

Silicon Valley Auto Outlook

Released by:
Silicon Valley Automobile
Dealers Association

Covering the Santa Clara County Automotive Market

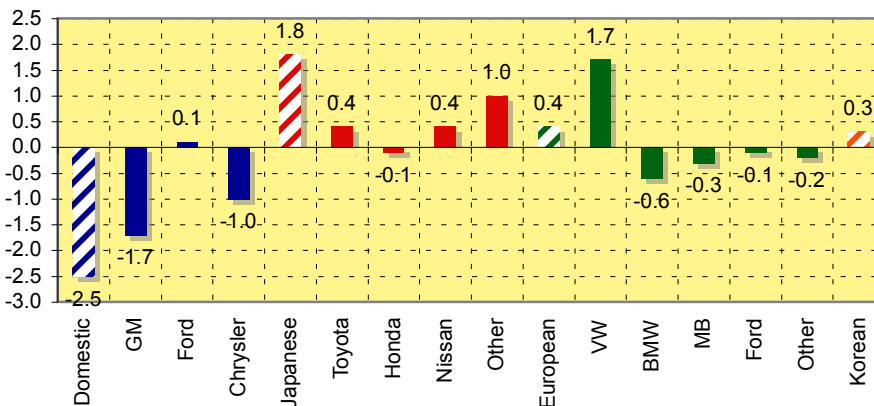
Data thru January 2010

Santa Clara County New Retail Car and Light Truck Registrations

	Dec 09 and Jan 10 Combined			YTD thru Dec				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	6,617	8,157	23.3%	55,227	41,258	-25.3%	-21.3%			
Cars	3,889	5,000	28.6%	34,527	26,315	-23.8%	-19.2%	62.5	63.8	1.3
Light Trucks	2,728	3,157	15.7%	20,700	14,943	-27.8%	-23.6%	37.5	36.2	-1.3
Domestic Brands	1,172	1,096	-6.5%	9,747	6,230	-36.1%	-26.8%	17.6	15.1	-2.5
General Motors	447	364	-18.6%	4,107	2,356	-42.6%	-29.7%	7.4	5.7	-1.7
Ford	599	581	-3.0%	4,129	3,153	-23.6%	-15.3%	7.5	7.6	0.1
Chrysler	126	151	19.8%	1,511	721	-52.3%	-35.9%	2.7	1.7	-1.0
Japanese Brands	4,190	5,506	31.4%	35,867	27,520	-23.3%	-19.6%	64.9	66.7	1.8
Toyota	2,105	2,812	33.6%	17,399	13,166	-24.3%	-20.2%	31.5	31.9	0.4
Honda	1,353	1,589	17.4%	12,092	9,001	-25.6%	-19.5%	21.9	21.8	-0.1
Nissan	334	578	73.1%	3,303	2,635	-20.2%	-19.1%	6.0	6.4	0.4
Other	398	527	32.4%	3,073	2,718	-11.6%	-19.0%	5.6	6.6	1.0
European Brands	1,167	1,422	21.9%	8,755	6,744	-23.0%	-15.7%	15.9	16.3	0.4
Volkswagen	363	491	35.3%	2,285	2,397	4.9%	-4.7%	4.1	5.8	1.7
BMW	347	448	29.1%	3,000	1,969	-34.4%	-20.1%	5.4	4.8	-0.6
Mercedes	313	342	9.3%	2,333	1,629	-30.2%	-17.8%	4.2	3.9	-0.3
Ford	43	43	0.0%	321	222	-30.8%	-15.5%	0.6	0.5	-0.1
Other	101	98	-3.0%	816	527	-35.4%	-41.4%	1.5	1.3	-0.2
Korean Brands	88	133	51.1%	858	764	-11.0%	8.9%	1.6	1.9	0.3

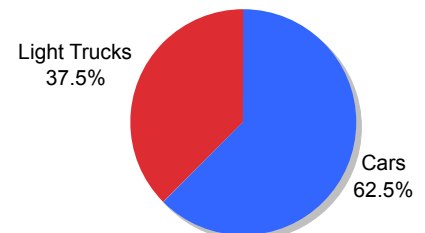
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi, 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 Dec vs. Year Earlier

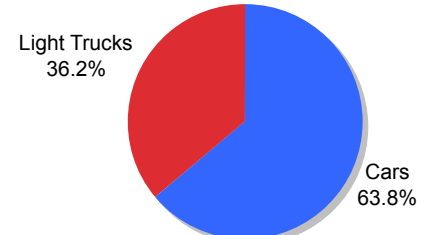


Car and Light Truck Market Share

YTD '08 thru Dec



YTD '09 thru Dec



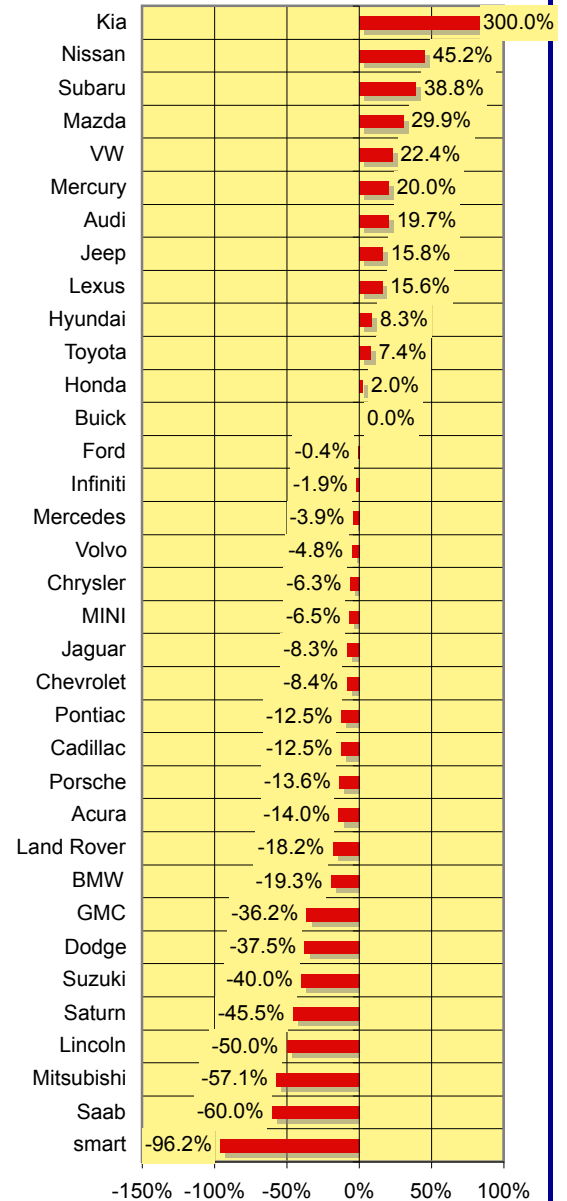
The table above shows new retail light vehicle registrations in Santa Clara County. Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental 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 Aug 09 thru Jan 10 vs. Year Earlier)

	Avg. Monthly Registrations			U.S. % chg.	County Market Share		
	8/08 to 1/09	8/09 to 1/10	% chg.		Prev.	Recent	Chg.
TOTAL	3,862	3,993	3.4%	-0.5%			
Acura	121	104	-14.0%	-13.8%	3.1	2.6	-0.5
Audi	71	85	19.7%	10.6%	1.8	2.1	0.3
BMW	181	146	-19.3%	-5.9%	4.7	3.7	-1.0
Buick	12	12	0.0%	-7.8%	0.3	0.3	0.0
Cadillac	16	14	-12.5%	-7.6%	0.4	0.4	0.0
Chevrolet	131	120	-8.4%	-6.0%	3.4	3.0	-0.4
Chrysler	16	15	-6.3%	-30.7%	0.4	0.4	0.0
Dodge	40	25	-37.5%	-20.6%	1.0	0.6	-0.4
Ford	283	282	-0.4%	14.6%	7.3	7.1	-0.2
GMC	58	37	-36.2%	-17.0%	1.5	0.9	-0.6
Honda	715	729	2.0%	3.7%	18.5	18.3	-0.2
Hummer	3	0	--	-78.3%	0.1	0.0	-0.1
Hyundai	60	65	8.3%	39.4%	1.6	1.6	0.0
Infiniti	54	53	-1.9%	-13.7%	1.4	1.3	-0.1
Jaguar	12	11	-8.3%	8.0%	0.3	0.3	0.0
Jeep	19	22	15.8%	-17.2%	0.5	0.6	0.1
Kia	5	20	300.0%	32.4%	0.1	0.5	0.4
Land Rover	11	9	-18.2%	9.6%	0.3	0.2	-0.1
Lexus	192	222	15.6%	6.0%	5.0	5.6	0.6
Lincoln	16	8	-50.0%	-10.8%	0.4	0.2	-0.2
Mazda	107	139	29.9%	0.2%	2.8	3.5	0.7
Mercedes	154	148	-3.9%	9.4%	4.0	3.7	-0.3
Mercury	5	6	20.0%	-0.8%	0.1	0.2	0.1
MINI	46	43	-6.5%	-9.4%	1.2	1.1	-0.1
Mitsubishi	21	9	-57.1%	-30.2%	0.5	0.2	-0.3
Nissan	166	241	45.2%	9.5%	4.3	6.0	1.7
Pontiac	16	14	-12.5%	-31.0%	0.4	0.4	0.0
Porsche	22	19	-13.6%	8.4%	0.6	0.5	-0.1
Saab	5	2	-60.0%	-60.7%	0.1	0.1	0.0
Saturn	22	12	-45.5%	-67.1%	0.6	0.3	-0.3
smart	26	1	-96.2%	-53.8%	0.7	0.0	-0.7
Subaru	80	111	38.8%	30.8%	2.1	2.8	0.7
Suzuki	5	3	-40.0%	-38.7%	0.1	0.1	0.0
Toyota/Scion	1,026	1,102	7.4%	2.5%	26.6	27.6	1.0
Volkswagen	116	142	22.4%	14.0%	3.0	3.6	0.6
Volvo	21	20	-4.8%	18.9%	0.5	0.5	0.0
Other	12	6	-50.0%	-46.3%	0.3	0.2	-0.1

Percent Change in Registrations
(Aug 09 thru Jan 10 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 (Aug '09 thru Jan '10) 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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