

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

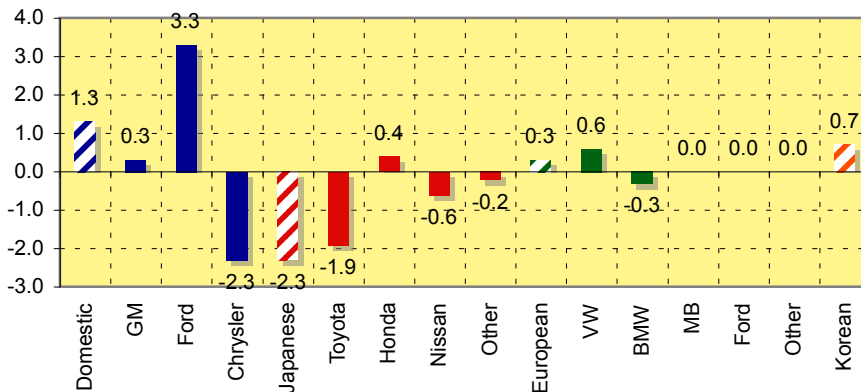
Data thru December 2009

Saint Louis Area New Retail Car and Light Truck Registrations

| | Nov 09 and Dec 09 Combined | | | YTD thru Dec | | | | 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 | 9,132 | 8,878 | -2.8% | 83,476 | 67,573 | -19.1% | -21.3% | | | |
| Cars | 4,628 | 4,519 | -2.4% | 46,530 | 36,375 | -21.8% | -19.2% | 55.7 | 53.8 | -1.9 |
| Light Trucks | 4,504 | 4,359 | -3.2% | 36,946 | 31,198 | -15.6% | -23.6% | 44.3 | 46.2 | 1.9 |
| Domestic Brands | 4,538 | 4,454 | -1.9% | 41,375 | 34,373 | -16.9% | -26.8% | 49.6 | 50.9 | 1.3 |
| General Motors | 2,040 | 2,347 | 15.0% | 20,502 | 16,821 | -18.0% | -29.7% | 24.6 | 24.9 | 0.3 |
| Ford | 1,322 | 1,504 | 13.8% | 10,293 | 10,545 | 2.4% | -15.3% | 12.3 | 15.6 | 3.3 |
| Chrysler | 1,176 | 603 | -48.7% | 10,580 | 7,007 | -33.8% | -35.9% | 12.7 | 10.4 | -2.3 |
| Japanese Brands | 3,414 | 3,331 | -2.4% | 32,175 | 24,469 | -24.0% | -19.6% | 38.5 | 36.2 | -2.3 |
| Toyota | 1,157 | 1,089 | -5.9% | 11,144 | 7,732 | -30.6% | -20.2% | 13.3 | 11.4 | -1.9 |
| Honda | 1,130 | 1,123 | -0.6% | 10,119 | 8,420 | -16.8% | -19.5% | 12.1 | 12.5 | 0.4 |
| Nissan | 711 | 759 | 6.8% | 6,906 | 5,188 | -24.9% | -19.1% | 8.3 | 7.7 | -0.6 |
| Other | 416 | 360 | -13.5% | 4,006 | 3,129 | -21.9% | -19.0% | 4.8 | 4.6 | -0.2 |
| European Brands | 668 | 698 | 4.5% | 5,554 | 4,740 | -14.7% | -15.7% | 6.7 | 7.0 | 0.3 |
| Volkswagen | 286 | 323 | 12.9% | 2,198 | 2,134 | -2.9% | -4.7% | 2.6 | 3.2 | 0.6 |
| BMW | 187 | 153 | -18.2% | 1,639 | 1,172 | -28.5% | -20.1% | 2.0 | 1.7 | -0.3 |
| Mercedes | 120 | 131 | 9.2% | 989 | 835 | -15.6% | -17.8% | 1.2 | 1.2 | 0.0 |
| Volvo | 44 | 45 | 2.3% | 386 | 326 | -15.5% | -15.5% | 0.5 | 0.5 | 0.0 |
| Other | 31 | 46 | 48.4% | 342 | 273 | -20.2% | -41.4% | 0.4 | 0.4 | 0.0 |
| Korean Brands | 512 | 395 | -22.9% | 4,372 | 3,991 | -8.7% | 8.9% | 5.2 | 5.9 | 0.7 |

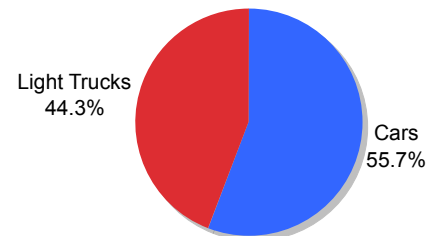
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi,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

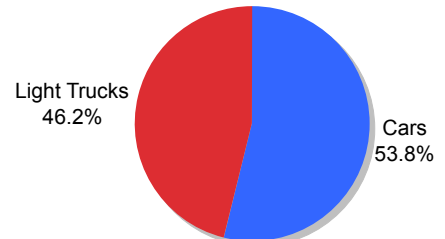


Car and Light Truck Market Share

YTD '08 thru Dec



YTD '09 thru Dec

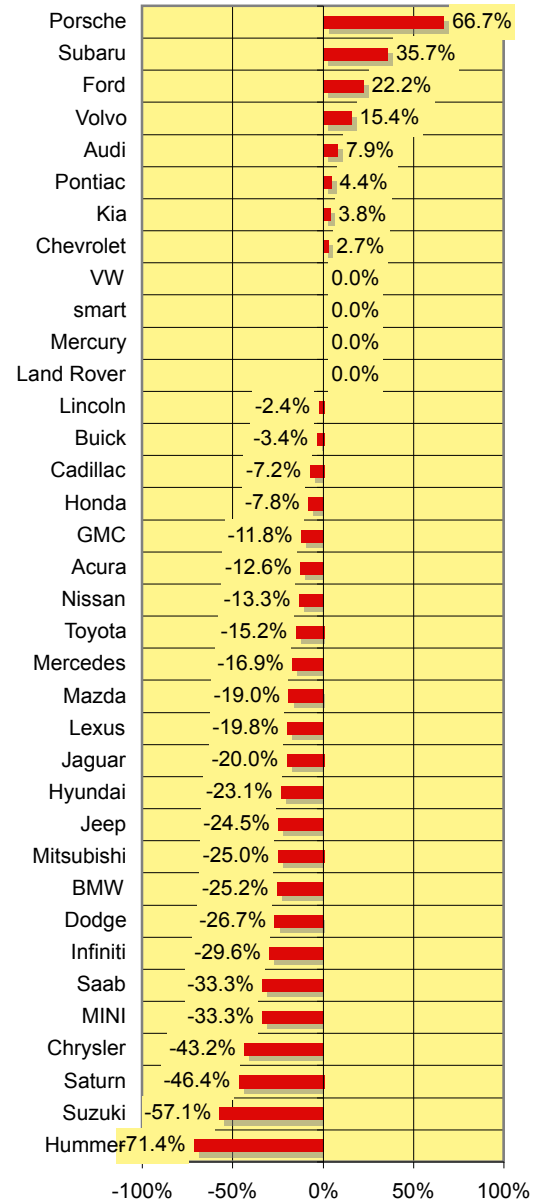


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing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

| | Avg. Monthly Registrations | | | U.S. % chg. | Area Market Share | | |
|--------------|----------------------------|------------------|-----------|----------------|-------------------|--------|------|
| | 7/08 to 12/08 | 7/09 to 12/09 | % chg. | | Prev. | Recent | Chg. |
| TOTAL | 6,559 | 6,012 | -8.3% | -3.6% | | | |
| Acura | 95 | 83 | -12.6% | -18.0% | 1.4 | 1.4 | 0.0 |
| Audi | 38 | 41 | 7.9% | 5.0% | 0.6 | 0.7 | 0.1 |
| BMW | 103 | 77 | -25.2% | -12.5% | 1.6 | 1.3 | -0.3 |
| Buick | 89 | 86 | -3.4% | -16.6% | 1.4 | 1.4 | 0.0 |
| Cadillac | 69 | 64 | -7.2% | -16.5% | 1.1 | 1.1 | 0.0 |
| Chevrolet | 950 | 976 | 2.7% | -10.5% | 14.5 | 16.2 | 1.7 |
| Chrysler | 183 | 104 | -43.2% | -31.4% | 2.8 | 1.7 | -1.1 |
| Dodge | 415 | 304 | -26.7% | -19.6% | 6.3 | 5.1 | -1.2 |
| Ford | 724 | 885 | 22.2% | 11.0% | 11.0 | 14.7 | 3.7 |
| GMC | 186 | 164 | -11.8% | -20.7% | 2.8 | 2.7 | -0.1 |
| Honda | 727 | 670 | -7.8% | 0.2% | 11.1 | 11.1 | 0.0 |
| Hummer | 7 | 2 | -71.4% | -74.8% | 0.1 | 0.0 | -0.1 |
| Hyundai | 225 | 173 | -23.1% | 35.0% | 3.4 | 2.9 | -0.5 |
| Infiniti | 81 | 57 | -29.6% | -16.6% | 1.2 | 0.9 | -0.3 |
| Jaguar | 5 | 4 | -20.0% | -5.8% | 0.1 | 0.1 | 0.0 |
| Jeep | 159 | 120 | -24.5% | -15.9% | 2.4 | 2.0 | -0.4 |
| Kia | 156 | 162 | 3.8% | 31.9% | 2.4 | 2.7 | 0.3 |
| Land Rover | 6 | 6 | 0.0% | 6.6% | 0.1 | 0.1 | 0.0 |
| Lexus | 106 | 85 | -19.8% | 2.1% | 1.6 | 1.4 | -0.2 |
| Lincoln | 42 | 41 | -2.4% | -16.4% | 0.6 | 0.7 | 0.1 |
| Mazda | 237 | 192 | -19.0% | -3.1% | 3.6 | 3.2 | -0.4 |
| Mercedes | 77 | 64 | -16.9% | -0.3% | 1.2 | 1.1 | -0.1 |
| Mercury | 60 | 60 | 0.0% | -0.1% | 0.9 | 1.0 | 0.1 |
| MINI | 30 | 20 | -33.3% | -9.6% | 0.5 | 0.3 | -0.2 |
| Mitsubishi | 32 | 24 | -25.0% | -36.6% | 0.5 | 0.4 | -0.1 |
| Nissan | 497 | 431 | -13.3% | 0.5% | 7.6 | 7.2 | -0.4 |
| Pontiac | 160 | 167 | 4.4% | -21.9% | 2.4 | 2.8 | 0.4 |
| Porsche | 3 | 5 | 66.7% | -8.3% | 0.0 | 0.1 | 0.1 |
| Saab | 6 | 4 | -33.3% | -64.6% | 0.1 | 0.1 | 0.0 |
| Saturn | 112 | 60 | -46.4% | -65.2% | 1.7 | 1.0 | -0.7 |
| smart | 7 | 7 | 0.0% | -47.0% | 0.1 | 0.1 | 0.0 |
| Subaru | 42 | 57 | 35.7% | 31.8% | 0.6 | 0.9 | 0.3 |
| Suzuki | 7 | 3 | -57.1% | -43.1% | 0.1 | 0.0 | -0.1 |
| Toyota/Scion | 743 | 630 | -15.2% | 2.3% | 11.3 | 10.5 | -0.8 |
| Volkswagen | 151 | 151 | 0.0% | 8.2% | 2.3 | 2.5 | 0.2 |
| Volvo | 26 | 30 | 15.4% | 17.7% | 0.4 | 0.5 | 0.1 |
| Other | 5 | 6 | 20.0% | -48.8% | 0.1 | 0.1 | 0.0 |

**Percent Change in Registrations
(July 09 thru Dec 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 (July 09 thru Dec 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).