

Silicon Valley Outlook

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Silicon Valley
Automobile
Dealers Association

Covering the Santa Clara County automotive market

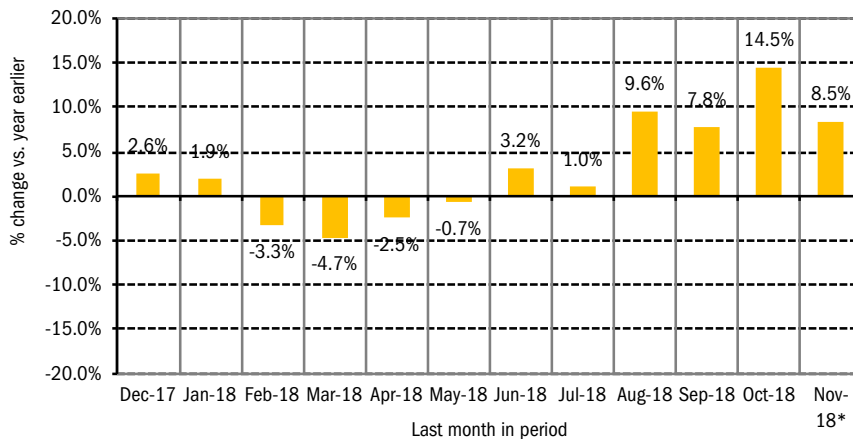
Data thru November 2018

Santa Clara County New Retail Car and Light Truck Registrations

	October			November*			Year-to-date thru November			YTD Market Share		
	Sep-17	Sep-18	% change	Oct-17	Oct-18	% change	2017	2018	% change	2017	2018	change
Industry Total	7,461	8,856	18.7%	8,358	8,775	5.0%	88,966	92,484	4.0%			
Cars	3,573	4,911	37.4%	3,925	3,751	-4.4%	45,228	46,350	2.5%	50.8	50.1	-0.7
Light Trucks	3,888	3,945	1.5%	4,433	5,024	13.3%	43,738	46,134	5.5%	49.2	49.9	0.7
Japanese Brands	3,547	3,379	-4.7%	4,305	4,053	-5.9%	46,293	43,540	-5.9%	52.0	47.1	-4.9
Honda	1,120	1,031	-7.9%	1,418	1,267	-10.6%	14,492	13,911	-4.0%	16.3	15.0	-1.3
Nissan	266	331	24.4%	373	314	-15.8%	4,719	3,900	-17.4%	5.3	4.2	-1.1
Toyota	1,459	1,401	-4.0%	1,771	1,717	-3.0%	18,554	17,630	-5.0%	20.9	19.1	-1.8
Other	702	616	-12.3%	743	755	1.6%	8,528	8,099	-5.0%	9.6	8.8	-0.8
Domestic Brands	2,185	3,620	65.7%	2,024	2,755	36.1%	22,373	28,470	27.3%	25.1	30.8	5.7
FCA (excl. FIAT)	386	392	1.6%	399	448	12.3%	4,234	4,730	11.7%	4.8	5.1	0.3
Ford	615	530	-13.8%	649	588	-9.4%	6,876	6,062	-11.8%	7.7	6.6	-1.1
General Motors	796	642	-19.3%	788	780	-1.0%	8,732	7,451	-14.7%	9.8	8.1	-1.7
Other	388	2,056	429.9%	188	939	399.5%	2,531	10,227	304.1%	2.8	11.1	8.3
European Brands	1,448	1,545	6.7%	1,717	1,662	-3.2%	16,494	16,963	2.8%	18.5	18.3	-0.2
BMW	407	443	8.8%	507	494	-2.6%	4,337	4,528	4.4%	4.9	4.9	0.0
Mercedes	328	414	26.2%	387	362	-6.5%	3,543	3,813	7.6%	4.0	4.1	0.1
Volkswagen	549	495	-9.8%	619	557	-10.0%	6,682	6,320	-5.4%	7.5	6.8	-0.7
Other	164	193	17.7%	204	249	22.1%	1,932	2,302	19.2%	2.2	2.5	0.3
Korean Brands	281	312	11.0%	312	305	-2.2%	3,806	3,511	-7.8%	4.3	3.8	-0.5

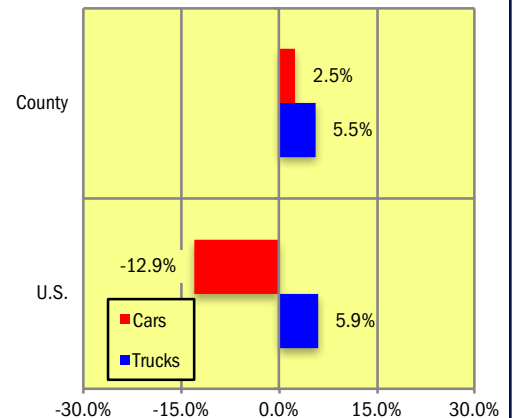
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 November 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 November 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 November* 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 November, 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 Nov.	YTD '18 thru Nov.*	% change	YTD '17 thru Nov.	YTD '18 thru Nov.*
TOTAL	88,966	92,484	4%		
Acura	1,870	1,748	-7%	2.1%	1.9%
Alfa Romeo	79	203	157%	0.1%	0.2%
Audi	2,651	2,732	3%	3.0%	3.0%
BMW	3,842	4,063	6%	4.3%	4.4%
Buick	385	356	-8%	0.4%	0.4%
Cadillac	316	231	-27%	0.4%	0.2%
Chevrolet	6,585	5,669	-14%	7.4%	6.1%
Chrysler	534	741	39%	0.6%	0.8%
Dodge	936	863	-8%	1.1%	0.9%
FIAT	208	103	-50%	0.2%	0.1%
Ford	6,692	5,937	-11%	7.5%	6.4%
Genesis	91	70	-23%	0.1%	0.1%
GMC	1,446	1,195	-17%	1.6%	1.3%
Honda	12,622	12,163	-4%	14.2%	13.2%
Hyundai	2,524	2,119	-16%	2.8%	2.3%
Infiniti	867	731	-16%	1.0%	0.8%
Jaguar	333	241	-28%	0.4%	0.3%
Jeep	1,901	2,146	13%	2.1%	2.3%
Kia	1,191	1,322	11%	1.3%	1.4%
Land Rover	548	647	18%	0.6%	0.7%
Lexus	3,429	3,288	-4%	3.9%	3.6%
Lincoln	184	125	-32%	0.2%	0.1%
Maserati	133	88	-34%	0.1%	0.1%
Mazda	3,804	3,502	-8%	4.3%	3.8%
Mercedes	3,507	3,790	8%	3.9%	4.1%
MINI	490	461	-6%	0.6%	0.5%
Mitsubishi	54	151	180%	0.1%	0.2%
Nissan	3,852	3,169	-18%	4.3%	3.4%
Other	173	199	15%	0.2%	0.2%
Porsche	890	853	-4%	1.0%	0.9%
Ram	863	980	14%	1.0%	1.1%
Subaru	4,651	4,436	-5%	5.2%	4.8%
Tesla	2,523	10,214	305%	2.8%	11.0%
Toyota	15,125	14,342	-5%	17.0%	15.5%
Volkswagen	3,141	2,735	-13%	3.5%	3.0%
Volvo	526	871	66%	0.6%	0.9%

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

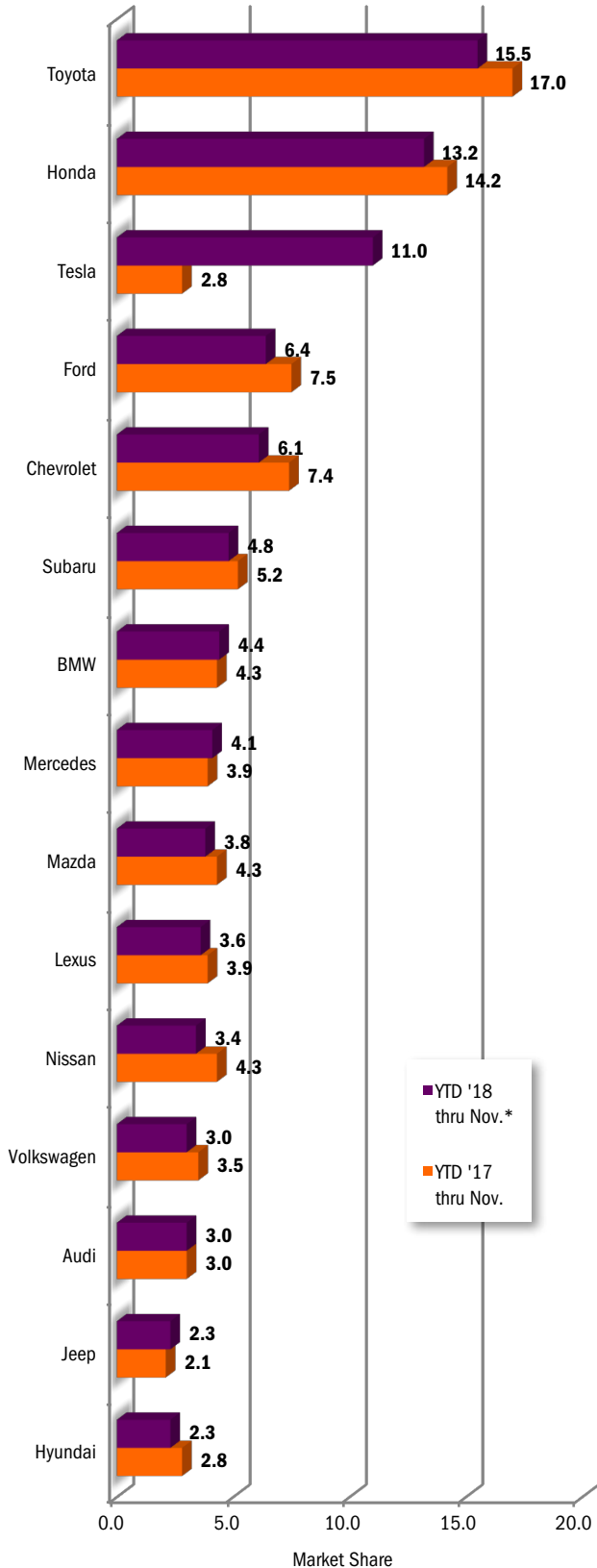
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County Market Share for Top 15 Selling Brands
YTD '18 thru November* vs. YTD '17



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