California Auto Outlook™

Comprehensive information on the California new vehicle market

Volume 9, Number 1
Released January 2013 **Covering Fourth Quarter 2012**

Publication Sponsored By:

CNCDA
California New Car Dealers Association

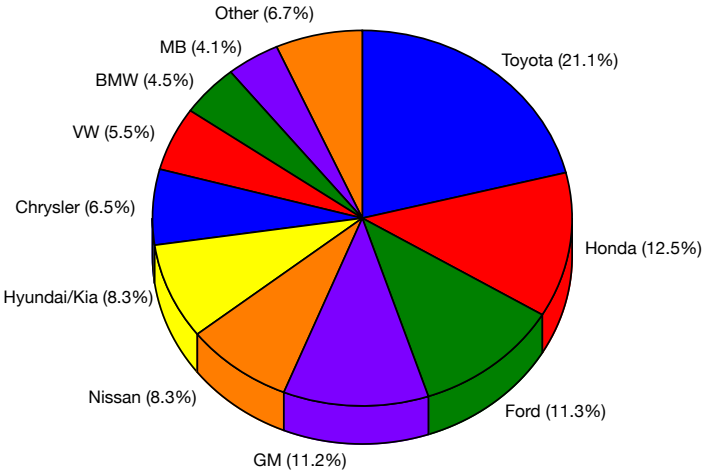
FORECAST AND ANALYSIS OF CALIFORNIA NEW LIGHT VEHICLE MARKET

California's New Vehicle Market Increases 25.3 Percent Over 2011

The new vehicle market in California continued its winning streak at the end of 2012, with new registrations increasing 22 percent in the Fourth Quarter versus a year earlier. It was the 15th consecutive year-over-year quarterly increase. Last year's annual total exceeded 1.6 million units, a 25.3 percent increase from 2011. The release of pent up demand, easing credit conditions, and strong trade in values helped the market last year and should continue to support sales in 2013. Auto Outlook is predicting a smaller 8.2 percent improvement this year, but registrations are expected to reach approximately 1.75 million units. Other key trends in the state market:

- Among the top 15 selling brands in the state, Kia had the largest percentage increase last year, up 53.3 percent.
- Korean, Japanese, European, and Detroit Three brand registrations each increased by more than 17 percent last year.
- Passenger car share increased 2.4 share points. SUVs were down two points.
- The state market was up 25.3 percent last year, well above the national 13.4 percent increase.

MANUFACTURER SHARE OF CALIFORNIA NEW VEHICLE MARKET 2012

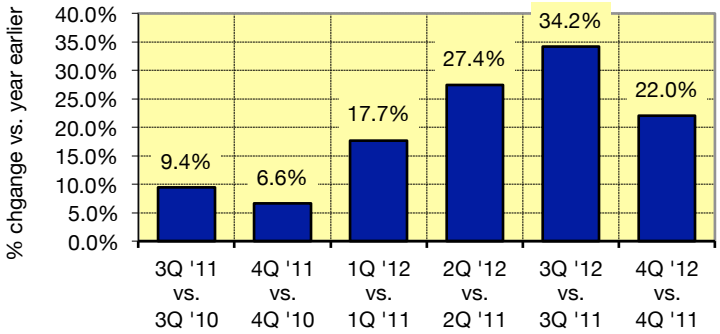


Brands included: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Ford (Ford and Lincoln), GM (Buick, Cadillac, Chevrolet, and GMC), Nissan (Nissan and Infiniti), Chrysler (Chrysler, Dodge, Fiat, and Jeep), VW (Audi, Bentley, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz and smart), Other (all other brands).

Data source: AutoCount Data from Experian Automotive.

Any material referenced from this publication must cite the above data source information.

QUARTERLY NEW LIGHT VEHICLE REGISTRATIONS IN CALIFORNIA PERCENT CHANGE VERSUS YEAR EARLIER



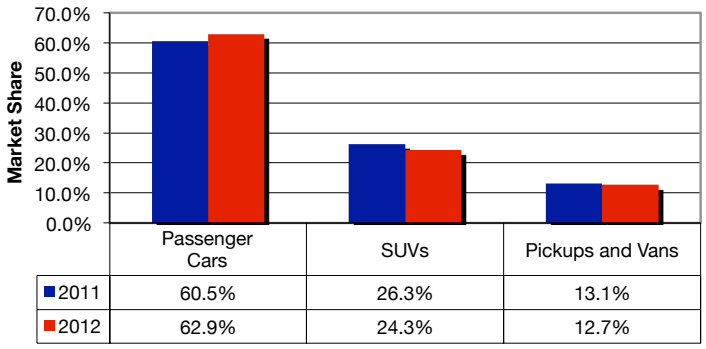
Data Source: AutoCount data from Experian Automotive.

CALIFORNIA NEW LIGHT VEHICLE REGISTRATIONS (INCLUDES RETAIL AND FLEET TRANSACTIONS)

	2011	2012	Forecast 2013	% ch. '11 to '12	% ch. '12 to '13
TOTAL	1,290,920	1,617,103	1,750,000	25.3%	8.2%
Car	781,302	1,017,562	1,123,500	30.2%	10.4%
Light Truck	509,618	599,541	626,500	17.6%	4.5%
Detroit Three	408,015	479,774	511,000	17.6%	6.5%
Japanese	574,586	748,409	824,250	30.3%	10.1%
European	208,842	254,624	273,000	21.9%	7.2%
Korean	99,477	134,296	141,750	35.0%	5.6%

Data Source: AutoCount data from Experian Automotive.

SEGMENTATION IN CALIFORNIA NEW LIGHT VEHICLE MARKET



As shown on the graph above, passenger car market share in the state increased 2.4 share points during 2012

Data Source: AutoCount data from Experian Automotive.

MODEL SALES

Prius is Top Selling Car in Retail Market for 2012

Top Selling Models in Each Segment - California
New Retail Registrations and Market Share of Segment (2012 Annual Totals)

Cars

Entry			Sub Compact			Sporty Compact			Standard Mid Size		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Nissan Versa	13489	18.0	Toyota Prius	60688	19.3	Chevrolet Camaro	7772	25.2	Toyota Camry	50250	23.2
Kia Soul	10358	13.8	Honda Civic	57124	18.2	Ford Mustang	6299	20.4	Honda Accord	49420	22.8
Honda Fit	9913	13.2	Toyota Corolla/Matrix	38037	12.1	Dodge Challenger	5071	16.4	Nissan Altima	23706	10.9
Fiat 500	8505	11.4	Volkswagen Jetta	21324	6.8	Scion tC	4919	15.9	Hyundai Sonata	22012	10.1
Ford Fiesta	6519	8.7	Hyundai Elantra	18150	5.8	Hyundai Veloster	4144	13.4	Kia Optima	17729	8.2
Large Mid Size			**Near Luxury**			**Luxury**			**Sports Car**		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Dodge Charger	3990	23.2	BMW 3-Series	18856	18.7	Mercedes E-Class	16397	27.6	Porsche 911	1965	26.5
Chrysler 300	3796	22.1	Mercedes C-Class	18093	17.9	BMW 5-Series	10457	17.6	Nissan 370Z	1284	17.3
Nissan Maxima	2531	14.7	Infiniti G	8979	8.9	Lexus GS	4017	6.8	Chevrolet Corvette	911	12.3
Buick LaCrosse	1990	11.6	Lexus ES	8384	8.3	Audi A5	3191	5.4	Mazda MX5	763	10.3
Toyota Avalon	1782	10.4	Lexus IS	7119	7.1	Audi A6	2945	5.0	BMW Z4	550	7.4

Light Trucks

Compact Pickup			Full Size Pick Up			Mini Van			Full Size Van		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Toyota Tacoma	21935	66.6	Ford F-Series	25434	34.0	Toyota Sienna	16147	40.6	Ford E-Series	2937	30.1
Nissan Frontier	6193	18.8	Chevrolet Silverado	17804	23.8	Honda Odyssey	14737	37.0	Ford Transit Connect	2323	23.8
Ford Ranger	1974	6.0	Ram	11299	15.1	Dodge Caravan	2319	5.8	Chevrolet Express	1665	17.1
Chevrolet Colorado	1356	4.1	Toyota Tundra	10838	14.5	Nissan Quest	1577	4.0	Sprinter	1593	16.4
Honda Ridgeline	1011	3.1	GMC Sierra	7374	9.8	Mazda 5	1569	3.9	Nissan NV	897	9.2
Compact SUV			**Mid Size SUV**			**Full Size SUV**			**Luxury SUV**		
Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share	Model	Regs.	Share
Honda CRV	29055	24.0	Toyota Highlander	13059	15.2	Ford Explorer	9377	25.7	Lexus RX	14451	16.7
Toyota RAV4	15274	12.6	Honda Pilot	12602	14.7	GMC Acadia	3949	10.8	BMW X5	7411	8.6
Ford Escape	11406	9.4	Ford Edge	11362	13.2	Ford Flex	3889	10.7	Mercedes M-Class	6675	7.7
Nissan Rogue	9839	8.1	Jeep Grand Cherokee	9905	11.5	Chevrolet Tahoe	3472	9.5	Acura MDX	6464	7.5
Jeep Wrangler	9114	7.5	Kia Sorento	7724	9.0	Chevrolet Traverse	2967	8.1	Mercedes GLK	4694	5.4

Data source: AutoCount Data from Experian Automotive.
Note: Prius includes c, v, and Plug In.

MARKET PERSPECTIVE

Improvement in State Market Easily Exceeds Nation

New light vehicle registrations (including retail and fleet transactions) in California increased 25.3 percent from 2011 to 2012, higher than the 13.4 percent improvement in the U.S. market (see table below). Car market share in California exceeded National levels by more than 11 share points. Domestic brand market share (the Detroit Three) in California was 29.7 percent versus 44.5 percent in the Nation.

NEW LIGHT VEHICLE MARKET COMPARISON (INCLUDES RETAIL AND FLEET TRANSACTIONS)

Market	% change in registrations 2012 vs. 2011	Car market share 2012	Domestic brand share 2012
California	25.3%	62.9%	29.7%
U.S.	13.4%	51.6%	44.5%

Source for California data: AutoCount data from Experian Automotive
Source for U.S. data: Automotive News

DATA SOURCE INFORMATION

WHO ARE MY TOP COMPETITORS? -BY MARKET AREA?
WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?
ANSWERS DRIVE RESULTS.
You need insights into your marketplace to make the best decisions to maximize profits. The AutoCount® Dealer Report analyzes full details on new and used competitive dealer market share, down to specific areas you define. You bring the questions. We'll bring the answers.
Experian Automotive
www.experianautomotive.com 888 211 5809

DATA EXPLANATION

Data presented in Auto Outlook measures new vehicle registrations in California. Monthly recording of registrations occurs when the data is processed by the DMV.

BRAND SCOREBOARD

Detailed Results for All Brands in California Market

The table shows new light vehicle registrations in California, including retail and fleet 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.** The top 10 ranked brands in each percent change category are shaded green. Source for California registrations: AutoCount data from Experian Automotive. Source for U.S. data: Automotive News.

California New Car and Light Truck Registrations

	December				Fourth Quarter 2011 and 2012				Annual Totals				Annual Market Share (%)		
	California			U.S.	California			U.S.	California			U.S.	California		
	2011	2012	% chg.	% chg.	2011	2012	% chg.	% chg.	2011	2012	% chg.	% chg.	2011	2012	Chg.
MARKET SUMMARY															
TOTAL	125,790	151,712	20.6%	9.0%	304,325	371,403	22.0%	10.2%	1,290,920	1,617,103	25.3%	13.4%			
Cars	72,814	93,042	27.8%	15.4%	179,185	232,512	29.8%	16.6%	781,302	1,017,562	30.2%	17.9%	60.5	62.9	2.4
Light Trucks	52,976	58,670	10.7%	3.7%	125,140	138,891	11.0%	4.6%	509,618	599,541	17.6%	9.0%	39.5	37.1	-2.4
Domestic	37,423	41,900	12.0%	4.3%	91,098	100,401	10.2%	4.5%	408,015	479,774	17.6%	7.1%	31.6	29.7	-1.9
Japanese	55,488	69,225	24.8%	10.7%	134,963	172,682	27.9%	14.1%	574,586	748,409	30.3%	19.9%	44.5	46.3	1.8
European	23,204	29,203	25.9%	24.3%	54,577	68,893	26.2%	22.4%	208,842	254,624	21.9%	20.0%	16.2	15.7	-0.5
Korean	9,675	11,384	17.7%	4.7%	23,687	29,427	24.2%	5.5%	99,477	134,296	35.0%	11.4%	7.7	8.3	0.6
BRAND REGISTRATIONS															
Acura	1,793	1,995	11.3%	21.3%	4,110	5,416	31.8%	18.4%	16,552	21,388	29.2%	26.7%	1.3	1.3	0.0
Audi	2,072	2,841	37.1%	17.3%	5,254	6,987	33.0%	18.5%	20,768	25,904	24.7%	18.5%	1.6	1.6	0.0
BMW	5,666	7,337	29.5%	39.4%	13,260	17,146	29.3%	35.4%	50,779	57,553	13.3%	13.5%	3.9	3.6	-0.3
Buick	547	657	20.1%	10.0%	1,323	1,563	18.1%	14.9%	8,641	9,024	4.4%	1.6%	0.7	0.6	-0.1
Cadillac	1,096	1,469	34.0%	12.2%	2,508	3,226	28.6%	18.0%	11,219	11,854	5.7%	-1.7%	0.9	0.7	-0.2
Chevrolet	10,408	10,749	3.3%	3.7%	25,595	26,451	3.3%	2.2%	118,629	133,445	12.5%	4.3%	9.2	8.3	-0.9
Chrysler	1,526	1,505	-1.4%	6.4%	3,593	3,549	-1.2%	4.2%	12,994	23,238	78.8%	39.1%	1.0	1.4	0.4
Dodge	2,308	3,574	54.9%	26.1%	6,603	8,563	29.7%	26.0%	32,629	40,696	24.7%	16.4%	2.5	2.5	0.0
Fiat	441	799	81.2%	59.4%	1,155	2,423	109.8%	86.7%	2,960	9,277	213.4%	121.4%	0.2	0.6	0.4
Ford	14,779	16,492	11.6%	2.2%	35,117	38,245	8.9%	3.3%	155,796	176,408	13.2%	5.0%	12.1	10.9	-1.2
GMC	2,219	2,441	10.0%	4.7%	5,149	5,816	13.0%	4.2%	23,107	25,226	9.2%	4.0%	1.8	1.6	-0.2
Honda	11,976	16,691	39.4%	26.8%	29,326	42,673	45.5%	24.7%	139,326	181,382	30.2%	23.7%	10.8	11.2	0.4
Hyundai	5,718	6,758	18.2%	17.1%	14,012	17,142	22.3%	6.8%	60,617	74,739	23.3%	8.9%	4.7	4.6	-0.1
Infiniti	1,476	1,669	13.1%	14.9%	3,562	4,024	13.0%	26.6%	14,346	17,033	18.7%	21.8%	1.1	1.1	0.0
Jaguar	229	219	-4.4%	-7.7%	555	525	-5.4%	-27.2%	2,596	2,576	-0.8%	-2.2%	0.2	0.2	0.0
Jeep	2,663	2,443	-8.3%	-8.5%	6,242	6,173	-1.1%	-5.7%	25,284	32,000	26.6%	13.1%	2.0	2.0	0.0
Kia	3,957	4,626	16.9%	-9.7%	9,675	12,285	27.0%	3.9%	38,860	59,557	53.3%	14.9%	3.0	3.7	0.7
Land Rover	779	782	0.4%	9.1%	1,662	1,810	8.9%	1.3%	5,865	7,200	22.8%	14.6%	0.5	0.4	-0.1
Lexus	4,197	5,448	29.8%	20.7%	9,826	12,319	25.4%	16.3%	35,022	45,876	31.0%	23.0%	2.7	2.8	0.1
Lincoln	430	314	-27.0%	-12.1%	1,016	885	-12.9%	-12.2%	5,448	4,703	-13.7%	-4.1%	0.4	0.3	-0.1
Mazda	2,889	2,820	-2.4%	21.9%	6,331	6,856	8.3%	14.3%	28,727	34,131	18.8%	10.6%	2.2	2.1	-0.1
Mercedes	6,976	8,452	21.2%	11.3%	15,411	18,784	21.9%	11.0%	53,648	65,023	21.2%	12.7%	4.2	4.0	-0.2
MINI	1,195	1,588	32.9%	13.0%	2,738	3,785	38.2%	10.8%	12,667	15,227	20.2%	15.0%	1.0	0.9	-0.1
Mitsubishi	383	440	14.9%	-18.3%	1,154	1,204	4.3%	-11.2%	8,177	6,656	-18.6%	-26.9%	0.6	0.4	-0.2
Nissan	9,937	9,400	-5.4%	-3.6%	23,979	24,045	0.3%	-0.1%	99,017	116,298	17.5%	8.2%	7.7	7.2	-0.5
Porsche	579	861	48.7%	61.0%	1,470	2,105	43.2%	57.7%	6,587	7,521	14.2%	20.7%	0.5	0.5	0.0
Ram	1,003	1,457	45.3%	16.1%	2,792	3,506	25.6%	18.5%	11,119	13,892	24.9%	16.8%	0.9	0.9	0.0
smart	76	130	71.1%	40.3%	274	498	81.8%	85.9%	795	1,910	140.3%	92.2%	0.1	0.1	0.0
Subaru	1,656	3,143	89.8%	8.8%	4,349	7,563	73.9%	27.4%	19,994	28,836	44.2%	26.0%	1.5	1.8	0.3
Suzuki	46	50	8.7%	-24.2%	104	245	135.6%	-2.0%	534	667	24.9%	-4.7%	0.0	0.0	0.0
Toyota/Scion	21,134	27,569	30.4%	7.0%	52,220	68,337	30.9%	13.1%	212,888	296,141	39.1%	27.1%	16.5	18.3	1.8
Volkswagen	4,866	6,220	27.8%	35.4%	11,847	15,365	29.7%	29.3%	45,897	63,273	37.9%	35.1%	3.6	3.9	0.3
Volvo	552	560	1.4%	15.1%	1,573	1,349	-14.2%	9.3%	6,997	6,387	-8.7%	1.3%	0.5	0.4	-0.1
Other	218	213	-2.3%	-20.1%	540	540	0.0%	-18.0%	2,435	2,062	-15.3%	-34.8%	0.2	0.1	-0.1

RETAIL MARKET RECAP

State New Retail Market Surges in 2012

The table below summarizes new retail light vehicle market results during 2011 and 2012. (Note: the information presented includes retail registrations only, and excludes fleet transactions.) New retail light vehicle registrations in California increased 26.5 percent in 2012, just above the 25.3 percent increase in total registrations, which include fleets.

The Southern California retail market increased 25.5 percent, while Northern California was up 28.6 percent. The LA and Orange County market improved 24.6 percent, while San Diego County was up 27 percent.

Data Source: AutoCount data from Experian Automotive.

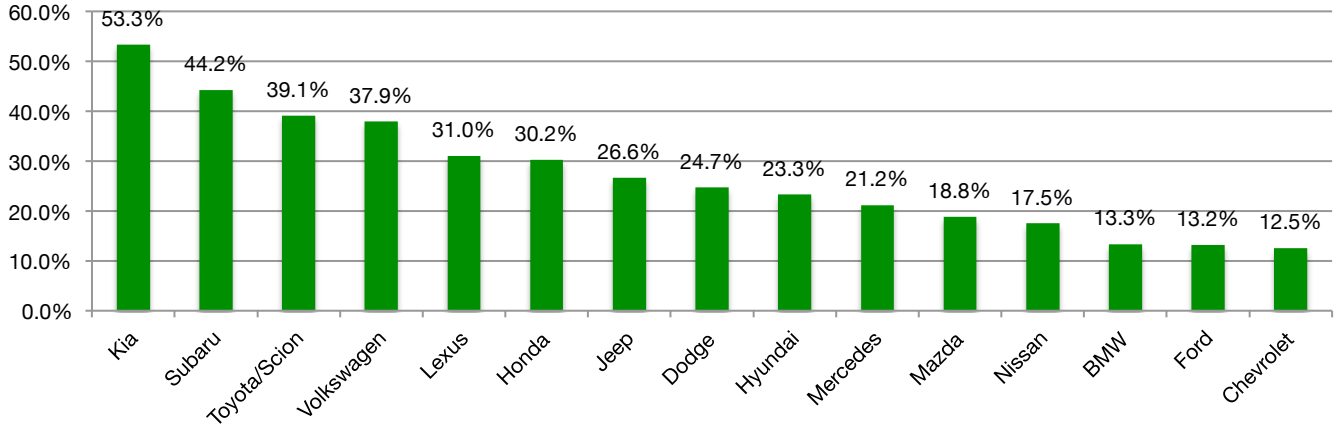
NEW RETAIL LIGHT VEHICLE REGISTRATIONS (excluding fleets) - Annual Totals							
Northern and Southern California				Selected Regional Markets			
	2011	2012	Percent Change		2011	2012	Percent Change
Statewide Total	1,035,756	1,310,720	26.5%	San Francisco Bay	197,594	252,943	28.0%
Cars	626,109	823,084	31.5%	Cars	119,482	158,156	32.4%
Light Trucks	409,647	487,636	19.0%	Light Trucks	78,112	94,787	21.3%
Northern California	335,448	431,553	28.6%	LA and Orange Counties	419,258	522,356	24.6%
Cars	192,869	258,722	34.1%	Cars	266,441	344,330	29.2%
Light Trucks	142,579	172,831	21.2%	Light Trucks	152,817	178,026	16.5%
Southern California	700,308	879,167	25.5%	San Diego County	97,368	123,680	27.0%
Cars	433,240	564,362	30.3%	Cars	57,934	76,459	32.0%
Light Trucks	267,068	314,805	17.9%	Light Trucks	39,434	47,221	19.7%

BRAND SCOREBOARD

Of Top 15 Brands in State, Six Had Increases of Greater Than 30% in 2012

This graph below shows the percent change in new vehicle registrations from 2011 to 2012 for the top 15 selling brands in the state.
Data Source: AutoCount data from Experian Automotive.

Percent Change in New Vehicle Registrations for Top 15 Brands in State (includes fleets) - 2012 vs. 2011



California Auto Outlook

Published by:
Auto Outlook, Inc.
5 Great Valley Parkway, Malvern, PA 19355
Phone 800-206-0102 Email: jfoltz@autooutlook.com

Any material quoted must be attributed to California Auto Outlook, published by Auto Outlook, Inc. on behalf of the California New Car Dealers Association. Unforeseen events may affect the forecast projections presented. Consequently, Auto Outlook, Inc. is not responsible for management decisions based on the content of Auto Outlook.
Copyright: Auto Outlook, Inc. January, 2013

California Auto Outlook is printed, sponsored, and distributed by the California New Car Dealers Association, and is provided free of charge to all members as an added benefit of Association membership. The Association is proud to provide this valuable and practical information to members.