

# Silicon Valley Outlook

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Covering the Santa Clara County automotive market

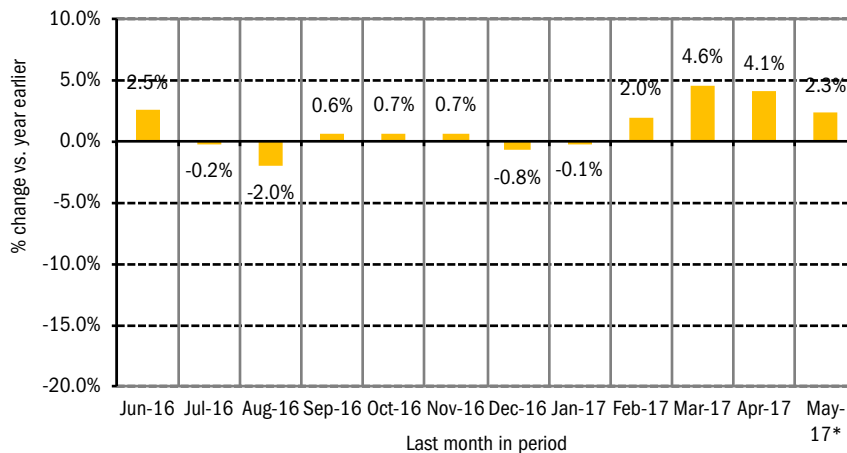
Data thru May 2017

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

	Most Recent Two Months			Year to date thru May			YTD Market Share		
	4/16 & 5/16	4/17 & 5/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	16,616	16,282	-2.0%	38,781	39,456	1.7%			
Cars	9,000	8,358	-7.1%	21,298	20,429	-4.1%	54.9	51.8	-3.1
Light Trucks	7,616	7,924	4.0%	17,483	19,027	8.8%	45.1	48.2	3.1
Japanese Brands	8,636	8,654	0.2%	20,496	20,390	-0.5%	52.9	51.7	-1.2
Honda	2,664	2,650	-0.5%	5,939	6,169	3.9%	15.3	15.6	0.3
Nissan	944	1,005	6.5%	2,397	2,442	1.9%	6.2	6.2	0.0
Toyota	3,558	3,507	-1.4%	8,529	7,991	-6.3%	22.0	20.3	-1.7
Other	1,470	1,492	1.5%	3,631	3,788	4.3%	9.4	9.6	0.2
Domestic Brands	3,977	3,940	-0.9%	9,243	10,031	8.5%	23.8	25.4	1.6
FCA (excl. FIAT)	845	801	-5.2%	2,004	1,929	-3.7%	5.2	4.9	-0.3
Ford	1,311	1,258	-4.0%	3,302	3,154	-4.5%	8.5	8.0	-0.5
General Motors	1,310	1,422	8.5%	3,055	3,827	25.3%	7.9	9.7	1.8
Other	511	459	-10.2%	882	1,121	27.1%	2.3	2.8	0.5
European Brands	3,202	2,971	-7.2%	7,309	7,323	0.2%	18.8	18.6	-0.2
BMW	1,025	830	-19.0%	2,306	1,967	-14.7%	5.9	5.0	-0.9
Mercedes	683	620	-9.2%	1,556	1,574	1.2%	4.0	4.0	0.0
Volkswagen	1,167	1,192	2.1%	2,592	2,965	14.4%	6.7	7.5	0.8
Other	327	329	0.6%	855	817	-4.4%	2.2	2.1	-0.1
Korean Brands	801	717	-10.5%	1,733	1,712	-1.2%	4.5	4.3	-0.2

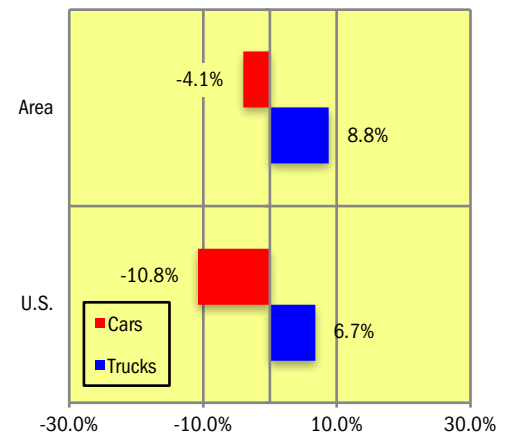
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 May 2017 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 May 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

**Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '17 thru May\* vs. YTD '16**



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. \*Figures for May, 2017 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 '16 thru May	YTD '17 thru May*	% change	YTD '16 thru May	YTD '17 thru May*
TOTAL	38,781	39,456	2%		
Acura	817	789	-3%	2.1%	2.0%
Alfa Romeo	2	31	1450%	0.0%	0.1%
Audi	961	1,154	20%	2.5%	2.9%
BMW	1,970	1,718	-13%	5.1%	4.4%
Buick	171	203	19%	0.4%	0.5%
Cadillac	138	142	3%	0.4%	0.4%
Chevrolet	2,211	2,868	30%	5.7%	7.3%
Chrysler	113	185	64%	0.3%	0.5%
Dodge	518	497	-4%	1.3%	1.3%
FIAT	208	96	-54%	0.5%	0.2%
Ford	3,203	3,070	-4%	8.3%	7.8%
Genesis	0	45		0.0%	0.1%
GMC	535	614	15%	1.4%	1.6%
Honda	5,122	5,380	5%	13.2%	13.6%
Hyundai	1,228	1,154	-6%	3.2%	2.9%
Infiniti	322	355	10%	0.8%	0.9%
Jaguar	60	149	148%	0.2%	0.4%
Jeep	1,011	862	-15%	2.6%	2.2%
Kia	505	513	2%	1.3%	1.3%
Land Rover	229	223	-3%	0.6%	0.6%
Lexus	1,709	1,470	-14%	4.4%	3.7%
Lincoln	99	84	-15%	0.3%	0.2%
Maserati	69	71	3%	0.2%	0.2%
Mazda	1,657	1,673	1%	4.3%	4.2%
Mercedes	1,538	1,567	2%	4.0%	4.0%
MINI	334	248	-26%	0.9%	0.6%
Mitsubishi	47	40	-15%	0.1%	0.1%
Nissan	2,075	2,087	1%	5.4%	5.3%
Other	53	66	25%	0.1%	0.2%
Porsche	364	404	11%	0.9%	1.0%
Ram	362	385	6%	0.9%	1.0%
Subaru	1,922	2,069	8%	5.0%	5.2%
Tesla	881	1,119	27%	2.3%	2.8%
Toyota	6,820	6,521	-4%	17.6%	16.5%
Volkswagen	1,267	1,407	11%	3.3%	3.6%
Volvo	260	197	-24%	0.7%	0.5%

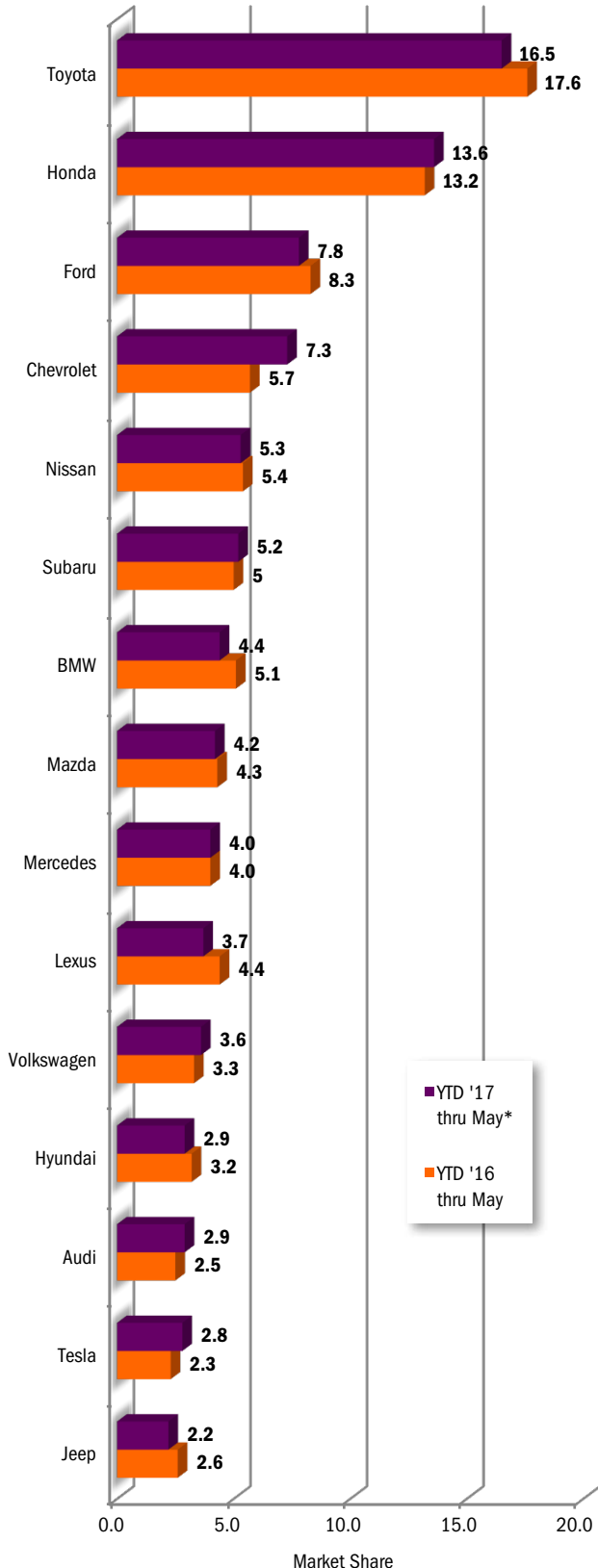
Top ten ranked brands in each percent change category are shaded green.  
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Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands  
YTD '17 thru May\* vs. YTD '16



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