

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

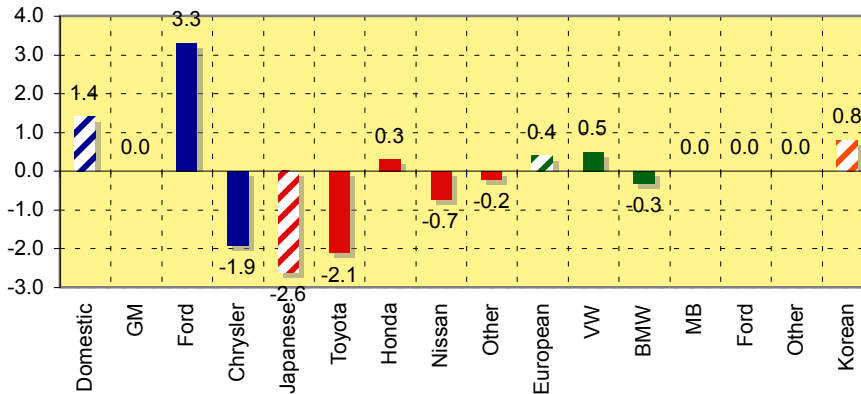
Data thru November, 2009

Saint Louis Area New Retail Car and Light Truck Registrations

	Oct 09 and Nov 09 Combined			YTD thru Nov				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	11,386	9,491	-16.6%	78,524	62,948	-19.8%	-23.9%			
Cars	5,865	5,150	-12.2%	44,117	34,087	-22.7%	-21.8%	56.2	54.2	-2.0
Light Trucks	5,521	4,341	-21.4%	34,407	28,861	-16.1%	-26.2%	43.8	45.8	2.0
Domestic Brands	5,705	4,553	-20.2%	38,862	32,046	-17.5%	-29.3%	49.5	50.9	1.4
General Motors	2,897	2,333	-19.5%	19,369	15,563	-19.6%	-31.6%	24.7	24.7	0.0
Ford	1,474	1,504	2.0%	9,587	9,772	1.9%	-19.0%	12.2	15.5	3.3
Chrysler	1,334	716	-46.3%	9,906	6,711	-32.3%	-38.0%	12.6	10.7	-1.9
Japanese Brands	4,316	3,671	-14.9%	30,393	22,706	-25.3%	-22.6%	38.7	36.1	-2.6
Toyota	1,442	1,147	-20.5%	10,578	7,147	-32.4%	-23.8%	13.5	11.4	-2.1
Honda	1,436	1,236	-13.9%	9,510	7,828	-17.7%	-22.3%	12.1	12.4	0.3
Nissan	957	870	-9.1%	6,538	4,804	-26.5%	-21.7%	8.3	7.6	-0.7
Other	481	418	-13.1%	3,767	2,927	-22.3%	-21.0%	4.8	4.6	-0.2
European Brands	788	767	-2.7%	5,187	4,392	-15.3%	-17.7%	6.6	7.0	0.4
Volkswagen	324	347	7.1%	2,041	1,974	-3.3%	-6.6%	2.6	3.1	0.5
BMW	215	185	-14.0%	1,539	1,099	-28.6%	-22.3%	2.0	1.7	-0.3
Mercedes	158	137	-13.3%	922	772	-16.3%	-19.5%	1.2	1.2	0.0
Volvo	44	51	15.9%	359	300	-16.4%	-18.7%	0.5	0.5	0.0
Other	47	47	0.0%	326	247	-24.2%	-41.8%	0.4	0.4	0.0
Korean Brands	577	500	-13.3%	4,082	3,804	-6.8%	6.9%	5.2	6.0	0.8

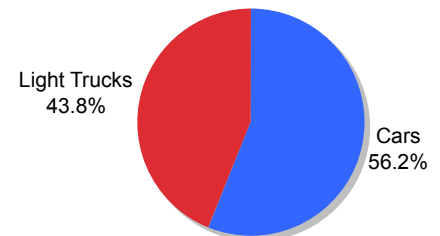
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi,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

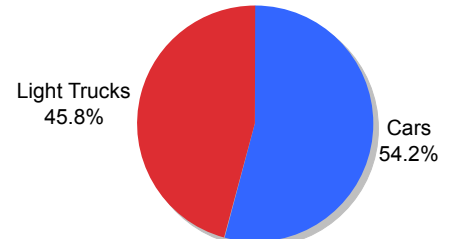


Car and Light Truck Market Share

YTD '08 thru Nov



YTD '09 thru Nov

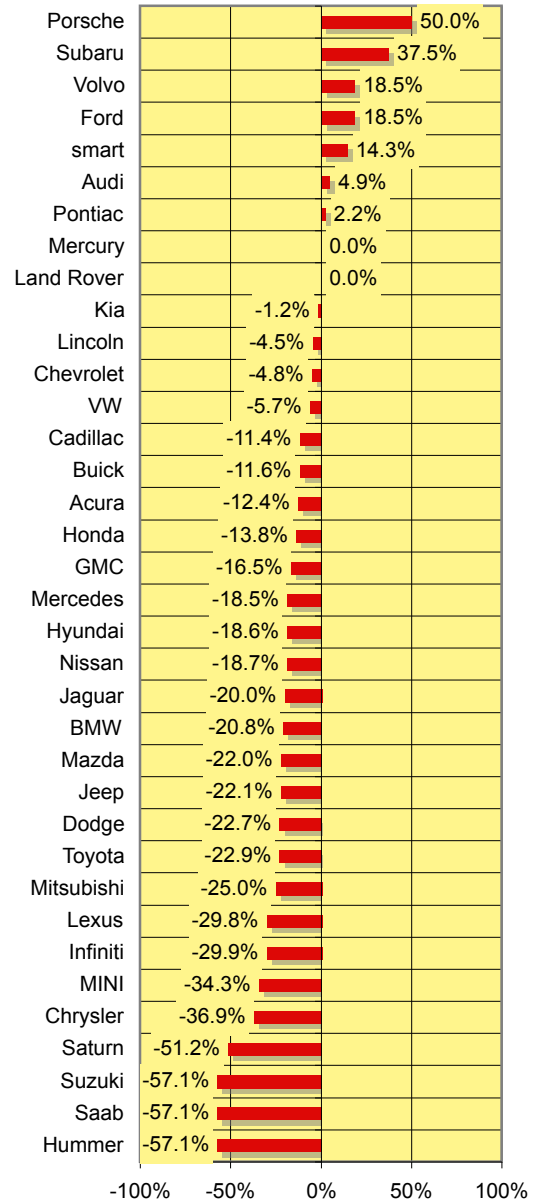


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing 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 June 09 thru Nov 09 vs. Year Earlier)**

	Avg. Monthly Registrations			U.S. % chg.	Area Market Share		
	6/08 to 11/08	6/09 to 11/09	% chg.		Prev.	Recent	Chg.
TOTAL	7,062	6,200	-12.2%	-11.0%			
Acura	97	85	-12.4%	-23.5%	1.4	1.4	0.0
Audi	41	43	4.9%	0.3%	0.6	0.7	0.1
BMW	106	84	-20.8%	-17.4%	1.5	1.4	-0.1
Buick	95	84	-11.6%	-22.9%	1.3	1.4	0.1
Cadillac	70	62	-11.4%	-26.3%	1.0	1.0	0.0
Chevrolet	1,025	976	-4.8%	-16.2%	14.5	15.7	1.2
Chrysler	198	125	-36.9%	-38.5%	2.8	2.0	-0.8
Dodge	445	344	-22.7%	-26.3%	6.3	5.5	-0.8
Ford	761	902	18.5%	3.2%	10.8	14.5	3.7
GMC	188	157	-16.5%	-27.3%	2.7	2.5	-0.2
Honda	796	686	-13.8%	-9.3%	11.3	11.1	-0.2
Hummer	7	3	-57.1%	-67.9%	0.1	0.0	-0.1
Hyundai	237	193	-18.6%	19.2%	3.4	3.1	-0.3
Infiniti	87	61	-29.9%	-23.6%	1.2	1.0	-0.2
Jaguar	5	4	-20.0%	-19.4%	0.1	0.1	0.0
Jeep	172	134	-22.1%	-21.2%	2.4	2.2	-0.2
Kia	170	168	-1.2%	22.4%	2.4	2.7	0.3
Land Rover	6	6	0.0%	-4.7%	0.1	0.1	0.0
Lexus	114	80	-29.8%	-5.0%	1.6	1.3	-0.3
Lincoln	44	42	-4.5%	-24.0%	0.6	0.7	0.1
Mazda	259	202	-22.0%	-11.8%	3.7	3.3	-0.4
Mercedes	81	66	-18.5%	-5.9%	1.1	1.1	0.0
Mercury	62	62	0.0%	-9.7%	0.9	1.0	0.1
MINI	35	23	-34.3%	-12.7%	0.5	0.4	-0.1
Mitsubishi	36	27	-25.0%	-40.5%	0.5	0.4	-0.1
Nissan	540	439	-18.7%	-5.9%	7.6	7.1	-0.5
Pontiac	180	184	2.2%	-17.2%	2.5	3.0	0.5
Porsche	4	6	50.0%	-22.9%	0.1	0.1	0.0
Saab	7	3	-57.1%	-67.9%	0.1	0.0	-0.1
Saturn	127	62	-51.2%	-64.9%	1.8	1.0	-0.8
smart	7	8	14.3%	-45.7%	0.1	0.1	0.0
Subaru	40	55	37.5%	26.0%	0.6	0.9	0.3
Suzuki	7	3	-57.1%	-52.4%	0.1	0.0	-0.1
Toyota/Scion	827	638	-22.9%	-8.7%	11.7	10.3	-1.4
Volkswagen	159	150	-5.7%	1.6%	2.3	2.4	0.1
Volvo	27	32	18.5%	14.2%	0.4	0.5	0.1
Other	4	5	25.0%	-50.1%	0.1	0.1	0.0

**Percent Change in Registrations
(June 09 thru Nov 09 vs. Year Earlier)**



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 (June 09 thru Nov 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).

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

WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?

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