

# Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

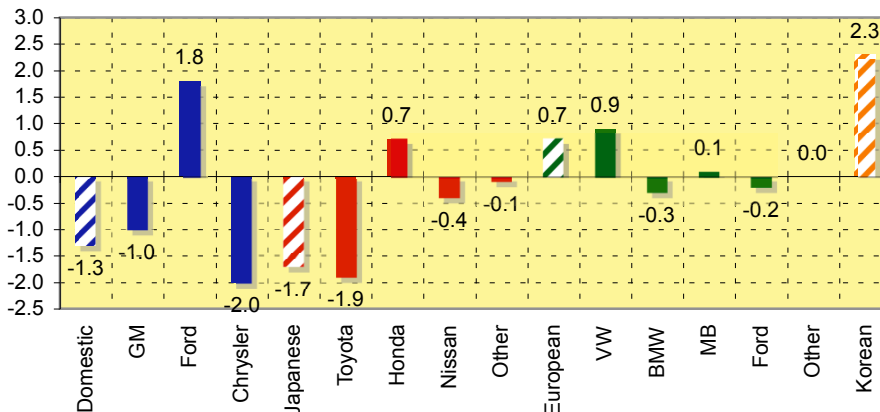
Data thru March, 2009

## Saint Louis Area New Retail Car and Light Truck Registrations

	Feb 09 and Mar 09 Combined			YTD thru Mar				YTD Market Share (%)		
	St. Louis Area			St. Louis Area			U.S.	St. Louis Area		
	Previous	Current	% chg.	2008	2009	% chg.	% chg.	2008	2009	Chg.
Industry Total	14,666	9,593	-34.6%	20,868	14,868	-28.8%	-38.4%			
Cars	7,623	4,851	-36.4%	10,793	7,502	-30.5%	-36.4%	51.7	50.5	-1.2
Light Trucks	7,043	4,742	-32.7%	10,075	7,366	-26.9%	-40.4%	48.3	49.5	1.2
Domestic Brands	7,695	4,968	-35.4%	11,113	7,734	-30.4%	-46.2%	53.3	52.0	-1.3
General Motors	3,925	2,397	-38.9%	5,603	3,834	-31.6%	-48.8%	26.8	25.8	-1.0
Ford	1,760	1,278	-27.4%	2,514	2,051	-18.4%	-43.0%	12.0	13.8	1.8
Chrysler	2,010	1,293	-35.7%	2,996	1,849	-38.3%	-45.5%	14.4	12.4	-2.0
Japanese Brands	5,441	3,294	-39.5%	7,558	5,136	-32.0%	-34.9%	36.2	34.5	-1.7
Toyota	2,010	1,083	-46.1%	2,782	1,694	-39.1%	-37.1%	13.3	11.4	-1.9
Honda	1,642	1,099	-33.1%	2,293	1,739	-24.2%	-34.5%	11.0	11.7	0.7
Nissan	1,108	667	-39.8%	1,544	1,045	-32.3%	-35.2%	7.4	7.0	-0.4
Other	681	445	-34.7%	939	658	-29.9%	-28.3%	4.5	4.4	-0.1
European Brands	860	631	-26.6%	1,315	1,037	-21.1%	-27.7%	6.3	7.0	0.7
Volkswagen	323	305	-5.6%	478	479	0.2%	-18.5%	2.3	3.2	0.9
BMW	254	141	-44.5%	391	237	-39.4%	-25.2%	1.9	1.6	-0.3
Mercedes	142	105	-26.1%	221	184	-16.7%	-28.3%	1.1	1.2	0.1
Volvo	76	31	-59.2%	118	63	-46.6%	-43.1%	0.6	0.4	-0.2
Other	65	49	-24.6%	107	74	-30.8%	-41.3%	0.5	0.5	0.0
Korean Brands	670	700	4.5%	882	961	9.0%	0.7%	4.2	6.5	2.3

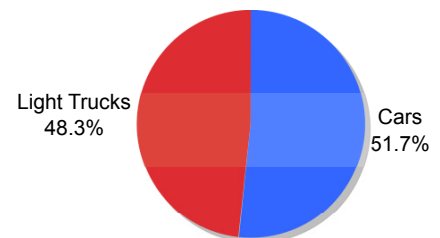
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi,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

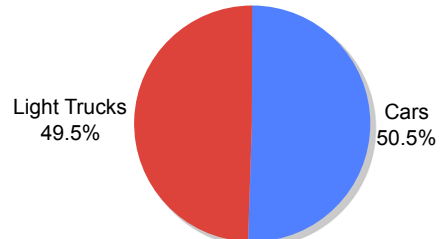


### Car and Light Truck Market Share

#### YTD '08 thru Mar



#### YTD '09 thru Mar

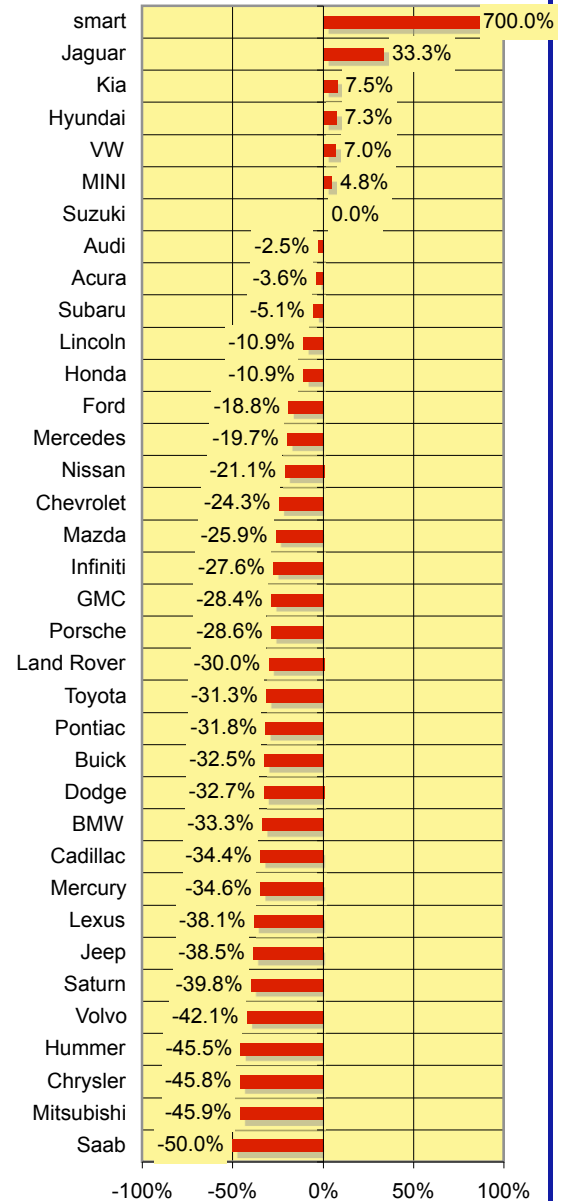


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental agencies.** Source for area registrations: AutoCount, an Experian Company. U.S. sales: Automotive News.

**Area New Retail Car and Light Truck Registrations  
(Six Month Average Oct 08 thru Mar 09 vs. Year Earlier)**

	Avg. Monthly Registrations			% U.S. % chg.	Area Market Share		
	10/07 to 3/08	10/08 to 3/09	% chg.		Prev.	Recent	Chg.
TOTAL	6,875	5,201	-24.3%	-36.5%			
Acura	110	106	-3.6%	-34.3%	1.6	2.0	0.4
Audi	40	39	-2.5%	-17.2%	0.6	0.7	0.1
BMW	105	70	-33.3%	-29.5%	1.5	1.3	-0.2
Buick	120	81	-32.5%	-44.0%	1.7	1.6	-0.1
Cadillac	93	61	-34.4%	-48.0%	1.4	1.2	-0.2
Chevrolet	1,054	798	-24.3%	-41.0%	15.3	15.3	0.0
Chrysler	286	155	-45.8%	-58.1%	4.2	3.0	-1.2
Dodge	507	341	-32.7%	-41.2%	7.4	6.6	-0.8
Ford	755	613	-18.8%	-37.0%	11.0	11.8	0.8
GMC	229	164	-28.4%	-45.3%	3.3	3.2	-0.1
Honda	589	525	-10.9%	-32.4%	8.6	10.1	1.5
Hummer	11	6	-45.5%	-64.9%	0.2	0.1	-0.1
Hyundai	164	176	7.3%	-21.6%	2.4	3.4	1.0
Infiniti	87	63	-27.6%	-33.5%	1.3	1.2	-0.1
Jaguar	3	4	33.3%	-29.5%	0.0	0.1	0.1
Jeep	239	147	-38.5%	-41.3%	3.5	2.8	-0.7
Kia	120	129	7.5%	-19.4%	1.7	2.5	0.8
Land Rover	10	7	-30.0%	-41.9%	0.1	0.1	0.0
Lexus	126	78	-38.1%	-35.2%	1.8	1.5	-0.3
Lincoln	46	41	-10.9%	-24.4%	0.7	0.8	0.1
Mazda	224	166	-25.9%	-29.6%	3.3	3.2	-0.1
Mercedes	76	61	-19.7%	-32.7%	1.1	1.2	0.1
Mercury	78	51	-34.6%	-41.4%	1.1	1.0	-0.1
MINI	21	22	4.8%	8.0%	0.3	0.4	0.1
Mitsubishi	37	20	-45.9%	-38.3%	0.5	0.4	-0.1
Nissan	421	332	-21.1%	-35.4%	6.1	6.4	0.3
Pontiac	179	122	-31.8%	-46.3%	2.6	2.3	-0.3
Porsche	7	5	-28.6%	-34.9%	0.1	0.1	0.0
Saab	10	5	-50.0%	-48.6%	0.1	0.1	0.0
Saturn	133	80	-39.8%	-51.1%	1.9	1.5	-0.4
smart	1	8	700.0%	113.8%	0.0	0.2	0.2
Subaru	39	37	-5.1%	-4.5%	0.6	0.7	0.1
Suzuki	6	6	0.0%	-45.0%	0.1	0.1	0.0
Toyota/Scion	785	539	-31.3%	-34.0%	11.4	10.4	-1.0
Volkswagen	114	122	7.0%	-15.2%	1.7	2.3	0.6
Volvo	38	22	-42.1%	-48.7%	0.6	0.4	-0.2
Other	14	3	-78.6%	-45.5%	0.2	0.1	-0.1

**Percent Change in Registrations  
Oct 08 thru Mar 09 vs. Year Earlier**



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

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

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**Explanation and Notes**

The table above shows combined new car and light truck registrations for all major brands in the area. Average monthly registrations are shown for the most recent six month period (Oct 08 thru Mar 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 area 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 area 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 Saint Louis Auto Dealers Association and produced by Auto Outlook. For questions or comments, please contact SLADA (314-822-0333) or Auto Outlook (800-206-0102).