

Silicon Valley Outlook

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Silicon Valley
Automobile
Dealers Association

Covering the Santa Clara County automotive market

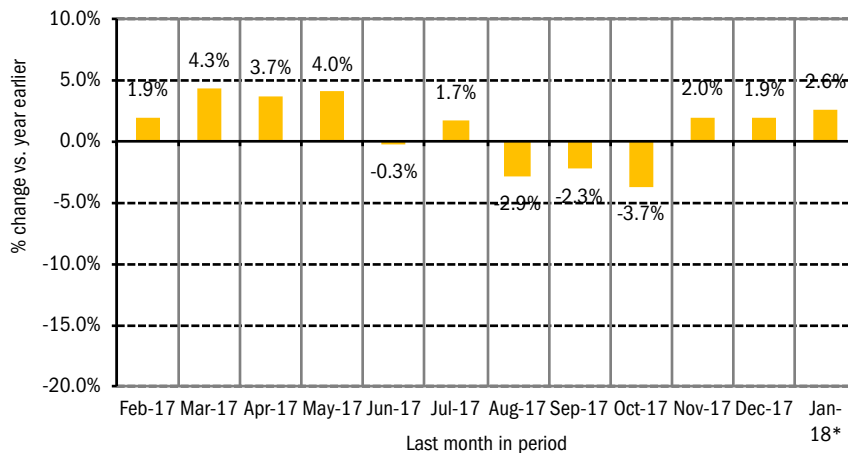
Data thru January 2018

Santa Clara County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Annual total			Annual Market Share		
	12/16 & 1/17	12/17 & 1/18*	% change	2016	2017	% change	2016	2017	change
Industry Total	17,232	17,216	-0.1%	97,734	98,473	0.8%			
Cars	8,752	8,076	-7.7%	52,586	49,638	-5.6%	53.8	50.4	-3.4
Light Trucks	8,480	9,140	7.8%	45,148	48,835	8.2%	46.2	49.6	3.4
Japanese Brands	8,804	8,609	-2.2%	51,217	51,021	-0.4%	52.4	51.8	-0.6
Honda	2,787	2,649	-5.0%	15,572	16,183	3.9%	15.9	16.4	0.5
Nissan	1,027	782	-23.9%	6,106	5,115	-16.2%	6.2	5.2	-1.0
Toyota	3,415	3,519	3.0%	20,581	20,574	0.0%	21.1	20.9	-0.2
Other	1,575	1,659	5.3%	8,958	9,149	2.1%	9.2	9.3	0.1
Domestic Brands	4,216	4,449	5.5%	22,952	24,651	7.4%	23.5	25.0	1.5
FCA (excl. FIAT)	733	661	-9.8%	4,782	4,584	-4.1%	4.9	4.7	-0.2
Ford	1,253	1,128	-10.0%	7,725	7,464	-3.4%	7.9	7.6	-0.3
General Motors	1,629	1,658	1.8%	8,023	9,659	20.4%	8.2	9.8	1.6
Other	601	1,002	66.7%	2,422	2,944	21.6%	2.5	3.0	0.5
European Brands	3,548	3,523	-0.7%	19,138	18,630	-2.7%	19.6	18.9	-0.7
BMW	1,032	1,003	-2.8%	5,617	4,948	-11.9%	5.7	5.0	-0.7
Mercedes	827	836	1.1%	4,282	4,039	-5.7%	4.4	4.1	-0.3
Volkswagen	1,322	1,284	-2.9%	7,010	7,470	6.6%	7.2	7.6	0.4
Other	367	400	9.0%	2,229	2,173	-2.5%	2.3	2.2	-0.1
Korean Brands	664	635	-4.4%	4,427	4,171	-5.8%	4.5	4.2	-0.3

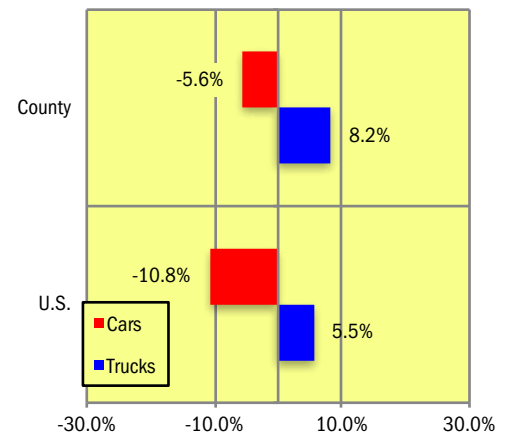
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW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

Percent Change in County and U.S. New Retail Light Vehicle Markets 2017 vs. 2016



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 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	
	2016 Annual	2017 Annual	% change	2016 Annual	2017 Annual
TOTAL	97,734	98,473	1%		
Acura	2,138	2,119	-1%	2.2%	2.2%
Alfa Romeo	5	92	1740%	0.0%	0.1%
Audi	2,632	3,036	15%	2.7%	3.1%
BMW	4,892	4,396	-10%	5.0%	4.5%
Buick	372	432	16%	0.4%	0.4%
Cadillac	386	361	-6%	0.4%	0.4%
Chevrolet	5,919	7,248	22%	6.1%	7.4%
Chrysler	361	605	68%	0.4%	0.6%
Dodge	1,165	992	-15%	1.2%	1.0%
FIAT	505	233	-54%	0.5%	0.2%
Ford	7,498	7,271	-3%	7.7%	7.4%
Genesis	41	96	134%	0.0%	0.1%
GMC	1,346	1,618	20%	1.4%	1.6%
Honda	13,434	14,064	5%	13.7%	14.3%
Hyundai	3,051	2,748	-10%	3.1%	2.8%
Infiniti	914	993	9%	0.9%	1.0%
Jaguar	301	359	19%	0.3%	0.4%
Jeep	2,352	2,046	-13%	2.4%	2.1%
Kia	1,335	1,327	-1%	1.4%	1.3%
Land Rover	536	605	13%	0.5%	0.6%
Lexus	4,208	3,832	-9%	4.3%	3.9%
Lincoln	227	193	-15%	0.2%	0.2%
Maserati	157	151	-4%	0.2%	0.2%
Mazda	4,160	4,175	0%	4.3%	4.2%
Mercedes	4,240	4,000	-6%	4.3%	4.1%
MINI	722	546	-24%	0.7%	0.6%
Mitsubishi	125	62	-50%	0.1%	0.1%
Nissan	5,192	4,122	-21%	5.3%	4.2%
Other	140	192	37%	0.1%	0.2%
Porsche	847	958	13%	0.9%	1.0%
Ram	904	941	4%	0.9%	1.0%
Subaru	4,661	4,892	5%	4.8%	5.0%
Tesla	2,411	2,934	22%	2.5%	3.0%
Toyota	16,373	16,742	2%	16.8%	17.0%
Volkswagen	3,531	3,476	-2%	3.6%	3.5%
Volvo	653	616	-6%	0.7%	0.6%

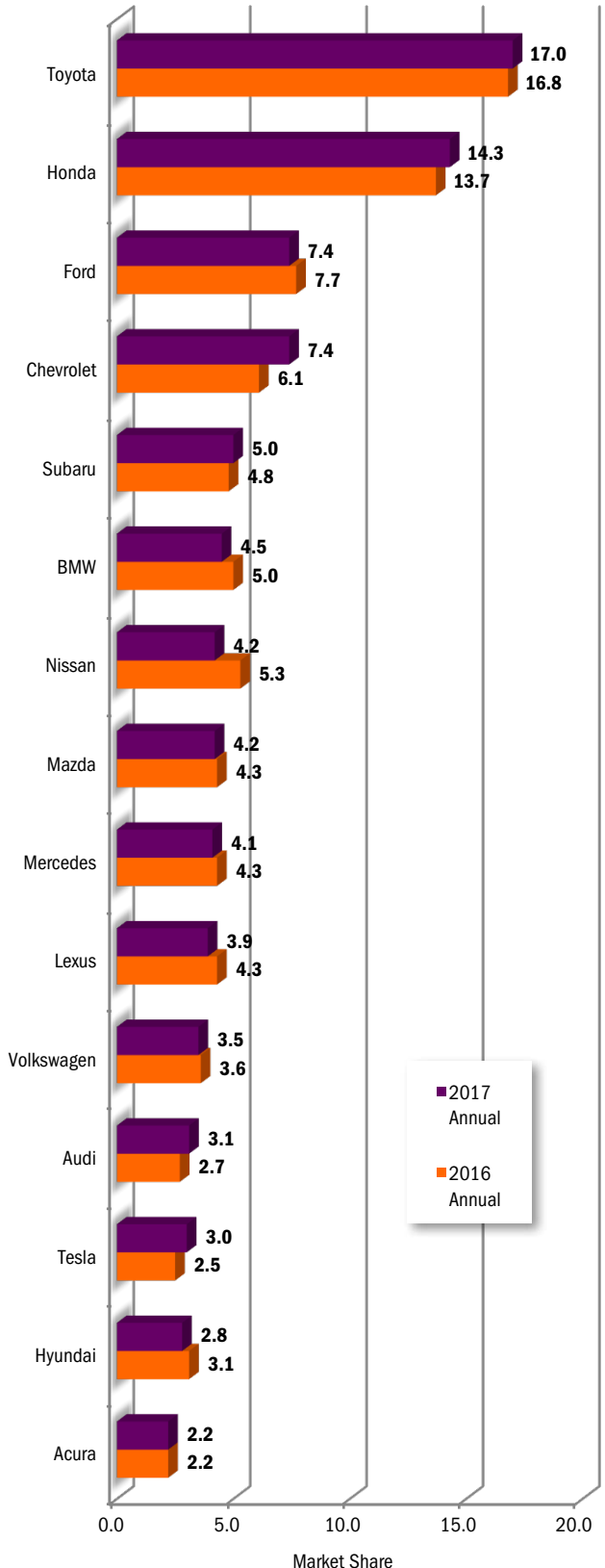
Top ten ranked brands in each percent change category are shaded green.

Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands
2017 vs. 2016



Data Source: IHS Markit.