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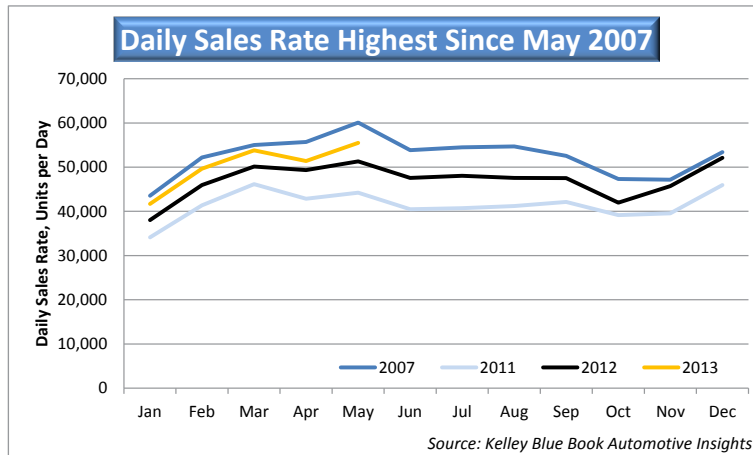
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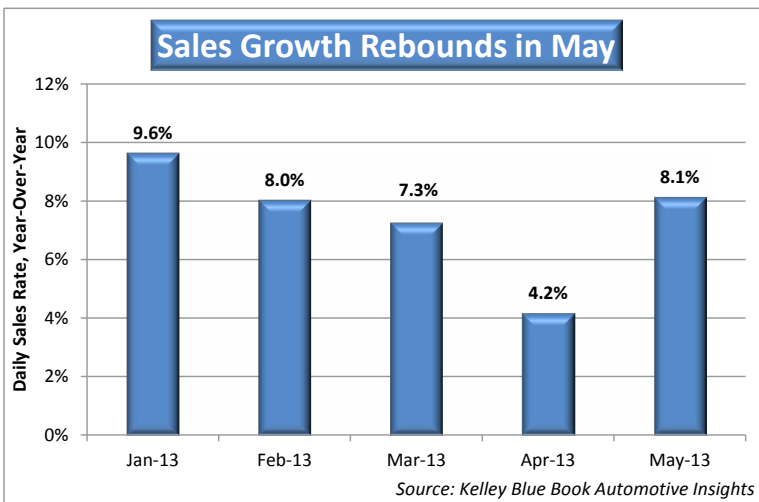
NEW-CAR MARKET ANALYSIS:

## Sales Bounce Back, Seasonally Adjusted Annual Rate (SAAR) Jumps to 15.3 Million in May



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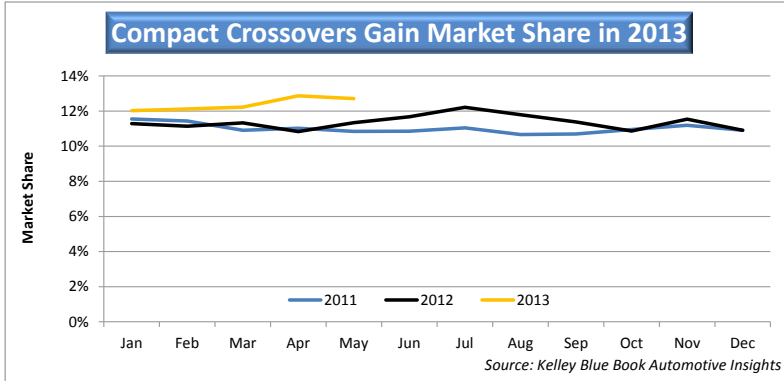


- After sales growth slowed last month, in May 2013, SAAR returned above 15 million with 8.1 percent year-over-year growth
- With consumer confidence on the upswing, Kelley Blue Book expects sales to remain strong through the summer months.

“INDUSTRY GROWTH ONCE AGAIN WAS DRIVEN BY STRONG PICKUP AND COMPACT CROSSOVER SALES, WHICH WERE BOTH MORE THAN 20 PERCENT ABOVE MAY 2012,” SAID ALEC GUTIERREZ, SENIOR MARKET ANALYST FOR KELLEY BLUE BOOK. “TRUCKS HAVE BENEFITTED FROM A REBOUND IN NEW HOME CONSTRUCTION, WHILE SMALL CROSSOVERS HAVE GROWN IN DEMAND AS FUEL-THIRSTY SUVs HAVE FALLEN OUT OF FAVOR.”

-ALEC GUTIERREZ

## Compact Crossovers Post Biggest Ever Month of Sales



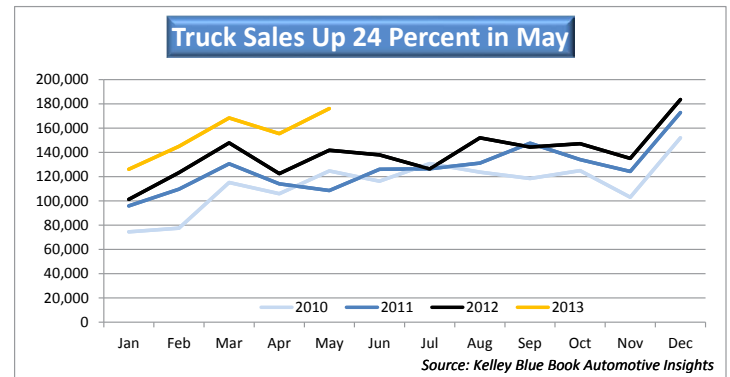
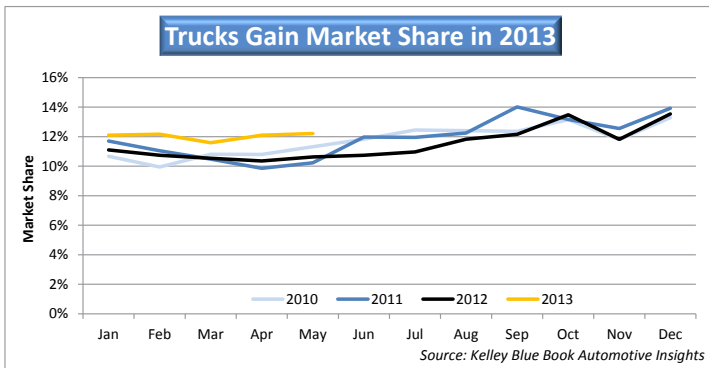
Make	Model	May-13	YTD 2013	YOY % Chg	YTD YOY % Chg
Ford	Escape	29,123	127,932	26.2%	29.7%
Honda	CR-V	27,298	119,191	8.4%	-3.4%
Chevrolet	Equinox	22,918	102,752	13.2%	14.0%
Toyota	RAV4	20,780	80,734	8.0%	8.6%
Nissan	Rogue	17,333	63,533	44.7%	4.4%
Subaru	Forester	10,068	40,578	37.5%	35.9%
GMC	Terrain	7,847	42,617	-10.5%	9.8%
Mazda	CX-5	7,128	31,201	79.4%	171.8%
Jeep	Patriot	6,636	31,425	12.6%	15.9%
Subaru	XV Crosstrek	5,295	20,438	New	New

Source: Kelley Blue Book Automotive Insights

- At 183,319 units, more compact crossovers were sold in May 2013 than in any month before. Sales increased 21.2 percent from last year, and are up 18.9 percent for the year.
- Market share fell slightly from last month to 12.7 percent; however, the year-to-date total of 12.4 percent share is more than a full percentage point higher than last year.

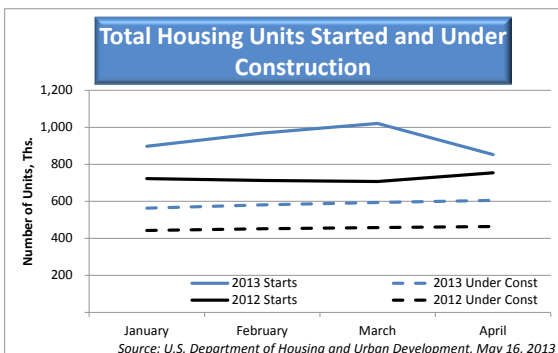
“Transaction prices for the compact crossover segment remain high, climbing 3.1 percent to \$26,709,” said Gutierrez. “The recently redesigned Ford Escape and Toyota RAV4 led the way, with prices increasing 5.9 percent and 3.5 percent, respectively.”

## Full-Size Pickup Truck Sales Making Year-Over-Year Gains, Thanks to Improved Construction Numbers



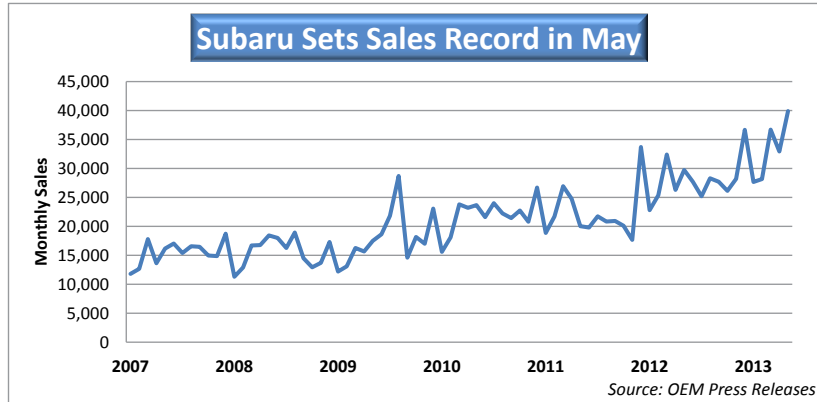
- To-date in 2013, sales of new full-size pickup trucks are outpacing the last several years.
  - Total full-size pickup truck sales in May 2013 were 34,344 units, or 24 percent higher, than May 2012.
  - Full-size pickup trucks made up 12.2 percent of total new-vehicle sales in May 2013, compared to 10.6 percent in May 2012.

“Sales of full-size pickup trucks are up from previous years due to the improved housing and construction sectors,” said Gutierrez. “The recently redesigned Ram pickup and upcoming GM truck redesigns will help to keep sales strong.”



- The total number of new, privately owned housing units that began construction was up 13.1 percent at the end of April 2013 compared to April 2012.
- The total number of new privately owned housing units under construction at the end of April 2013 was 30.4 percent higher than at the end of April 2012.

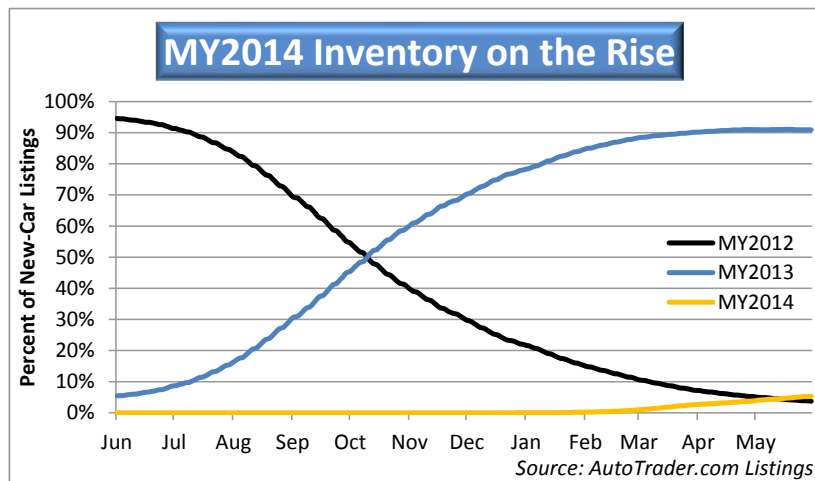
## Subaru Has Best Month Ever



- Subaru set its best monthly sales record in May 2013, with total sales coming in at 39,892 units.
- Subaru bested its May 2012 sales figures by 34.2 percent, while increasing 21.1 percent month-over-month, putting the brand's total sales for the year (to date) at 165,362 units.
- This ranks Subaru No. 11 among brands for May 2013 new-car sales, and No. 12 in total sales year-to-date.

“Subaru sales have been bolstered by increased interest in the redesigned Impreza, as well as the all-new Subaru Forester,” said Gutierrez. “With so much available in the way of new product, Kelley Blue Book expects Subaru's strength to continue.”

## More Model-Year 2014 Units Appearing on Dealer Lots

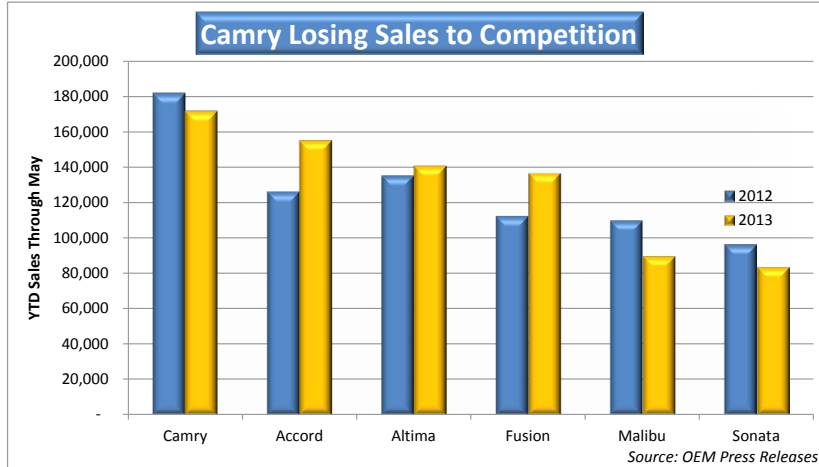


- In May 2013, model-year 2014 vehicles surpassed model-year 2012 for total number of vehicles in inventory.

“Inventory levels suggest consumers shopping for a new 2012 vehicle are going to have a difficult time finding one as inventory depletes,” said Gutierrez. “However, great deals may be found as dealers are looking to make room on their lots for the incoming 2014 model year.”

- For example, consumers looking for a full-size sedan may want to consider the 2013 Chevrolet Impala, since a new 2014 is just around the corner.
  - The 2013 model is currently available with up to \$4,000 in cash offers and/or 0.9 percent financing for up to 72 months. Model-year 2013 vehicle inventory levels appear to have reached their peak in May, and Kelley Blue Book expects levels to begin declining in June as manufacturers ramp-up production of 2014 model-year vehicles.

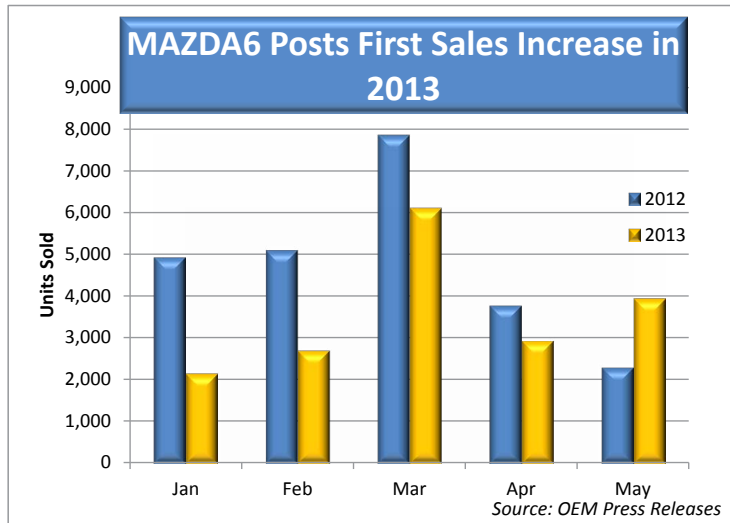
## Toyota Camry Sales Down, Honda Accord and Ford Fusion Post Big Gains



- Although the Toyota Camry remains the sales leader of the mid-size car segment, total sales for the year are down 5.5 percent.
- The two vehicles that have significantly improved their sales in 2013 are the Honda Accord and the Ford Fusion. Accord and Fusion sales have increased 22.9 and 21.7 percent (respectively) this year as a result of 2013 redesigns.

“Not all redesigns are performing up to par,” said Gutierrez. “The new Chevrolet Malibu received a lukewarm reception last year and sales are down 18.4 percent in 2013. In response, GM is launching a refresh for the 2014 model year, hoping to regain some of its lost market share.”

## New MAZDA6 Tries to Turn Around Slow Sales Start in 2013

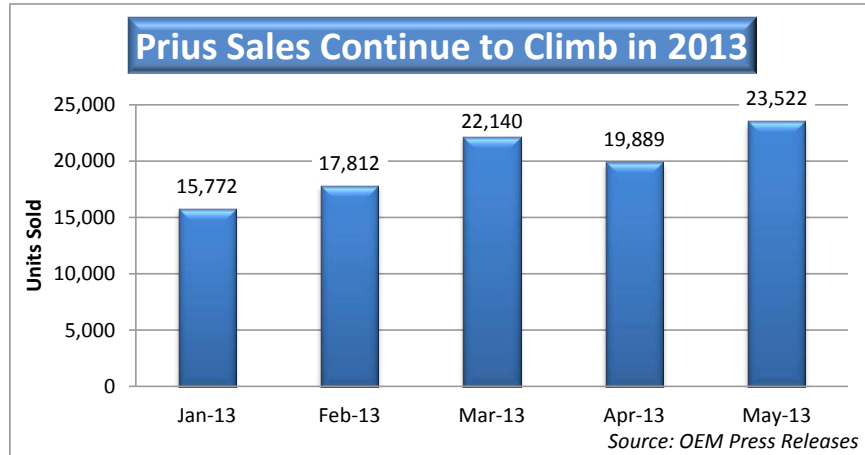


“WITH THE NEW 2014 MAZDA6 MODEL NOW AVAILABLE, SALES SHOULD VASTLY OUTPACE LAST YEAR’S NUMBERS IN JUNE AND THROUGH THE SECOND HALF OF THE YEAR. HOWEVER, STIFF COMPETITION WITHIN THE MID-SIZE CAR SEGMENT WILL MAKE ANY LARGE VOLUME GAINS DIFFICULT FOR MAZDA.”

-ALEC GUTIERREZ

- The MAZDA6 has posted slow sales in most of 2013, down 25.6 percent. However, sales in May were 34.5 percent above the April numbers. The slow first quarter likely was due to consumers waiting for the 2014 redesign, which became available in April.

## Prius Sales Continue to Climb



- Despite a decline in the month of April, Toyota Prius new-car sales rebounded in May 2013 to reach its highest monthly sales figure in more than a year at 23,522 units sold. This amounted to a 9.5 percent increase from last May.
- In total, 99,135 units in the Prius family have been sold in 2013. However, this figure is still down 7.8 percent from last year. This can be strongly attributed to lower fuel costs, which are 10 cents cheaper on average in 2013.

“The Prius also has faced competition from electric vehicles, which have relied upon aggressive lease offers in recent months,” said Gutierrez. “For example, the Nissan LEAF can be had for \$199 a month for 36 months with only \$1,999 down, making it a truly compelling offering for those seeking to reduce fuel expenses.”

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