

# Silicon Valley Outlook

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Covering the Santa Clara County automotive market

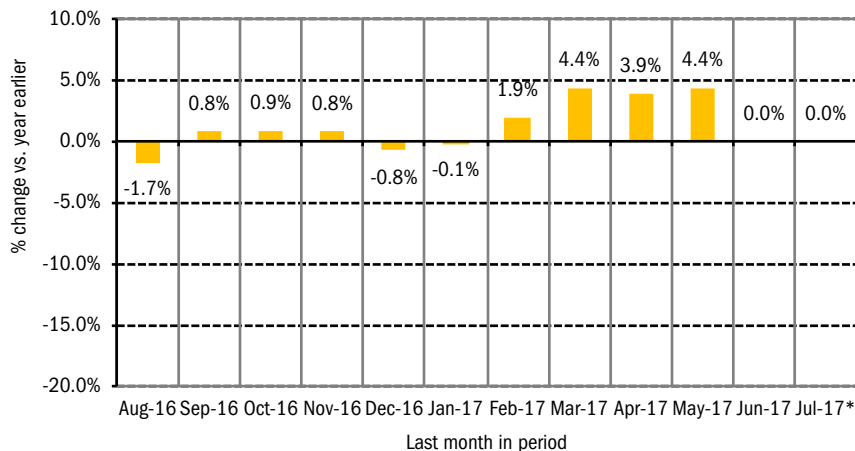
Data thru July 2017

## Santa Clara County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru July*			YTD Market Share		
	6/16 & 7/16	6/17 & 7/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	16,428	15,984	-2.7%	55,218	55,935	1.3%			
Cars	8,909	8,223	-7.7%	30,216	28,971	-4.1%	54.7	51.8	-2.9
Light Trucks	7,519	7,761	3.2%	25,002	26,964	7.8%	45.3	48.2	2.9
Japanese Brands	8,696	8,744	0.6%	29,194	29,383	0.6%	52.9	52.5	-0.4
Honda	2,820	2,909	3.2%	8,759	9,177	4.8%	15.9	16.4	0.5
Nissan	936	893	-4.6%	3,333	3,292	-1.2%	6.0	5.9	-0.1
Toyota	3,457	3,541	2.4%	11,988	11,563	-3.5%	21.7	20.7	-1.0
Other	1,483	1,401	-5.5%	5,114	5,351	4.6%	9.3	9.6	0.3
Domestic Brands	3,833	3,761	-1.9%	13,076	14,016	7.2%	23.7	25.1	1.4
FCA (excl. FIAT)	802	702	-12.5%	2,806	2,678	-4.6%	5.1	4.8	-0.3
Ford	1,220	1,166	-4.4%	4,522	4,384	-3.1%	8.2	7.8	-0.4
General Motors	1,342	1,301	-3.1%	4,397	5,288	20.3%	8.0	9.5	1.5
Other	469	592	26.2%	1,351	1,666	23.3%	2.4	3.0	0.6
European Brands	3,137	2,821	-10.1%	10,446	10,085	-3.5%	18.9	18.0	-0.9
BMW	841	653	-22.4%	3,147	2,546	-19.1%	5.7	4.6	-1.1
Mercedes	744	640	-14.0%	2,300	2,226	-3.2%	4.2	4.0	-0.2
Volkswagen	1,192	1,189	-0.3%	3,784	4,187	10.7%	6.9	7.5	0.6
Other	360	339	-5.8%	1,215	1,126	-7.3%	2.2	2.0	-0.2
Korean Brands	762	658	-13.6%	2,502	2,451	-2.0%	4.5	4.4	-0.1

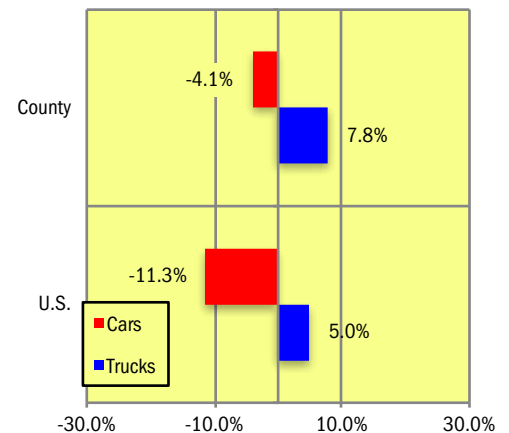
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (Audi, Bentley, Porsche, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz and smart), Other (Alfa Romeo, Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.  
\*Figures for July 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

**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 July 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

**Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '17 thru July\* vs. YTD '16**



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. \*Figures for July, 2017 were estimated by Auto Outlook.  
Data Source: IHS Markit.

### Data Information

All data represents new vehicle retail registrations in Santa Clara 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 Markit.

Santa Clara County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '16 thru July	YTD '17 thru July*	% change	YTD '16 thru July	YTD '17 thru July*
TOTAL	55,218	55,935	1%		
Acura	1,147	1,180	3%	2.1%	2.1%
Alfa Romeo	2	54	2600%	0.0%	0.1%
Audi	1,423	1,658	17%	2.6%	3.0%
BMW	2,702	2,248	-17%	4.9%	4.0%
Buick	226	232	3%	0.4%	0.4%
Cadillac	202	189	-6%	0.4%	0.3%
Chevrolet	3,226	4,015	24%	5.8%	7.2%
Chrysler	179	300	68%	0.3%	0.5%
Dodge	692	650	-6%	1.3%	1.2%
FIAT	267	125	-53%	0.5%	0.2%
Ford	4,390	4,269	-3%	8.0%	7.6%
Genesis	0	55		0.0%	0.1%
GMC	743	852	15%	1.3%	1.5%
Honda	7,612	7,997	5%	13.8%	14.3%
Hyundai	1,757	1,634	-7%	3.2%	2.9%
Infiniti	471	526	12%	0.9%	0.9%
Jaguar	126	205	63%	0.2%	0.4%
Jeep	1,444	1,238	-14%	2.6%	2.2%
Kia	745	762	2%	1.3%	1.4%
Land Rover	317	326	3%	0.6%	0.6%
Lexus	2,385	2,134	-11%	4.3%	3.8%
Lincoln	132	115	-13%	0.2%	0.2%
Maserati	89	84	-6%	0.2%	0.2%
Mazda	2,441	2,414	-1%	4.4%	4.3%
Mercedes	2,272	2,199	-3%	4.1%	3.9%
MINI	443	297	-33%	0.8%	0.5%
Mitsubishi	70	50	-29%	0.1%	0.1%
Nissan	2,862	2,766	-3%	5.2%	4.9%
Other	82	102	24%	0.1%	0.2%
Porsche	479	535	12%	0.9%	1.0%
Ram	491	490	0%	0.9%	0.9%
Subaru	2,597	2,876	11%	4.7%	5.1%
Tesla	1,345	1,662	24%	2.4%	3.0%
Toyota	9,603	9,429	-2%	17.4%	16.9%
Volkswagen	1,882	1,994	6%	3.4%	3.6%
Volvo	374	273	-27%	0.7%	0.5%

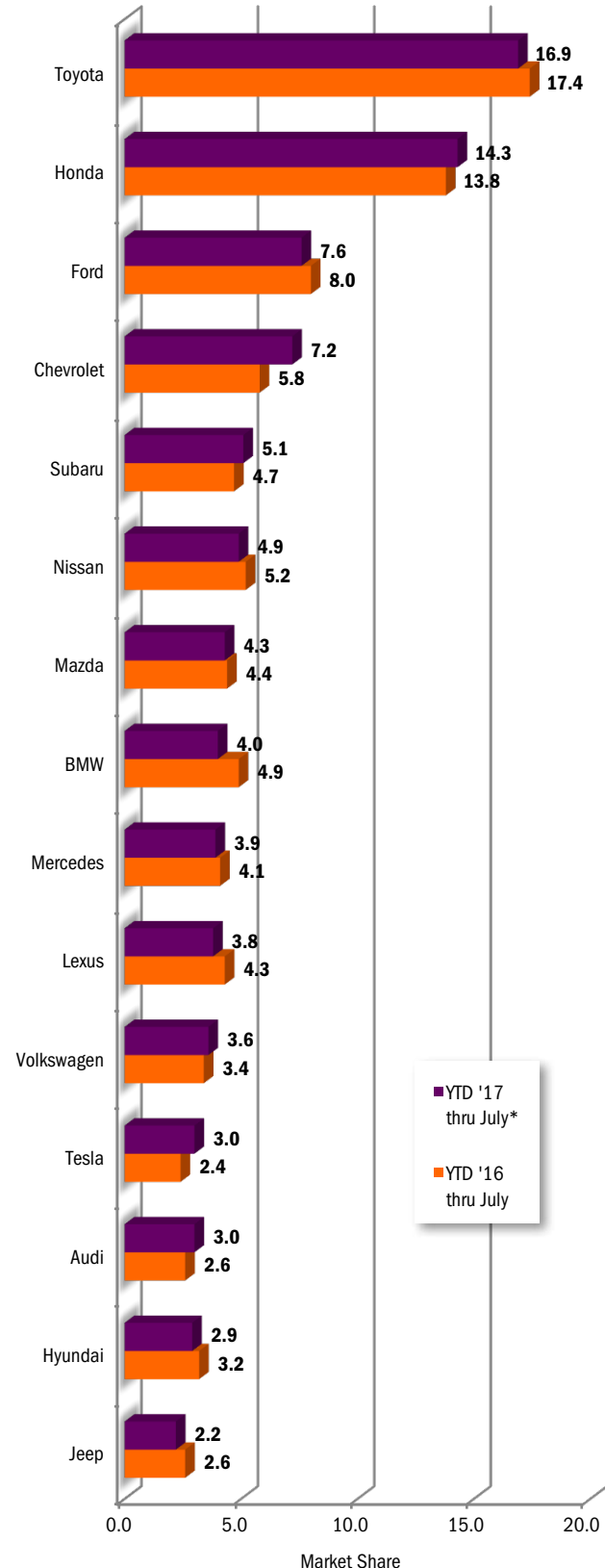
Top ten ranked brands in each percent change category are shaded green.  
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County Market Share for Top 15 Selling Brands  
YTD '17 thru July\* vs. YTD '16



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