Greater Philadelphia Auto Outlook

Covering the Philadelphia Area automotive market **Data thru May 2013**

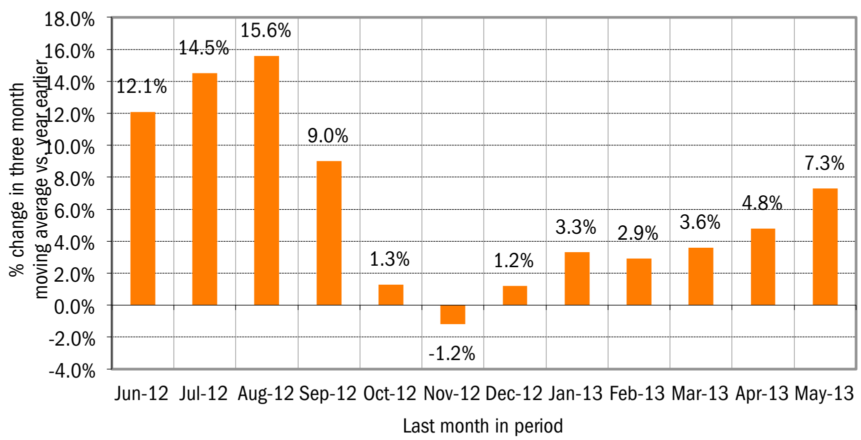
Released by: ADA of Greater Philadelphia

Greater Philadelphia Area New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru May*			YTD Market Share		
	4/12 & 5/12	5/13 & 5/13*	% change	2012	2013	% change	2012	2013	change
Industry Total	29,604	31,816	7.5%	68,992	72,613	5.2%			
Cars	16,503	17,114	3.7%	37,967	38,590	1.6%	55.0	53.1	-1.9
Light Trucks	13,101	14,702	12.2%	31,025	34,023	9.7%	45.0	46.9	1.9
Japanese Brands	13,052	14,084	7.9%	30,615	32,399	5.8%	44.4	44.6	0.2
Toyota	4,565	4,778	4.7%	10,197	10,813	6.0%	14.8	14.9	0.1
Honda	4,102	4,201	2.4%	9,361	9,626	2.8%	13.6	13.3	-0.3
Nissan	2,348	2,799	19.2%	6,121	6,496	6.1%	8.9	8.9	0.0
Other	2,037	2,306	13.2%	4,936	5,464	10.7%	7.2	7.5	0.3
Domestic Brands	9,035	10,159	12.4%	21,163	23,463	10.9%	30.7	32.3	1.6
General Motors	3,162	3,378	6.8%	7,528	8,278	10.0%	10.9	11.4	0.5
Ford	3,145	3,778	20.1%	7,475	8,718	16.6%	10.8	12.0	1.2
Chrysler	2,713	2,973	9.6%	6,128	6,385	4.2%	8.9	8.8	-0.1
Other	15	30	100.0%	32	82	156.3%	0.0	0.1	0.1
European Brands	4,151	4,341	4.6%	9,393	9,608	2.3%	13.6	13.2	-0.4
Volkswagen	1,691	1,691	0.0%	3,634	3,763	3.5%	5.3	5.2	-0.1
BMW	996	1,101	10.5%	2,300	2,453	6.7%	3.3	3.4	0.1
Mercedes	866	948	9.5%	1,929	2,105	9.1%	2.8	2.9	0.1
Other	598	601	0.5%	1,530	1,287	-15.9%	2.2	1.8	-0.4
Korean Brands	3,366	3,232	-4.0%	7,821	7,143	-8.7%	11.3	9.8	-1.5

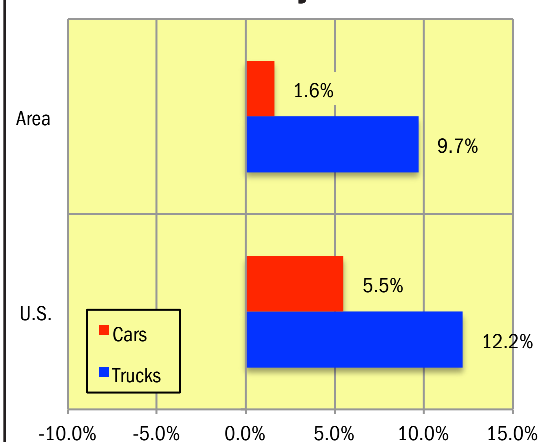
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, Subaru, and Suzuki). European: VW (Audi, Bentley, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz), Other (Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.
*Figures for May 2013 were estimated by Auto Outlook. Data Source: Polk.

Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



The graph above provides a clear picture of the trending direction of the area market. It shows the year-over-year percent change in the three month moving average of new retail light vehicle registrations. The three month moving average is less erratic than monthly registrations, which can fluctuate due to such factors as the timing of manufacturer incentive programs, weather and title processing delays by governmental agencies.
*Figures for May 2013 were estimated by Auto Outlook. Data Source: Polk.

Percent Change in Area and U.S. New Retail Light Vehicle Markets YTD '13 thru May* vs. YTD '12



The graph above compares the change in new retail car and light truck registrations in both the area and U.S. markets.
*Figures for May 2013 were estimated by Auto Outlook.
Data Source: Polk.

Data Information

All data represents new vehicle retail registrations in the Greater Philadelphia Area and excludes fleet and wholesale transactions. **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. For this reason, the year-to-date figures will typically be more reflective of market results.**
Data Source: Polk.

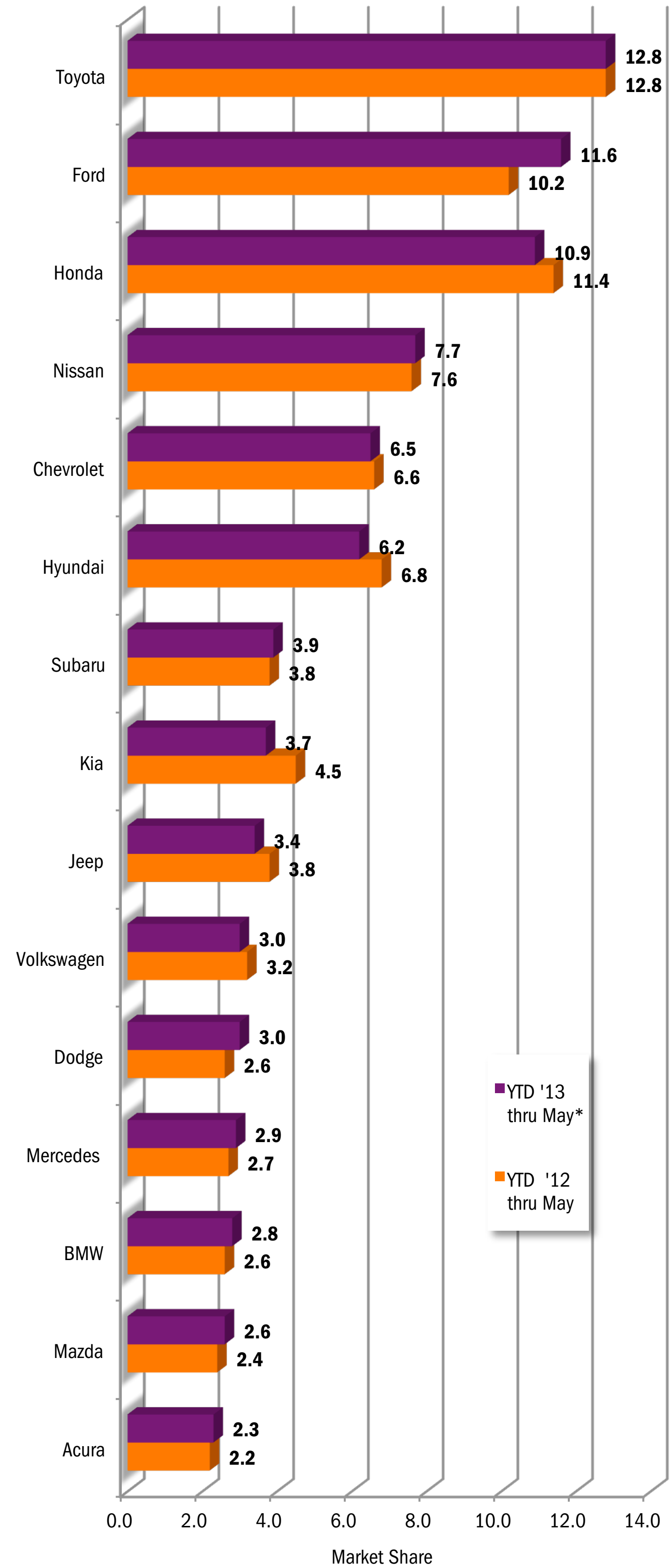
Greater Philadelphia Area New Retail Light Vehicle Registrations	Registrations			Market share	
	YTD '12 thru May	YTD '13 thru May*	% change	YTD '12 thru May	YTD '13 thru May*
TOTAL	68,992	72,613	5%		
Acura	1,504	1,689	12%	2.2%	2.3%
Audi	1,209	1,240	3%	1.8%	1.7%
BMW	1,825	2,053	12%	2.6%	2.8%
Buick	890	1,090	22%	1.3%	1.5%
Cadillac	739	943	28%	1.1%	1.3%
Chevrolet	4,553	4,704	3%	6.6%	6.5%
Chrysler	1,072	950	-11%	1.6%	1.3%
Dodge	1,815	2,212	22%	2.6%	3.0%
FIAT	187	158	-16%	0.3%	0.2%
Ford	7,052	8,390	19%	10.2%	11.6%
GMC	1,346	1,539	14%	2.0%	2.1%
Honda	7,857	7,937	1%	11.4%	10.9%
Hyundai	4,714	4,488	-5%	6.8%	6.2%
Infiniti	880	870	-1%	1.3%	1.2%
Jaguar	91	77	-15%	0.1%	0.1%
Jeep	2,650	2,473	-7%	3.8%	3.4%
Kia	3,107	2,654	-15%	4.5%	3.7%
Land Rover	302	326	8%	0.4%	0.4%
Lexus	1,346	1,515	13%	2.0%	2.1%
Lincoln	423	327	-23%	0.6%	0.5%
Mazda	1,642	1,916	17%	2.4%	2.6%
Mercedes	1,897	2,077	9%	2.7%	2.9%
MINI	475	400	-16%	0.7%	0.6%
Mitsubishi	601	699	16%	0.9%	1.0%
Nissan	5,241	5,625	7%	7.6%	7.7%
Other	226	203	-10%	0.3%	0.3%
Porsche	209	308	47%	0.3%	0.4%
Ram	591	748	27%	0.9%	1.0%
Subaru	2,623	2,842	8%	3.8%	3.9%
Toyota	8,851	9,298	5%	12.8%	12.8%
Volkswagen	2,216	2,214	0%	3.2%	3.0%
Volvo	858	648	-24%	1.2%	0.9%

Top ten ranked brands in each percent change category are shaded green.

*Figures for May 2013 were estimated.

Source: Polk

Area Market Share for Top 15 Selling Brands YTD '13 thru May* vs. YTD '12



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Source: Polk.

This report is sponsored by the Automobile Dealers Association of Greater Philadelphia (610-279-5229) and produced by Auto Outlook (800-206-0102).