

Dallas – Forth Worth Automotive Market Analysis

Comprehensive information on the DFW Metroplex new vehicle market

An Advising Automobile Dealers LLC Publication

Market rebounds from stagnant 2009; Up slightly in 2010

As anticipated the pace of new vehicle sales improved in the Metroplex following four years of industry-wide declines. Improvements of 17.78%, 10.43% and 5.50% in the first, second and fourth quarters (compared to the same periods in 2009), coupled with a decline of 7.01% in the third quarter, led to an overall improvement of 5.87% in the DFW market for 2010. A third quarter decline in sales in 2010 compared with 2009 was somewhat anticipated given the artificial and extraordinary sales during the Cash for Clunkers program in the third quarter of 2009.

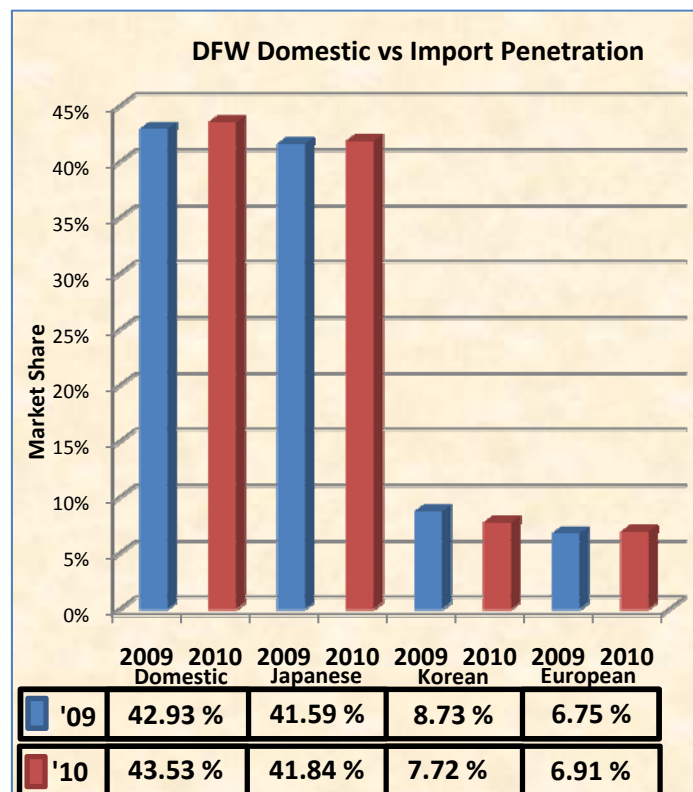
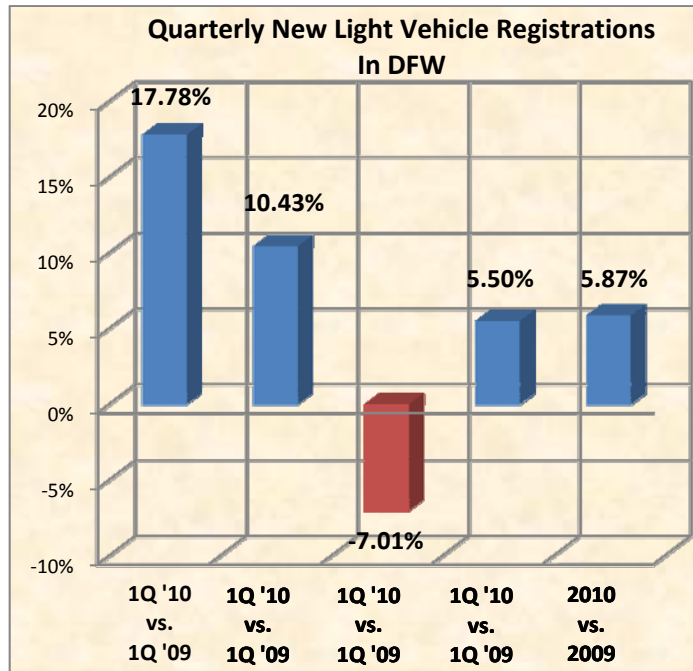
Domestic and Japanese penetration remained substantial, making small gains in 2010, along with a small gain from the European manufacturers.

- The Detroit 3 maintain a small advantage in market share over its Japanese competition in the DFW Market.
- Korean manufacturers were the only group to see their market share decline from 2009 to 2010.

DATA SOURCE INFORMATION

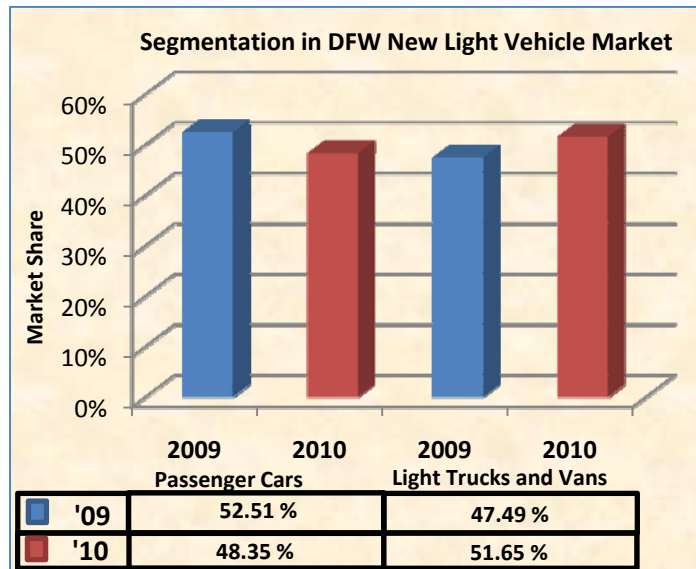
Data for report was sourced from the Autonews Data Center, the Cross-Sell Report and the Texas Department of Motor Vehicles.

For the purpose of this report “The DFW Market” a.k.a. “The Metroplex” includes Dallas, Tarrant, Denton, Collin, Rockwall, Kaufmann and Parker Counties.



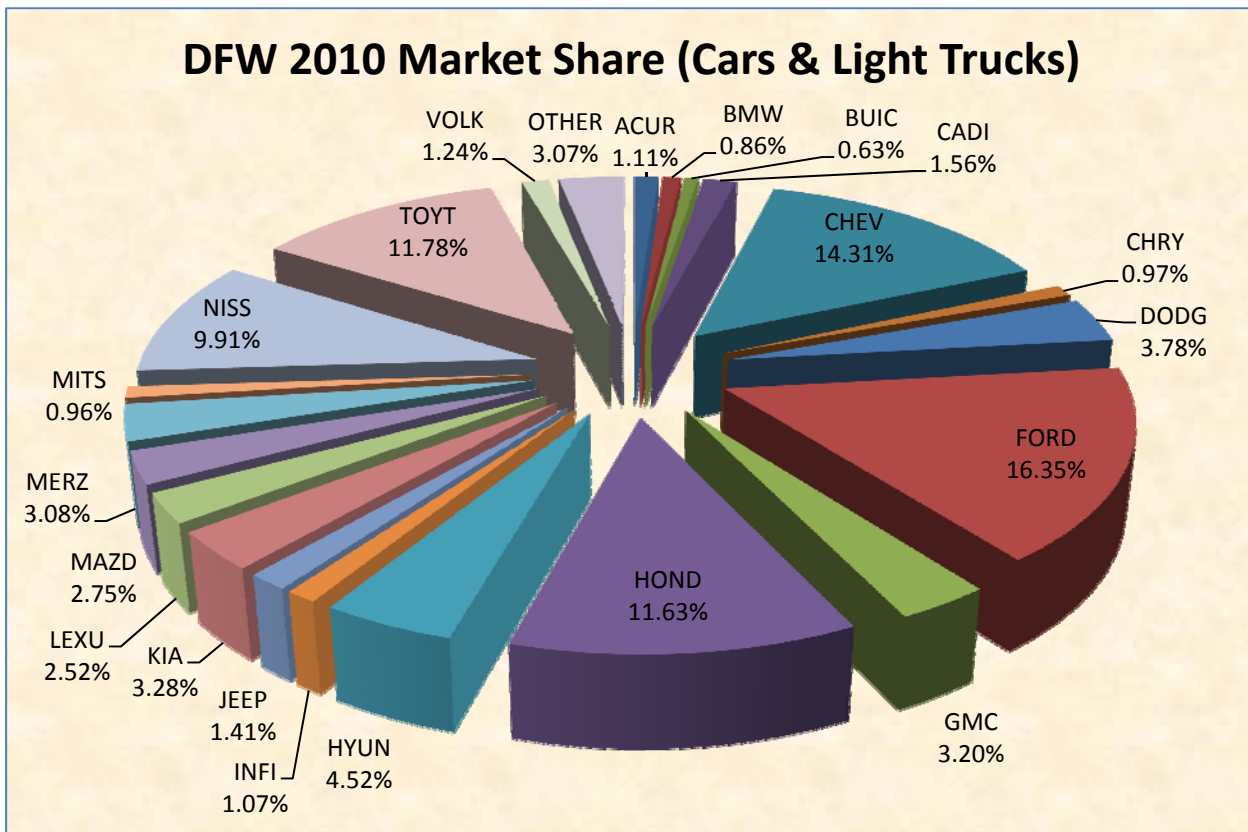
Vehicle mix trends toward trucks

In 2010 the mix of passenger cars vs. light trucks and vans trended back toward trucks and vans. The passenger car market share decreased nearly four percentage points as light trucks and vans occupied the majority market again. In 2009 the passenger car share declined from 52.51% to 48.35% as the truck share grew from 47.49% to 51.65%. Nationally the U.S. light truck market picked up 2.90 percentage points as it grew from 45.43% to 48.33% of the market.



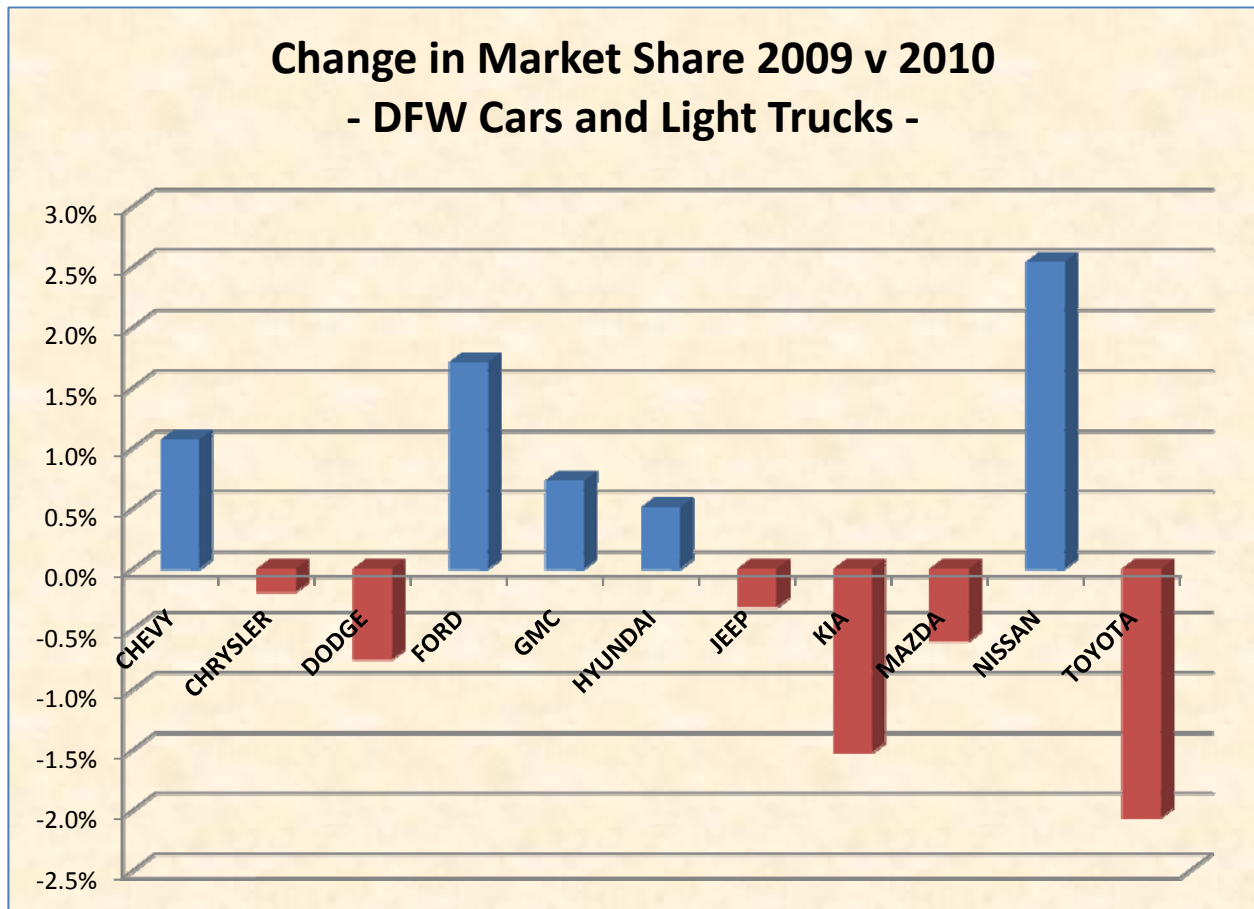
Ford continues to hold top spot in DFW market share

As was the case in 2009, 2010 saw Ford hold onto its spot as the number one make in the Metroplex as it increased its market share to 15.72%. In 2010 in terms of total market share Ford was followed by Chevrolet with 13.76%, Toyota with 11.33%, Honda with 11.18% and Nissan with 9.52%. No other make carried more than 5.00% of the market. (See full chart on page 4)



Nissan and Ford see largest gain in market share; Toyota largest decline

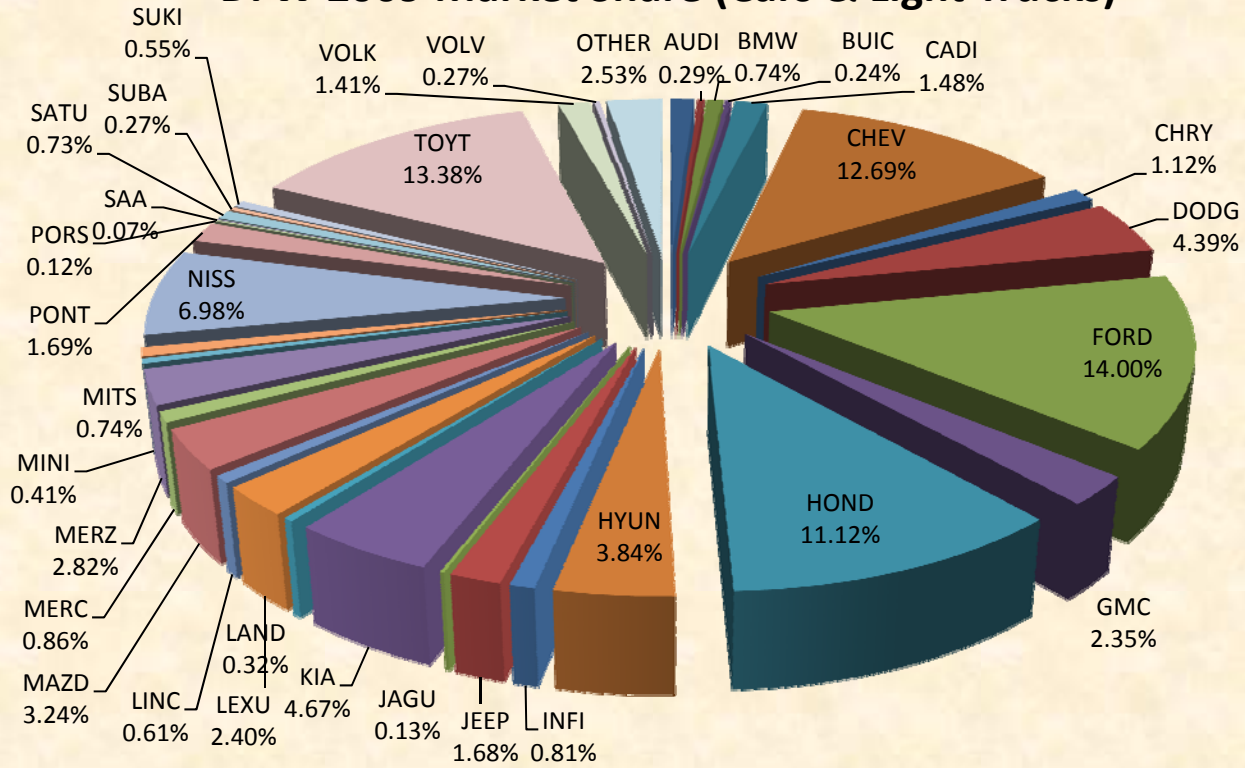
In 2010 Nissan increased its DFW penetration by 2.54% compared to 2009. Ford added 1.71% to its market share between 2009 and 2010, and Chevrolet picked up 1.07%. Toyota conceded 2.06% of the DFW market in 2010, while Kia dropped 1.52% as well. GMC and Hyundai saw modest gains of less than a percentage point, while Chrysler, Jeep, Dodge and Mazda all lost ground. (See full chart on Page 12)



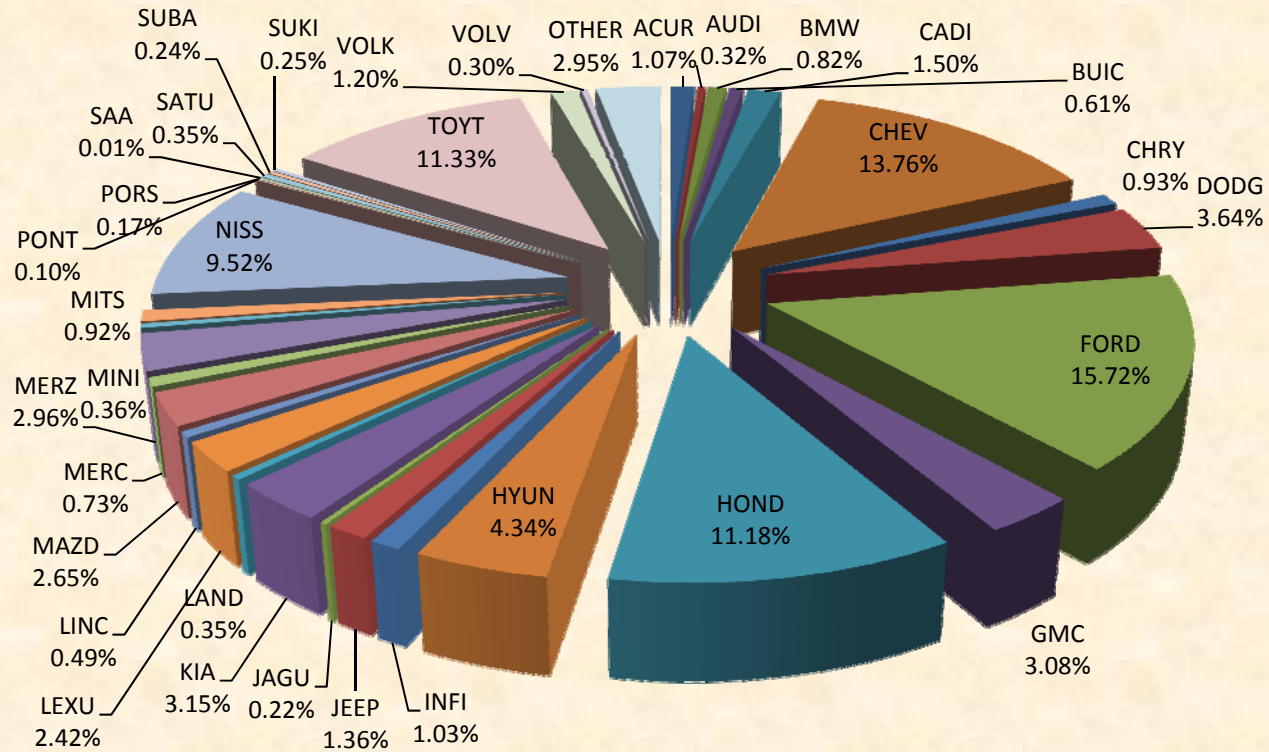
DFW, Texas, and national market comparison

New Light Vehicle Market Comparison (Includes Retail and Fleet Transactions)			
Market	2009 Sales	2010 Sales	% change in registrations 2010 vs 2009
U.S.	10,431,510	11,590,274	11.11%
Texas	779,894	822,090	5.41%
DFW	206,370	218,482	5.87%

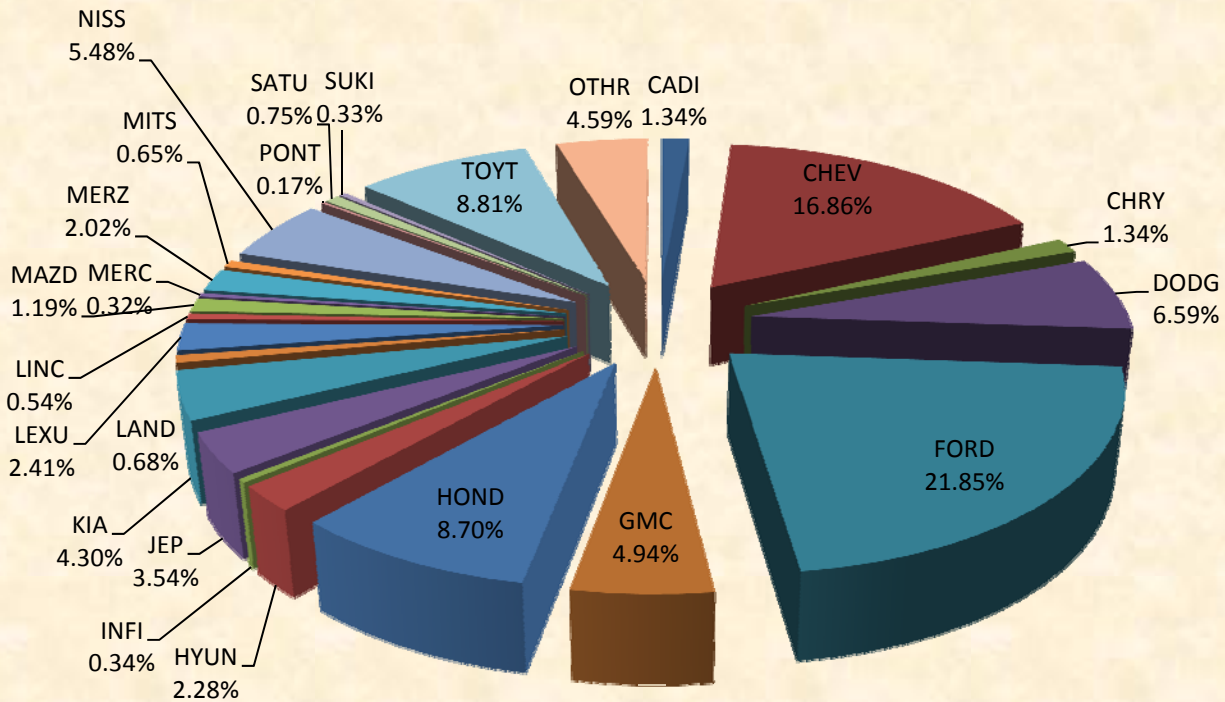
DFW 2009 Market Share (Cars & Light Trucks)



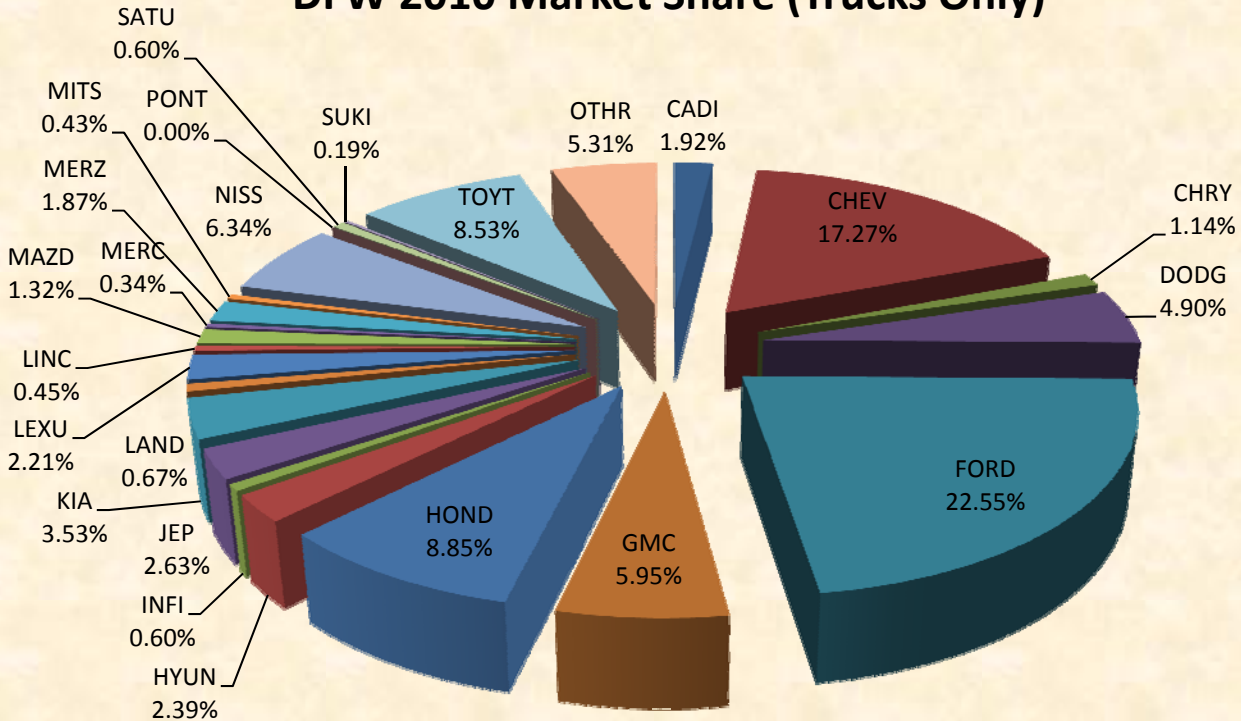
DFW 2010 Market Share (Cars & Light Trucks)



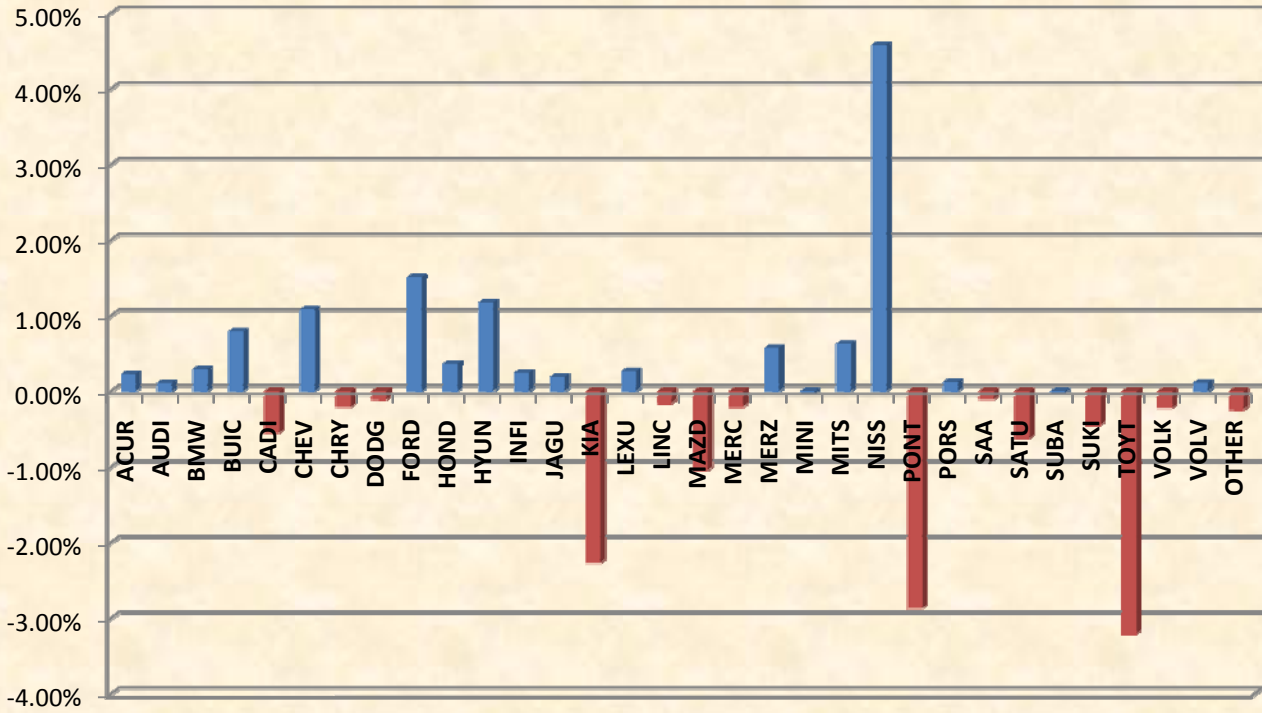
DFW 2009 Market Share (Trucks Only)



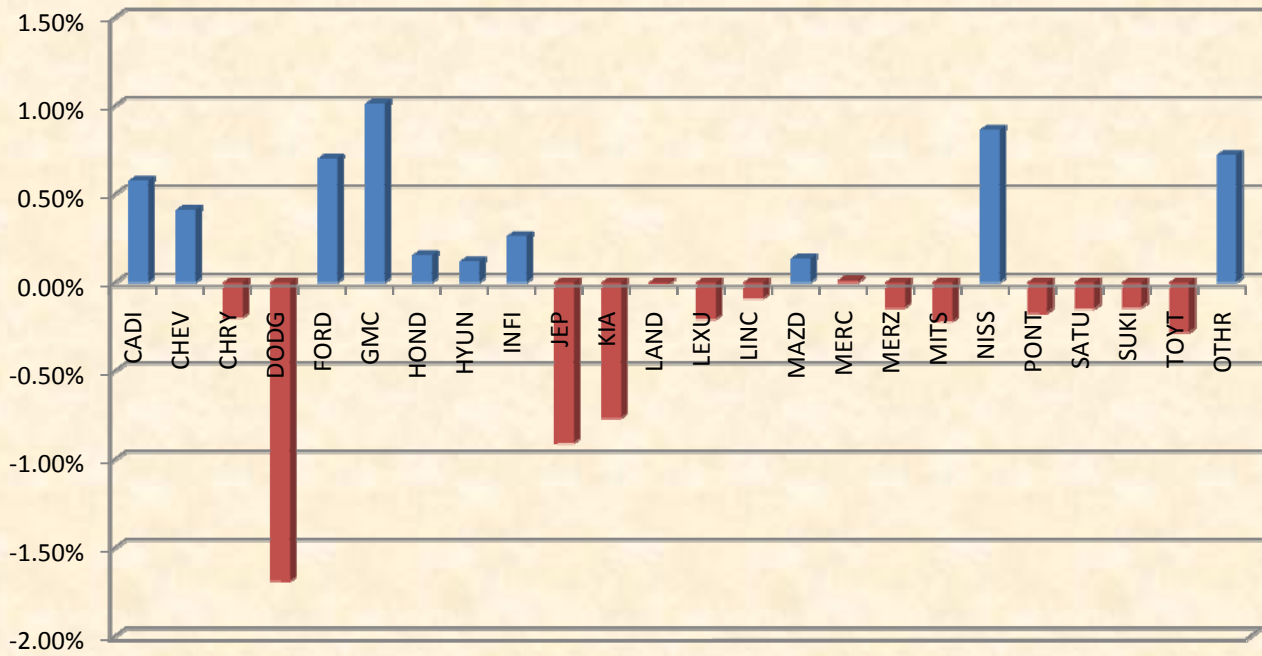
DFW 2010 Market Share (Trucks Only)



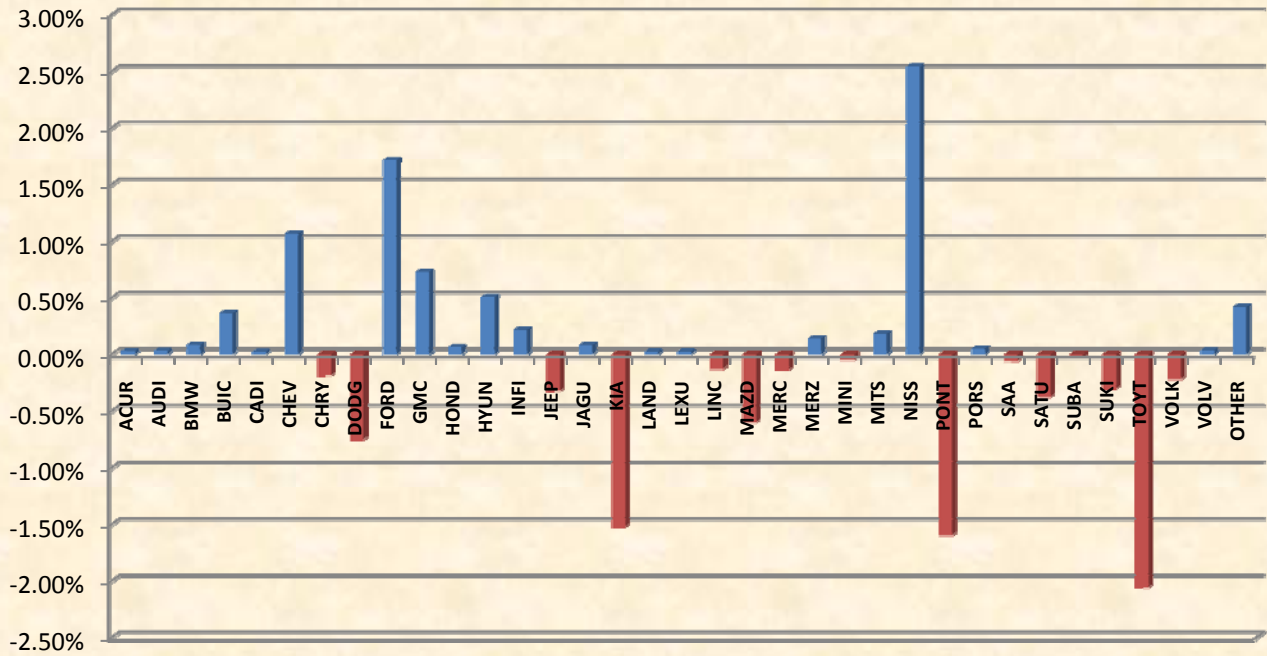
Change in Market Share 2009 v 2010 - DFW Cars



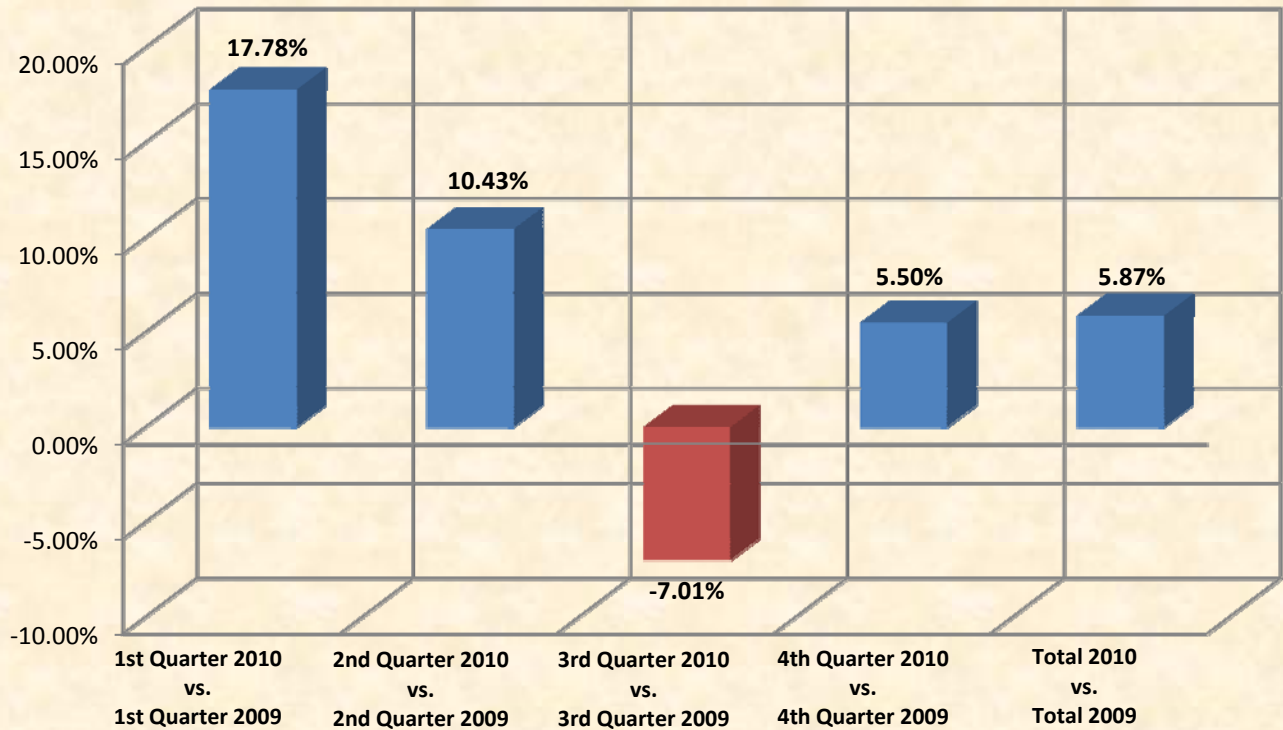
Change in Market Share 2009 v 2010 - DFW Light Trucks



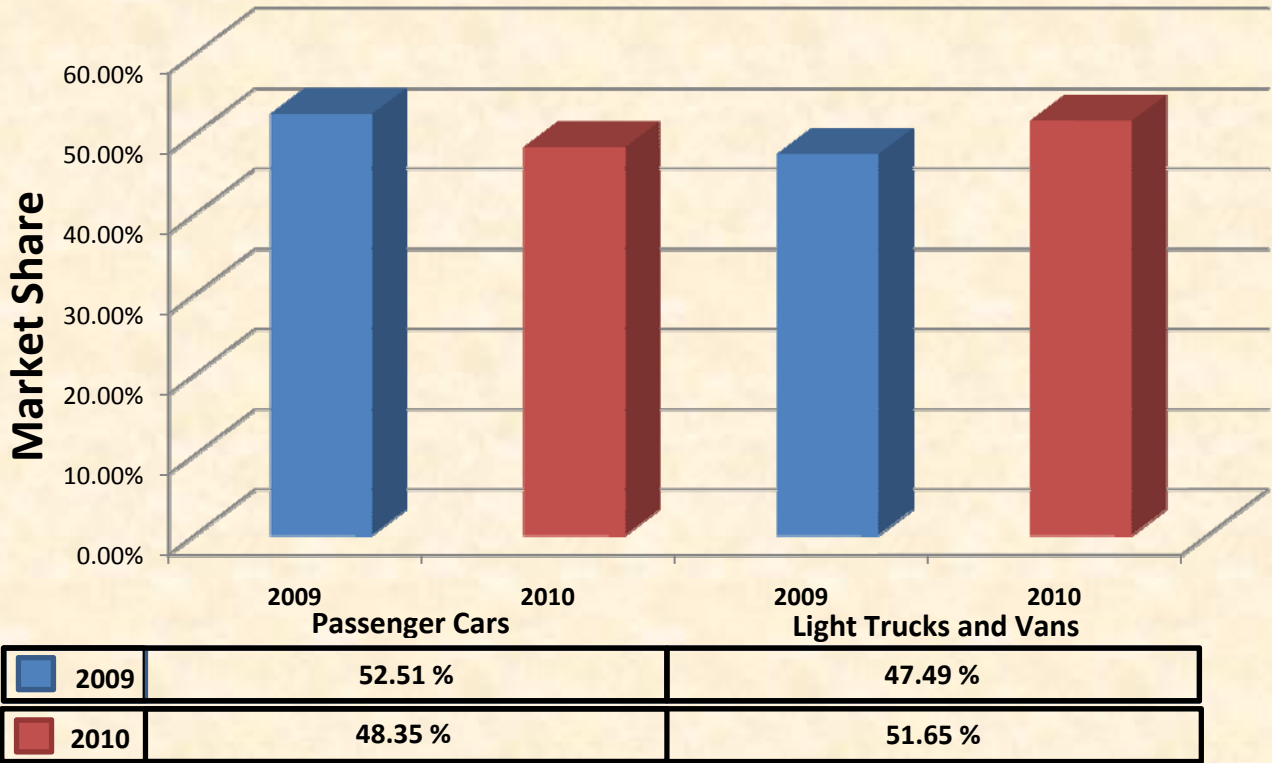
Change in Market Share 2009 v 2010 - DFW Cars and Light Trucks



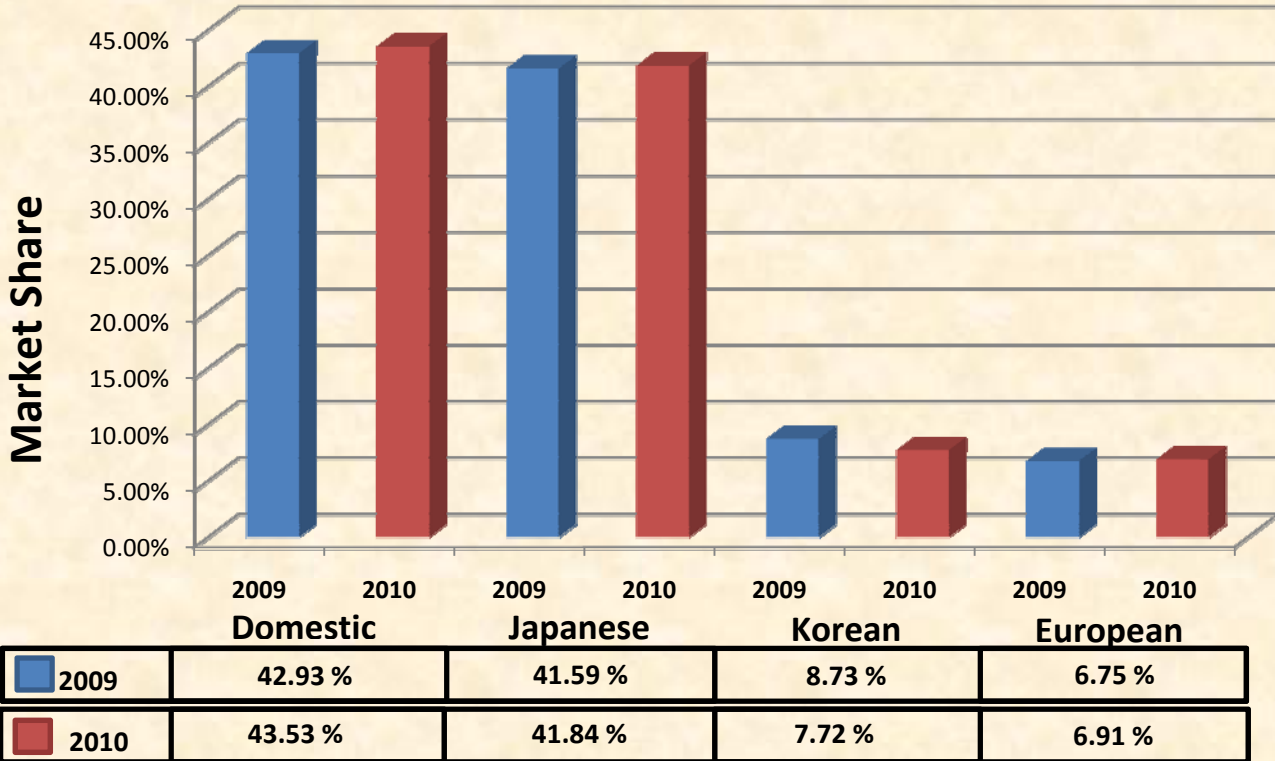
Quarterly New Light Vehicle Registrations in DFW - Percent Change 2009 vs 2010 -



Segmentation in DFW New Light Vehicle Market



DFW Domestic vs Import Penetration





2010 Automotive Market Analysis

Dallas – Fort Worth Metroplex*

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