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2.3. Buses market 39
2.4. Trucks market 55
1. PREFACE

The methodology, used in this report is mainly relying on the following steps:

- **Gathering primary and secondary data** from AMIC Egypt members.
- **Validating missing data and cross checking of data** from different sources including Customs, JAMA, Ministry of Interior, etc..
- **Processing, Analyzing and presenting data** in a useful way to AMIC Egypt members.
- **Gathering Macro Economics and Automotive industry news** from: Newspapers and Magazines, Internet, published material, etc... and **presenting** them in a simple way.

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This report was prepared and developed by:
**Integrated Management Consultancy – IMC**, which is a Management Consultancy Office with specific areas of strengths in:
- Marketing – Specially Business to Business,
- Human Resources – Specifically in Learning Organizations,
- Six Sigma Methodology - Manufacturing.
- SME Upgrading and Training - World bank / Business Edge Partner
- On the Job Coaching.

---

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2. LOCAL INDUSTRY ANALYSIS
2.1. TOTAL AUTOMOTIVE MARKET

Total Market split December 08 – December 09 in volume

<table>
<thead>
<tr>
<th></th>
<th>Dec 08</th>
<th>Dec 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger Cars</td>
<td>9,910</td>
<td>15,473</td>
</tr>
<tr>
<td>Buses</td>
<td>1,583</td>
<td>1,337</td>
</tr>
<tr>
<td>Trucks</td>
<td>3,952</td>
<td>3,604</td>
</tr>
<tr>
<td><strong>Total Market Volume</strong></td>
<td><strong>15,445</strong></td>
<td><strong>20,414</strong></td>
</tr>
</tbody>
</table>

Total Market volume for the month of December 2009 was higher than December 2008 sales by **32.2% from 15,445 to 20,414 units**.

The Passenger cars segment had a volume increase of **56.1%** in units, when comparing December 09 to December 08; the Buses segment had a volume decrease of **-15.5%**, and the Trucks segment had a volume decrease of **-8.8%**.
Total Market split YTD 08 – YTD 09 in volume

<table>
<thead>
<tr>
<th></th>
<th>YTD 08</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC, 198,800</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>Buses, 17,469</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Trucks, 45,685</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Total Market Volume</strong></td>
<td><strong>261,954</strong></td>
<td><strong>205,521</strong></td>
</tr>
</tbody>
</table>

Passenger Cars 198,800 -20% Passenger Cars 158,926
Buses 17,469 -25% Buses 13,149
Trucks 45,685 -27% Trucks 33,446
Total Market Volume 261,954 -22% Total Market Volume 205,521

Total Market volume for the YTD 2009 was lower than YTD 2008 sales by -22% from 261,954 to 205,521 units.

The Passenger cars segment had a volume decrease of almost -20% in units, when comparing YTD 09 to YTD 08; the Buses segment had a volume decrease of -25%, and the Trucks segment had a volume decrease of -27%.
Total Market December 2009 sales analysis in volume

This chart is developed in order to assist in giving a comparative view of current month results to all directly relevant previous results, which could have impact on future market performance projections and/or demand forecasts.

This chart has been developed consistently for all 3 sectors.

- December 2009 sales are higher than 2009 YTD average sales by 19%.
- December 2009 sales are lower than 2008 YTD average sales by -6%.
- December 2009 sales are lower than 2008 average sales by -6%.
- December 2009 sales are higher than November 2008 sales by 32%.
- December 2009 sales are higher than November 2009 sales by 9%.

Performance in December 2009 is lower than YTD 2008 average, the 2008 average sales, but higher than the 2009 YTD average and the November 2008 sales as well as November 2009 sales.
Total Market YTD 2008 – YTD 2009 by Origin in volume

CKD sales for Year 2009 are lower than Year 2008 by **-23.0%** when comparing YTD 2009 to 2008 results.

As well as, **CBU YTD 2009 sales are lower by -20.3% than 2008.**
The above graph is showing that 2009 is following more or less the same seasonality trends of 2008, with deviations in November and December, with an accumulated YTD decline in units of **-21.5%**.
Total Market CKD seasonality YTD 2008 – YTD 2009 in volume

The above graph is showing that 2009 is following the same seasonality trends of 2008 with an accumulated YTD decline in units of \(-23.0\%\).
The above graph is showing that 2009 is following more or less the same seasonality trends of 2008 with an accumulated YTD decline in units of **-20.3%**.
Total Market by Brand YTD 2008 – YTD 2009 in volume

- **Chevrolet**: YTD 2009 = 57,562, YTD 2008 = 51,092
- **Hyundai**: YTD 2009 = 41,778, YTD 2008 = 51,522
- **Toyota**: YTD 2009 = 28,970, YTD 2008 = 14,845
- **Kia**: YTD 2009 = 14,381, YTD 2008 = 7,859
- **Speranza**: YTD 2009 = 11,988, YTD 2008 = 12,484
- **Nissan**: YTD 2009 = 15,882, YTD 2008 = 11,551
- **Suzuki**: YTD 2009 = 14,144, YTD 2008 = 7,614
- **Renault**: YTD 2009 = 5,651, YTD 2008 = 2,121
- **Mercedes**: YTD 2009 = 4,124, YTD 2008 = 5,108
- **Mitsubishi**: YTD 2009 = 10,938, YTD 2008 = 4,800
- **Others**: YTD 2009 = 36,713, YTD 2008 = 56,348
Total Market by Brand YTD 2008 – YTD 2009 in market share

- **Chevrolet**: 22.0% (YTD 2008), 22.0% (YTD 2009)
- **Hyundai**: 20.3% (YTD 2008), 19.7% (YTD 2009)
- **Toyota**: 11.1% (YTD 2008), 7.2% (YTD 2009)
- **Kia**: 3.0% (YTD 2008), 7.0% (YTD 2009)
- **Speranza**: 5.4% (YTD 2008), 5.8% (YTD 2009)
- **Nissan**: 5.6% (YTD 2008), 6.1% (YTD 2009)
- **Suzuki**: 3.7% (YTD 2008), 5.4% (YTD 2009)
- **Renault**: 0.8% (YTD 2008), 2.7% (YTD 2009)
- **Mercedes**: 1.6% (YTD 2008), 2.5% (YTD 2009)
- **Mitsubishi**: 2.3% (YTD 2008), 4.2% (YTD 2009)
- **Others**: 17.9% (YTD 2008), 21.5% (YTD 2009)
2.2 PASSENGER CARS

PC Market split December 2008 – December 2009 in volume

For the month of December, the overall total PC market increased by 56.1% from 9,910 to 15,473 units.
The overall total PC market dropped by -20% from 198,800 units to 158,926 units.

The main reason of this drop is due to the <= 1.0L and the 1.5L-1.6L segments which have respective decrease of: -72%, -16% over the figures of 2008.
PC Market December 2009 Sales Analysis in volume

- December 2009 sales volume is higher than 2009 YTD avg. sales by **16.8%**
- December 2009 sales volume is lower than 2008 YTD avg. sales by **-6.6%**.
- December 2009 sales volume is lower than 2008 avg. sales by **-6.6%**.
- December 2009 sales volume is higher than December 2008 sales by **56.1%**.
- December 2009 sales volume is higher than November 2009 sales by **5.4%**.
PC Market seasonality YTD 2008 – YTD 2009 in volume

The above Trend analysis graph is showing that for PC; 2009 is following more or less the same seasonality trend of 2008 with an accumulated YTD decline of -20%.
PC Segments YTD08 – YTD09

Less than 1L

1L - 1.3L
PC Segments YTD08 – YTD09 ... Continued

1.3L - 1.5L

<table>
<thead>
<tr>
<th>Month</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>2,858</td>
<td>2,520</td>
</tr>
<tr>
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<tr>
<td>Mar</td>
<td>2,839</td>
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<td>Apr</td>
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<td>1,868</td>
</tr>
<tr>
<td>Dec</td>
<td>1,723</td>
<td></td>
</tr>
</tbody>
</table>

1.5L - 1.6L

<table>
<thead>
<tr>
<th>Month</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Feb</td>
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<tr>
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<td>10,902</td>
</tr>
<tr>
<td>Dec</td>
<td>10,902</td>
<td>5,576</td>
</tr>
</tbody>
</table>

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PC Segments YTD08 – YTD09 ... Continued
PC Segments YTD08 – YTD09 ... Continued

![Graph showing PC segments YTD08 to YTD09](image-url)

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AMIC Egypt
Email: AMICEgypt@link.net
PC Segments YTD08 – YTD09 ... Continued

SUV less than 2L

Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec
--- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | ---
412 | 490 | 461 | 449 | 465 | 519 | 807 | 885 | 650 | 568 | 791 | 521
345 | 360 | 404 | 438 | 405 | 384 | 349 | 432 | 505 | 547 | 476 |

SUV more than 2L

Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec
--- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | ---
501 | 536 | 620 | 591 | 622 | 668 | 607 | 547 | 543 | 460 | 436 | 531
454 | 440 | 596 | 361 | 331 | 411 | 493 | 498 | 351 | 435 | 436 |
PC Market split by Origin YTD 2008 – YTD 2009 in volume

CKD decreased in volume by -22.3%, and CBU decreased by -18.6%.
PC CKD Market seasonality YTD 2008 – YTD 2009 in volume

The above Trend analysis graph is showing that for PC; 2009 is following the same seasonality trends of 2008 but with an accumulated YTD decline of **-22.3%**.
The above Trend analysis graph is showing that for PC; 2009 is following more or less the same seasonality trends of 2008 but with an accumulated YTD decline of **-18.6%**.
PC Market split by Brand Origin YTD 2008 – YTD 2009 in volume

- European increased by 7.5%.
- Japanese decreased by -51.1%.
- South Korean decreased by -19.8%.
- Turkish dropped by -96.4%.
- US increased by 10.4%.
- Asian decreased by -22.9%.
- Chinese increased by 0.2%.
PC Market by Brand YTD 08 – YTD 09 in volume

- HYUNDAI: 41,418 (YTD 09), 50,312 (YTD 08)
- Chevrolet: 26,700 (YTD 09), 30,044 (YTD 08)
- KIA: 14,381 (YTD 09), 7,899 (YTD 08)
- Speranza: 12,994 (YTD 09), 11,988 (YTD 08)
- Nissan: 12,185 (YTD 09), 8,189 (YTD 08)
- TOYOTA: 15,786 (YTD 09), 6,964 (YTD 08)
- RENAULT: 5,610 (YTD 09), 2,075 (YTD 08)
- MERCEDES: 3,628 (YTD 09), 3,024 (YTD 08)
- VW: 4,211 (YTD 09), 3,628 (YTD 08)
- SKODA: 3,582 (YTD 09), 1,540 (YTD 08)
- MITSUBISHI: 8,203 (YTD 09), 2,951 (YTD 08)
- DAIHATSU: 3,443 (YTD 09), 2,871 (YTD 08)
- Proton: 2,649 (YTD 09), 2,603 (YTD 08)
- Honda: 4,474 (YTD 09), 2,576 (YTD 08)
- BMW: 2,448 (YTD 09), 2,402 (YTD 08)
- Suzuki: 9,200 (YTD 09), 2,373 (YTD 08)
- BRILLIANCE: 1,906 (YTD 09), 1,655 (YTD 08)
- OPEL: 1,290 (YTD 09), 1,106 (YTD 08)
- FIAT: 1,010 (YTD 09), 1,260 (YTD 08)
- DAEWOO: 12,145 (YTD 09), 722 (YTD 08)
- TOFAS: 8,597 (YTD 09), 2,765 (YTD 08)
- Others: 11,534 (YTD 09), 500 (YTD 08)
PC Market by Brand YTD 08 – YTD 09 in Market Share

- HYUNDAI: 26.06% (YTD 09), 15% (YTD 08)
- Chevrolet: 18.90% (YTD 09), 15% (YTD 08)
- KIA: 10.05% (YTD 09), 7% (YTD 08)
- Speranaza: 7.54% (YTD 09), 7% (YTD 08)
- Nissan: 5.15% (YTD 09), 7% (YTD 08)
- TOYOTA: 4.38% (YTD 09), 9% (YTD 08)
- RENAULT: 3.53% (YTD 09), 1% (YTD 08)
- MERCEDES: 2.34% (YTD 09), 2% (YTD 08)
- VW: 2.28% (YTD 09), 2% (YTD 08)
- SKODA: 2.25% (YTD 09), 1% (YTD 08)
- MITSUBISHI: 1.86% (YTD 09), 5% (YTD 08)
- DAIHATSU: 1.81% (YTD 09), 2% (YTD 08)
- Proton: 1.64% (YTD 09), 2% (YTD 08)
- Honda: 1.62% (YTD 09), 3% (YTD 08)
- BMW: 1.51% (YTD 09), 3% (YTD 08)
- Suzuki: 1.49% (YTD 09), 5% (YTD 08)
- BRILLIANCE: 1.04% (YTD 09), 1% (YTD 08)
- OPEL: 0.81% (YTD 09), 2% (YTD 08)
- FIAT: 0.79% (YTD 09), 1% (YTD 08)
- DAEWOO: 0.45% (YTD 09), 7% (YTD 08)
- TOFAS: 0.06% (YTD 09), 2% (YTD 08)
- Others: 5.41% (YTD 09), 7% (YTD 08)
### PC Brands by Origin versus CKD & CBU YTD 08 – YTD 09 in volume

**CKD**

<table>
<thead>
<tr>
<th>Brand</th>
<th>YTD 08</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevrolet</td>
<td>2,765</td>
<td>10,217</td>
</tr>
<tr>
<td>HYUNDAI</td>
<td>11,478</td>
<td>14,176</td>
</tr>
<tr>
<td>Speranza</td>
<td></td>
<td>11,904</td>
</tr>
<tr>
<td>Nissan</td>
<td>6,696</td>
<td>11,185</td>
</tr>
<tr>
<td>MERCEDES</td>
<td>2,316</td>
<td>2,497</td>
</tr>
<tr>
<td>BMW</td>
<td>1,944</td>
<td>1,825</td>
</tr>
<tr>
<td>JEEP</td>
<td>1,338</td>
<td>1,384</td>
</tr>
<tr>
<td>KOMODO</td>
<td>1,237</td>
<td>256</td>
</tr>
<tr>
<td>DAEWOO</td>
<td>722</td>
<td>12,145</td>
</tr>
<tr>
<td>MAHINDRA</td>
<td>396</td>
<td>960</td>
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<tr>
<td>BRILLIANCE Auto</td>
<td>380</td>
<td>1,014</td>
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<tr>
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<td>100</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>521</td>
<td>622</td>
</tr>
</tbody>
</table>

- Hyundai decreased by **-32%**.
- Daewoo dropped by **-94%**.
- Speranza increased by **4%**.
- Tofas dropped by **-96%**.
- Brilliance dropped by **-63%**.
- Mercedes dropped by **-7%**.
- BMW increased by **7%**.
- Nissan decreased by **-34%**.
- Jeep decreased by **-3%**.
- Chevrolet increased by **66%**.
- Mahindra dropped by **-59%**.
- Komodo increased by **383%**.
Hyundai dropped by -7%.
Toyota dropped by -56%.
Mitsubishi dropped -64%.
Renault increased 170%.
Chevrolet dropped by -26%.
VW decreased by -14%.
Honda dropped by -42%.
BMW decreased by -26%.
Mercedes increased by 167%.
Daihatsu dropped by -17%.
Proton decreased by -2%.
Opel dropped by -53%.
Nissan dropped by -24%.
Fiat increased by 25%.
Seat dropped by -61%.
Suzuki dropped by -74%.
Speranza dropped by -92%.
Kia increased by 83%.
Brilliance increased by 43%

- Geely increased by -11%
- Skoda increased by 133%
PC Models market share by segment YTD 09 in volume

Segment <=1 L
2,883 Units

Segment From 1L to 1.3 L
13,275 Unit
PC Models market share by segment YTD 09 in volume (continued)

Segment from 1.3L to 1.5L
28,583 Units
PC Models market share by segment YTD 09 in volume (continued)

Segment from 1.5L to 1.6L
96,706 Units
PC Models market share by segment in YTD 09 in volume (continued)

### Segment from 1.6L to 2L

**3,151 Units**

- **Terios**: 30%
- **Tiggo 1.6**: 29%
- **Tiggo 2.0**: 22%
- **Scorpio GLX**: 4%
- **Tiguan 1.4**: 2%
- **Explosion 1.3**: 2%
- **Tuscon**: 2%
- **RENAULT GRAND VITARA**: 2%
- **RAV4**: 2%
- **Explosion 1.6**: 2%
- **Explosion 1.5**: 1%
- **Others**: 4%

### Segment >2L

**2,076 Units**

- **E 300**: 26%
- **525i**: 19%
- **525**: 11%
- **525E**: 11%
- **S 550**: 10%
- **S 350**: 8%
- **C 280 Avantgarde**: 8%
- **E 280**: 6%
- **E 230**: 6%
- **750Li**: 5%
- **330i**: 4%
- **Sonata**: 3%
- **740Li**: 2%
- **Town & Country**: 2%
- **S 500**: 1%
- **320i**: 2%
- **Others**: 6%

### SUV<=2.0 L

**7,037 Units**

- **Cherokee 3.7**: 26%
- **Komodo GLX**: 19%
- **Land Cruiser**: 8%
- **X-Trail**: 7%
- **BMW X3**: 6%
- **Mercedes GLK**: 6%
- **Prado**: 5%
- **Santa Fe**: 2%
- **Grand Cherokee**: 2%
- **Sorento**: 1%
- **Komodo GL**: 1%
- **PAJERO**: 0%
- **Others**: 16%

### SUV > 2L

**5,215 Units**

- **Cherokee 3.7**: 26%
- **Komodo GLX**: 19%
- **Land Cruiser**: 8%
- **X-Trail**: 7%
- **BMW X3**: 6%
- **Mercedes GLK**: 6%
- **Prado**: 5%
- **Santa Fe**: 2%
- **Grand Cherokee**: 2%
- **Sorento**: 1%
- **Komodo GL**: 1%
- **PAJERO**: 0%
- **Others**: 16%
PC by Model YTD 08 – YTD 09 in volume (>800 cars)
YTD Volume by Price Segment

The following graphs show segmentation for the PC market according to Price segment in EGP. Both volume in units and market share in percentage are presented in seven segments:

- <= 50,000 EGP
- >50,000 EGP ~ <= 70,000 EGP
- >70,000 EGP ~ <= 100,000 EGP
- >100,000 EGP ~ <= 150,000 EGP
- >150,000 EGP ~ <= 300,000 EGP
- >300,000 EGP ~ <= 500,000 EGP
- >500,000 EGP

The above graph shows that the (50,000 EGP ~ 70,000 EGP) segment has the highest volume with (48,151) units, followed by the (70,000 EGP ~ 100,000 EGP) segment with (44,305) units. The least segment is the (<=50,000 EGP) with (1,685) units followed by the (>500,000 EGP) segment with (2,628) units.
The above graph shows that the (50,000 EGP ~ 70,000 EGP) segment has the highest market share with (30%), followed by the (70,000 EGP ~ 100,000 EGP) segment with (28%). The least segment is the (<=50,000 EGP) with (1%) followed by the (>500,000 EGP) segment with (2%).
Taxi Sales as a Percentage of Total

Percentage of Total PC

- Apr-09: 3.98%
- May-09: 10.33%
- Jun-09: 13.17%
- Jul-09: 11.28%
- Aug-09: 11.76%
- Sep-09: 9.41%
- Oct-09: 8.81%
- Nov-09: 11.12%
- Dec-09: 10.89%

Total Taxi

- Apr-09: 441
- May-09: 1297
- Jun-09: 2028
- Jul-09: 1777
- Aug-09: 1795
- Sep-09: 1355
- Oct-09: 1429
- Nov-09: 1633
- Dec-09: 1685
December 2009 Taxi Sales

<table>
<thead>
<tr>
<th>Make</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevrolet / LANOS</td>
<td>270</td>
</tr>
<tr>
<td>HYUNDAI / Verna 1.6</td>
<td>741</td>
</tr>
<tr>
<td>PEUGEOT / PARS</td>
<td>21</td>
</tr>
<tr>
<td>SPERANZA / A516</td>
<td>653</td>
</tr>
<tr>
<td>SPERANZA / A113</td>
<td>0</td>
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</table>
2.3 BUSES

Buses Market split December 08 – December 09 in volume

When comparing December 09 to December 08, total Buses Segment decreased by an overall of -16% from 1,583 units to 1,337 units. However, the drop is lead mainly by Tourism Micro -60.7%.
When comparing YTD 09 to YTD 08, total Buses Segment dropped by an overall of -25% from 17,469 units to 13,149 units. Transport segments volume decreased by -17.1%. Tourism segments volume decreased by -45.7%.
December 2009 sales volume is higher than 2009 YTD avg. sales by **22.0%**.

December 2009 sales volume is lower than 2008 YTD avg. sales by **-8.2%**.

December 2009 sales volume is lower than 2008 avg. sales by **-8.2%**.

December 2009 sales volume is lower than December 2008 sales by **-15.5%**.

December 2009 sales volume is higher than November 2009 sales by **22.4%**.
Buses Market seasonality YTD 08 – YTD 09 in volume

The above graph is showing that for Buses Market, 2009 trend is following more or less the same seasonality trends of 2008, but there is an accumulated YTD decline in units of **-25%**.
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Buses Segments YTD08 – YTD09

Transport Micro Micro

Tourism Micro

AMIC Egypt

Integrated Management Consultancy (IMC)

Email: AMICEgypt@link.net
Buses Segments YTD08 – YTD09 ... Continued

Transport Micro

Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec
312  307  408  432  319  308  337  399  280  280  287
663  654  651  538  257  290  322  95   196  196
515

Tourism Mini 106

Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec
25   22  29  23  27  32  26  52  48  54  45
47   48  59  55  64  62  65  100 55  0  95
Buses Segments YTD08 – YTD09 ... Continued
Buses Segments YTD08 – YTD09 ... Continued
Buses Segments YTD08 – YTD09 ... Continued

Transport Maxi City

January

February

March

April

May

June

July

August

September

October

November

December

2009

2008

Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec

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Buses Segments YTD08 – YTD09 ... Continued
Buses Market YTD 08 – YTD 09 by Origin in volume

CKD decreased in volume by \(-4.8\%\) against last year volume, and CBU decreased by \(-38.8\%\).
Buses CKD Market seasonality YTD 08 – YTD 09 in volume

The above graph is showing that for Buses CKD Market, 2009 trend is not following the same seasonality trends of 2008 but there is an accumulated YTD decline in units of -4.8%.
The above graph is showing that for Buses CBU Market, 2009 trend is not following the same seasonality trends of 2008, but there is an accumulated YTD decline in units of **-38.8%**.
Buses Market by Brand YTD 08 – YTD 09 in volume

- **SUZUKI**
  - YTD 09: 4,585
  - YTD 08: 3,982
- **TOYOTA**
  - YTD 09: 7,579
  - YTD 08: 3,922
- **BRILLIANCE AUTO**
  - YTD 09: 1,259
  - YTD 08: 805
- **CHEVROLET**
  - YTD 09: 1,002
  - YTD 08: 1,368
- **MITSUBISHI**
  - YTD 09: 696
  - YTD 08: 1,291
- **NISSAN**
  - YTD 09: 645
  - YTD 08: 543
- **MCV/MERCEDES**
  - YTD 09: 470
  - YTD 08: 676
- **HYUNDAI**
  - YTD 09: 321
  - YTD 08: 1,156
- **Others**
  - YTD 09: 249
  - YTD 08: 69

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**Buses Market by Brand YTD 08 – YTD 09 in volume**
### Buses Market by Brand YTD 08 – YTD 09 in Market Share

<table>
<thead>
<tr>
<th>Brand</th>
<th>Market Share YTD 08</th>
<th>Market Share YTD 09</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>HYUNDAI</td>
<td>9.6%</td>
<td>7%</td>
<td>-2.6%</td>
</tr>
<tr>
<td>MITSUBISHI</td>
<td>5.3%</td>
<td>7%</td>
<td>1.7%</td>
</tr>
<tr>
<td>NISSAN</td>
<td>3.6%</td>
<td>4.9%</td>
<td>1.3%</td>
</tr>
<tr>
<td>MCV/ MERCEDES</td>
<td>4%</td>
<td>3.6%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>TOYOTA</td>
<td>34.9%</td>
<td>29.8%</td>
<td>-5.1%</td>
</tr>
<tr>
<td>BRILLIANCE AUTO</td>
<td>5%</td>
<td>9.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>CHEVROLET</td>
<td>7.6%</td>
<td>6%</td>
<td>-1.6%</td>
</tr>
<tr>
<td>SUZUKI</td>
<td>23%</td>
<td>28%</td>
<td>5%</td>
</tr>
<tr>
<td>Others</td>
<td>1.9%</td>
<td>1.9%</td>
<td>0%</td>
</tr>
</tbody>
</table>

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Buses Models Market Share By Segment YTD 09 in Volume

**Transport Micro Segment**
3,777 Units

- Toyota Hiace: 51%
- Nissan Urvan: 15%
- BRILLIAN CE AUTO: 33%
- Mitsubishi L300: 1%

**Tourism Micro Segment**
1,922 Units

- Toyota Hiace: 82%
- H-1 STAREX: 18%
- Others: 0%

**Transport Mini Segment**
1,385 Units

- GM-NPR66P: 2%
- GB Cruiser C1: 5%
- JAC/JNB12: 28%
- GB Cruiser C3: 3%
- GM-NPR66L: 29%
- MCV 240E: 11%
- Others: 38%
- GB Cruiser C2/AD: 3%
- Civilian: 6%

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Buses by Model YTD 08 – YTD 09 in volume

<table>
<thead>
<tr>
<th>Model</th>
<th>YTD 09</th>
<th>YTD 08</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUZUKI/Microbus</td>
<td>4585</td>
<td>3982</td>
</tr>
<tr>
<td>TOYOTA/HIACE</td>
<td>3502</td>
<td></td>
</tr>
<tr>
<td>BRILLIANCE AUTO</td>
<td>1259</td>
<td></td>
</tr>
<tr>
<td>UR-VAN</td>
<td>560</td>
<td>504</td>
</tr>
<tr>
<td>GM-NPR66L</td>
<td>396</td>
<td>84</td>
</tr>
<tr>
<td>Toyota Coaster</td>
<td>420</td>
<td>554</td>
</tr>
<tr>
<td>Hyundai/H-1StarexTQ</td>
<td>659</td>
<td>308</td>
</tr>
<tr>
<td>GM-NQR 71R</td>
<td>473</td>
<td>225</td>
</tr>
<tr>
<td>MCV 240E</td>
<td>157</td>
<td>58</td>
</tr>
<tr>
<td>GB Cruiser C1</td>
<td>68</td>
<td>404</td>
</tr>
<tr>
<td>MERCEDES/MCV 600</td>
<td>306</td>
<td>70</td>
</tr>
<tr>
<td>CHEVROLET/GM-NPR66L</td>
<td>24</td>
<td>751</td>
</tr>
<tr>
<td>HYUNDAI/H-1STAREX</td>
<td>101</td>
<td>0</td>
</tr>
<tr>
<td>SVX</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>H-100 12/15S</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>1,575</td>
<td>3,102</td>
</tr>
</tbody>
</table>
2.4 Trucks

Trucks Market split December 09 – December 08 in volume

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mini Pickup /Van</td>
<td>906</td>
<td>748</td>
</tr>
<tr>
<td>Pickup</td>
<td>2229</td>
<td>1902</td>
</tr>
<tr>
<td>Light Trucks</td>
<td>81</td>
<td>92</td>
</tr>
<tr>
<td>Light Medium Trucks</td>
<td>558</td>
<td>581</td>
</tr>
<tr>
<td>Medium Trucks</td>
<td>25</td>
<td>69</td>
</tr>
<tr>
<td>Heavy Trucks</td>
<td>153</td>
<td>212</td>
</tr>
<tr>
<td><strong>Truck Volume</strong></td>
<td><strong>3,952</strong></td>
<td><strong>3,604</strong></td>
</tr>
</tbody>
</table>

Trucks segment decreased by **-9%**, mainly due to **Pickup segment’s** decrease by **-15%** while the **Light Medium Trucks segment** increased by **4%**.
Trucks segment dropped by -27%, mainly due to Pickup segment’s decrease by -29% which has the highest contribution in volume.

<table>
<thead>
<tr>
<th>Segment</th>
<th>YTD 08</th>
<th>% Change</th>
<th>YTD 09</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mini Pickup /Van</td>
<td>2,730</td>
<td>-26%</td>
<td>2,033</td>
<td></td>
</tr>
<tr>
<td>Pickup</td>
<td>31,880</td>
<td>-29%</td>
<td>22,544</td>
<td></td>
</tr>
<tr>
<td>Light Trucks</td>
<td>2,336</td>
<td>-23%</td>
<td>1,795</td>
<td></td>
</tr>
<tr>
<td>Light Medium Trucks</td>
<td>6,997</td>
<td>-27%</td>
<td>5,137</td>
<td></td>
</tr>
<tr>
<td>Medium Trucks</td>
<td>268</td>
<td>91%</td>
<td>511</td>
<td></td>
</tr>
<tr>
<td>Heavy Trucks</td>
<td>1,474</td>
<td>-3%</td>
<td>1,426</td>
<td></td>
</tr>
<tr>
<td><strong>Truck Volume</strong></td>
<td><strong>45,685</strong></td>
<td><strong>-27%</strong></td>
<td><strong>33,446</strong></td>
<td></td>
</tr>
</tbody>
</table>
Trucks Market December 09 sales analysis in volume

- December 2009 sales volume is higher than 2009 YTD avg. sales by **29.3%**.
- December 2009 sales volume is lower than 2008 YTD avg. sales by **-5.3%**.
- December 2009 sales volume is lower than 2008 avg. sales by **-5.3%**.
- December 2009 sales volume is lower than December 2008 sales by **-8.8%**.
- December 2009 sales volume is higher than November 2009 sales by **22.2%**.
Trucks Market Seasonality YTD 08 – YTD 09 in volume

The above Trend analysis graph is showing that for Trucks; 2009 is following more or less the same seasonality trends of 2008 but showing an accumulated YTD decline of -27%.
Trucks Segments YTD08 – YTD09

Mini pickup/Van

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>223</td>
<td>238</td>
<td>120</td>
<td>102</td>
<td>80</td>
<td>400</td>
<td>119</td>
<td>129</td>
<td>115</td>
<td>145</td>
<td>268</td>
<td>906</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>97</td>
<td>11</td>
<td>60</td>
<td>82</td>
<td>69</td>
<td>84</td>
<td>92</td>
<td>57</td>
<td>113</td>
<td>172</td>
<td>268</td>
<td>748</td>
</tr>
</tbody>
</table>

Pickup

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,980</td>
<td>2,829</td>
<td>2,937</td>
<td>2,564</td>
<td>2,859</td>
<td>2,666</td>
<td>2,442</td>
<td>2,496</td>
<td>2,928</td>
<td>2,728</td>
<td>2,222</td>
<td>2,229</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,140</td>
<td>1,936</td>
<td>1,646</td>
<td>2,103</td>
<td>1,376</td>
<td>1,892</td>
<td>2,148</td>
<td>1,636</td>
<td>1,772</td>
<td>1,988</td>
<td>2,000</td>
<td>1,902</td>
</tr>
</tbody>
</table>
Trucks Segments YTD08 – YTD09 ... Continued

![Graph showing Light Trucks sales from Jan 2008 to Dec 2009](image)

### Light Trucks
- 2009
- 2008

![Graph showing Light Medium Trucks sales from Jan 2008 to Dec 2009](image)

### Light Medium Trucks
- 2009
- 2008

---

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Trucks Segments YTD08 – YTD09 ... Continued

**Medium Trucks**

- **2009**
- **2008**

<table>
<thead>
<tr>
<th>Month</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>11</td>
<td>34</td>
</tr>
<tr>
<td>Feb</td>
<td>36</td>
<td>10</td>
</tr>
<tr>
<td>Mar</td>
<td>32</td>
<td>13</td>
</tr>
<tr>
<td>Apr</td>
<td>28</td>
<td>35</td>
</tr>
<tr>
<td>May</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>Jun</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jul</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Aug</td>
<td>4</td>
<td>34</td>
</tr>
<tr>
<td>Sep</td>
<td>69</td>
<td>63</td>
</tr>
<tr>
<td>Oct</td>
<td>63</td>
<td>54</td>
</tr>
<tr>
<td>Nov</td>
<td>21</td>
<td>13</td>
</tr>
<tr>
<td>Dec</td>
<td>25</td>
<td>13</td>
</tr>
</tbody>
</table>

**Heavy Trucks**

- **2009**
- **2008**

<table>
<thead>
<tr>
<th>Month</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>55</td>
<td>99</td>
</tr>
<tr>
<td>Feb</td>
<td>174</td>
<td>117</td>
</tr>
<tr>
<td>Mar</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td>Apr</td>
<td>70</td>
<td>73</td>
</tr>
<tr>
<td>May</td>
<td>96</td>
<td>96</td>
</tr>
<tr>
<td>Jun</td>
<td>209</td>
<td>215</td>
</tr>
<tr>
<td>Jul</td>
<td>105</td>
<td>125</td>
</tr>
<tr>
<td>Aug</td>
<td>95</td>
<td>93</td>
</tr>
<tr>
<td>Sep</td>
<td>103</td>
<td>71</td>
</tr>
<tr>
<td>Oct</td>
<td>153</td>
<td>129</td>
</tr>
<tr>
<td>Nov</td>
<td>103</td>
<td>153</td>
</tr>
<tr>
<td>Dec</td>
<td>212</td>
<td>212</td>
</tr>
</tbody>
</table>
Trucks Market YTD 08 – YTD 09 by Origin in volume

CKD dropped by **-28.1%** and CBU dropped by **-22.4%**. However, CKD volume has much more influence on YTD volume than CBU.
Trucks CKD Market seasonality YTD 08 – YTD 09 in volume

The above Trend analysis graph is showing that for Trucks; 2009 is following more or less the same seasonality trends of 2008 until December but showing an accumulated YTD decline of **-28.1%**.
Trucks CBU Market seasonality YTD 08 – YTD 09 in volume

The above Trend analysis graph is showing that for Trucks; 2009 is following more or less the same seasonality trends of 2008 but showing an accumulated YTD decline of -22.4%.
Trucks Market by Brand YTD 08 – YTD 09 in volume

- CHEVROLET: YTD 08 - 3,959, YTD 09 - 20,046
  - YTD 08: 29,494

- TOYOTA: YTD 08 - 5,605
  - YTD 08: 2,717

- NISSAN: YTD 08 - 3,154
  - YTD 08: 1,153

- MITSUBISHI: YTD 08 - 1,444
  - YTD 08: 916

- JAC: YTD 08 - 1,053
  - YTD 08: 870

- MCV/MERCEDES: YTD 08 - 424
  - YTD 08: 656

- SUZUKI: YTD 08 - 962
  - YTD 08: 891

- VW: YTD 08 - 1,302
  - YTD 08: 405

- IVECO: YTD 08 - 455
  - YTD 08: 1,833

- MAN: YTD 08 -
  - YTD 08: 455

- Others: YTD 08 - 1,792
  - YTD 08: 1,833
Trucks Market by Brand Market Share YTD 08 – YTD 09

- **CHEVROLET**: 59.9% (YTD 09), 64.6% (YTD 08)
- **TOYOTA**: 11.8% (YTD 09), 12.3% (YTD 08)
- **NISSAN**: 8.1% (YTD 09), 6.9% (YTD 08)
- **MITSUBISHI**: 3.4% (YTD 09), 3.2% (YTD 08)
- **JAC**: 2.6% (YTD 09), 2.3% (YTD 08)
- **MCV/MERCEDES**: 2.7% (YTD 09), 0.9% (YTD 08)
- **SUZUKI**: 2.0% (YTD 09), 2.1% (YTD 08)
- **VW**: 2.7% (YTD 09), 2.8% (YTD 08)
- **IVECO**: 1.2% (YTD 09), 1.0% (YTD 08)
- **MAN**: 0.0% (YTD 09), 0.0% (YTD 08)
- **Others**: 5.5% (YTD 09), 3.9% (YTD 08)
Trucks Models Market Share By Segment YTD 09 in Volume

Pickup Segment
22,544 Units

Light Medium Trucks Segment
5,137 Units

Heavy Trucks Segment
1,426 Units
Trucks by Model YTD 08 – YTD 09 in volume

- **Chevrolet TFR**: 15,239 (YTD 09), 2,862 (YTD 08)
- **Toyota/Hilux**: 3,860 (YTD 09), 5,164 (YTD 08)
- **Chevrolet NPR 66**: 3,612 (YTD 09), 5,391 (YTD 08)
- **Nissan Pickup S/C**: 2,276 (YTD 09), 2,623 (YTD 08)
- **Daihatsu V 118**: 640 (YTD 09), 373 (YTD 08)
- **Suzuki Pickup**: 672 (YTD 09), 569 (YTD 08)
- **Chevrolet NPR 55**: 562 (YTD 09), 595 (YTD 08)
- **Mitsubishi CANTER**: 812 (YTD 09), 419 (YTD 08)
- **Chevrolet/NQR 71**: 565 (YTD 09), 390 (YTD 08)
- **JAC HFCL**: 352 (YTD 09), 683 (YTD 08)
- **Nissan Pickup D/C**: 518 (YTD 09), 333 (YTD 08)
- **JAC HFCM**: 232 (YTD 09), 611 (YTD 08)
- **VW Crafter**: 1 (YTD 09), 103 (YTD 08)
- **Mitsubishi L200**: 148 (YTD 09), 87 (YTD 08)
- **Suzuki Van**: 290 (YTD 09), 3,797 (YTD 08)
- **Others**: 5,957 (YTD 09)