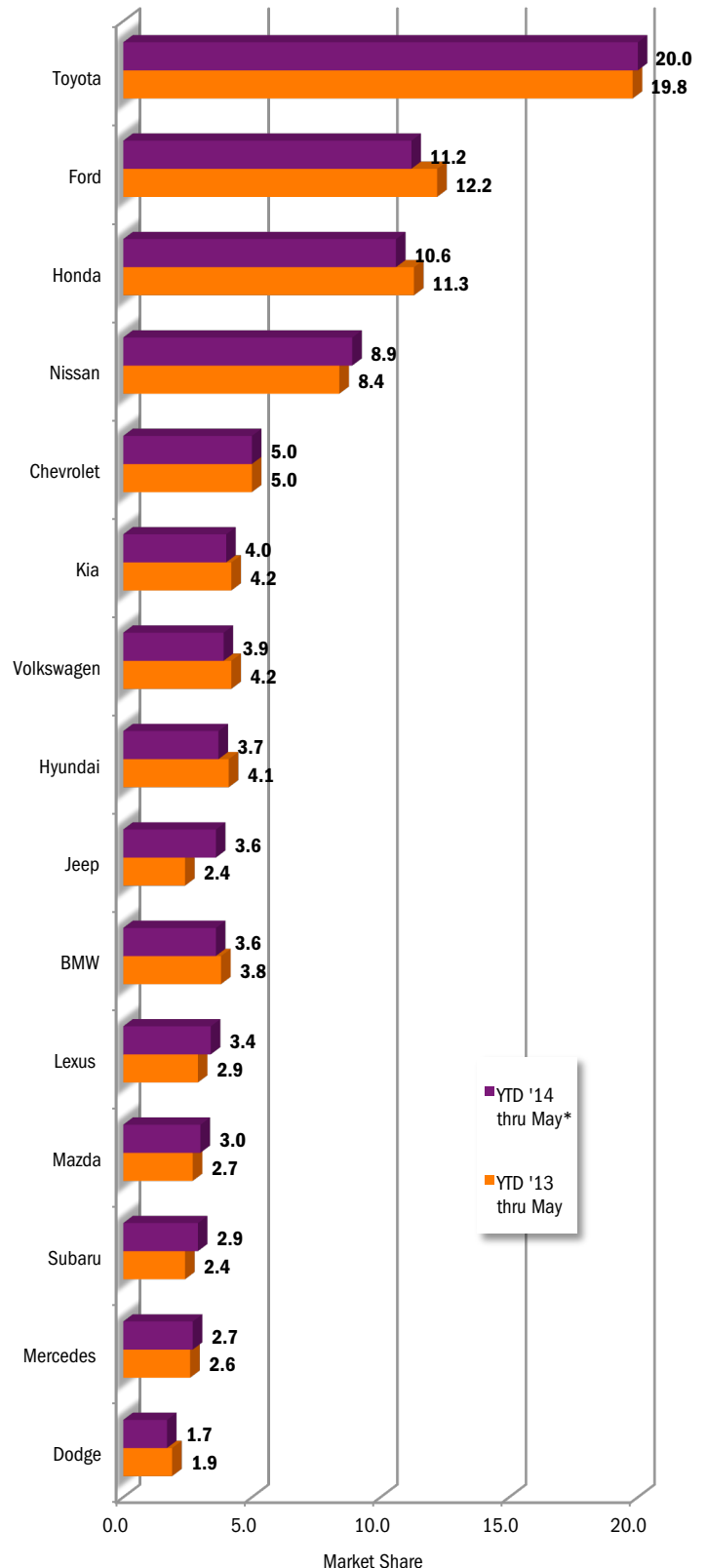
Source: Polk

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



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Source: Polk.