

Silicon Valley Outlook

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Automobile
Dealers Association

Covering the Santa Clara County automotive market

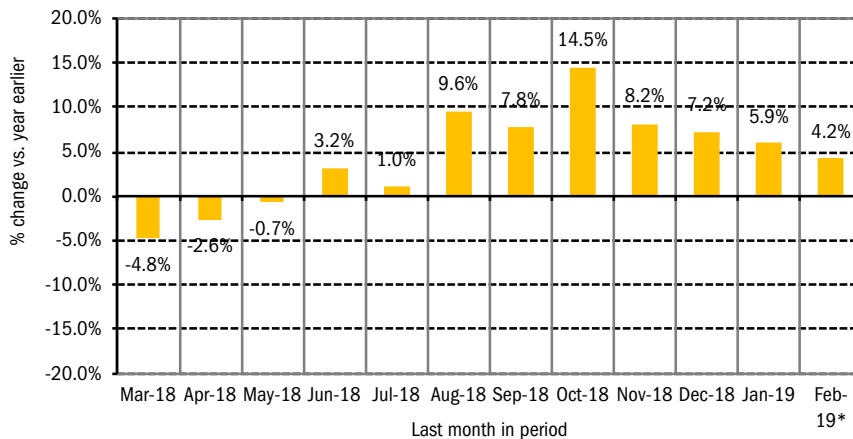
Data thru February 2019

Santa Clara County New Retail Car and Light Truck Registrations

	January			February*			YTD thru Feb*			YTD Market Share		
	Jan-18	Jan-19	% change	Feb-18	Feb-19	% change	YTD '18	YTD '19	% change	2018	2019*	change
Industry Total	7,368	8,425	14.3%	6,829	6,692	-2.0%	14,197	15,117	6.5%			
Cars	3,590	4,738	32.0%	3,325	3,067	-7.8%	6,915	7,805	12.9%	48.7	51.6	2.9
Light Trucks	3,778	3,687	-2.4%	3,504	3,625	3.5%	7,282	7,312	0.4%	51.3	48.4	-2.9
Japanese Brands	3,460	3,272	-5.4%	3,533	3,328	-5.8%	6,993	6,600	-5.6%	49.3	43.7	-5.6
Honda	1,006	994	-1.2%	1,190	1,154	-3.0%	2,196	2,148	-2.2%	15.5	14.2	-1.3
Nissan	232	297	28.0%	305	260	-14.8%	537	557	3.7%	3.8	3.7	-0.1
Toyota	1,417	1,273	-10.2%	1,418	1,317	-7.1%	2,835	2,590	-8.6%	20.0	17.1	-2.9
Other	805	708	-12.0%	620	597	-3.7%	1,425	1,305	-8.4%	10.0	8.6	-1.4
Domestic Brands	2,297	3,677	60.1%	1,661	1,818	9.5%	3,958	5,495	38.8%	27.9	36.3	8.4
FCA (excl. FIAT)	401	362	-9.7%	356	335	-5.9%	757	697	-7.9%	5.3	4.6	-0.7
Ford	624	448	-28.2%	498	462	-7.2%	1,122	910	-18.9%	7.9	6.0	-1.9
General Motors	597	454	-24.0%	604	554	-8.3%	1,201	1,008	-16.1%	8.5	6.7	-1.8
Other	675	2,413	257.5%	203	467	130.0%	878	2,880	228.0%	6.2	19.1	12.9
European Brands	1,294	1,194	-7.7%	1,332	1,238	-7.1%	2,626	2,432	-7.4%	18.5	16.1	-2.4
BMW	314	266	-15.3%	318	303	-4.7%	632	569	-10.0%	4.5	3.8	-0.7
Mercedes	254	337	32.7%	266	227	-14.7%	520	564	8.5%	3.7	3.7	0.0
Volkswagen	544	400	-26.5%	572	525	-8.2%	1,116	925	-17.1%	7.9	6.1	-1.8
Other	182	191	4.9%	176	183	4.0%	358	374	4.5%	2.5	2.5	0.0
Korean Brands	317	282	-11.0%	303	308	1.7%	620	590	-4.8%	4.4	3.9	-0.5

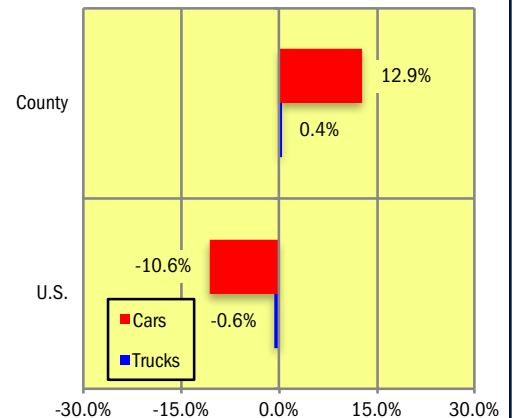
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 February 2019 were estimated by Auto Outlook. Data Source: IHS.

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 February 2019 were estimated by Auto Outlook. Data Source: IHS.

Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '19 thru February* vs. YTD '18



The graph above compares the change in new retail car and light truck registrations in both the area and U.S. markets. *Figures for February, 2019 were estimated by Auto Outlook.
Data Source: IHS.

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.

Santa Clara County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '18	YTD '19	% change	YTD '18	YTD '19
	thru Feb.	thru Feb.*		thru Feb.	thru Feb.*
TOTAL	14,197	15,117	6%		
Acura	233	274	18%	1.6%	1.8%
Alfa Romeo	22	24	9%	0.2%	0.2%
Audi	444	348	-22%	3.1%	2.3%
BMW	548	484	-12%	3.9%	3.2%
Buick	55	60	9%	0.4%	0.4%
Cadillac	34	46	35%	0.2%	0.3%
Chevrolet	904	712	-21%	6.4%	4.7%
Chrysler	129	84	-35%	0.9%	0.6%
Dodge	152	132	-13%	1.1%	0.9%
FIAT	17	10	-41%	0.1%	0.1%
Ford	1,096	893	-19%	7.7%	5.9%
Genesis	22	9	-59%	0.2%	0.1%
GMC	208	190	-9%	1.5%	1.3%
Honda	1,963	1,874	-5%	13.8%	12.4%
Hyundai	353	351	-1%	2.5%	2.3%
Infiniti	119	93	-22%	0.8%	0.6%
Jaguar	40	61	53%	0.3%	0.4%
Jeep	330	306	-7%	2.3%	2.0%
Kia	245	230	-6%	1.7%	1.5%
Land Rover	97	112	15%	0.7%	0.7%
Lexus	469	491	5%	3.3%	3.2%
Lincoln	26	17	-35%	0.2%	0.1%
Maserati	21	21	0%	0.1%	0.1%
Mazda	591	527	-11%	4.2%	3.5%
Mercedes	518	562	8%	3.6%	3.7%
MINI	84	85	1%	0.6%	0.6%
Mitsubishi	33	17	-48%	0.2%	0.1%
Nissan	418	464	11%	2.9%	3.1%
Other	22	19	-14%	0.2%	0.1%
Porsche	139	146	5%	1.0%	1.0%
Ram	146	175	20%	1.0%	1.2%
Subaru	800	760	-5%	5.6%	5.0%
Tesla	878	2,880	228%	6.2%	19.1%
Toyota	2,366	2,099	-11%	16.7%	13.9%
Volkswagen	533	431	-19%	3.8%	2.9%
Volvo	142	130	-8%	1.0%	0.9%

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

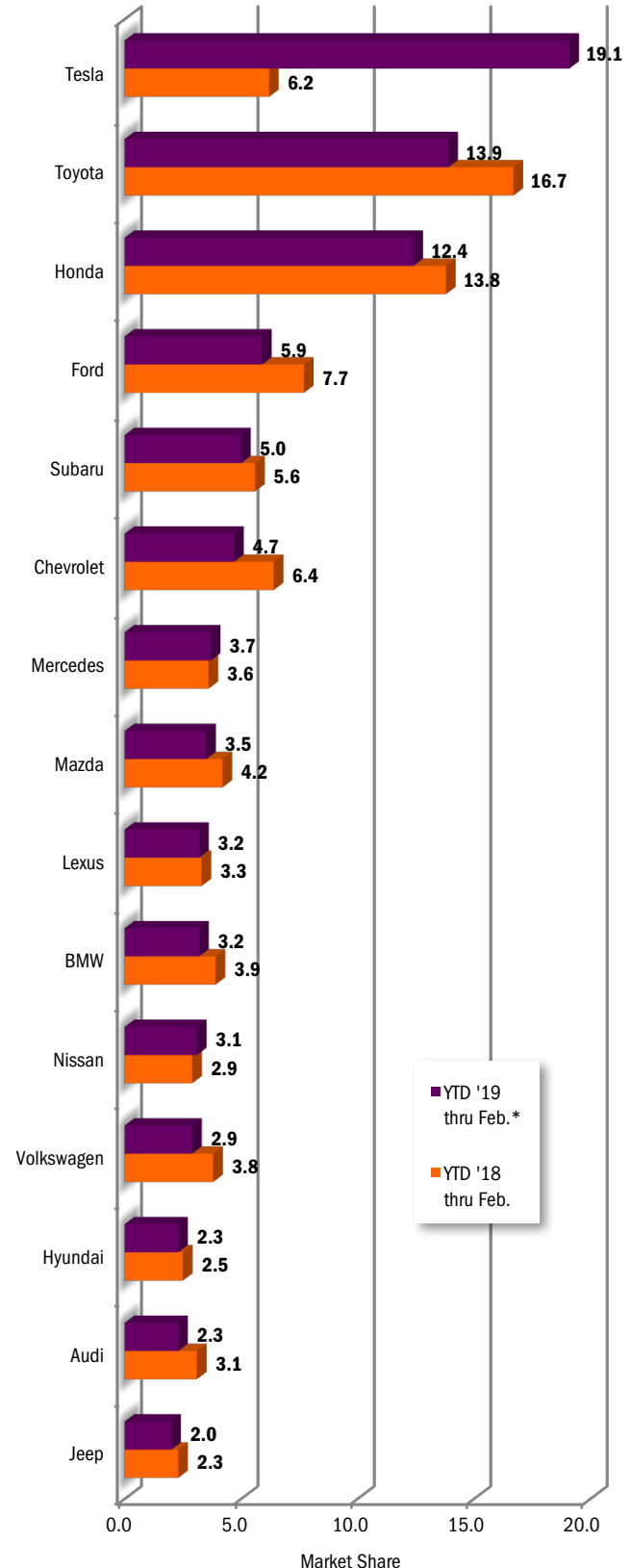
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County Market Share for Top 15 Selling Brands
YTD '19 thru February* vs. YTD '18



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