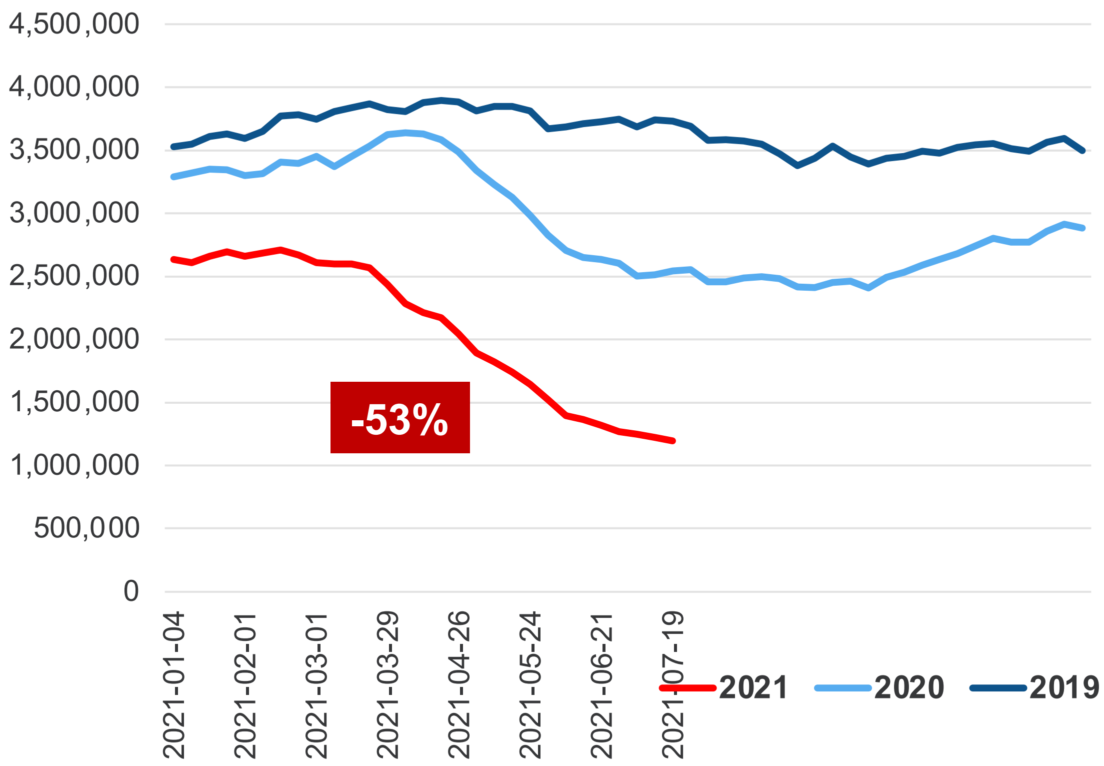
NEW-VEHICLE INVENTORY

AS OF JULY 19, 2021

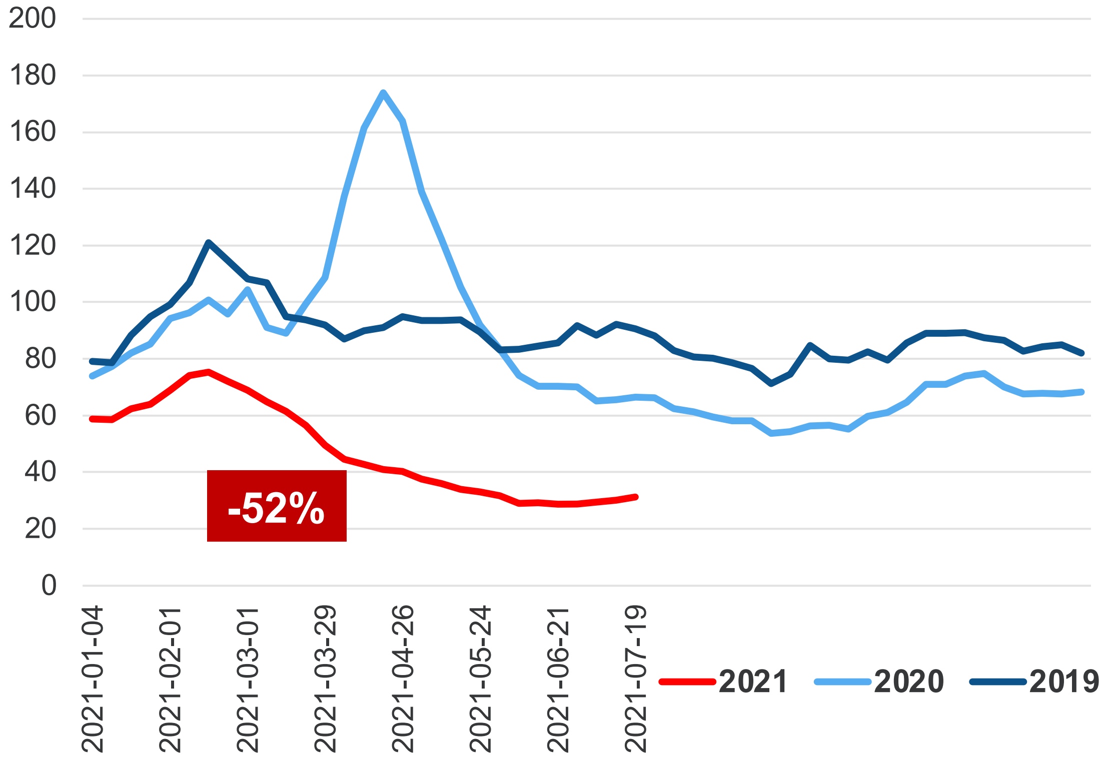
NEW-VEHICLE INVENTORY DAYS OF SUPPLY STABILIZING

Supply situation worsening – 1.3 million fewer vehicles than 2020, and over 2.5 million lower than 2019

Available Supply weekly

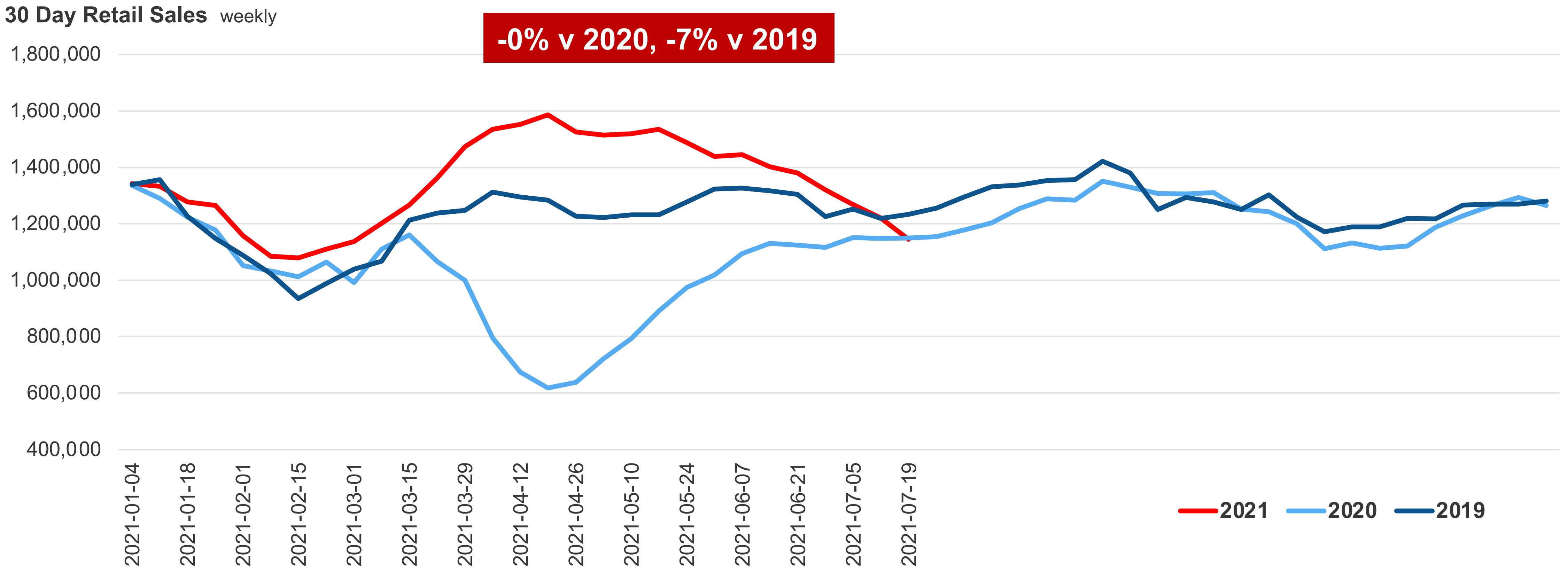


Days of Supply weekly



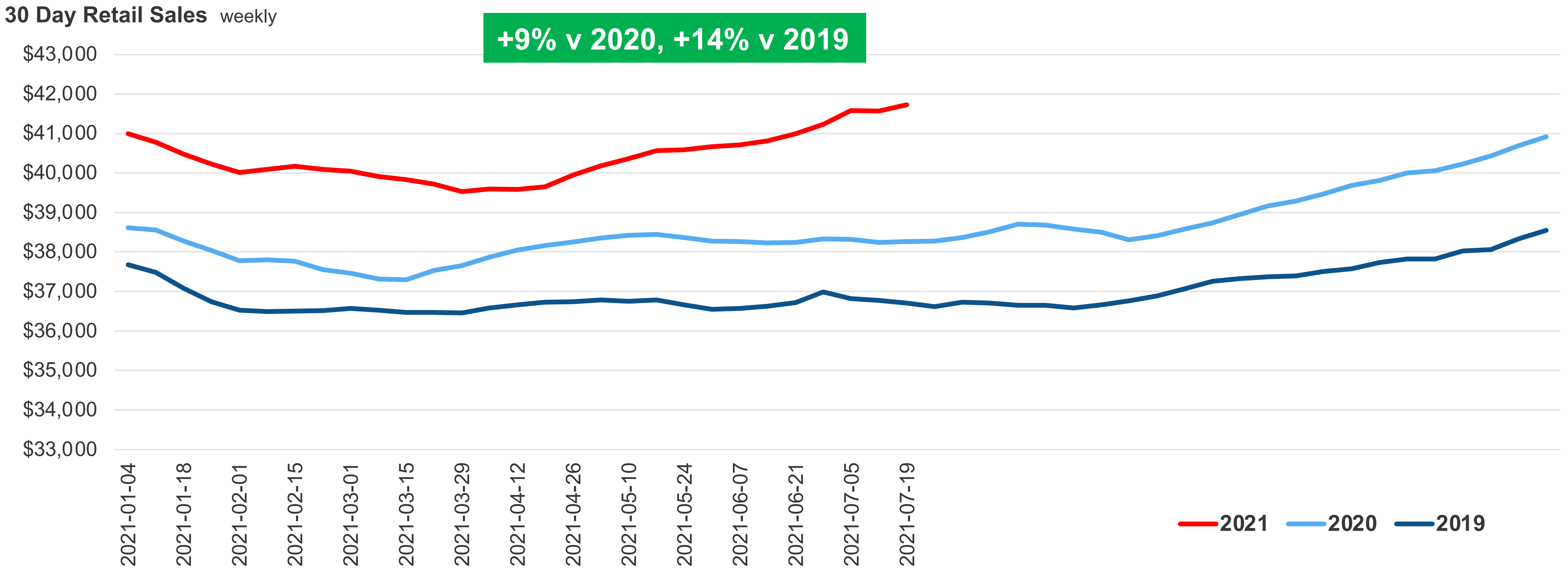
NEW-VEHICLE ROLLING SALES NOW BELOW 2019 PACE AND SLOWING

Consumer interest remains robust as economic recovery continues but lack of product limiting sales



NEW-VEHICLE LISTING PRICE ELEVATED AND LIKELY TO GO HIGHER

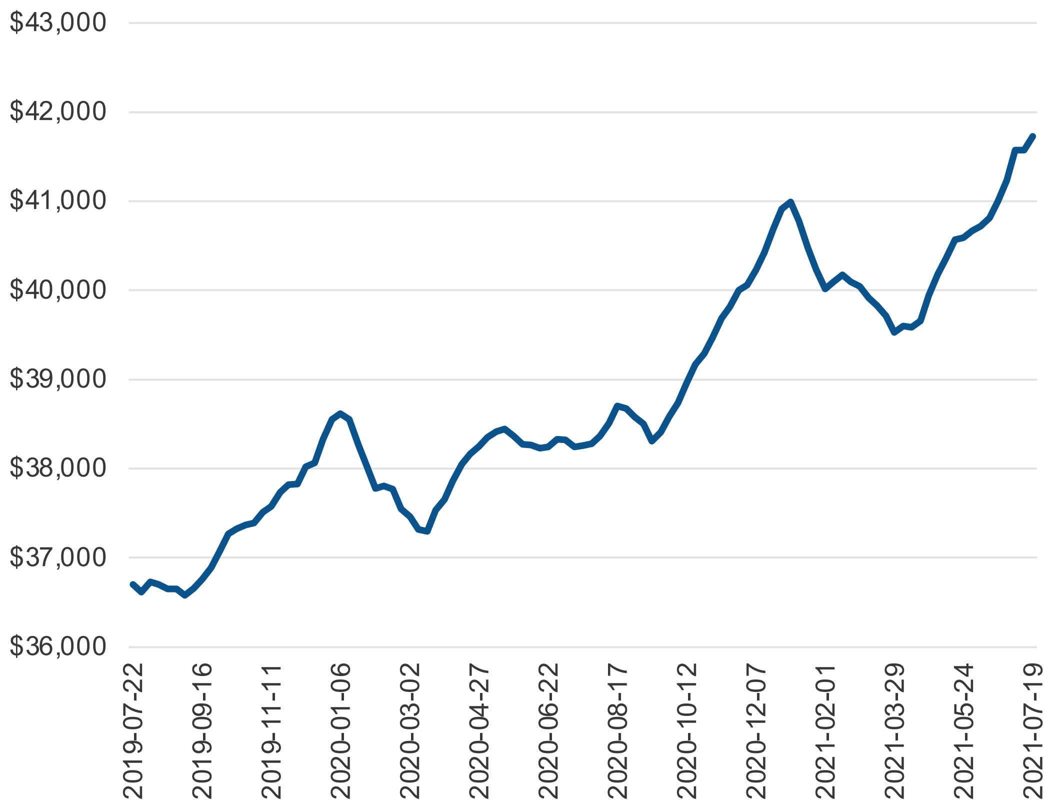
Price trends higher through the year as next year product introductions, but now shifted on to a higher level



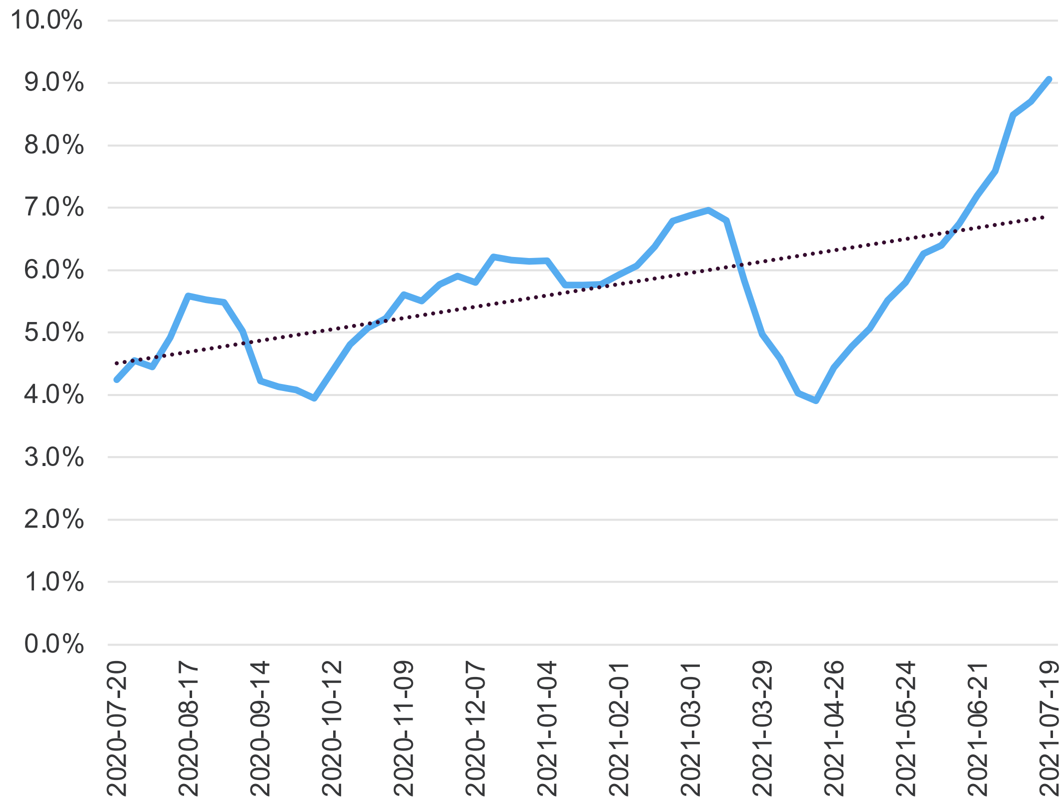
AVERAGE LISTING PRICE AT A NEW PEAK – APPROACHING $42,000

Prices still growing, now 9+% rate, keeping affordability a major headwind

Average Listing Price weekly

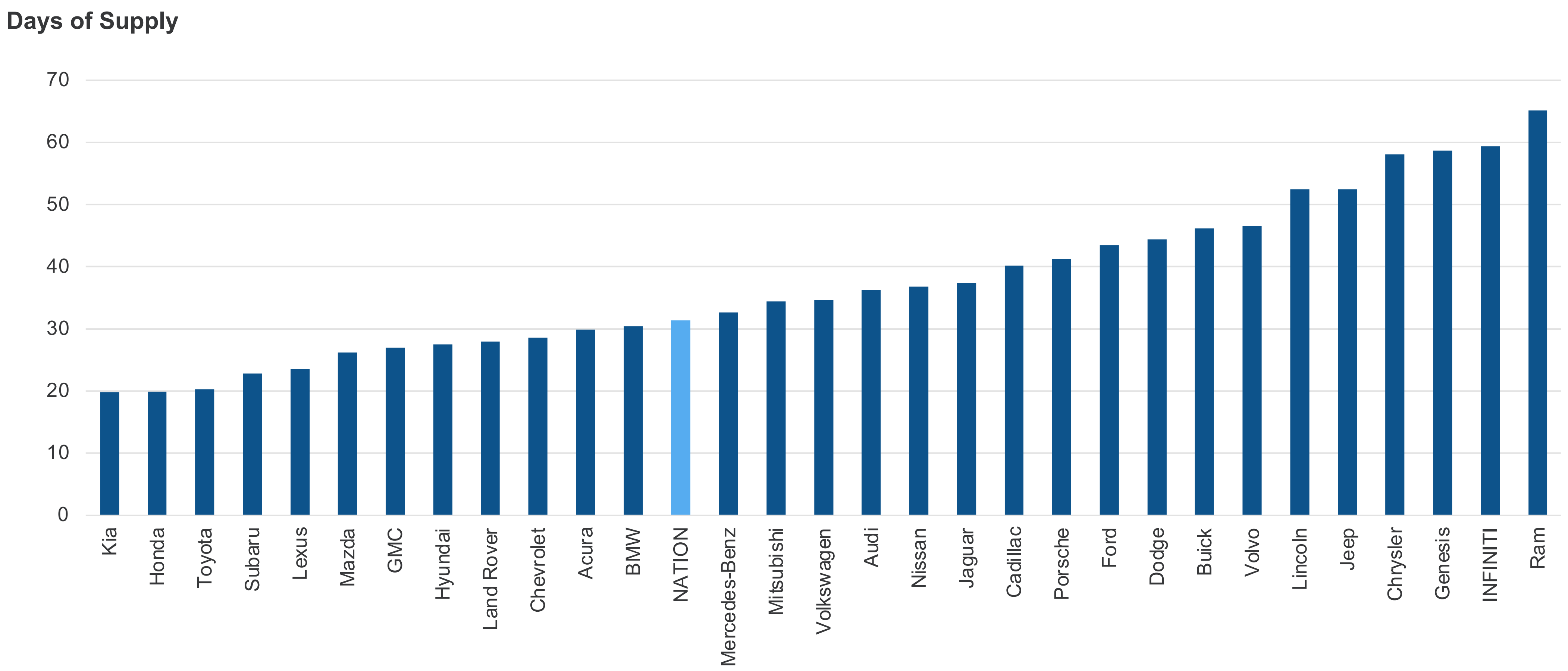


YOY Change weekly, last 12 months



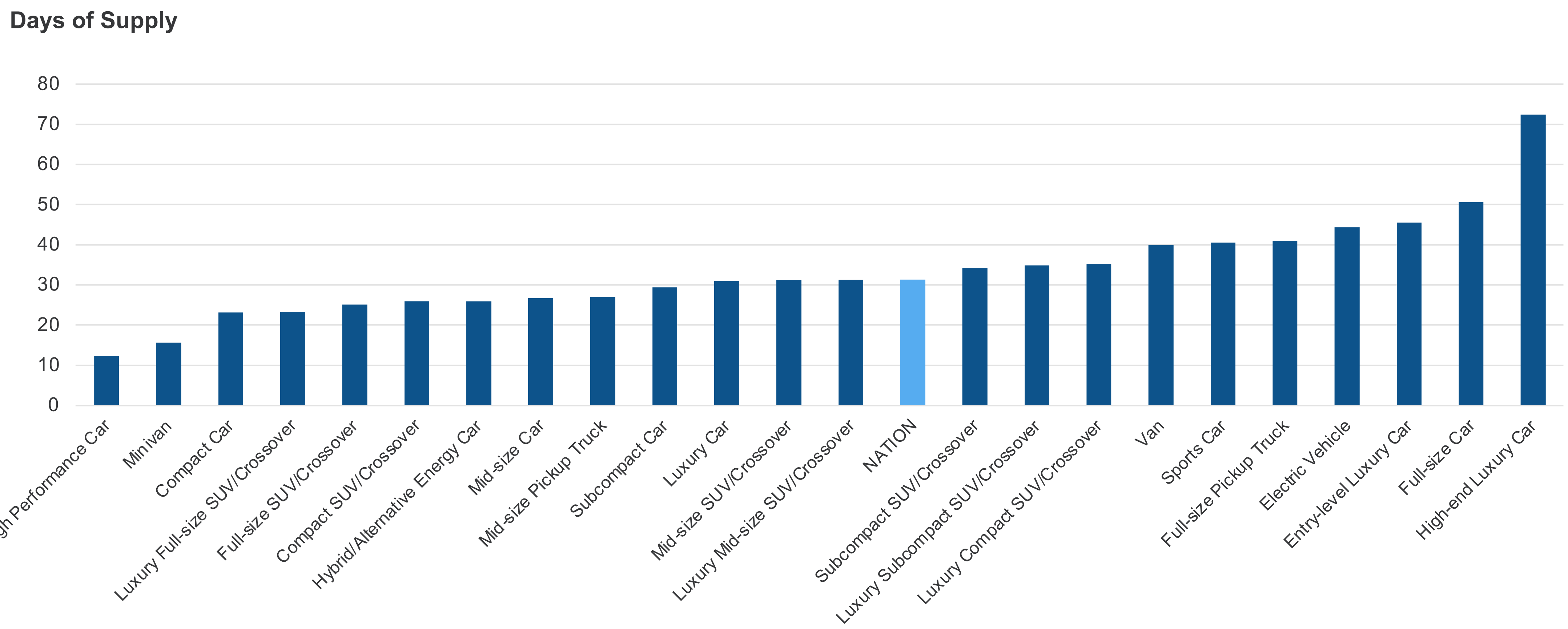
BRAND INVENTORY SUPPLY SITUATION VARIES SIGNIFICANTLY

Toyota, Kia, Honda have extremely tight inventories



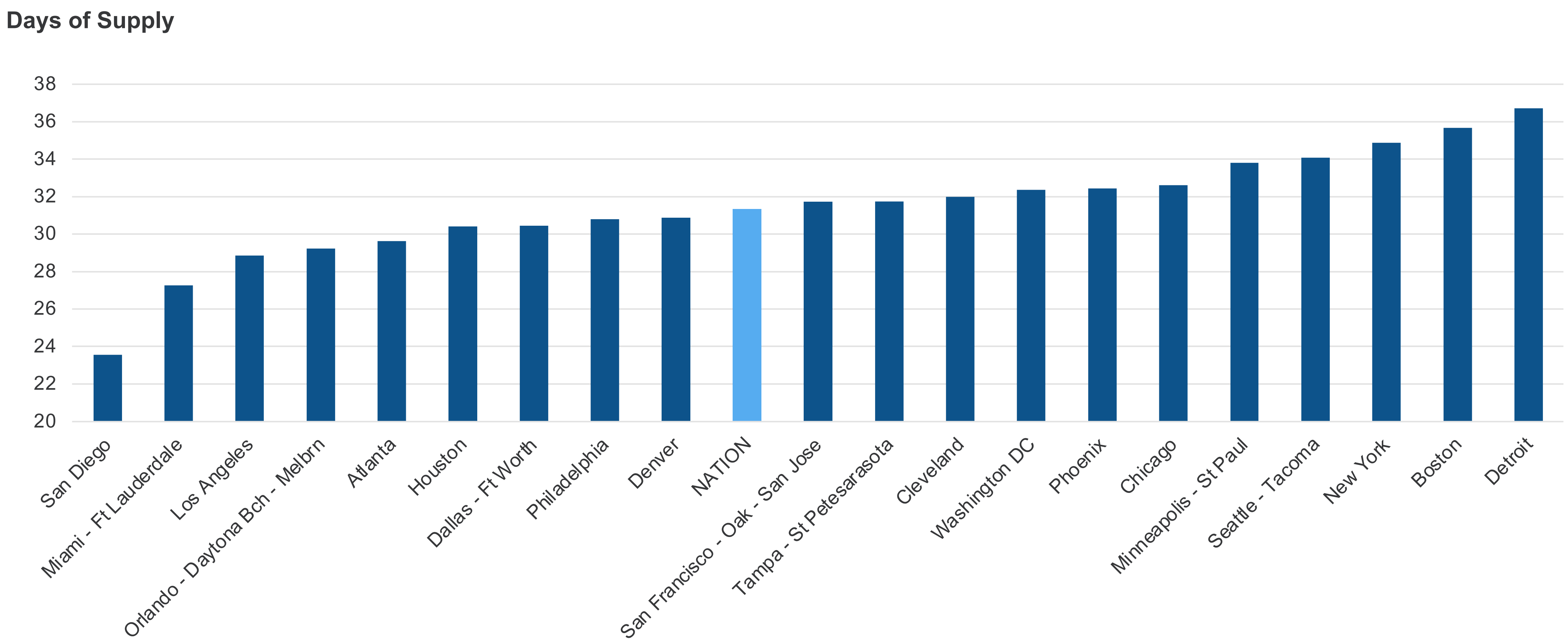
SEGMENT INVENTORY MINIVAN, BIG SUVS TIGHT, CARS NOT SO MUCH

Some segments, like large pickups, rising as sales decline rapidly



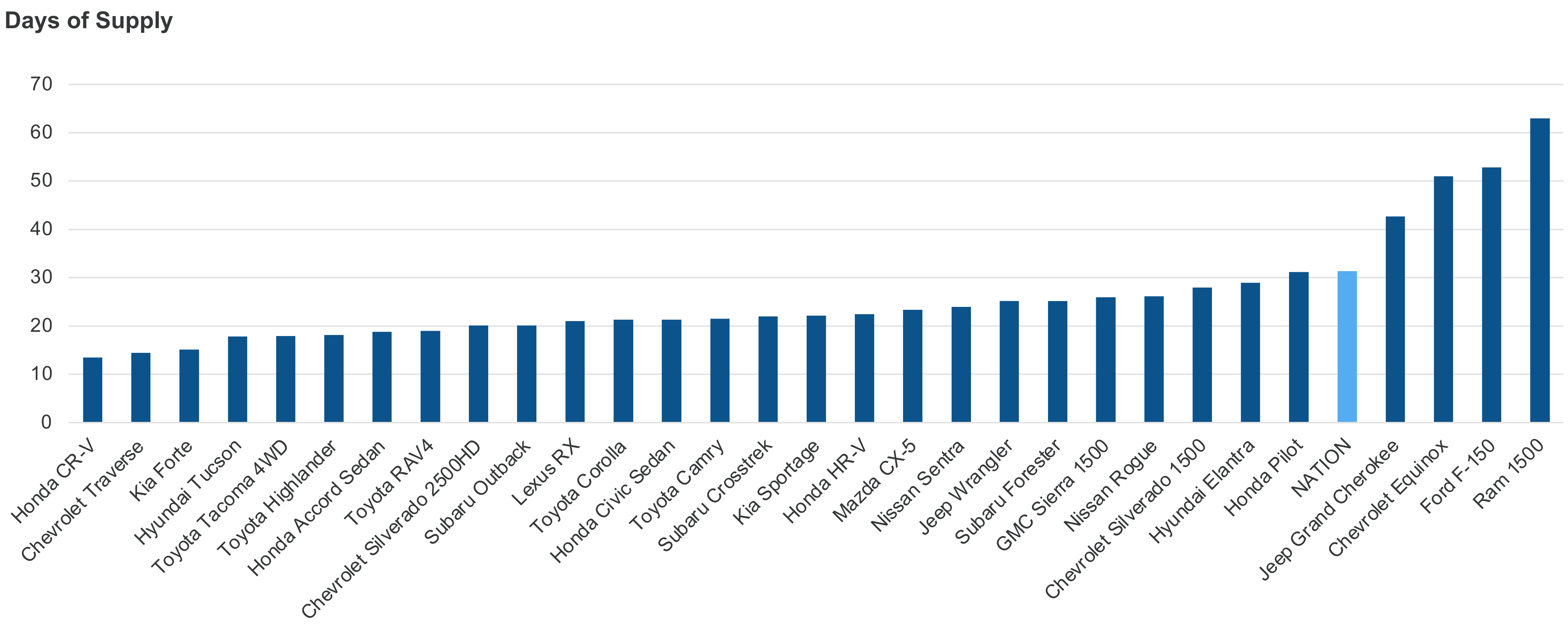
TOP 20 DMA INVENTORY FLORIDA - CALI TIGHT, NORTHEAST LESS SO

All large volume markets have tighter supply, but some more than others



TOP 30 NAMEPLATES INVENTORY SOME ARE EXTREMELY TIGHT

Toyota's big sellers hard to get – Truck sales declining, slowing sales, and lifting Days of Supply



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