



July 2009 Sales Recap

NADA Industry Analysis

Industry

| | <u>July YTD '09</u> | <u>July YTD '08</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|---------------------|---------------------|-------------|-----------------|-----------------|--------------|
| Car | 3,021,952 | 4,489,193 | -32.7% | 550,388 | 456,206 | 20.6% |
| Truck | 2,769,040 | 4,027,003 | -31.2% | 445,064 | 401,421 | 10.9% |
| Total | 5,790,992 | 8,516,196 | -32% | 995,452 | 857,627 | 16.1% |

July SAAR: 11.1 (June 9.5/May 9.9/April 9.5/March 9.8/Feb. 9.1M)

Share of Industry

| | <u>2009</u> | <u>2008</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|-------------|-------------|-------------|-----------------|-----------------|-------------|
| Detroit 3 | 45.2 | 47.8 | -2.6 | 44.2 | 46.2 | -2 |
| Japanese | 39.7 | 40.1 | -0.4 | 41.3 | 38.5 | 2.8 |
| European | 7.3 | 6.4 | 0.9 | 6.8 | 7.5 | -0.7 |
| S. Korea | 7.4 | 5.4 | 2 | 7.5 | 7.5 | 0 |
| Total | 99.6 | 99.7 | | 99.8 | 99.7 | |

Note: Tata Motors not included in total

Market Share By Group

| | <u>2009</u> | <u>2008</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|-------------|-------------|-------------|-----------------|-----------------|-------------|
| GM | 19.6 | 21.4 | -1.8 | 18.9 | 20.4 | -1.5 |
| Toyota | 16.3 | 16.9 | -0.6 | 17.6 | 15 | 2.6 |
| Ford | 16 | 15.1 | 0.9 | 16.4 | 17.8 | -1.4 |
| Chrysler | 9.6 | 11.3 | -1.7 | 8.9 | 7.9 | 1 |
| Honda | 11.1 | 11 | 0.1 | 11.5 | 11.7 | -0.2 |
| Nissan | 7.2 | 7.3 | -0.1 | 7.2 | 6.8 | 0.4 |
| Hyundai | 7.4 | 5.4 | 2.0 | 7.5 | 7.5 | 0 |
| Total | 87 | 88 | | 88 | 87 | |

Market Share Big 6 Brands

| | <u>2009</u> | <u>2008</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|-------------|-------------|-------------|-----------------|-----------------|-------------|
| Toyota | 14.4 | 15.0 | -0.6 | 15.7 | 13.4 | 2.3 |
| Ford | 13.6 | 12.8 | 0.8 | 14.0 | 15.3 | -1.3 |
| Chevrolet | 12.4 | 12.9 | -0.5 | 12.5 | 12.3 | 0.2 |
| Honda | 10.1 | 9.9 | 0.2 | 10.7 | 10.7 | 0.0 |
| Nissan | 6.5 | 6.4 | 0.1 | 6.5 | 6.1 | 0.4 |
| Dodge | 5.3 | 6.0 | -0.7 | 5.0 | 4.4 | 0.6 |
| Total | 62.3 | 63.0 | | 62.2 | 62.2 | |

Top 10 Most Sold - Current Month

| | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> | <u>Trucks</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|----------------|-----------------|-----------------|--------------|------------------|-----------------|-----------------|--------------|
| Cars | | | | F Series | 36,327 | 35,915 | 1.1% |
| Camry | 33,974 | 26,394 | 28.7% | Silverado | 27,617 | 24,766 | 11.5% |
| Civic | 30,037 | 20,594 | 45.9% | Escape | 20,241 | 15,385 | 31.6% |
| Accord | 29,774 | 23,955 | 24.3% | CR-V | 19,151 | 13,720 | 39.6% |
| Corolla/Matrix | 29,593 | 19,935 | 48.4% | Ram | 17,501 | 14,478 | 20.9% |
| Focus | 21,830 | 12,573 | 73.6% | RAV4 | 15,912 | 10,054 | 58.3% |
| Altima | 19,252 | 16,350 | 17.7% | Tacoma | 12,552 | 9,035 | 38.9% |
| Fusion | 17,610 | 18,561 | -5.1% | Sierra | 10,464 | 9,014 | 16.1% |
| Malibu | 15,339 | 11,466 | 33.8% | Odyssey | 6,785 | 14,670 | -53.7% |
| Impala | 14,649 | 14,931 | -1.9% | Econoline | 6,636 | 6,557 | 1.2% |
| Prius | 19,173 | 12,998 | 47.5% | | | | |
| Total | 231,231 | 177,757 | 30.1% | | 173,186 | 153,594 | 12.8% |
| % of Industry | 23.2% | 20.7% | | | 17.4% | 17.9% | |

Share by Segments % of Industry

| | <u>YTD '09</u> | <u>YTD '08</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|----------------|----------------|-------------|-----------------|-----------------|-------------|
| Small Car | 19.9 | 19.9 | 0.0 | 23.8 | 19.3 | 4.5 |
| Middle Car | 21.6 | 21.7 | -0.1 | 22.5 | 23.2 | -0.7 |
| Large Car | 3.1 | 3.5 | -0.4 | 2.2 | 2.8 | -0.6 |
| Luxury Car | 7.6 | 7.6 | 0.0 | 6.8 | 7.8 | -1.0 |
| CUV | 21.6 | 18.0 | 3.6 | 22.4 | 21.4 | 1.0 |
| SUV | 6.8 | 8.7 | -1.9 | 4.5 | 5.8 | -1.3 |
| Small Van | 4.3 | 4.6 | -0.3 | 3.4 | 4.5 | -1.1 |
| Large Van | 1.7 | 1.8 | -0.1 | 1.4 | 2.0 | -0.6 |
| Small P/U | 2.8 | 3.1 | -0.3 | 3.1 | 2.7 | 0.4 |
| Large P/U | 10.6 | 11.0 | -0.4 | 10.0 | 10.5 | -0.5 |
| Total | 100.0 | 100 | | 100 | 100 | |

Hybrid Sales

| | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> | <u>July '09</u> | <u>June '09</u> | <u>Chg.</u> |
|--------------|-----------------|-----------------|-------------|-----------------|-----------------|-------------|
| Hybrid Car | 130,269 | 171,009 | -24% | 29,359 | 22,266 | 32% |
| Hybrid Truck | 31,640 | 41,631 | -24% | 6,070 | 4,788 | 27% |
| Total | 161,909 | 212,640 | -24% | 35,429 | 27,054 | 31% |

Source: Wards Auto Data. Share by group depicts all brands owned by parent company