

Silicon Valley Outlook

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Automobile
Dealers Association

Covering the Santa Clara County automotive market

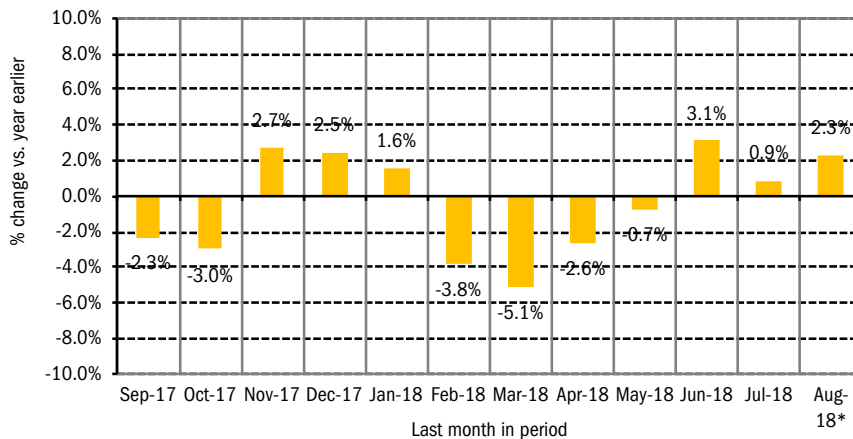
Data thru August 2018

Santa Clara County New Retail Car and Light Truck Registrations

	July			August			Year-to-date thru August*			YTD Market Share		
	Jul-17	Jul-18	% change	Aug-17	Aug-18	% change	2017	2018	% change	2017	2018	change
Industry Total	9,110	9,008	-1.1%	7,831	7,909	1.0%	64,156	63,698	-0.7%			
Cars	4,774	4,439	-7.0%	3,967	3,484	-12.2%	33,269	30,938	-7.0%	51.9	48.6	-3.3
Light Trucks	4,336	4,569	5.4%	3,864	4,425	14.5%	30,887	32,760	6.1%	48.1	51.4	3.3
Japanese Brands	5,047	4,463	-11.6%	4,131	4,145	0.3%	33,697	31,593	-6.2%	52.5	49.6	-2.9
Honda	1,558	1,398	-10.3%	1,270	1,299	2.3%	10,478	10,121	-3.4%	16.3	15.9	-0.4
Nissan	500	379	-24.2%	330	342	3.6%	3,642	2,857	-21.6%	5.7	4.5	-1.2
Toyota	2,111	1,866	-11.6%	1,763	1,728	-2.0%	13,378	12,705	-5.0%	20.9	19.9	-1.0
Other	878	820	-6.6%	768	776	1.0%	6,199	5,910	-4.7%	9.7	9.3	-0.4
Domestic Brands	2,142	2,775	29.6%	1,780	1,869	5.0%	15,861	17,605	11.0%	24.7	27.6	2.9
FCA (excl. FIAT)	377	527	39.8%	349	391	12.0%	3,042	3,392	11.5%	4.7	5.3	0.6
Ford	665	635	-4.5%	562	587	4.4%	4,954	4,471	-9.7%	7.7	7.0	-0.7
General Motors	818	689	-15.8%	749	655	-12.6%	6,207	5,292	-14.7%	9.7	8.3	-1.4
Other	282	924	227.7%	120	236	96.7%	1,658	4,450	168.4%	2.6	7.0	4.4
European Brands	1,530	1,402	-8.4%	1,591	1,550	-2.6%	11,755	11,905	1.3%	18.3	18.7	0.4
BMW	400	325	-18.8%	369	364	-1.4%	2,992	3,080	2.9%	4.7	4.8	0.1
Mercedes	291	300	3.1%	304	253	-16.8%	2,504	2,382	-4.9%	3.9	3.7	-0.2
Volkswagen	639	561	-12.2%	699	712	1.9%	4,888	4,785	-2.1%	7.6	7.5	-0.1
Other	200	216	8.0%	219	221	0.9%	1,371	1,658	20.9%	2.1	2.6	0.5
Korean Brands	391	368	-5.9%	329	342	4.0%	2,843	2,592	-8.8%	4.4	4.1	-0.3

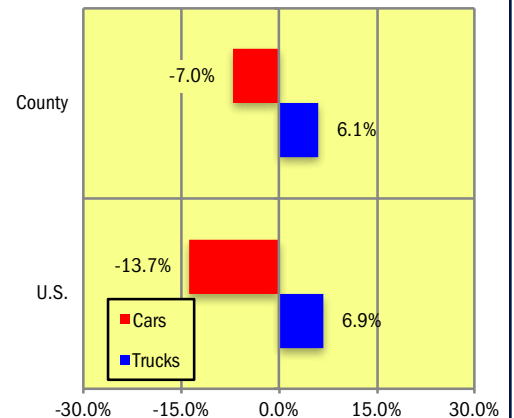
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 August 2018 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 August 2018 were estimated by Auto Outlook. Data Source: IHS Markit.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '18 thru August* vs. YTD '17



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. Figures for August, 2018 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 '17 thru Aug.	YTD '18 thru Aug.*	% change	YTD '17 thru Aug.	YTD '18 thru Aug.*
TOTAL	64,156	63,698	-1%		
Acura	1,362	1,243	-9%	2.1%	2.0%
Alfa Romeo	57	149	161%	0.1%	0.2%
Audi	1,931	2,049	6%	3.0%	3.2%
BMW	2,631	2,729	4%	4.1%	4.3%
Buick	266	261	-2%	0.4%	0.4%
Cadillac	227	160	-30%	0.4%	0.3%
Chevrolet	4,700	4,011	-15%	7.3%	6.3%
Chrysler	364	490	35%	0.6%	0.8%
Dodge	709	625	-12%	1.1%	1.0%
FIAT	155	72	-54%	0.2%	0.1%
Ford	4,817	4,384	-9%	7.5%	6.9%
Genesis	62	58	-6%	0.1%	0.1%
GMC	1,014	860	-15%	1.6%	1.4%
Honda	9,116	8,878	-3%	14.2%	13.9%
Hyundai	1,902	1,553	-18%	3.0%	2.4%
Infiniti	613	522	-15%	1.0%	0.8%
Jaguar	241	171	-29%	0.4%	0.3%
Jeep	1,385	1,608	16%	2.2%	2.5%
Kia	879	981	12%	1.4%	1.5%
Land Rover	407	494	21%	0.6%	0.8%
Lexus	2,443	2,330	-5%	3.8%	3.7%
Lincoln	137	87	-36%	0.2%	0.1%
Maserati	96	64	-33%	0.1%	0.1%
Mazda	2,789	2,597	-7%	4.3%	4.1%
Mercedes	2,474	2,364	-4%	3.9%	3.7%
MINI	360	348	-3%	0.6%	0.5%
Mitsubishi	43	108	151%	0.1%	0.2%
Nissan	3,029	2,335	-23%	4.7%	3.7%
Other	119	107	-10%	0.2%	0.2%
Porsche	624	593	-5%	1.0%	0.9%
Ram	584	669	15%	0.9%	1.1%
Subaru	3,355	3,198	-5%	5.2%	5.0%
Tesla	1,654	4,445	169%	2.6%	7.0%
Toyota	10,935	10,375	-5%	17.0%	16.3%
Volkswagen	2,333	2,143	-8%	3.6%	3.4%
Volvo	343	637	86%	0.5%	1.0%

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

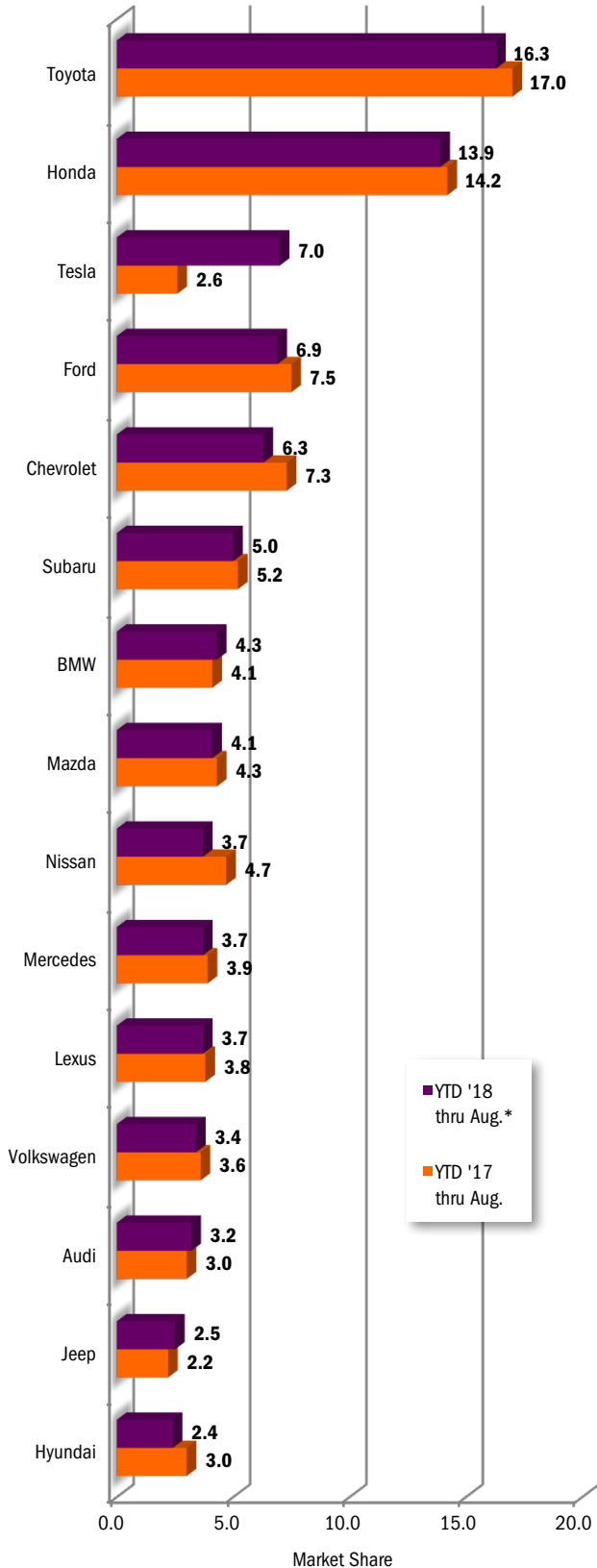
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County Market Share for Top 15 Selling Brands
YTD '18 thru August* vs. YTD '17



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