

# Silicon Valley Outlook

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Covering the Santa Clara County automotive market

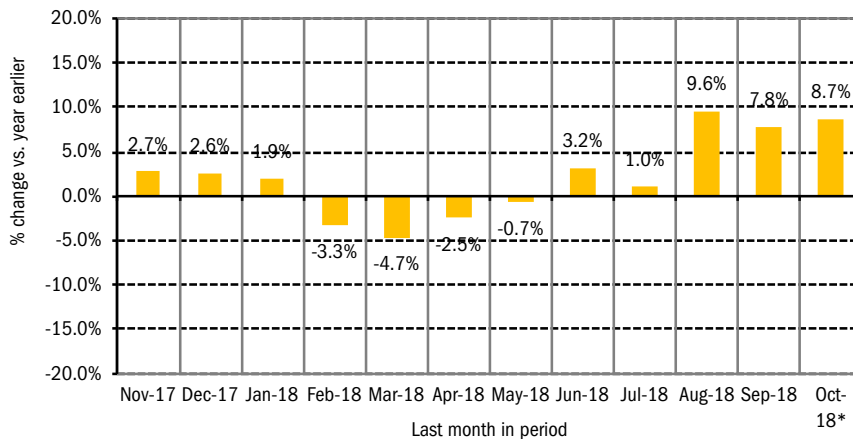
Data thru October 2018

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

	September			October*			Year-to-date thru October*			YTD Market Share		
	Sep-17	Sep-18	% change	Oct-17	Oct-18	% change	2017	2018	% change	2017	2018	change
Industry Total	8,994	9,278	3.2%	7,461	7,461	0.0%	80,608	82,314	2.1%	51.2	49.8	-1.4
Cars	4,457	4,860	9.0%	3,573	3,335	-6.7%	41,303	41,023	-0.7%	48.8	50.2	1.4
Light Trucks	4,537	4,418	-2.6%	3,888	4,126	6.1%	39,305	41,291	5.1%	52.1	47.4	-4.7
Japanese Brands	4,744	4,269	-10.0%	3,547	2,904	-18.1%	41,988	39,012	-7.1%	16.2	15.2	-1.0
Honda	1,476	1,358	-8.0%	1,120	899	-19.7%	13,074	12,512	-4.3%	5.4	4.2	-1.2
Nissan	438	381	-13.0%	266	200	-24.8%	4,346	3,455	-20.5%	20.8	19.2	-1.6
Toyota	1,946	1,790	-8.0%	1,459	1,266	-13.2%	16,783	15,778	-6.0%	9.7	8.8	-0.9
Other	884	740	-16.3%	702	539	-23.2%	7,785	7,267	-6.7%	25.2	30.7	5.5
Domestic Brands	2,311	3,143	36.0%	2,185	3,161	44.7%	20,349	25,256	24.1%	4.8	5.2	0.4
FCA (excl. FIAT)	407	464	14.0%	386	359	-7.0%	3,835	4,249	10.8%	7.7	6.6	-1.1
Ford	664	506	-23.8%	615	486	-21.0%	6,227	5,430	-12.8%	9.9	8.1	-1.8
General Motors	942	738	-21.7%	796	623	-21.7%	7,944	6,652	-16.3%	2.9	10.8	7.9
Other	298	1,435	381.5%	388	1,693	336.3%	2,343	8,925	280.9%	18.3	18.1	-0.2
European Brands	1,571	1,546	-1.6%	1,448	1,173	-19.0%	14,777	14,929	1.0%	4.8	4.8	0.0
BMW	428	399	-6.8%	407	339	-16.7%	3,830	3,930	2.6%	3.9	4.0	0.1
Mercedes	324	378	16.7%	328	264	-19.5%	3,156	3,301	4.6%	7.5	6.9	-0.6
Volkswagen	626	578	-7.7%	549	420	-23.5%	6,063	5,688	-6.2%	2.1	2.4	0.3
Other	193	191	-1.0%	164	150	-8.5%	1,728	2,010	16.3%	4.3	3.8	-0.5
Korean Brands	368	320	-13.0%	281	223	-20.6%	3,494	3,117	-10.8%			

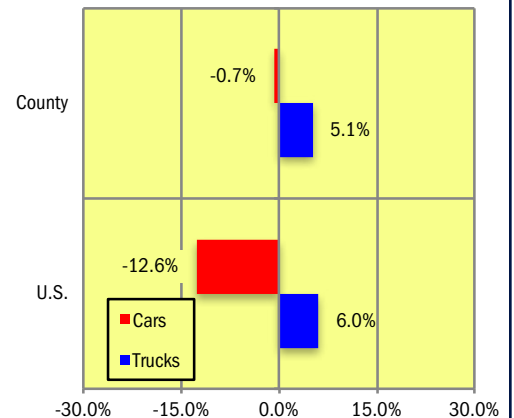
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 October 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 October 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 October\* 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 October, 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	YTD '18	% change	YTD '17	YTD '18
	thru Oct.	thru Oct.*		thru Oct.	thru Oct.*
TOTAL	80,608	82,314	2%		
Acura	1,676	1,534	-8%	2.1%	1.9%
Alfa Romeo	70	190	171%	0.1%	0.2%
Audi	2,380	2,425	2%	3.0%	2.9%
BMW	3,370	3,505	4%	4.2%	4.3%
Buick	336	311	-7%	0.4%	0.4%
Cadillac	287	202	-30%	0.4%	0.2%
Chevrolet	6,019	5,090	-15%	7.5%	6.2%
Chrysler	470	682	45%	0.6%	0.8%
Dodge	854	775	-9%	1.1%	0.9%
FIAT	191	83	-57%	0.2%	0.1%
Ford	6,057	5,316	-12%	7.5%	6.5%
Genesis	82	68	-17%	0.1%	0.1%
GMC	1,302	1,049	-19%	1.6%	1.3%
Honda	11,398	10,978	-4%	14.1%	13.3%
Hyundai	2,312	1,854	-20%	2.9%	2.3%
Infiniti	771	634	-18%	1.0%	0.8%
Jaguar	296	203	-31%	0.4%	0.2%
Jeep	1,745	1,970	13%	2.2%	2.4%
Kia	1,100	1,195	9%	1.4%	1.5%
Land Rover	501	592	18%	0.6%	0.7%
Lexus	3,081	2,921	-5%	3.8%	3.5%
Lincoln	170	114	-33%	0.2%	0.1%
Maserati	125	79	-37%	0.2%	0.1%
Mazda	3,509	3,189	-9%	4.4%	3.9%
Mercedes	3,123	3,281	5%	3.9%	4.0%
MINI	456	422	-7%	0.6%	0.5%
Mitsubishi	49	132	169%	0.1%	0.2%
Nissan	3,575	2,821	-21%	4.4%	3.4%
Other	155	141	-9%	0.2%	0.2%
Porsche	804	766	-5%	1.0%	0.9%
Ram	766	822	7%	1.0%	1.0%
Subaru	4,209	3,939	-6%	5.2%	4.8%
Tesla	2,337	8,918	282%	2.9%	10.8%
Toyota	13,702	12,857	-6%	17.0%	15.6%
Volkswagen	2,879	2,497	-13%	3.6%	3.0%
Volvo	451	759	68%	0.6%	0.9%

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

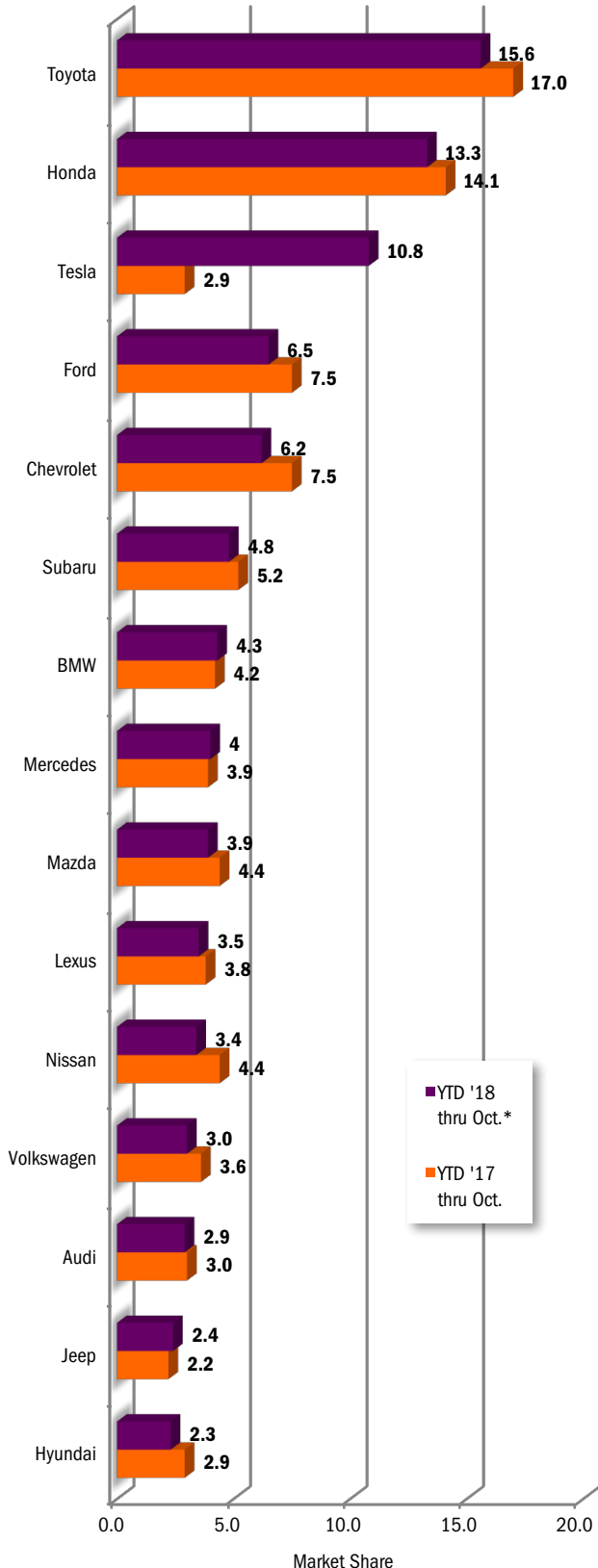
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County Market Share for Top 15 Selling Brands  
YTD '18 thru October\* vs. YTD '17



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