

# Silicon Valley Auto Outlook

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Dealers Association

Covering the Santa Clara County Automotive Market

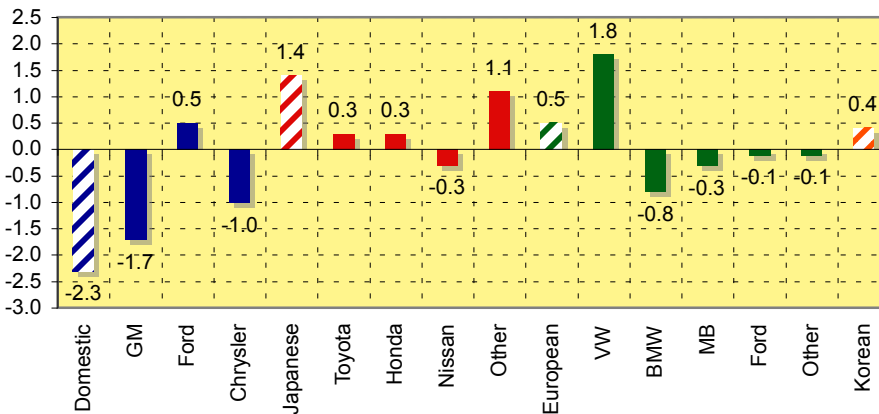
Data thru October, 2009

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

	Sep 09 and Oct 09 Combined			YTD thru Oct				YTD Market Share (%)		
	Santa Clara County			Santa Clara County			U.S.	Santa Clara County		
	Previous	Current	% chg.	2008	2009	% chg.	% chg.	2008	2009	Chg.
Industry Total	9,634	7,818	-18.8%	49,133	33,693	-31.4%	-25.4%			
Cars	5,911	5,370	-9.2%	30,804	21,706	-29.5%	-23.4%	62.7	64.4	1.7
Light Trucks	3,723	2,448	-34.2%	18,329	11,987	-34.6%	-27.7%	37.3	35.6	-1.7
Domestic Brands	1,547	1,154	-25.4%	8,748	5,232	-40.2%	-30.7%	17.8	15.5	-2.3
General Motors	689	444	-35.6%	3,730	1,985	-46.8%	-33.4%	7.6	5.9	-1.7
Ford	679	601	-11.5%	3,622	2,650	-26.8%	-20.3%	7.4	7.9	0.5
Chrysler	179	109	-39.1%	1,396	597	-57.2%	-38.9%	2.8	1.8	-1.0
Japanese Brands	6,307	5,265	-16.5%	31,971	22,406	-29.9%	-24.3%	65.1	66.5	1.4
Toyota	2,973	2,274	-23.5%	15,367	10,637	-30.8%	-25.5%	31.3	31.6	0.3
Honda	2,186	1,863	-14.8%	10,851	7,555	-30.4%	-23.4%	22.1	22.4	0.3
Nissan	639	610	-4.5%	3,031	1,986	-34.5%	-24.0%	6.2	5.9	-0.3
Other	509	518	1.8%	2,722	2,228	-18.1%	-22.2%	5.5	6.6	1.1
European Brands	1,589	1,170	-26.4%	7,659	5,418	-29.3%	-19.2%	15.6	16.1	0.5
Volkswagen	458	465	1.5%	1,982	1,946	-1.8%	-7.9%	4.0	5.8	1.8
BMW	520	331	-36.3%	2,638	1,559	-40.9%	-23.5%	5.4	4.6	-0.8
Mercedes	429	244	-43.1%	2,037	1,273	-37.5%	-21.6%	4.1	3.8	-0.3
Ford	48	36	-25.0%	289	179	-38.1%	-20.4%	0.6	0.5	-0.1
Other	134	94	-29.9%	713	461	-35.3%	-43.2%	1.5	1.4	-0.1
Korean Brands	191	229	19.9%	755	637	-15.6%	5.4%	1.5	1.9	0.4

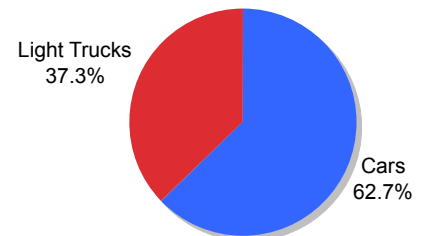
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi, Subaru, and Suzuki). European: VW (Audi, Bentley, and Volkswagen), BMW (BMW, Rolls Royce, and Mini), MB (Mercedes Benz), Ford (Volvo), Other (Aston Martin, Ferrari, Jaguar, Land Rover, Lotus, Maserati, and Saab). Korean: Hyundai and Kia.

Change in Market Share - YTD '09 thru Oct vs. Year Earlier

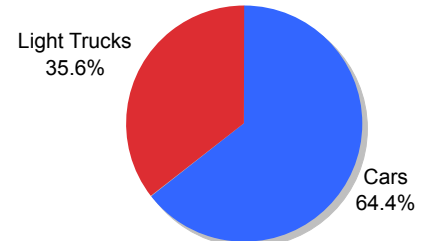


Car and Light Truck Market Share

YTD '08 thru Oct



YTD '09 thru Oct



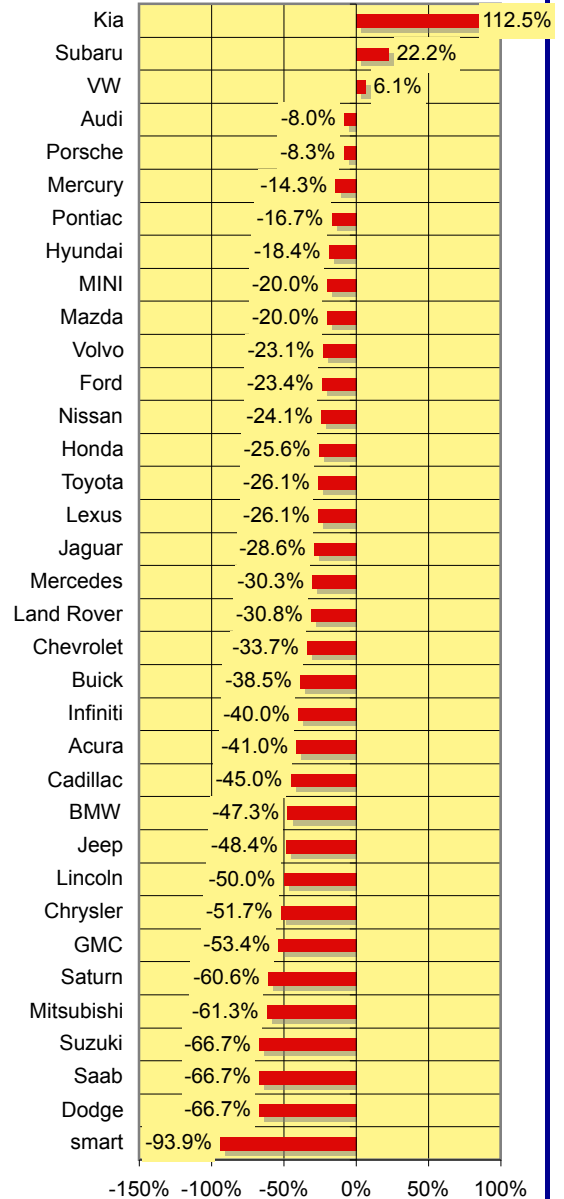
The table above shows new retail light vehicle registrations in Santa Clara County. Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental agencies. For this reason, the year-to-date figures will typically be more reflective of market results.

Source for state registrations: AutoCount, an Experian Company. U.S. sales: Automotive News.

**County New Retail Car and Light Truck Registrations  
(Six Month Average May 09 thru Oct 09 vs. Year Earlier)**

	Avg. Monthly Registrations			U.S. % chg.	County Market Share		
	5/08 to 10/08	5/09 to 10/09	% chg.		Prev.	Recent	Chg.
TOTAL	4,880	3,543	-27.4%	-16.9%			
Acura	134	79	-41.0%	-29.6%	2.7	2.2	-0.5
Audi	75	69	-8.0%	-2.0%	1.5	1.9	0.4
BMW	220	116	-47.3%	-21.8%	4.5	3.3	-1.2
Buick	13	8	-38.5%	-26.0%	0.3	0.2	-0.1
Cadillac	20	11	-45.0%	-32.7%	0.4	0.3	-0.1
Chevrolet	181	120	-33.7%	-19.7%	3.7	3.4	-0.3
Chrysler	29	14	-51.7%	-41.5%	0.6	0.4	-0.2
Dodge	60	20	-66.7%	-31.7%	1.2	0.6	-0.6
Ford	342	262	-23.4%	-3.1%	7.0	7.4	0.4
GMC	58	27	-53.4%	-29.5%	1.2	0.8	-0.4
Honda	974	725	-25.6%	-16.9%	20.0	20.5	0.5
Hummer	3	0	--	-61.4%	0.1	0.0	-0.1
Hyundai	76	62	-18.4%	8.7%	1.6	1.7	0.1
Infiniti	65	39	-40.0%	-26.0%	1.3	1.1	-0.2
Jaguar	14	10	-28.6%	-28.1%	0.3	0.3	0.0
Jeep	31	16	-48.4%	-25.2%	0.6	0.5	-0.1
Kia	8	17	112.5%	14.6%	0.2	0.5	0.3
Land Rover	13	9	-30.8%	-9.1%	0.3	0.3	0.0
Lexus	230	170	-26.1%	-13.8%	4.7	4.8	0.1
Lincoln	14	7	-50.0%	-20.3%	0.3	0.2	-0.1
Mazda	150	120	-20.0%	-19.2%	3.1	3.4	0.3
Mercedes	178	124	-30.3%	-13.6%	3.6	3.5	-0.1
Mercury	7	6	-14.3%	-13.3%	0.1	0.2	0.1
MINI	50	40	-20.0%	-11.0%	1.0	1.1	0.1
Mitsubishi	31	12	-61.3%	-43.9%	0.6	0.3	-0.3
Nissan	237	180	-24.1%	-14.5%	4.9	5.1	0.2
Pontiac	24	20	-16.7%	-22.2%	0.5	0.6	0.1
Porsche	24	22	-8.3%	-28.7%	0.5	0.6	0.1
Saab	6	2	-66.7%	-68.0%	0.1	0.1	0.0
Saturn	33	13	-60.6%	-64.1%	0.7	0.4	-0.3
smart	33	2	-93.9%	-45.1%	0.7	0.1	-0.6
Subaru	81	99	22.2%	20.5%	1.7	2.8	1.1
Suzuki	9	3	-66.7%	-58.0%	0.2	0.1	-0.1
Toyota/Scion	1,289	953	-26.1%	-17.1%	26.4	26.9	0.5
Volkswagen	132	140	6.1%	-2.4%	2.7	4.0	1.3
Volvo	26	20	-23.1%	7.0%	0.5	0.6	0.1
Other	13	7	-46.2%	-52.3%	0.3	0.2	-0.1

**Percent Change in Registrations  
(May 09 thru Oct 09 vs. Year Earlier)**



**Explanation and Notes**

The table above shows combined new car and light truck registrations for all major brands in the county. Average monthly registrations are shown for the most recent six month period (May '09 thru Oct '09) and the same period a year earlier. The six month average trend provides a clearer picture of brand sales performance than individual monthly registrations, which are subject to significant volatility. The table also shows the percent change in U.S. new vehicle sales during the same time span, and county market share during the most recent six month period. The top ten brands in each percent change category are shaded green. The graph shows the percent change in county registrations during the most recent six month period versus a year earlier (the fourth column in the table). Brands are ranked from highest to lowest percentage change.

This report is sponsored by the Silicon Valley Automobile Dealers Association and produced by Auto Outlook. For questions or comments, please contact SVADA (408-437-7557) or Auto Outlook (800-206-0102).

**WHO ARE MY TOP COMPETITORS?  
-BY MARKET AREA?**

**WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?**

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