



Dennis DesRosiers

Family Vehicles - Market Commentary and Product Impressions

The secret to success (and failure) in the automotive sector has always come down to three words: Product, Product, Product! OEMs typically get themselves into trouble when they try selling vehicles that are plain looking, poorly executed, or just plain bad. They reverse their fortunes with exciting, well-manufactured products that strike a chord with consumers. Great products meet with great success while poor products accrue for their makers weak profits and negative reputations.

Greatness isn't necessarily measured by spectacular design, stunning looks, or mega-horsepower. Countless boring-but-wholesome cars have secured winning positions on the sales charts by providing solid value, long-term dependability, and an assortment of other family-endearing traits. By way of example, Toyota has built their entire company around reliability and dependability.

In many circles "Boring-but-wholesome" could generally be defined by two words: "Family Vehicle."

Unfortunately, it appears as though this boring breed is becoming much less significant in the market. The market for Mid-Size/Family

vehicles is slowly but surely shrinking, with segments like Entry Level and Large/Luxury/Sport rapidly picking up the slack. We define family vehicles as Intermediate passenger cars (e.g. Toyota Camry), Intermediate Sport Utilities (e.g. Ford Explorer), and Small Vans (e.g. Dodge Caravan) - value-oriented vehicles with room for a family and their luggage. The segmentation is not perfect, but it does deliver an accurate overview of large-scale industry movements and trends.

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When combined with annual sales numbers, this overview tells us that the loss of family vehicle market share is very real, but it is our view that these losses are not necessarily resultant from any true failings on the product side. Quite the contrary - most (not all) family vehicles have never been better. In terms of creature comfort content, user friendliness, durability, performance, and fuel efficiency, Canadians can choose from a wide array of better-than-ever vehicles. There have been some duds but these

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are limited and most are quickly relegated to the "fleet" market where groups of buyers (daily rentals as an example) are more than willing to pick up vehicles under the appropriate pricing.

Paradoxically, as the products got better, the Mid-Size/Family vehicle segment experienced a

sharp decline in market share. Over the past decade, family vehicles have dropped from a 43.6 percent share of the market in 1997 to 30.9 percent share of the market in 2005. From a high of 647,882 vehicles in 1999, the segment shrunk to 488,572 units last year. Still significant, but definitely declining. If we take

daily rental sales out of this segment, the market declines to only 357,803 Mid-Size/Family vehicles purchased by consumers. There was a time when close to half of consumers bought Mid-Size/Family vehicles. Last year only 27.5 percent of consumers bought this size of vehicle. The fleet market is still

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Total Light Vehicle Sales - Canada - Units

	2000	2001	2002	2003	2004	2005
Entry Level	536,797	598,691	648,709	610,554	609,622	677,142
Market Share	34.6%	38.1%	38.1%	38.3%	39.7%	42.8%
Mid-Size/Family	623,570	599,990	650,341	585,870	512,712	488,572
Market Share	40.2%	38.2%	38.2%	36.8%	33.4%	30.9%
Large/Luxury/Sport	154,435	153,729	169,583	166,980	170,769	184,576
Market Share	10.0%	9.8%	10.0%	10.5%	11.1%	11.7%
Primarily Commercial	234,639	218,219	234,613	230,102	241,312	233,001
Market Share	15.1%	13.9%	13.8%	14.4%	15.7%	14.7%
Total	1,549,441	1,570,629	1,703,246	1,593,506	1,534,415	1,583,291

Vehicles Consumers Buy

	2000	2001	2002	2003	2004	2005
Entry Level	489,755	548,823	597,558	570,008	559,921	624,470
Market Share	38.9%	43.1%	43.0%	43.3%	44.6%	47.9%
Mid-Size/Family	467,467	446,453	487,993	440,812	375,578	357,803
Market Share	37.2%	35.1%	35.1%	33.5%	29.9%	27.5%
Large/Luxury/Sport	137,458	136,964	149,247	146,207	148,123	160,936
Market Share	10.9%	10.8%	10.7%	11.1%	11.8%	12.4%
Primarily Commercial	163,321	141,193	154,129	158,904	172,582	159,677
Market Share	13.0%	11.1%	11.1%	12.1%	13.7%	12.3%
Total	1,258,001	1,273,433	1,388,927	1,315,931	1,256,204	1,302,886

Total Fleet Vehicles

	2000	2001	2002	2003	2004	2005
Entry Level	47,042	49,868	51,151	40,546	49,701	52,672
Market Share	16.1%	16.8%	16.3%	14.6%	17.9%	18.8%
Mid-Size/Family	156,103	153,537	162,348	145,058	137,134	130,769
Market Share	53.6%	51.7%	51.7%	52.3%	49.3%	46.6%
Large/Luxury/Sport	16,977	16,765	20,336	20,773	22,646	23,640
Market Share	5.8%	5.6%	6.5%	7.5%	8.1%	8.4%
Primarily Commercial	71,314	77,023	80,482	71,197	68,730	73,324
Market Share	24.5%	25.9%	25.6%	25.6%	24.7%	26.1%
Total	291,436	297,193	314,317	277,574	278,211	280,405

Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA

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very much focused on this size of vehicle but not consumers. Consumers now primarily buy entry level products.

A large portion of that loss can be attributed to the waning popularity of minivans. Caravans, Siennas, Odysseys, and their ilk have dropped from a combined 251,673 in 1999 to 171,534 in 2005 - the segment's worst sales year since 1995. Yes, some of these sales went to the emerging 'crossover' class, but it is important to keep in mind that our "Mid-Size/Family" segment includes Intermediate SUVs, thereby catching many of these vaguely-defined 'crossover utility vehicles.'

This is especially pertinent given the amount of marketing "push" directed at crossover vehicles. In an earlier *Observation*, we discussed the false excitement surrounding this emerging class, and it appears that our predictions have rung true. Despite major product proliferation and segment-splintering, sales of medium-sized vehicles are down. If crossovers are indeed a miracle salve for the industry's woes, how come the segment in which many of the volume models compete - family vehicles - is in freefall?

If market fragmentation is only a partial cause, how does one

explain the share loss? There must be externalities at work.

One of the keys to understanding this issue lies in the results of a study recently released by the Canadian Council on Social Development. According to the CCSD study, major changes in the family dynamic have taken place within the past decade. These changes have impacted the taxation structure, housing and employment rates, and - yes - the vehicle purchasing habits of Canadian consumers.

None of the study's findings are shocking, but it is instructive to see this data collected and summarized in a single report.

Some salient points:

- Fewer Canadians are getting married and having children.
- Fewer children are being born, and fewer still are living in two parent households.
- Motherhood is being delayed, with nearly half (48 percent) of women giving birth over the age of 30.

As we have said before, the new vehicle market does not exist in a vacuum. Just like every other consumer commodity market, it is

subject to the changing winds of demographics. We have often argued that consumers control OEM decisions, and this study is further proof that the vehicle manufacturers are responding to the changing face of Canadian society.

If fewer Canadians are living in nuclear families, vehicles tailored to the needs of a traditional household will not be required or

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desired. Single adults and childless couples typically have less need for the cubic footage of an Intermediate passenger car or minivan and therefore have the option of driving smaller cars, so there has been explosive growth in the Entry Level segments. A Honda Civic may not have adequately served an average family group in 1976, but their 2006 counterparts - lighter by several children, parents, or grandparents - may find it entirely serviceable.

Single adults and childless couples generally have more

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expendable income than their family-raising counterparts, so they can potentially afford a more expensive or expressive vehicle. The same rule applies for nuclear households with older providers - those men and women who put off having children until they're closer to their peak earning years. Those consumers often jump over the family sized segment and head straight to the luxury markets. Sales of Large/Luxury/Sport vehicles, thus, have been rising as family-oriented vehicles have declined. Many of these Luxury vehicles are based on family-oriented platforms, while many other Luxury-only platforms

provide much of the same utility as traditional family vehicles.

For instance, sales of BMW's 5-series sedan have nearly quadrupled over the past decade, providing clear indication that a market still exists for mid-sized four door sedans. Upscale consumers put more brand equity into 'BMW' than 'Chevrolet,' 'Ford,' or 'Dodge' and tailor their buying habits appropriately. This is a good example as to how the brand-destroying incentives offered by GM, Ford, and DaimlerChrysler have hurt these companies in more ways than just reduced profits.

Given these demographic shifts, it is not surprising that makers of mainstream family vehicles have begun to design in many of the attributes found in other vehicle classes, such as horsepower, luxury amenities, increased space, and fuel efficiency. Nearly every manufacturer's mainstream sedan line includes a legitimately sporty variant, and a number of Intermediate SUVs now come with third row seating and rear seat DVD systems. Hybrid powertrains, formerly exclusive to the Entry Level segment, can now be had in several Intermediate sedans and Sport Utilities. Family vehicles are

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Canadian Light Vehicle Market - Mid-Size/Family Vehicles

Year	Total	GM	GM	Ford	Ford	DCX	DCX	Japanese	Japanese	Korean	Korean	European	European
	Mid-Size/ Family Market	Mid-Size/ Family	Mid-Size/ Family Share	Mid-Size/ Family	Mid-Size/ Family Share	Mid-Size/ Family	Mid-Size/ Family Share	Mid-Size/ Family	Mid-Size/ Family Share	Mid-Size/ Family	Mid-Size/ Family Share	Mid-Size/ Family	Mid-Size/ Family Share
1990	432,275	174,473	40.4%	78,104	18.1%	68,159	15.8%	98,196	22.7%	8,981	2.1%	6,676	1.5%
1991	437,100	157,773	36.1%	82,975	19.0%	79,414	18.2%	103,420	23.7%	6,667	1.5%	8,350	1.9%
1992	459,481	169,151	36.8%	88,426	19.2%	90,529	19.7%	99,641	21.7%	5,168	1.1%	6,786	1.5%
1993	471,190	156,579	33.2%	102,189	21.7%	116,956	24.8%	85,213	18.1%	4,948	1.1%	5,442	1.2%
1994	514,380	182,654	35.5%	115,315	22.4%	126,889	24.7%	83,044	16.1%	4,811	0.9%	3,474	0.7%
1995	500,784	156,880	31.3%	130,757	26.1%	133,252	26.6%	75,684	15.1%	3,004	0.6%	2,610	0.5%
1996	521,253	152,153	29.2%	131,064	25.1%	153,531	29.5%	81,272	15.6%	1,601	0.3%	2,069	0.4%
1997	605,770	190,566	31.5%	153,547	25.3%	156,905	25.9%	101,771	16.8%	1,164	0.2%	1,833	0.3%
1998	592,599	186,839	31.5%	129,488	21.9%	156,971	26.5%	114,463	19.3%	1,148	0.2%	3,685	0.6%
1999	647,882	223,517	34.5%	127,483	19.7%	160,143	24.7%	127,070	19.6%	1,710	0.3%	4,381	0.7%
2000	623,570	233,386	37.4%	106,368	17.1%	148,076	23.7%	125,280	20.1%	5,380	0.9%	4,657	0.7%
2001	599,990	229,961	38.3%	88,435	14.7%	136,756	22.8%	128,065	21.3%	9,217	1.5%	5,295	0.9%
2002	650,341	251,826	38.7%	90,108	13.9%	135,028	20.8%	150,690	23.2%	17,255	2.7%	5,223	0.8%
2003	585,870	223,221	38.1%	75,704	12.9%	102,784	17.5%	159,150	27.2%	21,332	3.6%	4,365	0.7%
2004	512,712	191,110	37.3%	54,253	10.6%	90,788	17.7%	153,775	30.0%	18,099	3.5%	4,653	0.9%
2005	488,572	184,605	37.8%	44,754	9.2%	93,220	19.1%	143,162	29.3%	15,765	3.2%	5,865	1.2%
	-4.7%	-3.4%		-17.5%		2.7%		-6.9%		-12.9%		26.0%	

Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA

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the tofu of the automotive business: bland, nutritious, and highly capable of absorbing their neighbours' flavours.

It is also important to acknowledge the recent ascendancy of Entry Level vehicles - particularly Compact Cars and Compact Sport Utilities - as one of the many factors in the decline of the Mid-Size/Family segment. Compact cars such as the Honda Civic and Mazda3 now offer the same sort of horsepower, interior space, and mechanical refinement found in their midsize brethren only a decade previous. A 2006 Toyota RAV4 - a Compact SUV available with a 269 hp V6 and large interior - forces the consumer to make fewer ride, handling, or space compromises than a 1996 Toyota 4Runner, at that time a popular Intermediate Sport Utility. A decade ago the Chevrolet Cavalier had 95 horsepower, its replacement, the Chevrolet Cobalt, has 145 horsepower. Same with the Civic which jumped from 70 to 140 horsepower. If consumers can get the same performance in an Entry Level vehicle in terms of size and horsepower, many will not purchase a Mid-Size Family vehicle.

What follows is a brief overview of the major players in the Mid-

Size/Family segment. Many of these vehicles share platforms with out-of-segment models. When possible, in-segment platform variants have been grouped together to give an impression of the OEM's true presence in the family vehicle market.

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Honda Accord **2005 Sales: 24,115**

The seventh generation of Honda's popular Accord debuted in 2003 and continues the marquee's sales leadership of the Intermediate sedan segment. Larger and more powerful than the preceding generation, the current Accord can be had with many of the same comfort, convenience, and powertrain options as its more expensive Acura brethren (i.e., Acura's Luxury-segmented TL and TSX). Both performance-minded and economy-oriented buyers are accommodated by the Accord's wide array of trim packages and powertrain options.

Of special note is the Accord's 30 year stretch of uninterrupted

market presence. We remain firm believers in the power of long-term brand reputation, and 30 years of availability is a remarkable achievement.

Toyota Camry **2005 Sales: 18,861**

The Camry is the bestselling passenger car in the United States. Originally introduced for the 1983 model year, the recently released sixth generation 2007 model represents 24 years of uninterrupted branding for Toyota's mid-size sedan. The new model continues Toyota's tradition of being the ying to Honda's yang: a little softer, a little larger, and a little quieter. The Camry shares its platform with the Lexus ES350.

Nissan Altima & Maxima **2005 Sales: 20,603**

Current-generation Altimas have been on the road since 2002, with the nameplate's history stretching back 13 years to 1993. The Altima provides a great deal of power and feature content at price points slightly lower than its primary Japanese competitors.

The present Maxima debuted in 2004 and rides on the Altima's platform. It is a large, powerful

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car whose natural competitors include the Acura TL and Toyota Avalon (both classified as Luxury vehicles). Since the introduction of the new design

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three years ago, sales have declined considerably (2005 sales of the new model represented just 47 percent of the old model's 2003 tally). The Maxima has enjoyed 25 years of uninterrupted market availability.

Chevrolet Impala, Chevrolet Monte Carlo, Buick Allure, & Pontiac Grand Prix
2005 Sales: 44,394

GM's Intermediate-sized "W-cars" are larger than their Japanese and Korean rivals, but priced to compete with mainstream family sedans like the Honda Accord and Toyota Camry. All variants offer standard V6 power and commodious interiors. The Chevrolet Impala/Monte Carlo and Pontiac Grand Prix can be equipped with a 303 hp V8 engine, meeting or exceeding the horsepower ratings of many Luxury vehicles.

The GM W-car family is presently in its third generation. Unlike other automakers, GM revamps its W-car platform variants on different schedules for each of its divisions. As such, the Pontiac variant was refreshed for 2004, the Buick for 2005, and the two Chevrolets for 2006. With the exception of the Buick Allure, all W-car variants have long sub-brand histories and well-established reputations. GM derives a substantial portion of its W-car (51 percent) sales through fleet deals.

Chevrolet Malibu & Pontiac G6
2005 Sales: 31,909

The Malibu and G6 are good, solid family cars. The G6 is the more compelling of the two, with sportier tuning and an available manual transmission. These vehicles are sized directly in the Accord/Camry bracket, with prices set several thousand dollars below those of the import nameplate competitors.

"Malibu" is a long-standing Chevrolet nameplate, used from the mid-1960s until the early 1980s, and again from 1997 to present. 'G6' is a new name, replacing the diluted Grand Am brand.

The Malibu was new in 2004, while the G6 was introduced in 2005. Both vehicles ride on GM's Opel-sourced 'Epsilon' platform. Of the 31,909 Malibus and G6s delivered in 2005, 36.5 percent were sold to fleets. The Malibu has exceeded GM's sales expectations.

Dodge Caravan & Chrysler Town & Country
2005 Sales: 65,604

Since their debut in 1984, the DaimlerChrysler minivans have established a reputation as "industry standard" products. The current DCX vans have been on the market since 2001 and are due for a redesign. Despite the platform's age, it still compares well with its low-cost competitors, but it is certainly showing its age when cross shopped with the best from the import nameplate OEMs.

Even today, under fire from strong import nameplate competition, the Caravan and T & C continue to dominate the Canadian minivan market, outselling the closest rival - General Motors - by 15,824 units. For further perspective, consider that the Caravan outsells the most popular import nameplate minivan (Toyota Sienna) by 482 percent.

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Intermediate Car Sales

	2001	2002	2003	2004	2005	2005/ 2004	Market Share
Intermediate Cars	286,940	308,464	281,463	240,317	223,852	-6.9%	100.0%
% of Passenger Car Market	33.0%	33.0%	32.5%	29.3%	26.5%		
% of Total Light Vehicle Market	18.3%	18.1%	17.7%	15.7%	14.1%		
1 Accord	28,383	30,060	29,609	25,814	24,115	-6.6%	10.8%
2 Camry	21,507	28,967	22,780	20,135	18,861	-6.3%	8.4%
3 Impala	18,352	20,020	25,028	20,876	18,474	-11.5%	8.3%
4 Malibu	17,714	17,880	18,174	15,062	17,871	18.6%	8.0%
5 Altima	8,620	15,041	17,158	18,508	17,037	-7.9%	7.6%
6 Sebring Sedan	18,927	19,750	16,920	15,444	15,160	-1.8%	6.8%
7 Allure	-	-	-	1,414	14,408	919.0%	6.4%
8 G6	-	-	-	2,556	14,038	449.2%	6.3%
9 Mazda6	-	-	6,398	10,213	11,738	14.9%	5.2%
10 Grand Prix	13,125	16,598	12,490	12,289	10,171	-17.2%	4.5%
Other Intermediate	160,312	160,148	132,906	98,006	61,979	-36.8%	27.7%

Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA

Small Van Sales

	2001	2002	2003	2004	2005	2005/ 2004	Market Share
Small Van	229,554	234,150	198,977	184,614	171,534	-7.1%	100.0%
% of Light Truck Market	32.7%	30.5%	27.3%	25.8%	23.2%		
% of Total Light Vehicle Market	14.6%	13.7%	12.5%	12.0%	10.8%		
1 Caravan	84,056	83,588	61,869	63,559	65,002	2.3%	37.9%
2 Montana/Montana SV6	31,234	33,783	30,292	29,073	23,258	-20.0%	13.6%
3 Uplander	-	-	-	1,193	21,271	1,683.0%	12.4%
4 Freestar	-	-	3,103	21,733	15,608	-28.2%	9.1%
5 Sienna	9,456	9,366	16,077	17,043	13,622	-20.1%	7.9%
6 Odyssey	13,674	14,370	10,785	10,559	12,573	19.1%	7.3%
7 Sedona	1,837	6,024	6,068	4,772	3,683	-22.8%	2.1%
8 Astro	5,276	4,918	3,881	2,915	2,973	2.0%	1.7%
9 MPV 4X2	8,494	8,565	6,485	4,863	2,798	-42.5%	1.6%
10 Quest	168	29	1,670	2,944	2,495	-15.3%	1.5%
Other Small Vans	75,359	73,507	58,747	25,960	8,251	-68.2%	4.8%

Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA

Intermediate Sport Utility Sales

	2001	2002	2003	2004	2005	2005/ 2004	Market Share
Intermediate Sport Utility	83,496	107,727	105,430	87,781	93,186	6.2%	100.0%
% of Light Truck Market	11.9%	14.0%	14.5%	12.3%	12.6%		
% of Total Light Vehicle Market	5.3%	6.3%	6.6%	5.7%	5.9%		
1 Explorer	20,768	24,218	21,224	14,266	10,439	-26.8%	11.2%
2 Grand Cherokee 4WD	11,882	10,320	8,636	7,454	9,166	23.0%	9.8%
3 S/T Blazer	6,554	4,256	2,982	3,004	7,579	152.3%	8.1%
4 S/T Jimmy	6,612	3,188	2,227	2,701	6,730	149.2%	7.2%
5 Vue	-	4,637	5,675	6,220	6,650	6.9%	7.1%
6 Freestyle	-	-	-	487	6,141	1,161.0%	6.6%
7 Pilot	-	3,396	4,608	4,730	5,213	10.2%	5.6%
8 Murano	-	966	7,911	6,157	5,042	-18.1%	5.4%
9 Rendezvous	3,623	9,318	9,267	7,203	4,840	-32.8%	5.2%
10 Highlander	7,550	9,713	6,810	5,334	4,621	-13.4%	5.0%
Other Intermediate Sport Utilities	26,507	37,715	36,090	30,225	26,765	-11.4%	28.7%

Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA

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Despite lagging behind other automakers in seemingly-important areas like horsepower and exterior styling, the Caravan's strong interior package and low price win the day.

The DCX minivans are getting long in the tooth, and they face a major threat from the Korean manufacturers. The latest vans from Kia and Hyundai are gaining momentum in the marketplace, and DCX is likely to see some sales erosion.

Chevrolet Uplander, Pontiac Montana SV6, Buick Terraza, & Saturn Relay
2005 Sales: 47,544

GM's minivan platform was introduced for the 1997 model year and received an interior/exterior freshening for 2005. The vans have been dogged with reliability problems since introduced nine years ago, but consumers in the family vehicle market are very responsive to GM's combination of low prices and high feature content. Of the four brand variants, only the Pontiac Montana retains its original nameplate. With the Ford Freestar ending its [long] production run, the GM vans will be the oldest products vying for Canadians' minivan dollars. Expect GM to adjust MSRPs to catch the low end of the market.

Toyota Sienna
2005 Sales: 13,622

Higher-than-average MSRPs and lack of high-volume fleet sales separate the Toyota Sienna (as well as the Honda Odyssey) from the true minivan sales leaders. By both quantitative and qualitative measures, the Sienna and Odyssey are the class leaders. The Sienna provides superlative space, power, and refinement in a package that borders on "premium" pricing.

The Sienna nameplate bowed in 1998, and the current iteration has been on the market since 2004.

Ford Explorer
2005 Sales: 10,439

The Explorer is one of the largest, least fuel-efficient "Intermediate SUVs" on the market, yet it leads the segment in sales. This is partly explained by the Explorer's popularity with fleet buyers (38 percent of sales), but moreso by its adherence to traditional "family car" values. It is reliable, spacious, inoffensive-but-stylish, and representative of a certain familial groundedness that few brands still court.

The Explorer was substantially redesigned for the current model year, though it has been based

on the same platform since 2002. The brand has enjoyed 16 years of uninterrupted market presence in Canada.

Saturn VUE
2005 Sales: 6,650

Saturn's VUE occupies the small end of the Intermediate SUV spectrum, but it manages to offer impressive interior space, big V6 power, and an impressively-low sticker price. The VUE will be available later this year with a hybrid powertrain option, making Saturn the first SUV retailer to offer both performance (VUE Red Line) and economy-minded (VUE Green Line) variants of the same product.

The VUE has been on the market since 2002 and received some styling updates for the 2006 model year. It shares its platform ("Theta" in GMspeak) with the Chevrolet Equinox and Pontiac Torrent, both of which are officially segmented as Compact SUVs despite their larger overall dimensions. Combining the sales of these three vehicles results in a total of 21,717 units, making GM's Theta platform one of Canada's bestselling SUV lines. **DAR**