Experian Automotive Briefing
2014 automotive market share and registration trends

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Today’s presentation

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- Questions? Contact us at Auto@experian.com
Session overview

What’s on the Road

- VIO by model year, segment, age and market share
- U.S. light duty vehicles through December 31, 2014
- U.S. medium and heavy duty vehicles through December 31, 2014

Registrations

- Market share & registrations YTD for U.S. and Census Regions
- Manufacturer, brand on model share
- Domestic versus Imports

Marty Miller
Senior Product Manager

Melinda Zabritski
Senior Director
Vehicles in Operation

What’s on the road today?

Light duty vehicles
Medium and heavy duty vehicles
What’s on the road today? Light duty vehicles

Vehicles in operation:
Q4 2013
246.1 million

Out of operation:
11.2 million (4.5%)

VIO additions/deletions: **27.5 million** (11%)  
(out of operation + new sales)

VIO total changes: **66.8 million** (26.6%)  
(used sales + out of operation + new sales)

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Lost 73.9% of all vehicles within 13 MY

Out of Operation

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)

New Sales 16.3M
VIO by model year (in millions)

92.2M vehicles within “sweet spot” (MY2003 – 2009)

28% of VIO MY2010+

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
VIO Sweet Spot by Domestic vs Import

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Percentage of VIO by manufacturer

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>GM</td>
<td>25.6%</td>
</tr>
<tr>
<td>Ford</td>
<td>18.3%</td>
</tr>
<tr>
<td>Toyota</td>
<td>12.9%</td>
</tr>
<tr>
<td>Chrysler</td>
<td>12.4%</td>
</tr>
<tr>
<td>Honda</td>
<td>8.9%</td>
</tr>
<tr>
<td>Nissan</td>
<td>6.0%</td>
</tr>
<tr>
<td>Other</td>
<td>2.8%</td>
</tr>
<tr>
<td>Hyundai</td>
<td>2.5%</td>
</tr>
<tr>
<td>Volkswagen</td>
<td>2.4%</td>
</tr>
<tr>
<td>BMW</td>
<td>1.8%</td>
</tr>
<tr>
<td>Kia</td>
<td>1.7%</td>
</tr>
<tr>
<td>Mazda</td>
<td>1.6%</td>
</tr>
<tr>
<td>Daimler</td>
<td>1.6%</td>
</tr>
<tr>
<td>Subaru</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

Detroit 3 = 56.3%

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
VIO Top 20 segments on the road

Top 20 Vehicle Segment for the United States Market as of Q4 2014 Light Duty VIO

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)

Top 5 Segments = 51.7%
VIO Top 10 models today
Domestic v Import

F150 Ford
Silverado/1500 Chevrolet
Accord Honda
Camry Toyota
Civic Honda
Corolla Toyota
1500 Dodge/Ram
Explorer Ford
Altima Nissan
Grand Cherokee Jeep

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
VIO Top 10 model growth over last 12 months

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
VIO Bottom 10 model decline over last 12 months

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
What type of vehicles may be classified as medium and heavy duty vehicles?

- GVW class 4-8
- Delivery vans
- Buses
- Cement trucks
- Tow trucks
- Landscape trucks
- Motor homes
- Dump trucks
- Tractors

Source: Experian Automotive as of December 31, 2014 (U.S. medium & heavy duty vehicles only)
VIO by model year (in thousands)
Medium and heavy duty vehicles

Source: Experian Automotive as of December 31, 2014 (U.S. medium & heavy duty vehicles only)
VIO Market share of vehicles in operation by make

Medium and heavy duty vehicles

Source: Experian Automotive as of December 31, 2014 (U.S. medium & heavy duty vehicles only)
Vehicle registrations & market share

What metal is moving?
Annual vehicle registrations

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
Census regions

West Region

Midwest Region

South Region

Northeast Region

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Total (new & used) registrations by census region

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
New & used registrations by region (millions)

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 10 segments by new registrations

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top new segment models

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Alternate power registrations

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 10 alternate power models

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Winners and losers by year-over-year new registration change

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 5 new segments by region

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
New import versus domestics

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Import versus domestic new registrations and market share by region (millions)

Northeast Region
- 2013: 60.4%
- 2014: 59.4%

Midwest Region
- 2013: 37.9%
- 2014: 37.8%

South Region
- 2013: 52.0%
- 2014: 52.4%

West Region
- 2013: 61.5%
- 2014: 61.6%

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Manufacturer market share (ranking based on 2014 share)

Who is down (bps)?
- Ford -102
- Honda -44
- VW -30
- Hyundai/GM -15

Who is up (bps)?
- FCA US 121
- Subaru 38
- Nissan 35
- Toyota 9
- Kia 3
- Others 1

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Manufacturer market share: Top “others”

Who is up (bps)?
- Mitsubishi 8
- Mazda 4
- BMW 3
- Porsche 2

Who is down (bps)?
- Volvo -6
- Tesla -2
- Tata -2

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
Top 5 new manufacturer market share by region

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
Top 5 manufacturer market share gains (basis points) by region

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 10 new registrations by manufacturer

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top manufacturer gains and losses by registration count

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top manufacturer* gains and losses by percentage of volume change

-20% -10% 0% 10% 20% 30%

Mitsubishi
Subaru
FCA US
Porsche
Nissan
Ford
VW
Volvo
Tesla

*Average minimum of 1k/month registrations
Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 10 new registrations by brand

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Year-over-year brand gains and losses by registration count

-100,000 -50,000 0 50,000 100,000 150,000 200,000 250,000

Jeep
Nissan
Toyota
Chevrolet
Ram
Cadillac
Scion
Dodge
Ford
Volkswagen

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 10 models

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
F150 versus Camry

Source: Experian Automotive as of December 31, 2014  (U.S. light duty vehicles only)
New registrations by cylinder

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top model year-over-year* gains and losses by registration count

*Average minimum of 1k/month registrations current and prior year

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 5 new models by region

Northwest Region

- CR-V
- Accord
- RAV4
- Civic
- Camry

Southeast Region

- F150
- Camry
- Altima
- Silverado
- Corolla

Midwest Region

- F150
- Escape
- Silverado
- Fusion
- Equinox

West Region

- Camry
- Accord
- Civic
- Corolla
- F150

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
Top 5 new models gains* by region

**Northeast Region**
- Cherokee
- RAV4
- Forester
- CR-V
- 1500

**South Region**
- Cherokee
- Sentra
- Versa Note
- Corolla
- RAV4

**Midwest Region**
- Cherokee
- 1500
- Silverado 1500
- CR-V
- Cruze

**West Region**
- Camry
- Sentra
- Accord
- Corolla
- RAV4

*Avg 100/month in current and prior year

Source: Experian Automotive as of December 31, 2014 (U.S. light duty vehicles only)
In summary

- Light duty market size grows by 5M vehicles over the last 12 months as new sales continue to increase.
- The aftermarket sweet spot continues to decline in volume and is starting to shift toward a dominant share of import vehicles.
- While total registrations is up, growth rate is slightly lower than prior year.
- CUV-Entry Level continues to lead as number one segment with Full-Sized Pickups remaining in second position. F150 remains in the lead as the number one model.
- GM continues to lead the market as the number one manufacturer while Ford maintains its number one brand position. FCA US picks up the most manufacturer incremental registrations.
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