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## In this issue



# Light truck sales up 12.2% in August

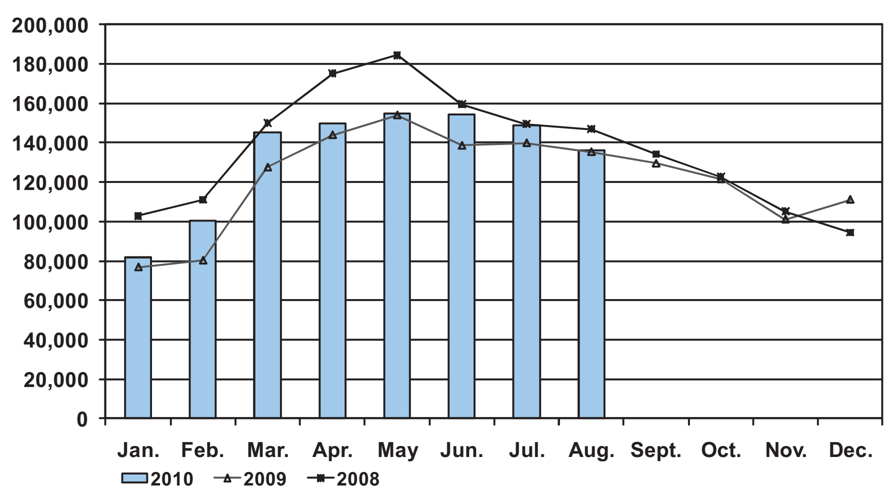
Light vehicle sales in August remained at par versus last year as 136,069 units were delivered, up from 135,351 units a year ago. A 12.2% upswing in light truck volume offset a 10.9% fallback in passenger car sales. Light truck volume reached 75,131 units, an 8,163 unit improvement compared to last year. Passenger car sales dropped 7,445 units compared to August 2009 as 60,938 units were sold. Year-to-date sales have grown 7.5% versus last year with 1.1 million light vehicles purchased thus far.

Impressive year-over-year gains were posted by Land Rover (+55.2%), Audi (+30.1%), and Infiniti (+29.1%). Both Audi and Infiniti posted strong sales growth in light truck volume as sales increased 53.3% and 52.4% respectively. Year-to-date sales remain well above last year's pace for all three of the automakers listed above.

Double-digit gains were posted by Subaru (+20.0%), Kia (+16.2%), Mercedes-Benz (+13.2%), Chrysler (+11.7%), and Porsche (+11.7%). Subaru was the only manufacturer of this group to confirm double-digit growth in both

*(continued on page 3)*

### Light Vehicle Sales in Canada 2010 vs. 2009 vs. 2008




*Source: DesRosiers Automotive Consultants Inc, CVMA and AIAMC*

80 Fulton Way
Suite 101
Richmond Hill, ON
Canada L4B 1J5

Tel. 905.881.0400
Fax. 905.881.7456
E-mail. jill@desrosiers.ca
Website. www.desrosiers.ca

For more information concerning the DesRosiers Automotive Reports, please contact:
**Jillian McConnell**
Consultant

**Publishing Division**
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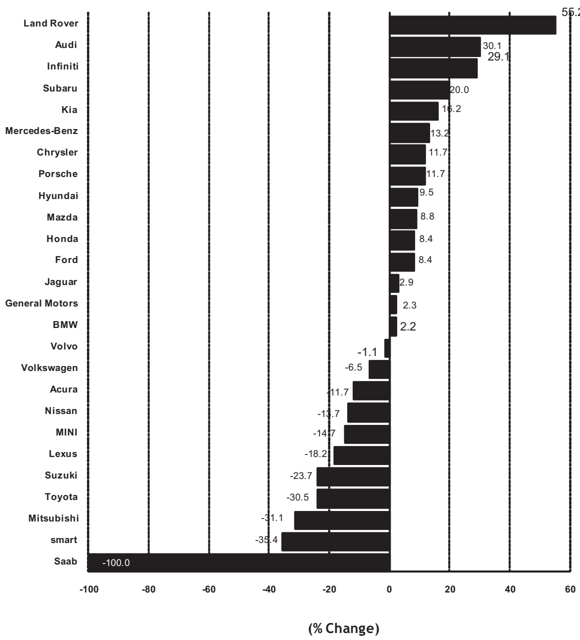
# Canadian Passenger Car and Light Truck Sales - August 2010

## Table 1: Canadian Light Vehicle Sales

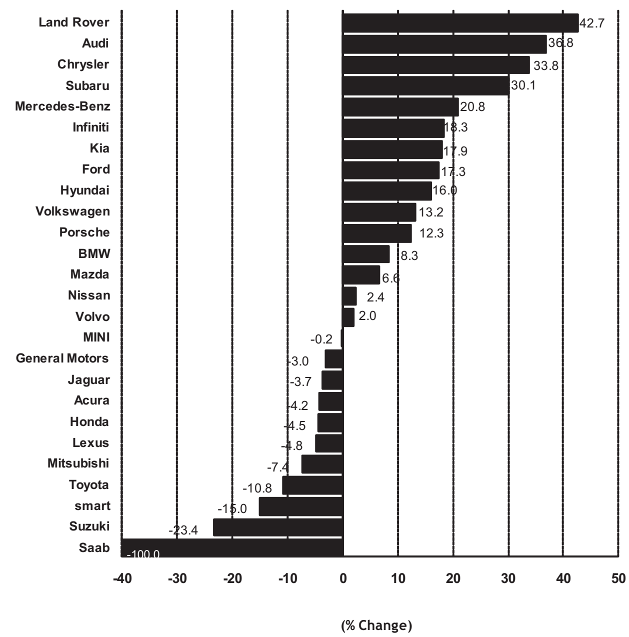
| | August 2010 | August 2009 | Percent Change | YTD 2010 | YTD 2009 | Percent Change | Market Share 2010 | Market Share 2009 | Point Change |
|---|---|---|---|---|---|---|---|---|---|
| **Acura** | **1,451** | **1,644** | **-11.7%** | **10,930** | **11,408** | **-4.2%** | **1.0%** | **1.1%** | **-0.1** |
| Passenger Car | 561 | 919 | -39.0% | 4,443 | 5,668 | -21.6% | 0.4% | 0.6% | -0.2 |
| Light Truck | 890 | 725 | 22.8% | 6,487 | 5,740 | 13.0% | 0.6% | 0.6% | 0.0 |
| **Audi** | **1,376** | **1,058** | **30.1%** | **10,000** | **7,312** | **36.8%** | **0.9%** | **0.7%** | **0.2** |
| Passenger Car | 884 | 737 | 19.9% | 7,021 | 5,482 | 28.1% | 0.7% | 0.6% | 0.1 |
| Light Truck | 492 | 321 | 53.3% | 2,979 | 1,830 | 62.8% | 0.3% | 0.2% | 0.1 |
| **BMW** | **2,342** | **2,292** | **2.2%** | **17,413** | **16,081** | **8.3%** | **1.6%** | **1.6%** | **0.0** |
| Passenger Car | 1,724 | 1,758 | -1.9% | 12,021 | 12,386 | -2.9% | 1.1% | 1.2% | -0.1 |
| Light Truck | 618 | 534 | 15.7% | 5,392 | 3,695 | 45.9% | 0.5% | 0.4% | 0.1 |
| **Chrysler** | **16,076** | **14,393** | **11.7%** | **143,440** | **107,219** | **33.8%** | **13.4%** | **10.8%** | **2.6** |
| Passenger Car | 1,133 | 2,713 | -58.2% | 21,509 | 23,226 | -7.4% | 2.0% | 2.3% | -0.3 |
| Light Truck | 14,943 | 11,680 | 27.9% | 121,931 | 83,993 | 45.2% | 11.4% | 8.4% | 3.0 |
| **Ford** | **24,029** | **22,166** | **8.4%** | **183,920** | **156,735** | **17.3%** | **17.2%** | **15.7%** | **1.4** |
| Passenger Car | 5,858 | 4,926 | 18.9% | 43,171 | 35,900 | 20.3% | 4.0% | 3.6% | 0.4 |
| Light Truck | 18,171 | 17,240 | 5.4% | 140,749 | 120,835 | 16.5% | 13.1% | 12.1% | 1.0 |
| **General Motors** | **23,536** | **23,018** | **2.3%** | **170,576** | **175,769** | **-3.0%** | **15.9%** | **17.6%** | **-1.7** |
| Passenger Car | 8,207 | 8,510 | -3.6% | 58,538 | 69,965 | -16.3% | 5.5% | 7.0% | -1.6 |
| Light Truck | 15,329 | 14,508 | 5.7% | 112,038 | 105,804 | 5.9% | 10.5% | 10.6% | -0.2 |
| **Honda** | **11,463** | **10,574** | **8.4%** | **79,870** | **83,637** | **-4.5%** | **7.5%** | **8.4%** | **-0.9** |
| Passenger Car | 6,903 | 7,402 | -6.7% | 49,850 | 59,278 | -15.9% | 4.7% | 5.9% | -1.3 |
| Light Truck | 4,560 | 3,172 | 43.8% | 30,020 | 24,359 | 23.2% | 2.8% | 2.4% | 0.4 |
| **Hyundai** | **11,403** | **10,418** | **9.5%** | **85,120** | **73,360** | **16.0%** | **7.9%** | **7.4%** | **0.6** |
| Passenger Car | 7,643 | 7,058 | 8.3% | 56,216 | 51,088 | 10.0% | 5.2% | 5.1% | 0.1 |
| Light Truck | 3,760 | 3,360 | 11.9% | 28,904 | 22,272 | 29.8% | 2.7% | 2.2% | 0.5 |
| **Infiniti** | **780** | **604** | **29.1%** | **5,496** | **4,647** | **18.3%** | **0.5%** | **0.5%** | **0.0** |
| Passenger Car | 425 | 371 | 14.6% | 3,385 | 2,761 | 22.6% | 0.3% | 0.3% | 0.0 |
| Light Truck | 355 | 233 | 52.4% | 2,111 | 1,886 | 11.9% | 0.2% | 0.2% | 0.0 |
| **Jaguar** | **70** | **68** | **2.9%** | **546** | **567** | **-3.7%** | **0.1%** | **0.1%** | **0.0** |
| **Kia** | **5,430** | **4,672** | **16.2%** | **37,588** | **31,891** | **17.9%** | **3.5%** | **3.2%** | **0.3** |
| Passenger Car | 4,050 | 3,915 | 3.4% | 28,059 | 25,191 | 11.4% | 2.6% | 2.5% | 0.1 |
| Light Truck | 1,380 | 757 | 82.3% | 9,529 | 6,700 | 42.2% | 0.9% | 0.7% | 0.2 |
| **Land Rover** | **208** | **134** | **55.2%** | **1,661** | **1,164** | **42.7%** | **0.2%** | **0.1%** | **0.0** |
| **Lexus** | **1,253** | **1,532** | **-18.2%** | **9,829** | **10,320** | **-4.8%** | **0.9%** | **1.0%** | **-0.1** |
| Passenger Car | 534 | 600 | -11.0% | 4,317 | 4,316 | 0.0% | 0.4% | 0.4% | 0.0 |
| Light Truck | 719 | 932 | -22.9% | 5,512 | 6,004 | -8.2% | 0.5% | 0.6% | -0.1 |
| **Mazda** | **7,486** | **6,880** | **8.8%** | **55,613** | **52,162** | **6.6%** | **5.2%** | **5.2%** | **0.0** |
| Passenger Car | 6,425 | 5,978 | 7.5% | 46,459 | 44,615 | 4.1% | 4.3% | 4.5% | -0.1 |
| Light Truck | 1,061 | 902 | 17.6% | 9,154 | 7,547 | 21.3% | 0.9% | 0.8% | 0.1 |
| **Mercedes-Benz** | **2,254** | **1,992** | **13.2%** | **19,253** | **15,939** | **20.8%** | **1.8%** | **1.6%** | **0.2** |
| Passenger Car | 1,200 | 1,322 | -9.2% | 11,128 | 9,831 | 13.2% | 1.0% | 1.0% | 0.1 |
| Light Truck | 1,054 | 670 | 57.3% | 8,125 | 6,108 | 33.0% | 0.8% | 0.6% | 0.1 |
| **MINI** | **390** | **457** | **-14.7%** | **2,883** | **2,888** | **-0.2%** | **0.3%** | **0.3%** | **0.0** |
| **Mitsubishi** | **1,282** | **1,860** | **-31.1%** | **12,793** | **13,816** | **-7.4%** | **1.2%** | **1.4%** | **-0.2** |
| Passenger Car | 657 | 993 | -33.8% | 7,252 | 7,680 | -5.6% | 0.7% | 0.8% | -0.1 |
| Light Truck | 625 | 867 | -27.9% | 5,541 | 6,136 | -9.7% | 0.5% | 0.6% | -0.1 |
| **Nissan** | **6,102** | **7,071** | **-13.7%** | **51,220** | **50,029** | **2.4%** | **4.8%** | **5.0%** | **-0.2** |
| Passenger Car | 3,592 | 4,848 | -25.9% | 35,391 | 35,722 | -0.9% | 3.3% | 3.6% | -0.3 |
| Light Truck | 2,510 | 2,223 | 12.9% | 15,829 | 14,307 | 10.6% | 1.5% | 1.4% | 0.0 |
| **Porsche** | **134** | **120** | **11.7%** | **1,354** | **1,206** | **12.3%** | **0.1%** | **0.1%** | **0.0** |
| Passenger Car | 68 | 58 | 17.2% | 914 | 713 | 28.2% | 0.1% | 0.1% | 0.0 |
| Light Truck | 66 | 62 | 6.5% | 440 | 493 | -10.8% | 0.0% | 0.0% | 0.0 |
| **Saab** | **-** | **36** | **-100.0%** | **-** | **599** | **-100.0%** | **0.0%** | **0.1%** | **-0.1** |
| Passenger Car | - | 32 | -100.0% | - | 549 | -100.0% | 0.0% | 0.1% | -0.1 |
| Light Truck | - | 4 | n.a. | - | 50 | -100.0% | 0.0% | 0.0% | 0.0 |
| **smart** | **173** | **268** | **-35.4%** | **1,472** | **1,732** | **-15.0%** | **0.1%** | **0.2%** | **0.0** |
| **Subaru** | **2,328** | **1,940** | **20.0%** | **18,012** | **13,844** | **30.1%** | **1.7%** | **1.4%** | **0.3** |
| Passenger Car | 1,069 | 879 | 21.6% | 7,679 | 7,492 | 2.5% | 0.7% | 0.8% | 0.0 |
| Light Truck | 1,259 | 1,061 | 18.7% | 10,333 | 6,352 | 62.7% | 1.0% | 0.6% | 0.3 |
| **Suzuki** | **1,004** | **1,315** | **-23.7%** | **6,281** | **8,196** | **-23.4%** | **0.6%** | **0.8%** | **-0.2** |
| Passenger Car | 614 | 1,007 | -39.0% | 4,254 | 5,376 | -20.9% | 0.4% | 0.5% | -0.1 |
| Light Truck | 390 | 308 | 26.6% | 2,027 | 2,820 | -28.1% | 0.2% | 0.3% | -0.1 |
| **Toyota** | **11,609** | **16,707** | **-30.5%** | **111,187** | **124,593** | **-10.8%** | **10.4%** | **12.5%** | **-2.1** |
| Passenger Car | 5,869 | 10,450 | -43.8% | 63,324 | 80,386 | -21.2% | 5.9% | 8.1% | -2.2 |
| Light Truck | 5,740 | 6,257 | -8.3% | 47,863 | 44,207 | 8.3% | 4.5% | 4.4% | 0.0 |
| **Volkswagen** | **3,369** | **3,605** | **-6.5%** | **30,135** | **26,611** | **13.2%** | **2.8%** | **2.7%** | **0.1** |
| Passenger Car | 2,726 | 2,912 | -6.4% | 24,816 | 21,775 | 14.0% | 2.3% | 2.2% | 0.1 |
| Light Truck | 643 | 693 | -7.2% | 5,319 | 4,836 | 10.0% | 0.5% | 0.5% | 0.0 |
| **Volvo** | **521** | **527** | **-1.1%** | **4,635** | **4,545** | **2.0%** | **0.4%** | **0.5%** | **0.0** |
| Passenger Car | 163 | 202 | -19.3% | 1,971 | 1,846 | 6.8% | 0.2% | 0.2% | 0.0 |
| Light Truck | 358 | 325 | 10.2% | 2,664 | 2,699 | -1.3% | 0.2% | 0.3% | 0.0 |
| **Passenger Car Total** | **60,938** | **68,383** | **-10.9%** | **496,619** | **516,433** | **-3.8%** | **46.4%** | **51.8%** | **-5.5** |
| **Light Truck Total** | **75,131** | **66,968** | **12.2%** | **574,608** | **479,837** | **19.8%** | **53.6%** | **48.2%** | **5.5** |
| **Total Light Vehicle Sales** | **136,069** | **135,351** | **0.5%** | **1,071,227** | **996,270** | **7.5%** | **100.0%** | **100.0%** | |

*Source: DesRosiers Automotive Consultants Inc., AIAMC and CVMA*

### Total Canadian Light Vehicle Sales
### % Change August 2010 vs. August 2009




### Total Canadian Light Vehicle Sales
### % Change 2010 YTD vs. 2009 YTD

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passenger car (+21.6%) and light truck (+18.7%) sales. An 82.3% upturn in light truck sales was evident at Kia as volume reached 1,380 units. Porsche recently announced that global sales of the Porsche Panamera reached 22,500 units in its first full year of production. The low-volume sports car maker stated that the Panamera 4S was the top selling model followed by the the Turbo and the Panamera S. All five automakers posted double-digit sales growth in cumulative sales between January and August.

Hyundai (+9.5%), Mazda (+8.8%), Honda (+8.4%), and Ford (+8.4%) all secured year-over-year growth in August sales. Honda was the only manufacturer listed above not witness enhanced sales of both light trucks (+43.8%) and passenger cars (-6.7%).

Modest growth in August sales was evident at Jaguar (+2.9%), General Motors (+2.3%), and BMW (+2.2%). BMW posted a 15.7% improvement in light truck sales as volume grew from 534 units a year ago to 618 units. Year-to-date sales were up for BMW (+8.3%) while General Motors (-3.0%) and Jaguar (-3.7%) suffered a fallback in volume.

A decline in August sales was evident at Volvo (-1.1%), Volkswagen (-6.5%), and Acura (-11.7%). Both Acura (+22.8%) and Volvo (+10.2%) witnessed an upturn in light truck sales. Volkswagen (+13.2%) was the only automaker listed above to confirm heightened year-to-date sales.

A fallback in August sales occurred at Nissan (-13.7%), MINI (-14.7%), and Lexus (-18.2%). Nissan could not offset a 25.9% slide in passenger car sales with a 12.9% gain in light truck volume. Year-to-date sales were up for only Nissan (+2.4%).

Suzuki (-23.7%), Toyota (-30.5%), Mitsubishi (-31.1%), smart (-35.4%), and Saab (-100.0%) suffered the largest drop-offs in August sales. Suzuki reported a 26.6% rise in light truck volume. Both Toyota and Mitsubishi suffered fallbacks in sales of both passenger cars and light trucks. Fewer light vehicles have been sold between January and August by all five automakers versus last year. DAR

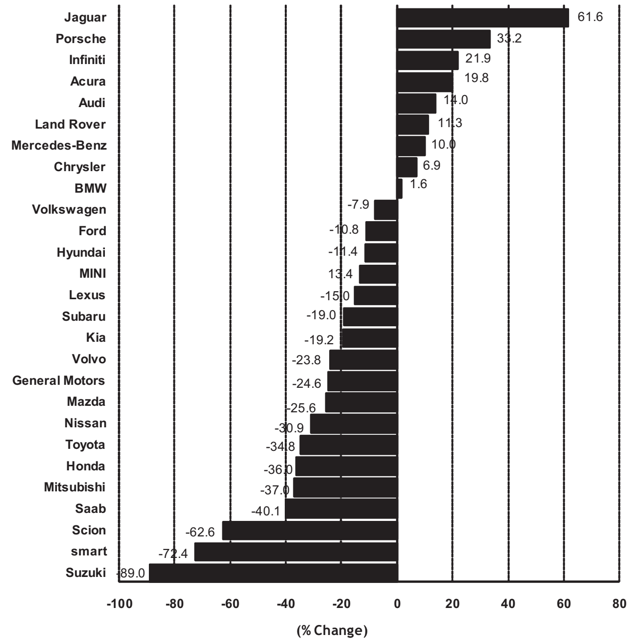
# U.S. Passenger Car and Light Truck Sales - August 2010

## Table 3: U.S. Light Vehicle Sales

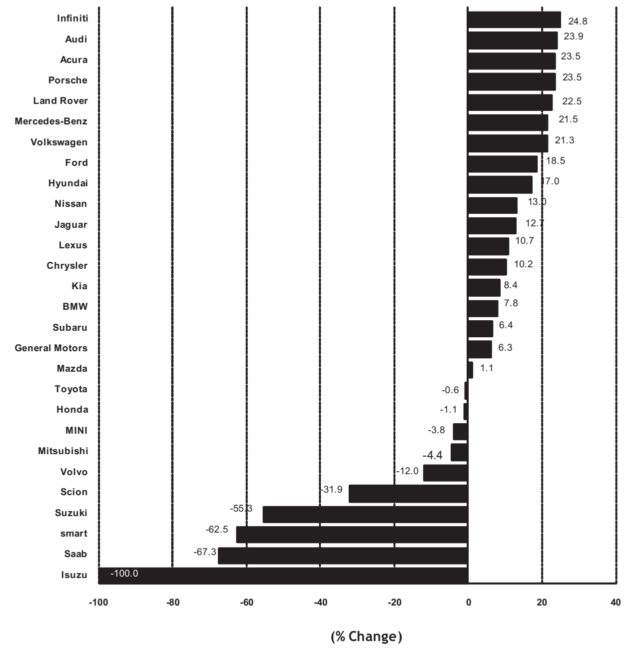
| | August 2010 | August 2009 | Percent Change | YTD 2010 | YTD 2009 | Percent Change | Market Share 2010 | Market Share 2009 | Point Change |
|---|---|---|---|---|---|---|---|---|---|
| **Acura** | **11,534** | **9,625** | **19.8%** | **85,668** | **69,369** | **23.5%** | **1.1%** | **1.0%** | **0.1** |
| Passenger Car | 5,494 | 6,077 | -9.6% | 44,611 | 44,386 | 0.5% | 0.6% | 0.6% | 0.0 |
| Light Truck | 6,040 | 3,548 | 70.2% | 41,057 | 24,983 | 64.3% | 0.5% | 0.4% | 0.2 |
| **Audi** | **9,182** | **8,057** | **14.0%** | **64,837** | **52,309** | **23.9%** | **0.9%** | **0.7%** | **0.1** |
| Passenger Car | 5,947 | 6,167 | -3.6% | 46,580 | 39,380 | 18.3% | 0.6% | 0.6% | 0.1 |
| Light Truck | 3,235 | 1,890 | 71.2% | 18,257 | 12,929 | 41.2% | 0.2% | 0.2% | 0.1 |
| **BMW** | **19,540** | **19,232** | **1.6%** | **139,236** | **129,176** | **7.8%** | **1.8%** | **1.8%** | **0.0** |
| Passenger Car | 15,422 | 15,923 | -3.1% | 108,985 | 104,770 | 4.0% | 1.4% | 1.5% | -0.1 |
| Light Truck | 4,118 | 3,309 | 24.4% | 30,251 | 24,406 | 23.9% | 0.4% | 0.3% | 0.1 |
| **Chrysler** | **98,991** | **92,619** | **6.9%** | **716,744** | **650,496** | **10.2%** | **9.4%** | **9.2%** | **0.2** |
| Passenger Car | 27,341 | 22,638 | 20.8% | 206,919 | 152,061 | 36.1% | 2.7% | 2.2% | 0.6 |
| Light Truck | 71,650 | 69,981 | 2.4% | 509,825 | 498,435 | 2.3% | 6.7% | 7.1% | -0.4 |
| **Ford** | **155,053** | **173,818** | **-10.8%** | **1,261,344** | **1,064,455** | **18.5%** | **16.5%** | **15.1%** | **1.5** |
| Passenger Car | 56,487 | 65,654 | -14.0% | 470,044 | 407,882 | 15.2% | 6.2% | 5.8% | 0.4 |
| Light Truck | 98,566 | 108,164 | -8.9% | 791,300 | 656,573 | 20.5% | 10.4% | 9.3% | 1.1 |
| **General Motors** | **184,823** | **245,091** | **-24.6%** | **1,461,581** | **1,375,139** | **6.3%** | **19.2%** | **19.5%** | **-0.3** |
| Passenger Car | 68,469 | 118,340 | -42.1% | 566,751 | 599,912 | -5.5% | 7.4% | 8.5% | -1.1 |
| Light Truck | 116,354 | 126,751 | -8.2% | 894,830 | 775,227 | 15.4% | 11.7% | 11.0% | 0.8 |
| **Honda** | **97,195** | **151,814** | **-36.0%** | **729,407** | **737,538** | **-1.1%** | **9.6%** | **10.4%** | **-0.9** |
| Passenger Car | 54,400 | 100,895 | -46.1% | 423,916 | 459,272 | -7.7% | 5.6% | 6.5% | -0.9 |
| Light Truck | 42,795 | 50,919 | -16.0% | 305,491 | 278,266 | 9.8% | 4.0% | 3.9% | 0.1 |
| **Hyundai** | **53,603** | **60,467** | **-11.4%** | **363,491** | **310,706** | **17.0%** | **4.8%** | **4.4%** | **0.4** |
| Passenger Car | 43,654 | 46,284 | -5.7% | 274,555 | 236,935 | 15.9% | 3.6% | 3.4% | 0.2 |
| Light Truck | 9,949 | 14,183 | -29.9% | 88,936 | 73,771 | 20.6% | 1.2% | 1.0% | 0.1 |
| **Infiniti** | **9,428** | **7,732** | **21.9%** | **66,492** | **53,276** | **24.8%** | **0.9%** | **0.8%** | **0.1** |
| Passenger Car | 6,677 | 5,521 | 20.9% | 47,813 | 37,012 | 29.2% | 0.6% | 0.5% | 0.1 |
| Light Truck | 2,751 | 2,211 | 24.4% | 18,679 | 16,264 | 14.8% | 0.2% | 0.2% | 0.0 |
| **Isuzu** | **-** | **-** | **n.a.** | **-** | **165** | **-100.0%** | **0.0%** | **0.0%** | **0.0** |
| **Jaguar** | **1,414** | **875** | **61.6%** | **8,781** | **7,794** | **12.7%** | **0.1%** | **0.1%** | **0.0** |
| **Kia** | **32,465** | **40,198** | **-19.2%** | **235,142** | **216,947** | **8.4%** | **3.1%** | **3.1%** | **0.0** |
| Passenger Car | 17,204 | 29,181 | -41.0% | 129,691 | 135,811 | -4.5% | 1.7% | 1.9% | -0.2 |
| Light Truck | 15,261 | 11,017 | 38.5% | 105,451 | 81,136 | 30.0% | 1.4% | 1.1% | 0.2 |
| **Land Rover** | **2,544** | **2,285** | **11.3%** | **19,800** | **16,159** | **22.5%** | **0.3%** | **0.2%** | **0.0** |
| **Lexus** | **19,465** | **22,892** | **-15.0%** | **145,490** | **131,469** | **10.7%** | **1.9%** | **1.9%** | **0.0** |
| Passenger Car | 9,353 | 12,610 | -25.8% | 72,290 | 67,456 | 7.2% | 0.9% | 1.0% | 0.0 |
| Light Truck | 10,112 | 10,282 | -1.7% | 73,200 | 64,013 | 14.4% | 1.0% | 0.9% | 0.1 |
| **Mazda** | **19,739** | **26,542** | **-25.6%** | **147,578** | **145,955** | **1.1%** | **1.9%** | **2.1%** | **-0.1** |
| Passenger Car | 14,107 | 20,772 | -32.1% | 108,534 | 114,726 | -5.4% | 1.4% | 1.6% | -0.2 |
| Light Truck | 5,632 | 5,770 | -2.4% | 39,044 | 31,229 | 25.0% | 0.5% | 0.4% | 0.1 |
| **Mercedes-Benz** | **18,826** | **17,112** | **10.0%** | **143,841** | **118,428** | **21.5%** | **1.9%** | **1.7%** | **0.2** |
| Passenger Car | 13,327 | 11,019 | 20.9% | 94,019 | 77,688 | 21.0% | 1.2% | 1.1% | 0.1 |
| Light Truck | 5,499 | 6,093 | -9.7% | 49,822 | 40,740 | 22.3% | 0.7% | 0.6% | 0.1 |
| **MINI** | **4,425** | **5,111** | **-13.4%** | **29,704** | **30,868** | **-3.8%** | **0.4%** | **0.4%** | **0.0** |
| **Mitsubishi** | **4,293** | **6,813** | **-37.0%** | **36,431** | **38,127** | **-4.4%** | **0.5%** | **0.5%** | **-0.1** |
| Passenger Car | 3,062 | 4,196 | -27.0% | 25,275 | 26,056 | -3.0% | 0.3% | 0.4% | 0.0 |
| Light Truck | 1,231 | 2,617 | -53.0% | 11,156 | 12,071 | -7.6% | 0.1% | 0.2% | 0.0 |
| **Nissan** | **67,399** | **97,580** | **-30.9%** | **533,004** | **471,627** | **13.0%** | **7.0%** | **6.7%** | **0.3** |
| Passenger Car | 41,241 | 72,645 | -43.2% | 351,355 | 317,545 | 10.6% | 4.6% | 4.5% | 0.1 |
| Light Truck | 26,158 | 24,935 | 4.9% | 181,649 | 154,082 | 17.9% | 2.4% | 2.2% | 0.2 |
| **Porsche** | **2,032** | **1,526** | **33.2%** | **15,718** | **12,729** | **23.5%** | **0.2%** | **0.2%** | **0.0** |
| Passenger Car | 1,257 | 1,017 | 23.6% | 11,428 | 7,340 | 55.7% | 0.1% | 0.1% | 0.0 |
| Light Truck | 775 | 509 | 52.3% | 4,290 | 5,389 | -20.4% | 0.1% | 0.1% | 0.0 |
| **Saab** | **290** | **484** | **-40.1%** | **2,106** | **6,444** | **-67.3%** | **0.0%** | **0.1%** | **-0.1** |
| Passenger Car | 290 | 404 | -28.2% | 2,013 | 4,738 | -57.5% | 0.0% | 0.1% | 0.0 |
| Light Truck | - | 80 | -100.0% | 93 | 1,706 | -94.5% | 0.0% | 0.0% | 0.0 |
| **Scion** | **4,012** | **10,727** | **-62.6%** | **29,672** | **43,565** | **-31.9%** | **0.4%** | **0.6%** | **-0.2** |
| **smart** | **448** | **1,622** | **-72.4%** | **4,357** | **11,607** | **-62.5%** | **0.1%** | **0.2%** | **-0.1** |
| **Subaru** | **23,239** | **28,683** | **-19.0%** | **173,182** | **162,755** | **6.4%** | **2.3%** | **2.3%** | **0.0** |
| Passenger Car | 7,766 | 16,016 | -51.5% | 55,543 | 83,285 | -33.3% | 0.7% | 1.2% | -0.4 |
| Light Truck | 15,473 | 12,667 | 22.2% | 117,639 | 79,470 | 48.0% | 1.5% | 1.1% | 0.4 |
| **Suzuki** | **630** | **5,749** | **-89.0%** | **14,131** | **31,634** | **-55.3%** | **0.2%** | **0.4%** | **-0.3** |
| Passenger Car | 133 | 3,563 | -96.3% | 9,789 | 19,791 | -50.5% | 0.1% | 0.3% | -0.2 |
| Light Truck | 497 | 2,186 | -77.3% | 4,342 | 11,843 | -63.3% | 0.1% | 0.2% | -0.1 |
| **Toyota** | **124,911** | **191,469** | **-34.8%** | **988,992** | **995,375** | **-0.6%** | **13.0%** | **14.1%** | **-1.1** |
| Passenger Car | 68,255 | 123,367 | -44.7% | 547,886 | 593,538 | -7.7% | 7.2% | 8.4% | -1.2 |
| Light Truck | 56,656 | 68,102 | -16.8% | 441,106 | 401,837 | 9.8% | 5.8% | 5.7% | 0.1 |
| **Volkswagen** | **22,855** | **24,823** | **-7.9%** | **172,747** | **142,421** | **21.3%** | **2.3%** | **2.0%** | **0.3** |
| Passenger Car | 19,455 | 20,486 | -5.0% | 144,947 | 119,061 | 21.7% | 1.9% | 1.7% | 0.2 |
| Light Truck | 3,400 | 4,337 | -21.6% | 27,800 | 23,360 | 19.0% | 0.4% | 0.3% | 0.0 |
| **Volvo** | **4,441** | **5,826** | **-23.8%** | **36,966** | **42,013** | **-12.0%** | **0.5%** | **0.6%** | **-0.1** |
| Passenger Car | 1,901 | 3,551 | -46.5% | 18,633 | 26,300 | -29.2% | 0.2% | 0.4% | -0.1 |
| Light Truck | 2,540 | 2,275 | 11.6% | 18,333 | 15,713 | 16.7% | 0.2% | 0.2% | 0.0 |
| **Passenger Car Total** | **491,541** | **724,661** | **-32.2%** | **3,834,091** | **3,768,779** | **1.7%** | **50.3%** | **53.3%** | **-3.0** |
| **Light Truck Total** | **501,236** | **534,111** | **-6.2%** | **3,792,351** | **3,299,767** | **14.9%** | **49.7%** | **46.7%** | **3.0** |
| **Total Light Vehicle Sales** | **992,777** | **1,258,772** | **-21.1%** | **7,626,442** | **7,068,546** | **7.9%** | **100.0%** | **100.0%** | |

*Source: DesRosiers Automotive Consultants Inc. and Ward's Automotive Reports*

**Total U.S. Light Vehicle Sales**
**% Change August 2010 vs. August 2009**




**Total U.S. Light Vehicle Sales**
**% Change 2010 YTD vs. 2009 YTD**




## U.S. light vehicle sales plunge 21.1% in August

Light vehicle sales in the U.S. dropped 21.1% compared to last August when sales were fuelled by the Cash-for-Clunkers rebate. A total of 501,236 light trucks were delivered, a modest 6.2% decline compared to August 2009. Passenger car sales witnessed a 32.2% downturn with 491,541 units purchased. Despite the deep fall in August sales, year-to-date sales volume is up 7.9% with 7.6 million units sold thus far.

Automakers securing August sales growth above the industry total included Jaguar (+61.6%), Porsche (+33.2%), and Infiniti (+21.9%). All three manufacturers mentioned above confirmed double-digit growth in year-to-date sales.

Acura (+19.8%), Audi (+14.0%), Land Rover (+11.3%), and Mercedes-Benz (+10.0%) all achieved heightened sales growth in August. Upswings in light truck sales at Audi (+71.2%) and Acura (+70.2%) offset passenger car sales reductions at both companies. Year-to-date sales remain positive for all the automakers listed above.

Chrysler reported a modest 6.9% rise in August sales while volume at BMW (+1.6%) remained at relative par. Sales of the BMW X3 crossover shot up 33.1%. Year-over-year cumulative sales between January and August were 10.2% higher at Chrysler and up 7.8% at BMW.

Volkswagen (-7.9%), Ford (-10.8%), Hyundai (-11.4%), MINI (-13.4%), Lexus (-15.0%), Subaru (-19.0%), and Kia (-19.2%) all suffered fallbacks in August sales. MINI (-3.8%) was the only manufacturer mentioned above to report a decline year-to-date sales thus far.

Deep downturns in August sales were evident at Volvo (-23.8%), General Motors (-24.6%), Mazda (-25.6%), Nissan (-30.9%), Toyota (-34.8%), Honda (-36.0%), and Mitsubishi (-37.0%). A rise in year-to-date sales occurred at Nissan (+13.0%), General Motors (+6.3%), and Mazda (+1.1%) while sales dropped at Toyota (-0.6%), Honda (-1.1%), and Volvo (-12.0%).

Saab (-40.1%), Scion (-62.6%), smart (-72.4%), and Suzuki (-89.0%) all witnessed a collapse in August sales. All four automakers have reported significant fallbacks in year to date sales thus far. DAR

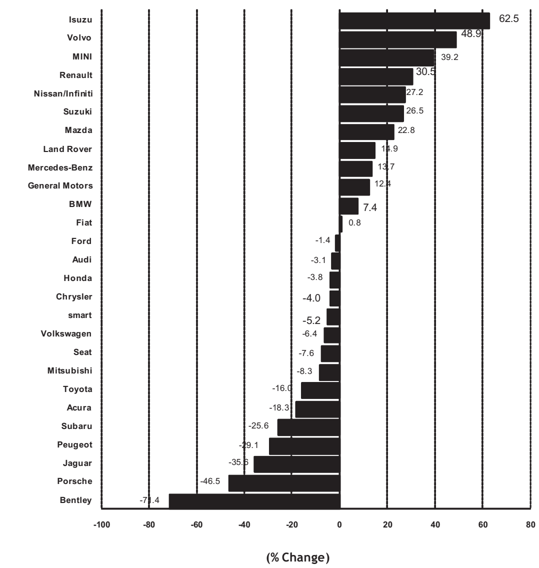
# Mexican Sales - 1H 2010

Mexican vehicle sales grew 5.6% at the end of the first half of 2010 as volume increased from 351,359 units a year ago to 371,065 units.

Double-digit year-over-year gains were posted by Isuzu (+62.5%), Volvo (+48.9%), MINI (+39.2%), Renault (+30.5%), Nissan/Infiniti (+27.2%), Suzuki (+26.5%), Mazda (+22.8%), Land Rover (+14.9%), Mercedes-Benz (+13.7%), and General Motors (+12.4%). A modest gain of 7.4% was evident at BMW while sales remained at par at Fiat (+0.8%).

A downturn in first have sales occurred at Ford (-1.4%), Audi (-3.1%), Honda (-3.8%), Chrysler (-4.0%), smart (-5.2%), Volkswagen (-6.4%), Seat (-7.6%), and Mitsubishi (-8.3%). The deepest fallbacks were felt by Toyota (-16.0%), Acura (-18.3%), Suabru (-25.6%), Peugeot (-29.1%), Jaguar (-35.6%), Porsche (-46.5%), and Bentley (-71.4%). DAR

**Mexican Vehicle Sales**
**% Change 1H 2010 vs. 1H 2009**




## Mexican Vehicle Sales - 1H 2010 vs. 1H 2009

| | 2Q 2010 | 2Q 2009 | Percent Change | 1H 2010 | 1H 2009 | Percent Change | Mkt. Shr. 2010 | Mkt. Shr. 2009 | Change |
|---|---|---|---|---|---|---|---|---|---|
| Acura | 469 | 481 | -2.5% | 841 | 1,030 | -18.3% | 0.2% | 0.3% | -0.1 |
| Audi | 1,272 | 1,334 | -4.6% | 2,449 | 2,527 | -3.1% | 0.7% | 0.7% | -0.1 |
| Bentley | 1 | 3 | -66.7% | 2 | 7 | -71.4% | 0.0% | 0.0% | 0.0 |
| BMW | 1,376 | 1,405 | -2.1% | 2,726 | 2,539 | 7.4% | 0.7% | 0.7% | 0.0 |
| Chrysler | 17,136 | 16,934 | 1.2% | 35,997 | 37,499 | -4.0% | 9.7% | 10.7% | -1.0 |
| Fiat | 651 | 685 | -5.0% | 1,317 | 1,307 | 0.8% | 0.4% | 0.4% | 0.0 |
| Ford | 18,911 | 20,566 | -8.0% | 38,536 | 39,082 | -1.4% | 10.4% | 11.1% | -0.7 |
| General Motors* | 36,137 | 29,291 | 23.4% | 72,471 | 64,481 | 12.4% | 19.5% | 18.4% | 1.2 |
| Honda | 7,571 | 6,657 | 13.7% | 16,266 | 16,903 | -3.8% | 4.4% | 4.8% | -0.4 |
| Jaguar | 19 | 27 | -29.6% | 47 | 73 | -35.6% | 0.0% | 0.0% | 0.0 |
| Isuzu | 392 | 191 | 105.2% | 580 | 357 | 62.5% | 0.2% | 0.1% | 0.1 |
| Land Rover | 112 | 70 | 60.0% | 247 | 215 | 14.9% | 0.1% | 0.1% | 0.0 |
| Mazda | 5,730 | 3,660 | 56.6% | 11,044 | 8,995 | 22.8% | 3.0% | 2.6% | 0.4 |
| Mercedes-Benz | 1,353 | 1,093 | 23.8% | 2,828 | 2,488 | 13.7% | 0.8% | 0.7% | 0.1 |
| MINI | 540 | 376 | 43.6% | 1,066 | 766 | 39.2% | 0.3% | 0.2% | 0.1 |
| Mitsubishi | 2,967 | 3,006 | -1.3% | 6,083 | 6,637 | -8.3% | 1.6% | 1.9% | -0.2 |
| Nissan/Infiniti | 41,935 | 29,272 | 43.3% | 87,121 | 68,493 | 27.2% | 23.5% | 19.5% | 4.0 |
| Peugeot | 1,349 | 2,040 | -33.9% | 2,946 | 4,154 | -29.1% | 0.8% | 1.2% | -0.4 |
| Porsche | 73 | 123 | -40.7% | 144 | 269 | -46.5% | 0.0% | 0.1% | 0.0 |
| Renault | 4,578 | 2,715 | 68.6% | 7,363 | 5,643 | 30.5% | 2.0% | 1.6% | 0.4 |
| Seat | 3,307 | 3,694 | -10.5% | 6,326 | 6,847 | -7.6% | 1.7% | 1.9% | -0.2 |
| smart | 183 | 164 | 11.6% | 366 | 386 | -5.2% | 0.1% | 0.1% | 0.0 |
| Subaru | 120 | 186 | -35.5% | 290 | 390 | -25.6% | 0.1% | 0.1% | 0.0 |
| Suzuki | 1,706 | 1,466 | 16.4% | 3,802 | 3,006 | 26.5% | 1.0% | 0.9% | 0.2 |
| Toyota | 10,275 | 10,929 | -6.0% | 20,726 | 24,666 | -16.0% | 5.6% | 7.0% | -1.4 |
| Volkswagen | 23,586 | 24,219 | -2.6% | 48,811 | 52,149 | -6.4% | 13.2% | 14.8% | -1.7 |
| Volvo | 324 | 216 | 50.0% | 670 | 450 | 48.9% | 0.2% | 0.1% | 0.1 |
| **Total Vehicle Sales** | **182,073** | **160,803** | **13.2%** | **371,065** | **351,359** | **5.6%** | **100.0%** | **100.0%** | |

*Includes some heavy-duty trucks*
**Includes Saab*
*Source: Asociacion Mexicana de la Industria Automotriz, A.C., and DesRosiers Automotive Consultants Inc.*

Over the first half of 2010, the average number of employees working within the automotive industry reached 803.5 thousand; a 1.4% improvement compared to 792.7 thousand a year prior. The first three months posted year-over-year fallbacks. Modest growth occurred in May (+3.3%) and April (+0.4%). Double-digit growth was evident in June (+10.9%) as average employment grew from 788.2 thousand to 874.4 thousand.

Between January and June, employment within Motor Vehicle Manufacturing (Table B) dropped 2.4% below 2009's average of 51.3 thousand, settling at 50.1thousand. Year-over-year gains were posted in June (+9.7%) and May (+3.0%). The first four months all witnessed a decrease in average employment with the biggest cutback occurring in April (-13.7%).

Employment in Motor Vehicle Body and Trailer Manufacturing (Table C) grew 11.9% in the first half of 2010. Significant double-digit growth was posted in May (+57.6%) and June (+55.0%). Deep fallbacks were also recorded in March (-15.1%) and January (-15.8%).

In the first six months of 2010, employment in Motor Vehicle Parts and Accessories Manufacturing (Table D) slid 5.6%. Employment fell in three each of the six months. Year-over-year growth was evident in June (+6.9%), May (+1.6%), February (+0.5%). Major reductions to average employment were confirmed in March (-13.8%) and April (-20.1%).

Highway, Street and Bridge Construction employment (Table E) rose by 3.4% in the first half of 2010 with an average of 60.1 thousand workers. Monthly gains were posted in June (+28.0%), May (+14.0%), and April (+8.5%).

Year-to-date employment within Motor Vehicles, Wholesale (Table

*(continued on next page)*

## Employment by Month in Thousands

**Table A: Total Employment**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 801.7 | 772.7 | -3.6% |
| February | 791.7 | 775.0 | -2.1% |
| March | 776.5 | 771.6 | -0.6% |
| April | 796.0 | 799.0 | 0.4% |
| May | 801.8 | 828.5 | 3.3% |
| June | 788.2 | 874.4 | 10.9% |
| July | 822.7 | | |
| August | 842.1 | | |
| September | 869.3 | | |
| October | 862.5 | | |
| November | 858.9 | | |
| December | 822.2 | | |
| **Year-to-date** | **792.7** | **803.5** | **1.4%** |

**Table B: Motor Vehicle Manufacturing (NAICS 3361)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 51.6 | 48.8 | -5.4% |
| February | 55.7 | 55.2 | -0.9% |
| March | 52.4 | 50.7 | -3.2% |
| April | 57.7 | 49.8 | -13.7% |
| May | 47.2 | 48.6 | 3.0% |
| June | 43.4 | 47.6 | 9.7% |
| July | 44.2 | | |
| August | 58.1 | | |
| September | 59.5 | | |
| October | 61.9 | | |
| November | 58.8 | | |
| December | 54.6 | | |
| **Year-to-date** | **51.3** | **50.1** | **-2.4%** |

**Table C: Motor Vehicle Body & Trailer Manufacturing (NAICS 3362)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 17.1 | 14.4 | -15.8% |
| February | 17.4 | 18.3 | 5.2% |
| March | 16.6 | 14.1 | -15.1% |
| April | 13.5 | 14.6 | 8.1% |
| May | 12.5 | 19.7 | 57.6% |
| June | 12.0 | 18.6 | 55.0% |
| July | 13.2 | | |
| August | 15.7 | | |
| September | 14.2 | | |
| October | 13.3 | | |
| November | 12.6 | | |
| December | 14.3 | | |
| **Year-to-date** | **14.9** | **16.6** | **11.9%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*

**Table D: Motor Vehicle Parts & Accessories Manufacturing (NAICS 3363**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 68.3 | 63.9 | -6.4% |
| February | 65.1 | 65.4 | 0.5% |
| March | 74.1 | 63.9 | -13.8% |
| April | 72.3 | 57.8 | -20.1% |
| May | 62.9 | 63.9 | 1.6% |
| June | 68.4 | 73.1 | 6.9% |
| July | 73.1 | | |
| August | 72.0 | | |
| September | 79.6 | | |
| October | 74.6 | | |
| November | 72.5 | | |
| December | 71.1 | | |
| **Year-to-date** | **68.5** | **64.7** | **-5.6%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*

*(continued from previous page)*

F) leapt by 42.0% as average employment grew to 23.3 thousand. This sector has declined by an annual average rate of 1.4% over the last five years. Double-digit gains were posted in all six months led by February (+53.0%), April (+52.6%), June (+49.7%), March (+48.9%), and May (+38.4%).

First half employment in Motor Vehicles, Parts and Accessories, Wholesale (Table G) inched up slightly by 1.3% crawling to an average of 27.7 thousand workers, compared to 27.3 thousand during the same period in 2009. The average annual rate of growth has fallen to -3.8% over the last five years. Employment fell in the first three months while large double-digit gains were evident for June (+37.7%) and May (+33.6%).

Automobile Dealers (Table H) continues to be the largest sector in the Canadian auto industry led by an 11.3% risel in employment. An average of 150.2 thousand workers were employed in the first half of 2010. Monthly gains were posted in all of the first six months. Significant growth was recorded in June (+25.3%), May (+11.9%), and April (+10.7%).

Automotive Parts and Accessories Stores (Table I) average employment dropped 0.3% by the end of June reaching 38.8 thousand. Year-over-year gains were posted in March (+22.5%) and April (+0.7%). Reductions were evident in the remaining months. This sector has grown by an annual average rate of 3.1% over the last five years.

Employment in the Gasoline Service Stations sector (Table J) fell 8.4% as employment averaged 64.6 thousand in the first half of 2010. Year-over-year declines occurred in all of the first six months led by May (-20.2%), March (-10.6%), and February (-10.5%). The average annual rate of growth for this sector over the past five years is -4.0%.

*(continued on next page)*

## Employment by Month in Thousands

**Table E: Highway, Street and Bridge Construction (NAICS 2373)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 56.4 | 45.3 | -19.7% |
| February | 49.2 | 42.5 | -13.6% |
| March | 49.3 | 44.6 | -9.5% |
| April | 52.7 | 57.2 | 8.5% |
| May | 68.0 | 77.5 | 14.0% |
| June | 73.2 | 93.7 | 28.0% |
| July | 81.5 | | |
| August | 79.9 | | |
| September | 89.5 | | |
| October | 88.0 | | |
| November | 81.0 | | |
| December | 62.6 | | |
| **Year-to-date** | **58.1** | **60.1** | **3.4%** |

**Table F: Motor Vehicles, Wholesale (NAICS 4151)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 18.7 | 21.5 | 15.0% |
| February | 16.6 | 25.4 | 53.0% |
| March | 17.6 | 26.2 | 48.9% |
| April | 13.7 | 20.9 | 52.6% |
| May | 16.4 | 22.7 | 38.4% |
| June | 15.5 | 23.2 | 49.7% |
| July | 17.5 | | |
| August | 16.7 | | |
| September | 13.6 | | |
| October | 19.0 | | |
| November | 20.0 | | |
| December | 19.5 | | |
| **Year-to-date** | **16.4** | **23.3** | **42.0%** |

**Table G: Motor Vehicles, Parts & Accessories, Wholesale (NAICS 4152)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 32.5 | 28.4 | -12.6% |
| February | 30.9 | 20.5 | -33.7% |
| March | 25.9 | 24.9 | -3.9% |
| April | 25.9 | 26.4 | 1.9% |
| May | 27.1 | 36.2 | 33.6% |
| June | 21.5 | 29.6 | 37.7% |
| July | 24.2 | | |
| August | 30.0 | | |
| September | 32.0 | | |
| October | 31.2 | | |
| November | 27.0 | | |
| December | 25.6 | | |
| **Year-to-date** | **27.3** | **27.7** | **1.3%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*

**Table H: Automobile Dealers (NAICS 4411)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 135.7 | 142.2 | 4.8% |
| February | 129.9 | 138.6 | 6.7% |
| March | 123.2 | 133.1 | 8.0% |
| April | 138.7 | 153.5 | 10.7% |
| May | 146.8 | 164.2 | 11.9% |
| June | 135.1 | 169.3 | 25.3% |
| July | 140.7 | | |
| August | 148.4 | | |
| September | 144.3 | | |
| October | 137.8 | | |
| November | 138.5 | | |
| December | 137.8 | | |
| **Year-to-date** | **134.9** | **150.2** | **11.3%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*



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(continued from previous page)

By the conclusion of June, average employment for Other General Merchandise Stores (Table K) grew by 3.7%, falling to 130.0 thousand workers. Year-over-year growth was recorded in five of the six months led by April (+10.4%) and May (+6.8%).

Automotive Equipment Rental and Leasing (Table L) secured the highest year-over-year decline in the automotive industry at the end of the first half of 2010, cutting average employment by 27.9%. Deep double-digit declines were evident in all six months led by March (-48.3%), January (+35.0%), and February (+30.9%).

Employment in the Automotive Repair & Maintenance sector (Table M) dipped 1.0% versus the previous year as an average of 148.6 thousand workers were employed between January and June. Year-over-year gains were posted in June (+2.7%), February (+1.8%), and March (+0.8%).

Metalworking Machinery Manufacturing (Table N) recorded a decrease in employment as the workforce in this sector fell from 15.7 thousand workers a year prior to 14.0 thousand workers. Reductions were made in five of the six months.

DAR

## Employment by Month in Thousands

**Table I: Automotive Parts & Accessories Stores (NAICS 4413)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 37.3 | 35.5 | -4.8% |
| February | 38.2 | 37.0 | -3.1% |
| March | 35.5 | 43.5 | 22.5% |
| April | 40.3 | 40.6 | 0.7% |
| May | 39.7 | 36.6 | -7.8% |
| June | 42.3 | 39.5 | -6.6% |
| July | 44.3 | | |
| August | 40.4 | | |
| September | 41.2 | | |
| October | 35.8 | | |
| November | 40.7 | | |
| December | 35.1 | | |
| **Year-to-date** | **38.9** | **38.8** | **-0.3%** |

**Table J: Gasoline Service Stations (NAICS 4471)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 76.2 | 73.9 | -3.0% |
| February | 81.2 | 72.7 | -10.5% |
| March | 74.3 | 66.4 | -10.6% |
| April | 69.1 | 66.2 | -4.2% |
| May | 67.2 | 53.6 | -20.2% |
| June | 55.0 | 54.8 | -0.4% |
| July | 58.8 | | |
| August | 59.5 | | |
| September | 69.6 | | |
| October | 74.2 | | |
| November | 74.7 | | |
| December | 78.0 | | |
| **Year-to-date** | **70.5** | **64.6** | **-8.4%** |

**Table K: Other General Merchandise Stores (NAICS 4529)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 124.8 | 127.5 | 2.2% |
| February | 126.6 | 123.2 | -2.7% |
| March | 124.5 | 129.7 | 4.2% |
| April | 118.1 | 130.4 | 10.4% |
| May | 122.1 | 130.4 | 6.8% |
| June | 135.8 | 138.6 | 2.1% |
| July | 123.6 | | |
| August | 130.9 | | |
| September | 135.3 | | |
| October | 132.5 | | |
| November | 140.1 | | |
| December | 144.6 | | |
| **Year-to-date** | **125.3** | **130.0** | **3.7%** |

**Table L: Automotive Equipment Rental & Leasing (NAICS 5321)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 22.3 | 14.5 | -35.0% |
| February | 21.7 | 15.0 | -30.9% |
| March | 21.1 | 10.9 | -48.3% |
| April | 19.7 | 15.3 | -22.3% |
| May | 19.8 | 16.3 | -17.7% |
| June | 19.5 | 17.5 | -10.3% |
| July | 20.7 | | |
| August | 21.5 | | |
| September | 19.0 | | |
| October | 20.5 | | |
| November | 18.0 | | |
| December | 16.5 | | |
| **Year-to-date** | **20.7** | **14.9** | **-27.9%** |

**Table M: Automotive Repair & Maintenance (NAICS 8111)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 144.0 | 140.9 | -2.2% |
| February | 144.2 | 146.8 | 1.8% |
| March | 147.5 | 148.7 | 0.8% |
| April | 154.8 | 151.7 | -2.0% |
| May | 156.7 | 145.8 | -7.0% |
| June | 153.5 | 157.6 | 2.7% |
| July | 163.8 | | |
| August | 153.8 | | |
| September | 155.1 | | |
| October | 161.7 | | |
| November | 158.5 | | |
| December | 147.9 | | |
| **Year-to-date** | **150.1** | **148.6** | **-1.0%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*

**Table N: Metalworking Machinery Manufacturing (NAICS 3335)**

| Month | 2009 | 2010 | 2010/ 2009 |
|---|---|---|---|
| January | 16.8 | 15.9 | -5.4% |
| February | 15.0 | 14.4 | -4.0% |
| March | 14.5 | 14.9 | 2.8% |
| April | 19.5 | 14.6 | -25.1% |
| May | 15.4 | 13.0 | -15.6% |
| June | 13.0 | 11.3 | -13.1% |
| July | 17.1 | | |
| August | 15.2 | | |
| September | 16.4 | | |
| October | 12.0 | | |
| November | 16.5 | | |
| December | 14.6 | | |
| **Year-to-date** | **15.7** | **14.0** | **-10.7%** |

*Source: Statistics Canada Labour Force Survey and DesRosiers Automotive Consultants Inc.*

## New and Used Vehicle Sales in Canada (000's of units)

| | New Vehicle Sales | Percent New Vehicles | Used Vehicle Sales | Percent Used Vehicles | Total Vehicle Sales | Total Units in Operation | Sales as a Percent Of UIO |
|---|---|---|---|---|---|---|---|
| 2001 | 1,571 | 43.7% | 2,022 | 56.3% | 3,592 | 17,668 | 20.3% |
| 2002 | 1,703 | 44.4% | 2,133 | 55.6% | 3,837 | 17,911 | 21.4% |
| 2003 | 1,594 | 41.6% | 2,238 | 58.4% | 3,832 | 18,207 | 21.0% |
| 2004 | 1,534 | 39.8% | 2,321 | 60.2% | 3,855 | 18,709 | 20.6% |
| 2005 | 1,583 | 40.2% | 2,351 | 59.8% | 3,934 | 18,883 | 20.8% |
| 2006 | 1,615 | 40.7% | 2,356 | 59.3% | 3,971 | 19,365 | 20.5% |
| 2007 | 1,653 | 38.5% | 2,637 | 61.5% | 4,290 | 20,243 | 21.2% |
| 2008 | 1,636 | 38.3% | 2,634 | 61.7% | 4,270 | 21,202 | 20.1% |
| 2009 | 1,461 | 34.4% | 2,790 | 65.6% | 4,250 | 21,608 | 19.6% |
| 2009/2008 | -10.7% | | 5.9% | | -0.5% | 1.9% | |

*Note: 2009 Units in operation is a forecast*

*Source: DesRosiers Automotive Consultants Inc., AIAMC, CVMA and Registration Data © R.L. Polk & Company, 2008 data released 2009.*

## Used Vehicle Sales by Channel (000's of units)

| | New Vehicle Dealer | Independent Used Vehicle Dealer | Private Sale | Total | Total Units in Operation | Sales as a Percent Of UIO |
|---|---|---|---|---|---|---|
| 2001 | 868 | 403 | 751 | 2,022 | 17,668 | 11.4% |
| 2002 | 909 | 418 | 806 | 2,133 | 17,911 | 11.9% |
| 2003 | 899 | 489 | 850 | 2,238 | 18,207 | 12.3% |
| 2004 | 921 | 535 | 866 | 2,321 | 18,709 | 12.4% |
| 2005 | 917 | 577 | 857 | 2,351 | 18,883 | 12.5% |
| 2006 | 918 | 602 | 836 | 2,356 | 19,365 | 12.2% |
| 2007 | 928 | 775 | 934 | 2,637 | 20,243 | 13.0% |
| 2008 | 915 | 825 | 894 | 2,634 | 21,202 | 12.4% |
| 2009 | 887 | 951 | 951 | 2,790 | 21,608 | 12.9% |
| 2009/2008 | -3.0% | 15.2% | 6.4% | 5.9% | 1.9% | |

*Note: 2009 Units in operation is a forecast*

*Source: DesRosiers Automotive Consultants Inc., AIAMC, CVMA and Registration Data © R.L. Polk & Company, 2008 data released 2009.*





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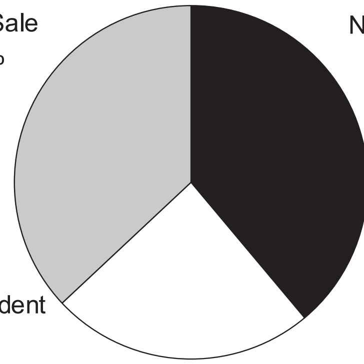
In 2009, approximately 21.6 million light vehicles were travelling on Canada's roads. Combined, new and used vehicle sales for 2009 reached 4.250 million units, equating to a 0.5% decline compared to the previous year. New vehicle sales make up approximately 34.4% of the total sales with dealers pushing 1.461 million units out the door. This is down 10.7% when compared to 2008's total. Used vehicle sales rose 5.9% as approximately 2.790 million units were sold.

The number of used vehicles sold through the new vehicle dealer channel dipped compared to last year's figure by 3.0%. In 2001, new vehicle dealers sold 868 thousand used vehicles. This represented 42.9% of the market during that year. In 2009, 887 thousand used vehicles were sold by new car dealers, the resulting market share falling to 31.8%.

The proportion of used vehicles sold privately in 2001 was 37.2%. By 2009, private sales share fell to 34.1%. Approximately 951 thousand vehicles were sold through this channel, a 6.4% increase versus 2008.

A total of 951 thousand used vehicles were dealt by independents during 2009. This represents an impressive 15.2% increase year-over-year. DAR

## Used Vehicle Sales 2009




## Used Vehicle Sales - Channel Share

| | New Vehicle Dealer | Independent Used Vehicle Dealer | Private Sale | Total |
|---|---|---|---|---|
| 2001 | 42.9% | 19.9% | 37.2% | 100% |
| 2002 | 42.6% | 19.6% | 37.8% | 100% |
| 2003 | 40.2% | 21.9% | 38.0% | 100% |
| 2004 | 39.7% | 23.0% | 37.3% | 100% |
| 2005 | 39.0% | 24.6% | 36.4% | 100% |
| 2006 | 39.0% | 25.5% | 35.5% | 100% |
| 2007 | 35.2% | 29.4% | 35.4% | 100% |
| 2008 | 34.7% | 31.3% | 33.9% | 100% |
| 2009 | 31.8% | 34.1% | 34.1% | 100% |

*Source: DesRosiers Automotive Consultants Inc.*

**Used Vehicle Sales by Channel - $ Millions**

| | New Car Dealer | Independent Used Car Dealer | Private Sale | Total |
|---|---|---|---|---|
| 2000 | $13,397 | $3,933 | $3,164 | $20,495 |
| 2001 | $13,646 | $4,016 | $3,546 | $21,207 |
| 2002 | $14,687 | $4,248 | $3,879 | $22,815 |
| 2003 | $14,902 | $4,979 | $4,100 | $23,981 |
| 2004 | $15,832 | $5,653 | $4,332 | $25,817 |
| 2005 | $15,667 | $6,064 | $4,262 | $25,994 |
| 2006 | $15,508 | $6,293 | $4,145 | $25,945 |
| 2007 | $16,225 | $8,066 | $4,606 | $28,897 |
| 2008 | $15,471 | $8,380 | $4,300 | $28,150 |
| 2009 | $15,642 | $9,696 | $4,591 | $29,930 |
| 2009/2008 | 1.1% | 15.7% | 6.8% | 6.3% |

*Source: DesRosiers Automotive Consultants Inc.*





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# Canadian Used Vehicle Summary

**The Canadian Used Vehicle Market**
New Vehicle Dealers - 2009 (Retail)

| | Average Retail Price | Percent of Retail Sales | Used Retail Total | Used Retail Total ($) | Average Gross Margin (%) | Average Gross Margin ($) | Average Acquisition Cost | Number of Dealers | Retail Sales per Dealer ($) |
|---|---|---|---|---|---|---|---|---|---|
| ***1-5 Year Old*** | | | | | | | | | |
| British Columbia | $18,377 | 54% | 79,753 | $1,465,603,561 | 17% | $3,124 | $15,253 | 405 | $3,618,774 |
| Prairies | $18,524 | 67% | 133,551 | $2,473,885,886 | 21% | $3,890 | $14,634 | 643 | $3,847,412 |
| Ontario | $19,053 | 67% | 190,765 | $3,634,674,539 | 15% | $2,858 | $16,195 | 1,188 | $3,059,490 |
| Quebec | $17,358 | 65% | 125,070 | $2,170,918,348 | 14% | $2,430 | $14,928 | 859 | $2,527,262 |
| Atlantic | $16,348 | 67% | 42,344 | $692,242,591 | 12% | $1,962 | $14,386 | 316 | $2,190,641 |
| **Canada** | **$18,264** | **64%** | **571,483** | **$10,437,324,926** | **16%** | **$2,976** | **$15,287** | **3,411** | **$3,059,902** |
| ***6-10 Year Old*** | | | | | | | | | |
| British Columbia | $11,216 | 29% | 42,830 | $480,396,434 | 18% | $2,019 | $9,197 | 405 | $1,186,164 |
| Prairies | $10,464 | 27% | 53,819 | $563,155,474 | 21% | $2,197 | $8,266 | 643 | $875,825 |
| Ontario | $10,570 | 20% | 56,945 | $601,901,504 | 17% | $1,797 | $8,773 | 1,188 | $506,651 |
| Quebec | $8,676 | 21% | 40,407 | $350,578,892 | 13% | $1,150 | $7,527 | 859 | $408,124 |
| Atlantic | $7,732 | 24% | 15,168 | $117,275,053 | 14% | $1,082 | $6,649 | 316 | $371,124 |
| **Canada** | **$10,103** | **24%** | **209,169** | **$2,113,307,357** | **18%** | **$1,769** | **$8,335** | **3,411** | **$619,557** |
| ***11+ Year Old*** | | | | | | | | | |
| British Columbia | $5,306 | 17% | 25,107 | $133,210,703 | 24% | $1,273 | $4,032 | 405 | $328,915 |
| Prairies | $4,607 | 6% | 11,960 | $55,098,686 | 25% | $1,152 | $3,455 | 643 | $85,690 |
| Ontario | $5,411 | 13% | 37,014 | $200,272,993 | 23% | $1,244 | $4,166 | 1,188 | $168,580 |
| Quebec | $3,766 | 14% | 26,938 | $101,462,628 | 25% | $928 | $2,838 | 859 | $118,117 |
| Atlantic | $3,577 | 9% | 5,688 | $20,348,127 | 22% | $787 | $2,790 | 316 | $64,393 |
| **Canada** | **$4,783** | **12%** | **106,707** | **$510,393,138** | **24%** | **$1,137** | **$3,646** | **3,411** | **$149,632** |
| ***Regional Totals*** | | | | | | | | | |
| British Columbia | $14,078 | | 147,690 | $2,079,210,698 | | | | | $5,133,854 |
| Prairies | $15,513 | | 199,330 | $3,092,140,046 | | | | | $4,808,927 |
| Ontario | $15,583 | | 284,724 | $4,436,849,036 | | | | | $3,734,721 |
| Quebec | $13,632 | | 192,416 | $2,622,959,869 | | | | | $3,053,504 |
| Atlantic | $13,131 | | 63,200 | $829,865,771 | | | | | $2,626,158 |
| **Canada** | **$14,719** | | **887,360** | **$13,061,025,420** | | | | | **$3,829,090** |

*Source: DesRosiers Automotive Consultants Inc.*



**Summary of the Used Vehicle Export Market in Canada**

| Year | U.S. Registered Importers Volume | Exchange Rate | Used Light Vehicle Sales In Canada | New Light Vehicle Sales In Canada | Total Light Vehicle Sales In Canada | Percentage of Used Light Vehicle Sales | Total Units in Operation | Sales as a Percentage Of UIO |
|---|---|---|---|---|---|---|---|---|
| 2001 | 200,074 | 1.5484 | 2,021,866 | 1,570,629 | 3,592,495 | 56.3% | 17,668 | 20.3% |
| 2002 | 211,797 | 1.5704 | 2,133,421 | 1,703,246 | 3,836,667 | 55.6% | 17,911 | 21.4% |
| 2003 | 96,621 | 1.4015 | 2,238,119 | 1,593,506 | 3,831,625 | 58.4% | 18,207 | 21.0% |
| 2004 | 43,355 | 1.3015 | 2,290,480 | 1,534,415 | 3,824,895 | 59.9% | 18,709 | 20.4% |
| 2005 | 12,503 | 1.2095 | 2,319,876 | 1,583,291 | 3,903,167 | 59.4% | 18,883 | 20.7% |
| 2006 | 9,654 | 1.1341 | 2,324,655 | 1,614,701 | 3,939,356 | 59.0% | 19,365 | 20.3% |
| 2007 | 7,418 | 1.0692 | 2,600,745 | 1,653,362 | 4,254,107 | 61.1% | 20,243 | 21.0% |
| 2008 | 6,318 | 1.0610 | 2,634,308 | 1,635,986 | 4,270,294 | 61.7% | 21,202 | 20.1% |
| 2009 | 10,754 | 1.1192 | 2,789,661 | 1,460,612 | 4,250,273 | 65.6% | 21,675 | 19.6% |

*Note: 2009 Units in Operation is a forecast*

*Source: DesRosiers Automotive Consultants Inc.and Registration Data © R.L. Polk & Company, 2009 data released 2010.*


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