

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru November 2014

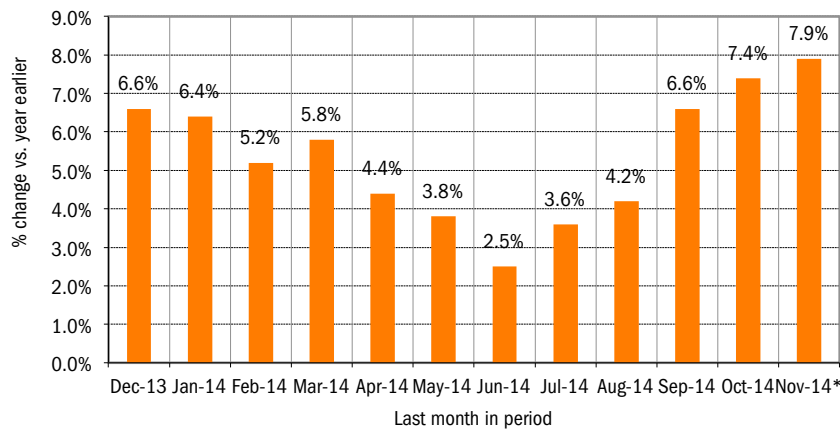
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru Nov*			YTD Market Share (thru Nov)*		
	10/13 & 11/13	10/14 & 11/14*	% change	2013	2014	% change	2013	2014	change
	Industry Total	21,900	23,546	7.5%	126,481	133,272	5.4%		
Cars	13,295	13,934	4.8%	77,924	80,020	2.7%	61.6	60.0	-1.6
Light Trucks	8,605	9,612	11.7%	48,557	53,252	9.7%	38.4	40.0	1.6
Japanese Brands	10,980	11,785	7.3%	64,193	69,259	7.9%	50.8	52.0	1.2
Toyota	5,036	5,256	4.4%	29,321	31,192	6.4%	23.2	23.4	0.2
Honda	2,663	2,968	11.5%	16,081	16,372	1.8%	12.7	12.3	-0.4
Nissan	1,894	1,997	5.4%	11,497	12,913	12.3%	9.1	9.7	0.6
Other	1,387	1,564	12.8%	7,294	8,782	20.4%	5.8	6.6	0.8
Domestic Brands	5,418	5,983	10.4%	31,872	33,211	4.2%	25.2	24.9	-0.3
General Motors	1,611	1,724	7.0%	9,093	9,398	3.4%	7.2	7.1	-0.1
Ford	2,502	2,536	1.4%	15,014	14,717	-2.0%	11.9	11.0	-0.9
Chrysler	1,228	1,570	27.9%	7,142	8,638	20.9%	5.6	6.5	0.9
Other	77	153	98.7%	623	458	-26.5%	0.5	0.3	-0.2
European Brands	3,894	4,130	6.1%	20,408	20,986	2.8%	16.1	15.7	-0.4
Volkswagen	1,459	1,528	4.7%	8,023	7,836	-2.3%	6.3	5.9	-0.4
BMW	1,110	1,200	8.1%	5,910	6,035	2.1%	4.7	4.5	-0.2
Mercedes	892	894	0.2%	3,761	4,117	9.5%	3.0	3.1	0.1
Other	433	508	17.3%	2,714	2,998	10.5%	2.1	2.2	0.1
Korean Brands	1,608	1,648	2.5%	10,008	9,816	-1.9%	7.9	7.4	-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, 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 November 2014 were estimated by Auto Outlook. Data Source: Polk.

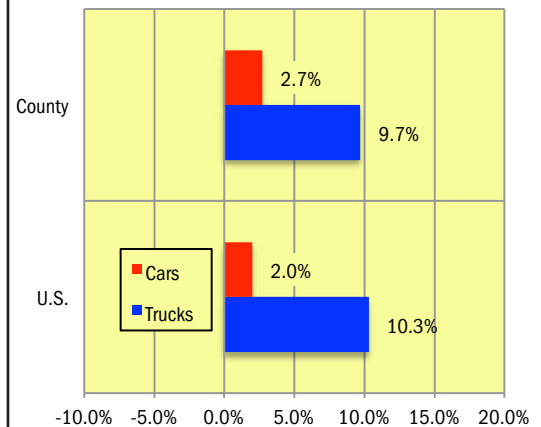
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '14 thru November* 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 November 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 Nov	thru Nov*		thru Nov	thru Nov*
TOTAL	126,481	133,272	5%		
Acura	1,648	1,625	-1%	1.3%	1.2%
Audi	1,885	2,113	12%	1.5%	1.6%
BMW	4,842	5,105	5%	3.8%	3.8%
Buick	542	469	-13%	0.4%	0.4%
Cadillac	953	914	-4%	0.8%	0.7%
Chevrolet	6,323	6,600	4%	5.0%	5.0%
Chrysler	568	519	-9%	0.4%	0.4%
Dodge	2,183	1,997	-9%	1.7%	1.5%
FIAT	948	1,194	26%	0.7%	0.9%
Ford	14,523	14,255	-2%	11.5%	10.7%
GMC	1,275	1,389	9%	1.0%	1.0%
Honda	14,433	14,759	2%	11.4%	11.1%
Hyundai	4,974	5,013	1%	3.9%	3.8%
Infiniti	1,257	1,073	-15%	1.0%	0.8%
Jaguar	188	208	11%	0.1%	0.2%
Jeep	3,359	4,535	35%	2.7%	3.4%
Kia	5,034	4,816	-4%	4.0%	3.6%
Land Rover	756	754	0%	0.6%	0.6%
Lexus	4,165	4,919	18%	3.3%	3.7%
Lincoln	491	497	1%	0.4%	0.4%
Mazda	3,643	4,117	13%	2.9%	3.1%
Mercedes	3,614	3,880	7%	2.9%	2.9%
MINI	1,068	920	-14%	0.8%	0.7%
Mitsubishi	437	498	14%	0.3%	0.4%
Nissan	10,240	11,845	16%	8.1%	8.9%
Other	386	588	52%	0.3%	0.4%
Porsche	607	669	10%	0.5%	0.5%
Ram	1,032	1,502	46%	0.8%	1.1%
Subaru	3,208	4,141	29%	2.5%	3.1%
Tesla	580	465	-20%	0.5%	0.3%
Toyota	25,156	26,286	4%	19.9%	19.7%
Volkswagen	5,531	5,073	-8%	4.4%	3.8%
Volvo	632	534	-16%	0.5%	0.4%

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

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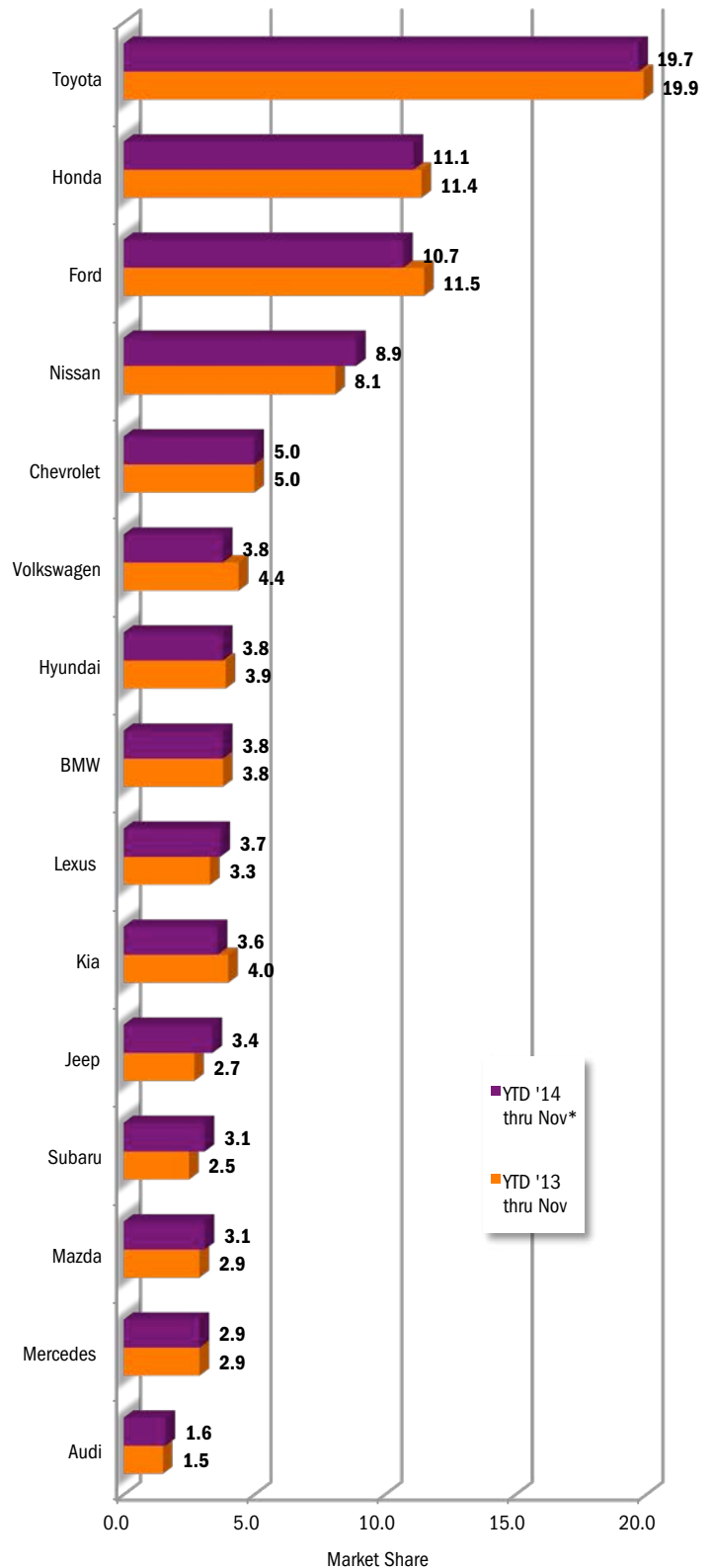
Source: Polk

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



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Source: Polk.