

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

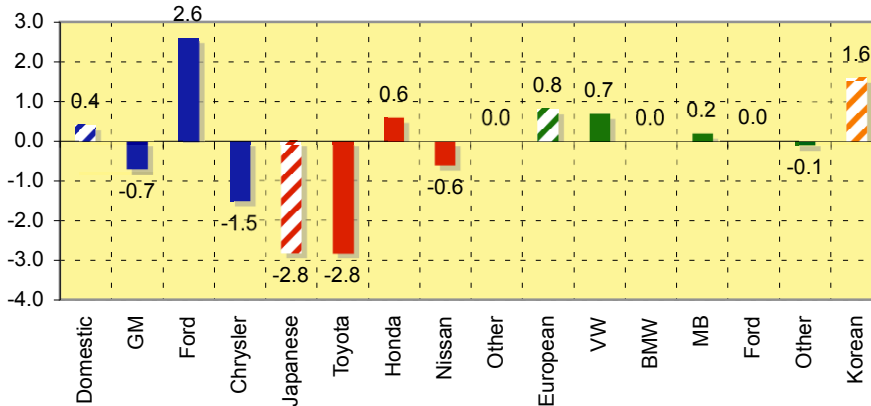
Data thru June, 2009

Saint Louis Area New Retail Car and Light Truck Registrations

	May 09 and Jun 09 Combined			YTD thru June				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	15,490	11,570	-25.3%	44,125	31,501	-28.6%	-35.1%			
Cars	9,531	6,141	-35.6%	24,613	16,353	-33.6%	-35.4%	55.8	51.9	-3.9
Light Trucks	5,959	5,429	-8.9%	19,512	15,148	-22.4%	-34.8%	44.2	48.1	3.9
Domestic Brands	7,545	5,814	-22.9%	22,438	16,165	-28.0%	-39.2%	50.9	51.3	0.4
General Motors	3,683	2,573	-30.1%	11,062	7,697	-30.4%	-40.3%	25.1	24.4	-0.7
Ford	1,842	1,822	-1.1%	5,335	4,629	-13.2%	-32.7%	12.1	14.7	2.6
Chrysler	2,020	1,419	-29.8%	6,041	3,839	-36.5%	-45.7%	13.7	12.2	-1.5
Japanese Brands	6,159	4,212	-31.6%	16,768	11,090	-33.9%	-35.2%	38.0	35.2	-2.8
Toyota	2,149	1,252	-41.7%	6,051	3,447	-43.0%	-37.9%	13.7	10.9	-2.8
Honda	1,984	1,519	-23.4%	5,191	3,907	-24.7%	-33.5%	11.8	12.4	0.6
Nissan	1,252	888	-29.1%	3,438	2,263	-34.2%	-33.4%	7.8	7.2	-0.6
Other	774	553	-28.6%	2,088	1,473	-29.5%	-32.6%	4.7	4.7	0.0
European Brands	967	857	-11.4%	2,831	2,266	-20.0%	-26.3%	6.4	7.2	0.8
Volkswagen	374	354	-5.3%	1,062	985	-7.3%	-16.0%	2.4	3.1	0.7
BMW	290	242	-16.6%	844	586	-30.6%	-27.5%	1.9	1.9	0.0
Mercedes	182	151	-17.0%	488	407	-16.6%	-29.3%	1.1	1.3	0.2
Volvo	62	65	4.8%	229	147	-35.8%	-32.8%	0.5	0.5	0.0
Other	59	45	-23.7%	208	141	-32.2%	-44.0%	0.5	0.4	-0.1
Korean Brands	819	687	-16.1%	2,088	1,980	-5.2%	-9.4%	4.7	6.3	1.6

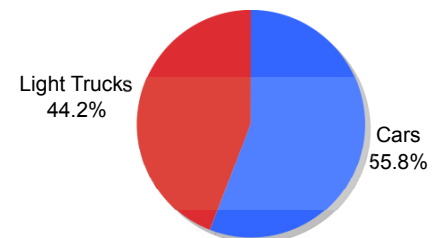
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi,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

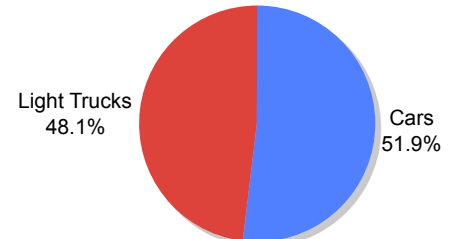


Car and Light Truck Market Share

YTD '08 thru June



YTD '09 thru June

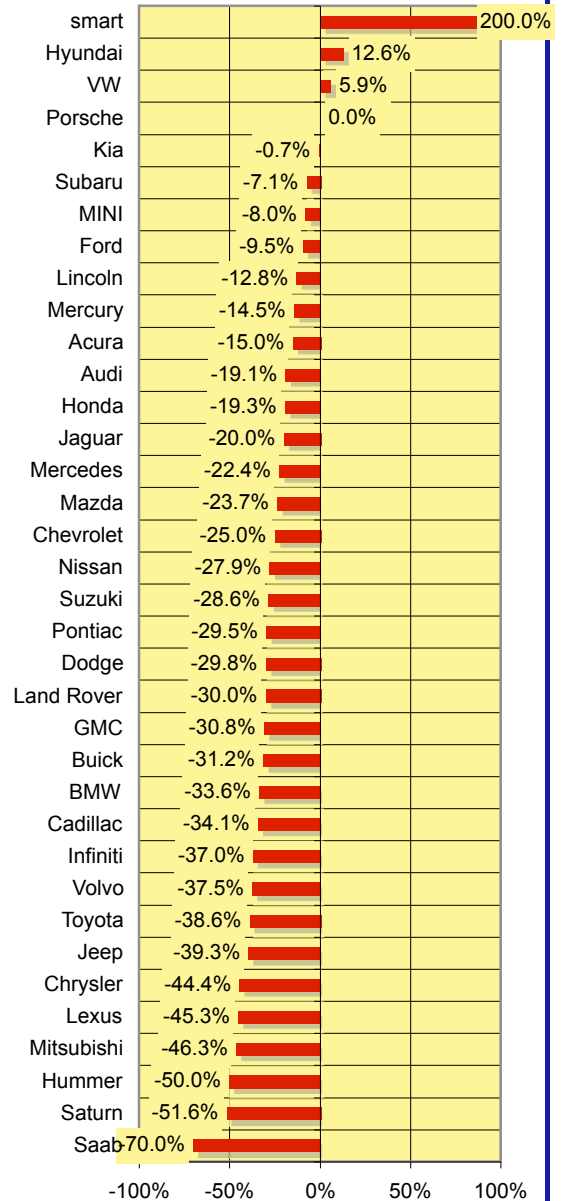


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing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

	Avg. Monthly Registrations			% U.S. % chg.	Area Market Share		
	1/08 to 6/08	1/09 to 6/09	% chg.		Prev.	Recent	Chg.
TOTAL	7,059	5,250	-25.6%	-35.1%			
Acura	113	96	-15.0%	-34.4%	1.6	1.8	0.2
Audi	47	38	-19.1%	-15.9%	0.7	0.7	0.0
BMW	113	75	-33.6%	-28.9%	1.6	1.4	-0.2
Buick	125	86	-31.2%	-33.7%	1.8	1.6	-0.2
Cadillac	88	58	-34.1%	-45.2%	1.2	1.1	-0.1
Chevrolet	1,058	794	-25.0%	-38.1%	15.0	15.1	0.1
Chrysler	266	148	-44.4%	-56.9%	3.8	2.8	-1.0
Dodge	483	339	-29.8%	-43.1%	6.8	6.5	-0.3
Ford	749	678	-9.5%	-32.5%	10.6	12.9	2.3
GMC	208	144	-30.8%	-38.7%	2.9	2.7	-0.2
Honda	688	555	-19.3%	-33.4%	9.7	10.6	0.9
Hummer	10	5	-50.0%	-61.7%	0.1	0.1	0.0
Hyundai	175	197	12.6%	-11.4%	2.5	3.8	1.3
Infiniti	92	58	-37.0%	-37.9%	1.3	1.1	-0.2
Jaguar	5	4	-20.0%	-31.3%	0.1	0.1	0.0
Jeep	252	153	-39.3%	-40.2%	3.6	2.9	-0.7
Kia	134	133	-0.7%	-6.5%	1.9	2.5	0.6
Land Rover	10	7	-30.0%	-25.7%	0.1	0.1	0.0
Lexus	128	70	-45.3%	-34.1%	1.8	1.3	-0.5
Lincoln	47	41	-12.8%	-28.4%	0.7	0.8	0.1
Mazda	236	180	-23.7%	-34.5%	3.3	3.4	0.1
Mercedes	76	59	-22.4%	-28.6%	1.1	1.1	0.0
Mercury	62	53	-14.5%	-38.4%	0.9	1.0	0.1
MINI	25	23	-8.0%	-20.9%	0.4	0.4	0.0
Mitsubishi	41	22	-46.3%	-50.9%	0.6	0.4	-0.2
Nissan	444	320	-27.9%	-32.8%	6.3	6.1	-0.2
Pontiac	193	136	-29.5%	-41.9%	2.7	2.6	-0.1
Porsche	7	7	0.0%	-36.0%	0.1	0.1	0.0
Saab	10	3	-70.0%	-55.4%	0.1	0.1	0.0
Saturn	124	60	-51.6%	-58.1%	1.8	1.1	-0.7
smart	3	9	200.0%	-35.4%	0.0	0.2	0.2
Subaru	42	39	-7.1%	-0.8%	0.6	0.7	0.1
Suzuki	7	5	-28.6%	-60.2%	0.1	0.1	0.0
Toyota/Scion	823	505	-38.6%	-38.3%	11.7	9.6	-2.1
Volkswagen	119	126	5.9%	-16.0%	1.7	2.4	0.7
Volvo	40	25	-37.5%	-35.6%	0.6	0.5	-0.1
Other	20	3	-85.0%	-55.8%	0.3	0.1	-0.2

**Percent Change in Registrations
(Jan 09 thru June 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 (Jan 09 thru June 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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