An Overview of Light Vehicle Retailing in the U.S.

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Percentage Increase/Decrease in U.S. New Light-Vehicle Sales by Manufacturer, full-year 2004

Source: Ward’s Automotive
Percentage Increase/Decrease in U.S. New Light-Vehicle Sales by Manufacturer YTD April 2005

Source: Ward’s Automotive
Crossover Utility Vehicles and Large Cars Led Sales in 2004

Source: Ward’s Automotive
Large Cars and Crossover Utility Vehicles (CUVs) Lead Sales Growth
YTD April 2005

Source: Ward’s Automotive
Crossover Utility Vehicle Unit Sales 2003 and 2004

Source: Ward’s Automotive
Crossover Utility Vehicle Unit Sales
YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
% Change in Crossover Utility Vehicle Unit Sales
YTD April 2004 to YTD April 2005

Source: Ward’s Automotive
Best Selling Trucks by Unit Sales
YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
% Change in Best Selling Truck Unit Sales, YTD April 2004 to YTD April 2005

Source: Ward’s Automotive
Volume of Large Regular Car Sales, YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
Volume of Middle Cross/Utility Vehicle Sales, YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
Volume of Middle Luxury Cross/Utility Vehicle Sales
YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
Volume of Large Luxury Sport/Utility Vehicle Sales
YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
Volume of Large Pickup Sales, YTD April 2004 and YTD April 2005

Source: Ward’s Automotive
Percent Change for Large Pickup Sales
YTD April 2005 over YTD April 2004

Source: Ward’s Automotive
Total Sales, Big 3 versus "Big 3 Asia-Badge"
Full-Size Pickup Sales, 1995-2005

Source: Ward’s Automotive
Automakers increased incentives to boost sales, but decreased average incentives late last year.
Median Vehicle Age

Median vehicle age in years

Source: RL Polk
U.S. Household Net Financial Assets

Net Household Wealth = Total Financial Assets - Total Liabilities
(excludes home equity but includes all mortgage debt)

Source: Federal Reserve Flow of Funds Data, Z.1., Table L.10.
Consumer Confidence
Conference Board’s Consumer Confidence Index

Source: Commerce Dept, Conference Board
NADA Dealer Optimism Index remains at Relatively Strong Levels

Source: NADA Industry Analysis
Number of Dealerships
Modest, Orderly Consolidation Since 1970

Source: NADA Industry Analysis