

Silicon Valley Outlook

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Silicon Valley
Automobile

Covering the Santa Clara County automotive market

Data thru November 2017

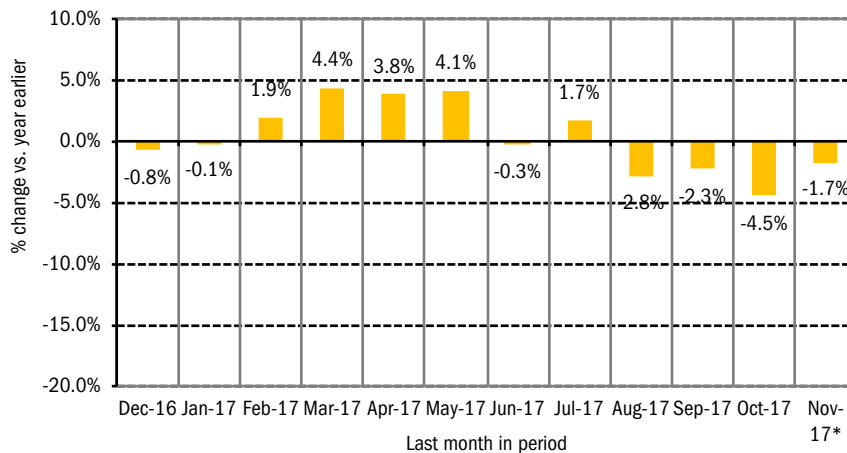
Dealers Association

Santa Clara County New Retail Car and Light Truck Registrations

	Most Recent Two Months			Year to date thru Nov.*			YTD Market Share		
	10/16 & 11/16	10/17 & 11/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	15,098	14,782	-2.1%	87,954	87,946	0.0%			
Cars	7,876	7,149	-9.2%	47,712	44,821	-6.1%	54.2	51.0	-3.2
Light Trucks	7,222	7,633	5.7%	40,242	43,125	7.2%	45.8	49.0	3.2
Japanese Brands	7,876	7,483	-5.0%	46,029	45,933	-0.2%	52.3	52.2	-0.1
Honda	2,324	2,375	2.2%	13,814	14,333	3.8%	15.7	16.3	0.6
Nissan	1,053	885	-16.0%	5,450	4,965	-8.9%	6.2	5.6	-0.6
Toyota	3,013	2,951	-2.1%	18,520	18,279	-1.3%	21.1	20.8	-0.3
Other	1,486	1,272	-14.4%	8,245	8,356	1.3%	9.4	9.5	0.1
Domestic Brands	3,640	3,713	2.0%	20,924	21,962	5.0%	23.8	25.0	1.2
FCA (excl. FIAT)	762	700	-8.1%	4,404	4,160	-5.5%	5.0	4.7	-0.3
Ford	1,148	1,163	1.3%	7,091	6,847	-3.4%	8.1	7.8	-0.3
General Motors	1,352	1,431	5.8%	7,152	8,579	20.0%	8.1	9.8	1.7
Other	378	419	10.8%	2,277	2,376	4.3%	2.6	2.7	0.1
European Brands	2,872	2,980	3.8%	16,934	16,239	-4.1%	19.3	18.5	-0.8
BMW	793	768	-3.2%	4,952	4,148	-16.2%	5.6	4.7	-0.9
Mercedes	679	692	1.9%	3,810	3,508	-7.9%	4.3	4.0	-0.3
Volkswagen	1,067	1,096	2.7%	6,172	6,599	6.9%	7.0	7.5	0.5
Other	333	424	27.3%	2,000	1,984	-0.8%	2.3	2.3	0.0
Korean Brands	710	606	-14.6%	4,067	3,812	-6.3%	4.6	4.3	-0.3

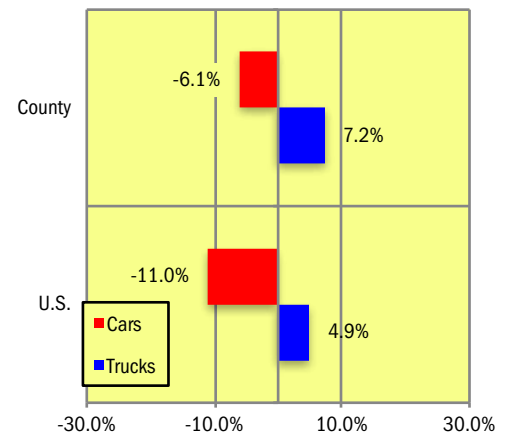
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 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 November 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 November* 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 November, 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 Nov.	YTD '17 thru Nov.*	% change	YTD '16 thru Nov.	YTD '17 thru Nov.*
TOTAL	87,954	87,946	0%		
Acura	1,884	1,837	-2%	2.1%	2.1%
Alfa Romeo	5	191	3720%	0.0%	0.2%
Audi	2,287	2,626	15%	2.6%	3.0%
BMW	4,284	3,647	-15%	4.9%	4.1%
Buick	336	367	9%	0.4%	0.4%
Cadillac	339	312	-8%	0.4%	0.4%
Chevrolet	5,285	6,473	22%	6.0%	7.4%
Chrysler	320	512	60%	0.4%	0.6%
Dodge	1,082	919	-15%	1.2%	1.0%
FIAT	480	219	-54%	0.5%	0.2%
Ford	6,883	6,663	-3%	7.8%	7.6%
Genesis	33	96	191%	0.0%	0.1%
GMC	1,192	1,427	20%	1.4%	1.6%
Honda	11,930	12,496	5%	13.6%	14.2%
Hyundai	2,830	2,528	-11%	3.2%	2.9%
Infiniti	788	861	9%	0.9%	1.0%
Jaguar	254	319	26%	0.3%	0.4%
Jeep	2,171	1,893	-13%	2.5%	2.2%
Kia	1,204	1,188	-1%	1.4%	1.4%
Land Rover	479	546	14%	0.5%	0.6%
Lexus	3,693	3,351	-9%	4.2%	3.8%
Lincoln	208	184	-12%	0.2%	0.2%
Maserati	131	126	-4%	0.1%	0.1%
Mazda	3,842	3,830	0%	4.4%	4.4%
Mercedes	3,777	3,475	-8%	4.3%	4.0%
MINI	665	498	-25%	0.8%	0.6%
Mitsubishi	115	62	-46%	0.1%	0.1%
Nissan	4,662	4,104	-12%	5.3%	4.7%
Other	121	148	22%	0.1%	0.2%
Porsche	761	865	14%	0.9%	1.0%
Ram	831	836	1%	0.9%	1.0%
Subaru	4,277	4,450	4%	4.9%	5.1%
Tesla	2,266	2,369	5%	2.6%	2.7%
Toyota	14,827	14,928	1%	16.9%	17.0%
Volkswagen	3,124	3,108	-1%	3.6%	3.5%
Volvo	588	492	-16%	0.7%	0.6%

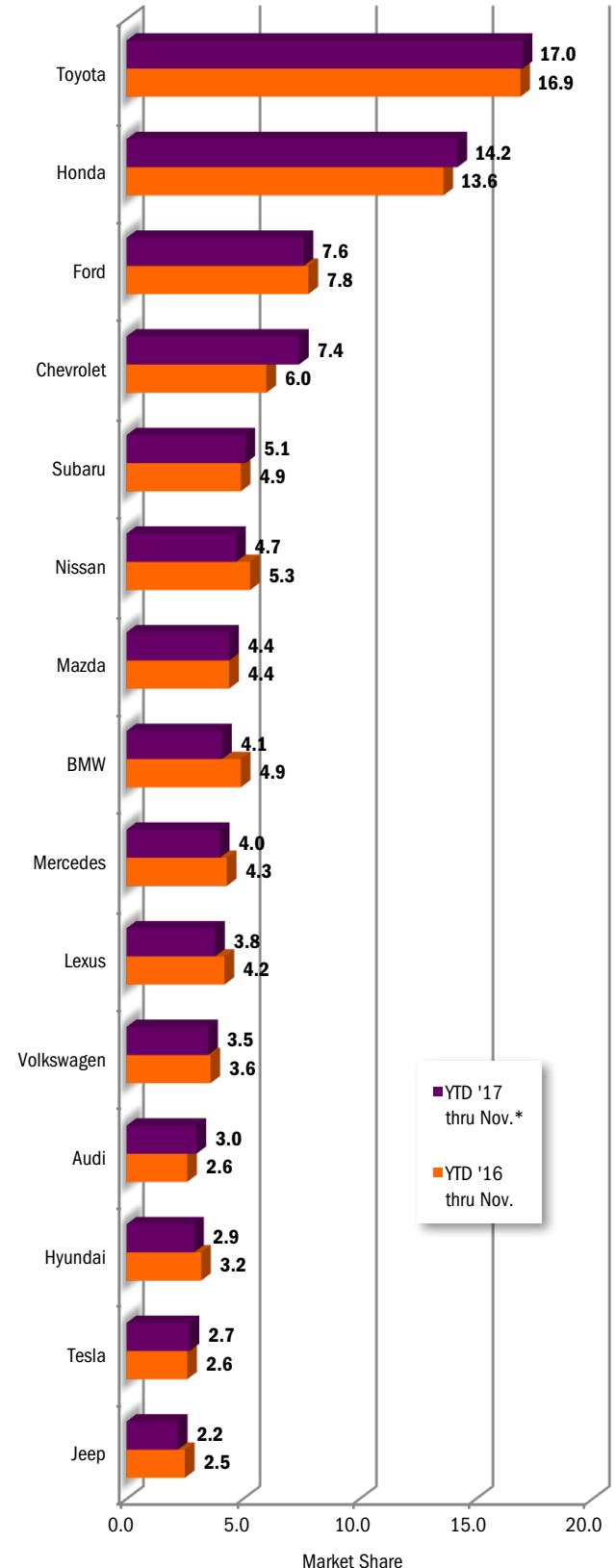
Top ten ranked brands in each percent change category are shaded green.
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Data Source: IHS Markit.

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



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Data Source: IHS Markit.