Saint Louis Auto Outlook

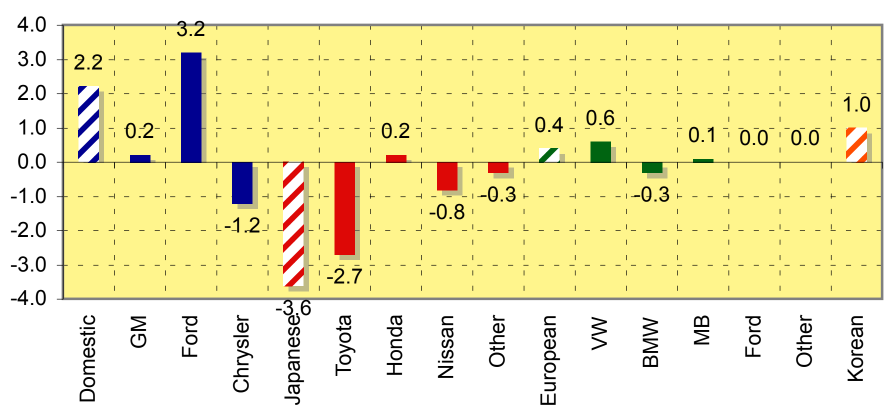
Covering the Saint Louis Area Automotive Market — **Data thru August, 2009**

Saint Louis Area New Retail Car and Light Truck Registrations

	July 09 and Aug 09 Combined			YTD thru Aug				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	16,114	14,183	-12.0%	60,239	45,684	-24.2%	-27.9%			
Cars	9,907	7,950	-19.8%	34,523	24,307	-29.6%	-26.0%	57.3	53.2	-4.1
Light Trucks	6,207	6,233	0.4%	25,716	21,377	-16.9%	-30.0%	42.7	46.8	4.1
Domestic Brands	7,428	7,487	0.8%	29,866	23,652	-20.8%	-32.5%	49.6	51.8	2.2
General Motors	3,695	3,582	-3.1%	14,757	11,279	-23.6%	-35.0%	24.5	24.7	0.2
Ford	1,954	2,338	19.7%	7,289	6,967	-4.4%	-23.6%	12.1	15.3	3.2
Chrysler	1,779	1,567	-11.9%	7,820	5,406	-30.9%	-39.3%	13.0	11.8	-1.2
Japanese Brands	6,584	5,012	-23.9%	23,352	16,102	-31.0%	-27.3%	38.8	35.2	-3.6
Toyota	2,211	1,590	-28.1%	8,262	5,037	-39.0%	-29.0%	13.7	11.0	-2.7
Honda	2,083	1,701	-18.3%	7,274	5,608	-22.9%	-25.6%	12.1	12.3	0.2
Nissan	1,443	1,080	-25.2%	4,881	3,343	-31.5%	-27.7%	8.1	7.3	-0.8
Other	847	641	-24.3%	2,935	2,114	-28.0%	-24.3%	4.9	4.6	-0.3
European Brands	1,103	874	-20.8%	3,934	3,140	-20.2%	-22.3%	6.5	6.9	0.4
Volkswagen	466	420	-9.9%	1,528	1,405	-8.0%	-10.1%	2.5	3.1	0.6
BMW	334	198	-40.7%	1,178	784	-33.4%	-26.3%	2.0	1.7	-0.3
Mercedes	186	149	-19.9%	674	556	-17.5%	-25.6%	1.1	1.2	0.1
Volvo	64	64	0.0%	293	211	-28.0%	-25.1%	0.5	0.5	0.0
Other	53	43	-18.9%	261	184	-29.5%	-44.5%	0.4	0.4	0.0
Korean Brands	999	810	-18.9%	3,087	2,790	-9.6%	0.8%	5.1	6.1	1.0

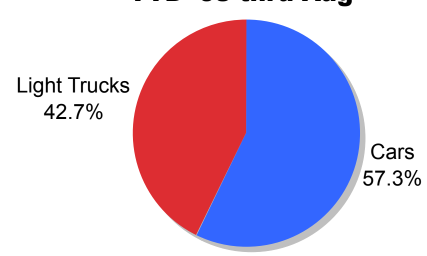
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi,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

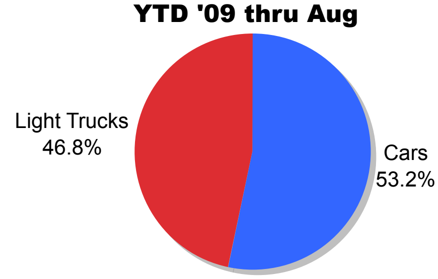


Car and Light Truck Market Share

YTD '08 thru Aug



YTD '09 thru Aug

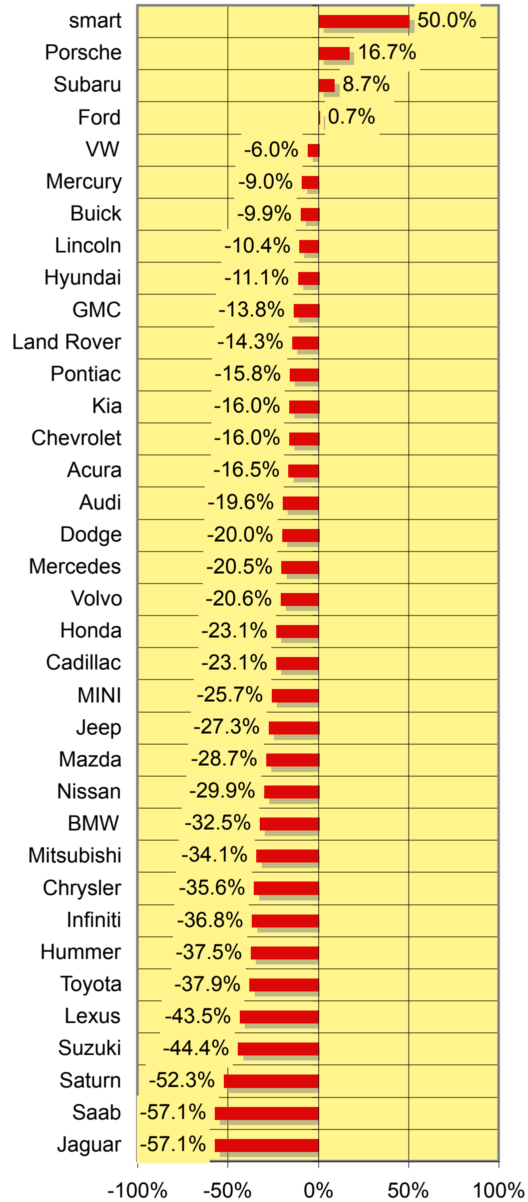


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing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

	Avg. Monthly Registrations				Area Market Share		
	3/08 to 8/08	3/09 to 8/09	% chg.	U.S. % chg.	Prev.	Recent	Chg.
TOTAL	7,654	5,994	-21.7%	-24.5%			
Acura	103	86	-16.5%	-34.0%	1.3	1.4	0.1
Audi	51	41	-19.6%	-6.0%	0.7	0.7	0.0
BMW	117	79	-32.5%	-28.6%	1.5	1.3	-0.2
Buick	101	91	-9.9%	-32.3%	1.3	1.5	0.2
Cadillac	78	60	-23.1%	-47.5%	1.0	1.0	0.0
Chevrolet	1,079	906	-16.0%	-24.0%	14.1	15.1	1.0
Chrysler	236	152	-35.6%	-44.3%	3.1	2.5	-0.6
Dodge	491	393	-20.0%	-34.2%	6.4	6.6	0.2
Ford	818	824	0.7%	-16.1%	10.7	13.7	3.0
GMC	181	156	-13.8%	-35.0%	2.4	2.6	0.2
Honda	858	660	-23.1%	-22.6%	11.2	11.0	-0.2
Hummer	8	5	-37.5%	-60.2%	0.1	0.1	0.0
Hyundai	235	209	-11.1%	-1.8%	3.1	3.5	0.4
Infiniti	95	60	-36.8%	-37.3%	1.2	1.0	-0.2
Jaguar	7	3	-57.1%	-36.3%	0.1	0.1	0.0
Jeep	227	165	-27.3%	-30.9%	3.0	2.8	-0.2
Kia	188	158	-16.0%	3.2%	2.5	2.6	0.1
Land Rover	7	6	-14.3%	-14.6%	0.1	0.1	0.0
Lexus	124	70	-43.5%	-29.3%	1.6	1.2	-0.4
Lincoln	48	43	-10.4%	-28.0%	0.6	0.7	0.1
Mazda	282	201	-28.7%	-26.1%	3.7	3.4	-0.3
Mercedes	78	62	-20.5%	-22.9%	1.0	1.0	0.0
Mercury	67	61	-9.0%	-25.1%	0.9	1.0	0.1
MINI	35	26	-25.7%	-14.4%	0.5	0.4	-0.1
Mitsubishi	44	29	-34.1%	-48.7%	0.6	0.5	-0.1
Nissan	548	384	-29.9%	-24.6%	7.2	6.4	-0.8
Pontiac	209	176	-15.8%	-24.4%	2.7	2.9	0.2
Porsche	6	7	16.7%	-37.6%	0.1	0.1	0.0
Saab	7	3	-57.1%	-60.5%	0.1	0.1	0.0
Saturn	132	63	-52.3%	-59.4%	1.7	1.1	-0.6
smart	6	9	50.0%	-34.1%	0.1	0.2	0.1
Subaru	46	50	8.7%	12.8%	0.6	0.8	0.2
Suzuki	9	5	-44.4%	-55.0%	0.1	0.1	0.0
Toyota/Scion	936	581	-37.9%	-26.9%	12.2	9.7	-2.5
Volkswagen	151	142	-6.0%	-8.9%	2.0	2.4	0.4
Volvo	34	27	-20.6%	-11.6%	0.4	0.5	0.1
Other	14	4	-71.4%	-56.5%	0.2	0.1	-0.1

Percent Change in Registrations
(Mar 09 thru Aug 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 (Mar 09 thru Aug 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).

Experian Automotive is the data provider for Auto Outlook