

San Diego Outlook

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New Car
Dealers Association
San Diego County

Covering the San Diego County automotive market

Data thru January 2015

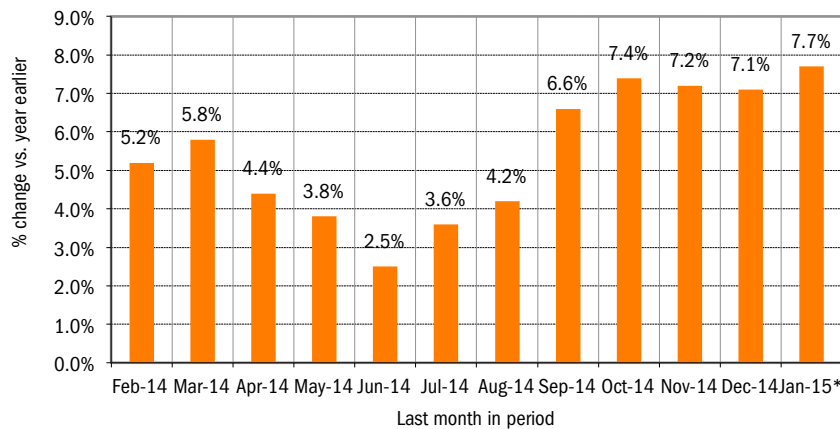
San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual			Annual Market Share		
	12/13 & 1/14	12/14 & 1/15*	% change	2013	2014	% change	2013	2014	change
	Industry Total	23,409	25,721	9.9%	139,370	146,999	5.5%		
Cars	13,800	14,780	7.1%	85,502	88,110	3.1%	61.3	59.9	-1.4
Light Trucks	9,609	10,941	13.9%	53,868	58,889	9.3%	38.7	40.1	1.4
Japanese Brands	11,877	13,258	11.6%	70,592	76,432	8.3%	50.7	52.0	1.3
Toyota	5,472	5,925	8.3%	32,187	34,279	6.5%	23.1	23.3	0.2
Honda	2,892	3,117	7.8%	17,771	18,279	2.9%	12.8	12.4	-0.4
Nissan	2,065	2,549	23.4%	12,573	14,320	13.9%	9.0	9.7	0.7
Other	1,448	1,667	15.1%	8,061	9,554	18.5%	5.8	6.5	0.7
Domestic Brands	5,855	6,424	9.7%	35,100	36,350	3.6%	25.2	24.7	-0.5
General Motors	1,651	1,938	17.4%	10,056	10,486	4.3%	7.2	7.1	-0.1
Ford	2,612	2,629	0.7%	16,422	16,025	-2.4%	11.8	10.9	-0.9
Chrysler	1,507	1,779	18.0%	7,925	9,351	18.0%	5.7	6.4	0.7
Other	85	78	-8.2%	697	488	-30.0%	0.5	0.3	-0.2
European Brands	4,049	4,358	7.6%	22,790	23,514	3.2%	16.4	16.0	-0.4
Volkswagen	1,405	1,515	7.8%	8,829	8,706	-1.4%	6.3	5.9	-0.4
BMW	1,155	1,311	13.5%	6,596	6,844	3.8%	4.7	4.7	0.0
Mercedes	874	966	10.5%	4,308	4,708	9.3%	3.1	3.2	0.1
Other	615	566	-8.0%	3,057	3,256	6.5%	2.2	2.2	0.0
Korean Brands	1,628	1,681	3.3%	10,888	10,703	-1.7%	7.8	7.3	-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 January 2015 were estimated by Auto Outlook. Data Source: IHS Automotive.

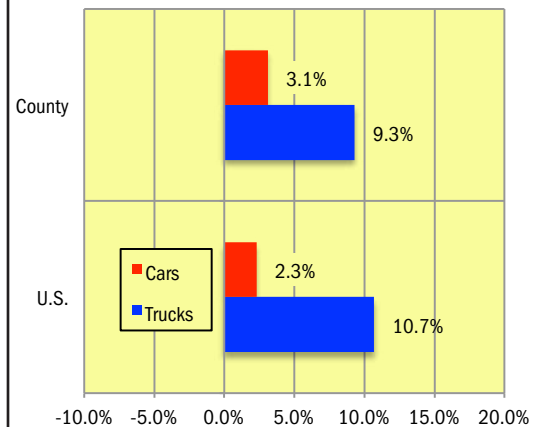
Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



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 2015 were estimated by Auto Outlook. Data Source: IHS Automotive.

Percent Change in County and U.S. New Retail Light Vehicle Markets 2014 vs. 2013



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

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: IHS Automotive.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	2013	2014	% change	2013	2014
	Annual	Annual		Annual	Annual
TOTAL	139,370	146,999	5%		
Acura	1,849	1,827	-1%	1.3%	1.2%
Audi	2,106	2,399	14%	1.5%	1.6%
BMW	5,449	5,825	7%	3.9%	4.0%
Buick	598	527	-12%	0.4%	0.4%
Cadillac	1,090	1,016	-7%	0.8%	0.7%
Chevrolet	6,949	7,340	6%	5.0%	5.0%
Chrysler	610	663	9%	0.4%	0.5%
Dodge	2,369	2,183	-8%	1.7%	1.5%
FIAT	1,050	1,235	18%	0.8%	0.8%
Ford	15,891	15,470	-3%	11.4%	10.5%
GMC	1,419	1,603	13%	1.0%	1.1%
Honda	15,922	16,452	3%	11.4%	11.2%
Hyundai	5,457	5,413	-1%	3.9%	3.7%
Infiniti	1,407	1,186	-16%	1.0%	0.8%
Jaguar	226	233	3%	0.2%	0.2%
Jeep	3,775	4,800	27%	2.7%	3.3%
Kia	5,431	5,290	-3%	3.9%	3.6%
Land Rover	849	861	1%	0.6%	0.6%
Lexus	4,886	5,598	15%	3.5%	3.8%
Lincoln	531	555	5%	0.4%	0.4%
Mazda	3,962	4,475	13%	2.8%	3.0%
Mercedes	4,143	4,456	8%	3.0%	3.0%
MINI	1,147	1,019	-11%	0.8%	0.7%
Mitsubishi	483	522	8%	0.3%	0.4%
Nissan	11,166	13,134	18%	8.0%	8.9%
Other	449	621	38%	0.3%	0.4%
Porsche	694	753	9%	0.5%	0.5%
Ram	1,171	1,705	46%	0.8%	1.2%
Subaru	3,610	4,542	26%	2.6%	3.1%
Tesla	653	458	-30%	0.5%	0.3%
Toyota	27,301	28,681	5%	19.6%	19.5%
Volkswagen	6,029	5,554	-8%	4.3%	3.8%
Volvo	698	603	-14%	0.5%	0.4%

Data source: IHS Automotive.

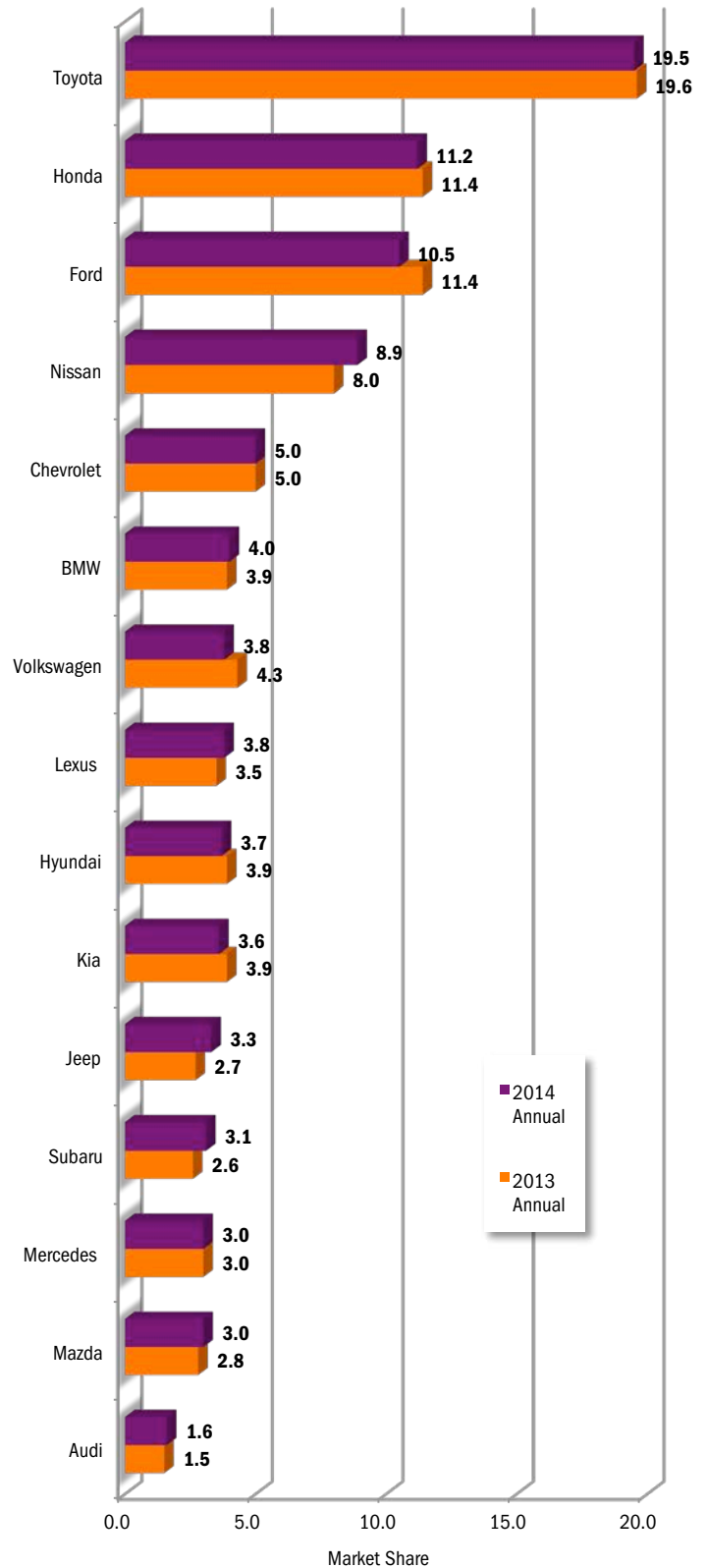
Top ten ranked brands in each percent change category are shaded green.

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County Market Share for Top 15 Selling Brands
2014 vs. 2013



Data source: IHS Automotive.