EGYPTIAN AUTOMOTIVE MARKET

AMIC SEPTEMBER 2010 REPORT

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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
* Processing, Analyzing and presenting data in a useful way to AMIC Egypt members.
* Gathering Macro Economic and Automotive industry news from: Newspapers and other sources

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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 September 2009 - September 2010 in volume

<table>
<thead>
<tr>
<th></th>
<th>September 2009</th>
<th>September 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger Cars</td>
<td>14,407</td>
<td>16,995</td>
</tr>
<tr>
<td>Buses</td>
<td>880</td>
<td>1,146</td>
</tr>
<tr>
<td>Trucks</td>
<td>2,424</td>
<td>3,525</td>
</tr>
<tr>
<td><strong>Total Market Volume</strong></td>
<td><strong>17,711</strong></td>
<td><strong>21,666</strong></td>
</tr>
</tbody>
</table>

Total Market volume for the month of September 2010 was higher than September 2009 sales by 22% from 17,711 to 21,666 units.

The Passenger cars segment had a volume increase of 18% in units, when comparing September 2009 to September 2010; the Buses segment had a volume increase of 30%, and the Trucks segment had a volume increase of 45%.
Total Market split YTD 2009 – YTD 2010 in volume

Total Market volume for the YTD 2010 was higher than YTD 2009 sales by 28% from 146,628 to 187,497 units.

The Passenger cars segment had a volume increase of almost 29% in units, when comparing YTD 2010 to YTD 2009; the Buses segment had a volume growth of 32% and the Trucks segment had a volume increase of 23%.
Total Market September 2010 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.

* September 2010 sales are higher than 2010 YTD average by 4.0%
* September 2010 sales are higher than 2009 YTD average by 33.0%
* September 2010 sales are higher than 2009 average by 26.5%
* September 2010 sales are higher than September 2009 by 22.3%
* September 2010 sales are Lower than August 2010 by -0.7%

Performance in September 2010 is higher than the YTD 2010 average, the YTD 2009 average, 2009 Average, September 2009 Sales but lower than August 2010 Sales
Total Market YTD 2009 – YTD 2010 by Origin in volume

CKD sales for Year 2010 are higher than Year 2009 by 31% when comparing YTD 2010 to 2009 results.

From another side, CBU YTD 2010 sales are higher by 25% than 2009.
Total Market by Brand YTD 2009 – YTD 2010 in volume (Top 12)
Total Market by Brand YTD 2009 – YTD 2010 in market share (Top 12)

- Chevrolet: 27.3% (25.0%)
- Hyundai: 21.7% (19.9%)
- Kia: 9.0% (5.6%)
- Nissan: 8.2% (6.1%)
- Speranza: 7.8% (5.2%)
- Toyota: 8.2% (4.0%)
- Suzuki: 3.9% (3.8%)
- Renault: 3.4% (2.5%)
- Mercedes: 2.8% (2.3%)
- Skoda: 1.9% (1.8%)
- Volkswagen: 1.7% (2.5%)
- Mitsubishi: 1.6% (2.6%)
- Others: 11.6% (14.7%)

[Graph showing market share for each brand]
2.2. Passenger Cars:

PC Market split September 2009 – September 2010 in volume

For the month of September, the overall total PC market grew by 18% from 14,407 to 16,995 units.

The main reason of this growth is due to the growth of 1.5L-1.6L by 25.5% over the figures of September 2009.
The overall total PC market grew by **29%** from **112,560** units to **144,739** units.

The main reason of this growth is due to the **1.5L-1.6L** which has respective growth of **43%** over the figures of 2009.

<table>
<thead>
<tr>
<th></th>
<th>YTD 2009</th>
<th>YTD 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;= 1.0 L</td>
<td>2,367</td>
<td>2,879</td>
</tr>
<tr>
<td>1.0L ~ 1.3 L</td>
<td>10,480</td>
<td>8,768</td>
</tr>
<tr>
<td>1.3L ~ 1.5 L</td>
<td>21,917</td>
<td>25,377</td>
</tr>
<tr>
<td>1.5L ~ 1.6 L</td>
<td>65,055</td>
<td>93,041</td>
</tr>
<tr>
<td>1.6L ~ 2.0 L</td>
<td>2,355</td>
<td>3,391</td>
</tr>
<tr>
<td>&gt; 2.0 L</td>
<td>1,331</td>
<td>1,327</td>
</tr>
<tr>
<td>SUV &lt;= 2.0 L</td>
<td>5,157</td>
<td>5,602</td>
</tr>
<tr>
<td>SUV &gt; 2.0 L</td>
<td>3,898</td>
<td>4,354</td>
</tr>
<tr>
<td><strong>PC Volume</strong></td>
<td><strong>112,560</strong></td>
<td><strong>144,739</strong></td>
</tr>
</tbody>
</table>
PC Market September 2010 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.

* September 2010 sales are higher than 2010 YTD average by 5.7%
* September 2010 sales are higher than 2009 YTD average by 36%
* September 2010 sales are higher than 2009 average by 28%
* September 2010 sales are higher than September 2009 by 18%
* September 2010 sales are higher than August 2010 by 4.4%

Performance in September 2010 is higher than the YTD 2010 average, the YTD 2009 average, 2009 Average, September 2009 Sales and August 2010 Sales.
PC Market split by Origin YTD 2009 – YTD 2010 in volume

CKD increased in volume by 29%, and CBU increased by 28%.
PC Market split by Brand Origin YTD 2009 – YTD 2010 in volume

* European grew by 28%
* Japanese dropped by -13%
* South Korean grew by 50.2%
* Turkish dropped by -100%
* US increased by 37.9%
* Asian increased by 34.9%
* Chinese increased by 14.1%
PC Market by Brand YTD 2009 – YTD2010 in volume (Top 12)

<table>
<thead>
<tr>
<th>Brand</th>
<th>YTD 10</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>HYUNDAI</td>
<td>40,129</td>
<td></td>
</tr>
<tr>
<td>Chevrolet</td>
<td>30,130</td>
<td></td>
</tr>
<tr>
<td>KIA</td>
<td>8,243</td>
<td>16,835</td>
</tr>
<tr>
<td>Speranza</td>
<td>9,699</td>
<td>7,857</td>
</tr>
<tr>
<td>Nissan</td>
<td>7,944</td>
<td>6,096</td>
</tr>
<tr>
<td>RENAULT</td>
<td>6,321</td>
<td></td>
</tr>
<tr>
<td>SKODA</td>
<td>3,642</td>
<td>2,644</td>
</tr>
<tr>
<td>MERCEDES</td>
<td>3,506</td>
<td>2,581</td>
</tr>
<tr>
<td>VW</td>
<td>2,989</td>
<td>3,138</td>
</tr>
<tr>
<td>TOYOTA</td>
<td>5,525</td>
<td>2,799</td>
</tr>
<tr>
<td>Suzuki</td>
<td>2,334</td>
<td>1,841</td>
</tr>
<tr>
<td>Proton</td>
<td>2,074</td>
<td>1,586</td>
</tr>
<tr>
<td>Others</td>
<td>16,397</td>
<td>19,268</td>
</tr>
</tbody>
</table>
PC Market by Brand YTD 2009 – YTD 2010 in Market Share (Top 12)

- **HYUNDAI**: 27.73%
- **Chevrolet**: 20.82%
- **KIA**: 11.63%
- **Speranza**: 6.70%
- **Nissan**: 5.49%
- **RENAULT**: 4.37%
- **SKODA**: 3.25%
- **MERCEDES**: 2.80%
- **VW**: 2.10%
- **TOYOTA**: 1.90%
- **Suzuki**: 1.81%
- **Proton**: 1.43%
- **Others**: 11.33%

**Others** includes all other brands not listed individually.
## PC Brands by Origin versus CKD & CBU YTD 2009 – YTD 2010 (Volume)

### CKD

<table>
<thead>
<tr>
<th>Brand</th>
<th>YTD 10</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevrolet</td>
<td>16,509</td>
<td></td>
</tr>
<tr>
<td>HYUNDAI</td>
<td>16,100</td>
<td></td>
</tr>
<tr>
<td>Speranza</td>
<td>9,341</td>
<td>9,699</td>
</tr>
<tr>
<td>Nissan</td>
<td>6,769</td>
<td>4,517</td>
</tr>
<tr>
<td>MERCEDES</td>
<td>2,146</td>
<td>1,587</td>
</tr>
<tr>
<td>BMW</td>
<td>1,726</td>
<td>1,334</td>
</tr>
<tr>
<td>JEEP</td>
<td>1,403</td>
<td>1,068</td>
</tr>
<tr>
<td>MAHINDRA</td>
<td>432</td>
<td>371</td>
</tr>
<tr>
<td>KOMODO</td>
<td>386</td>
<td>1,099</td>
</tr>
<tr>
<td>BRILLIANCE Auto</td>
<td>153</td>
<td>805</td>
</tr>
<tr>
<td>Great Wall</td>
<td>130</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>288</td>
<td>345</td>
</tr>
</tbody>
</table>

* Chevrolet increased by 20%  
* Hyundai increased by 62%  
* Speranza increased by 25%  
* Nissan increased by 39%  
* Mercedes increased by 35%  
* BMW sales increased by 29%  
* Jeep sales increased by 31%  
* Komodo dropped by -65%  
* Brilliance Auto dropped by -54%  
* Mahindra increased by 59%

### CBU

<table>
<thead>
<tr>
<th>Brand</th>
<th>YTD 10</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>HYUNDAI</td>
<td>24,029</td>
<td></td>
</tr>
<tr>
<td>Kia</td>
<td>16,835</td>
<td></td>
</tr>
<tr>
<td>Chevrolet</td>
<td>13,621</td>
<td></td>
</tr>
<tr>
<td>RENAULT</td>
<td>6,321</td>
<td>5,525</td>
</tr>
<tr>
<td>SKODA</td>
<td>644</td>
<td>441</td>
</tr>
<tr>
<td>VW</td>
<td>2,689</td>
<td>1,139</td>
</tr>
<tr>
<td>TOYOTA</td>
<td>2,779</td>
<td>1,730</td>
</tr>
<tr>
<td>Suzuki</td>
<td>2,334</td>
<td>1,441</td>
</tr>
<tr>
<td>Proton</td>
<td>2,074</td>
<td>1,286</td>
</tr>
<tr>
<td>DAIHATSU</td>
<td>969</td>
<td>939</td>
</tr>
<tr>
<td>BRILLIANCE Auto</td>
<td>1,369</td>
<td>924</td>
</tr>
<tr>
<td>MERCEDES</td>
<td>1,380</td>
<td>954</td>
</tr>
<tr>
<td>FIAT</td>
<td>1,332</td>
<td>932</td>
</tr>
<tr>
<td>Nissan</td>
<td>1,175</td>
<td>1,319</td>
</tr>
<tr>
<td>HONDA</td>
<td>1,045</td>
<td>1,017</td>
</tr>
<tr>
<td>SEAT</td>
<td>890</td>
<td>820</td>
</tr>
<tr>
<td>Geely</td>
<td>427</td>
<td>475</td>
</tr>
<tr>
<td>OPEL</td>
<td>579</td>
<td></td>
</tr>
<tr>
<td>BMW</td>
<td>882</td>
<td>846</td>
</tr>
<tr>
<td>Speranza</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>3,068</td>
<td>2,587</td>
</tr>
</tbody>
</table>

* Hyundai grew by 26%  
* Kia increased by 104%  
* Chevrolet increased by 76%  
* Renault increased by 89%  
* Skoda increased by 38%  
* VW dropped by -5%  
* Toyota dropped by -50%  
* Suzuki increased by 27%  
* Proton increased by -31%  
* Daihatsu decreased by -16%  
* Brilliance Auto increased by 71%  
* Mercedes increased by 37%  
* Mitsubishi decreased by -51%  
* Fiat increased by 27%  
* Nissan decreased by -4%  
* Honda decreased by -53%  
* Seat increased by 11%  
* Geely increased by 5%  
* Opel increased by -61%  
* BMW dropped by -27%
PC Models market share by segment YTD 2010 in volume:

Segment ≤1 L
2,879 Units

Segment From 1L to 1.3 L
8,768 Units

Segment from 1.3L to 1.5L
25,377 Units
PC Models market share by segment YTD 2010 in volume (continued)

Segment from 1.5L to 1.6L
93,041 Units
### PC Models market share by segment YTD 2010 in volume (continued)

**Units**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUV &lt;= 2L</td>
<td>5,602</td>
</tr>
<tr>
<td>SUV &gt; 2L</td>
<td>4,354</td>
</tr>
</tbody>
</table>

#### Segment from 1.6L to 2L

<table>
<thead>
<tr>
<th>Model</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tiggo 1.6</td>
<td>29%</td>
</tr>
<tr>
<td>Taros</td>
<td>22%</td>
</tr>
<tr>
<td>Tiggo 2.0</td>
<td>8%</td>
</tr>
<tr>
<td>Hover</td>
<td>2%</td>
</tr>
<tr>
<td>Tiguan 1.4</td>
<td>1%</td>
</tr>
<tr>
<td>Tuscan</td>
<td>1%</td>
</tr>
<tr>
<td>Scorpio GLX</td>
<td>1%</td>
</tr>
<tr>
<td>GRAND VITARA</td>
<td>1%</td>
</tr>
<tr>
<td>Explosion 1.6</td>
<td>1%</td>
</tr>
<tr>
<td>Explosion 1.3</td>
<td>0%</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
</tr>
</tbody>
</table>

**3,391 Units**

#### Segment >2L

<table>
<thead>
<tr>
<th>Model</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wrangler</td>
<td>9%</td>
</tr>
<tr>
<td>Mahindra</td>
<td>7%</td>
</tr>
<tr>
<td>Chevrolet</td>
<td>6%</td>
</tr>
<tr>
<td>X-Trail</td>
<td>6%</td>
</tr>
<tr>
<td>Komodo GLX</td>
<td>5%</td>
</tr>
<tr>
<td>Land Cruiser</td>
<td>5%</td>
</tr>
<tr>
<td>BMW X3</td>
<td>4%</td>
</tr>
<tr>
<td>Mercedes GLK</td>
<td>4%</td>
</tr>
<tr>
<td>Komodo GL</td>
<td>2%</td>
</tr>
<tr>
<td>Speranza</td>
<td>2%</td>
</tr>
<tr>
<td>Kia - New</td>
<td>2%</td>
</tr>
<tr>
<td>Explorer</td>
<td>1%</td>
</tr>
<tr>
<td>Grand</td>
<td>1%</td>
</tr>
<tr>
<td>Kia - MDHAYVE</td>
<td>1%</td>
</tr>
<tr>
<td>BMW - X-senie</td>
<td>1%</td>
</tr>
<tr>
<td>Santa Fe</td>
<td>1%</td>
</tr>
<tr>
<td>Others</td>
<td>5%</td>
</tr>
</tbody>
</table>

**1,327 Units**

**Others**

**Others**

**1%**
PC by Model YTD 2009 – YTD 2010 in volume (>1500 cars)

- **Verna 1.6**
  - YTD 10: 15,904
  - YTD 09: 12,860

- **Chevrolet Lanos**
  - YTD 10: 10,347
  - YTD 09: 7,660

- **ELANTRA**
  - YTD 10: 8,250
  - YTD 09: 7,951

- **New Accent 1.6**
  - YTD 10: 3,371
  - YTD 09: 7,303

- **New Carato**
  - YTD 10: 2,848
  - YTD 09: 6,769

- **SUNNY**
  - YTD 10: 4,877
  - YTD 09: 5,739

- **New Carens**
  - YTD 10: 1,257
  - YTD 09: 5,624

- **Cruza**
  - YTD 10: 879
  - YTD 09: 4,972

- **OPTRA**
  - YTD 10: 4,869
  - YTD 09: 4,511

- **LOGAN SEDAN**
  - YTD 10: 3,816
  - YTD 09: 4,511

- **AVEO 1.5**
  - YTD 10: 3,649
  - YTD 09: 3,376

- **Oct. Fantasia**
  - YTD 10: 2,985
  - YTD 09: 3,280

- **Speranza A516**
  - YTD 10: 1,177
  - YTD 09: 2,914

- **Tiggo 1.6**
  - YTD 10: 1,746
  - YTD 09: 4,433

- **SUNNY**
  - YTD 10: 2,266
  - YTD 09: 1,741

- **Speranza A113**
  - YTD 10: 1,871
  - YTD 09: 1,318

- **Suzuki Maruti**
  - YTD 10: 1,799
  - YTD 09: 2,679

- **COROLLA NG 1.6**
  - YTD 10: 12,860
  - YTD 09: 15,904
Taxi Project Sales

Taxi Project Sales as Percentage of Total PC Sales
September 2010 Taxi Sales

- Chevrolet / LANOS: 353
- HYUNDAI / Verna 1.6: 835
- PEUGEOT / PARS: 7
- SPERANZA / A516: 301
- SPERANZA / A113: 0
2.3 Buses

Buses Market split September 2009 – September 2010 in volume

When comparing September 2009 to September 2010, total Buses Segment increased by an overall of 30% from 880 units to 1,146 units.
When comparing YTD 2009 to YTD 2010, total Buses Segment grew by an overall of **32%** from **9,969** units to **13,192** units. Tourism segments volume decreased by **-32%**. Transport segments volume increased by **48%**.
Buses Market September 2010 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.

* September 2010 sales are lower than 2010 YTD average by -22%
* September 2010 sales are higher than 2009 YTD average by 3%
* September 2010 sales are higher than 2009 average by 5%
* September 2010 sales are higher than September 2009 by 30%
* September 2010 sales are Lower than August 2010 by -25%

Performance in September 2010 is higher than the YTD 2009 average, the 2009 average and September 2009 Sales, but lower than 2010 YTD Average and August 2010 Sales
Buses Market YTD 2009 – YTD 2010 by Origin in volume

CKD increased by 52% in volume against last year’s volume; CBU increased by 14%
Buses Market by Brand YTD 2009 – YTD 2010 in volume

<table>
<thead>
<tr>
<th>Brand</th>
<th>YTD 10</th>
<th>YTD 09</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUZUKI</td>
<td>4,385</td>
<td></td>
</tr>
<tr>
<td>TOYOTA</td>
<td>3,289</td>
<td>2,399</td>
</tr>
<tr>
<td>CHEVROLET</td>
<td>1,498</td>
<td></td>
</tr>
<tr>
<td>King Long</td>
<td>1,097</td>
<td></td>
</tr>
<tr>
<td>NISSAN</td>
<td>1,015</td>
<td></td>
</tr>
<tr>
<td>BRILLIANCE AUTO</td>
<td>960</td>
<td>860</td>
</tr>
<tr>
<td>MCV/MERCEDES</td>
<td>795</td>
<td></td>
</tr>
<tr>
<td>MITSUBISHI</td>
<td>678</td>
<td></td>
</tr>
<tr>
<td>HYUNDAI</td>
<td>298</td>
<td>245</td>
</tr>
<tr>
<td>Others</td>
<td>77</td>
<td>165</td>
</tr>
</tbody>
</table>

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Buses Market by Brand YTD 2009 – YTD 2010 in Percentage

- **SUZUKI**: 33% YTD 10, 33% YTD 09
- **TOYOTA**: 34% YTD 10, 33% YTD 09
- **CHEVROLET**: 11.4% YTD 10, 8.3% YTD 09
- **King Long**: 6% YTD 10, 0% YTD 09
- **NISSAN**: 7.7% YTD 10, 6% YTD 09
- **BRILLIANCE AUTO**: 9% YTD 10, 7.2% YTD 09
- **MCV/MERCEDES**: 6% YTD 10, 3% YTD 09
- **MITSUBISHI**: 5% YTD 10, 5.1% YTD 09
- **HYUNDAI**: 2% YTD 10, 2.3% YTD 09
- **Others**: 0.6% YTD 10, 2% YTD 09

**Others** include: King Long, CHEVROLET, NISSAN, SUZUKI, TOYOTA.
Buses Models Market Share By Segment YTD 2010 In Volume

**Transport Micro Micro Segment**
- **5549**
  - **Suzuki - Microbus**: 4385, 79%
  - **Toyota Hiace**: 35%
  - **King Long -SXQ6500**: 24%
  - **BRILLIAN CE AUTO**: 20%
  - **Nissan Urvan**: 21%
  - **Others**: 0%

**Transport Micro Segment**
- **4649**
  - **Toyota Hiace**: 65%
  - **H-1 STAREX TQ**: 32%
  - **Others**: 3%
  - **MCV 240E**: 21%
  - **GM- NPR66L**: 25%

**Tourism Micro Segment**
- **880**
  - **Toyota Hiace**: 65%

**Transport Mini Segment**
- **1055**
  - **GM- NPR66L**: 25%
  - **GB CRUISER NGL/GB**: 21%
  - **Others**: 29%
  - **MCV 240E**: 19%
Buses by Model YTD 2009 – YTD2010 in volume

- SUZUKI/Microbus: 4385 (YTD 10), 3269 (YTD 09)
- TOYOTA/HACE: 2210 (YTD 10), 3167 (YTD 09)
- King Long SXQ6600: 1,097 (YTD 10), 
- UR-VAN: 950 (YTD 10), 860 (YTD 09)
- BRILLIANCE AUTO: 198 (YTD 10), 134 (YTD 09)
- Hyundai/H1Starex TQ: 286 (YTD 10), 237 (YTD 09)
- GM-NPR66L: 262 (YTD 10), 372 (YTD 09)
- MCV 240E: 192 (YTD 10), 134 (YTD 09)
- Toyota Coaster: 189 (YTD 10), 265 (YTD 09)
- MERCEDES/MCV 600: 106 (YTD 10), 45 (YTD 09)
- GM-NQR 71R: 72 (YTD 10), 192 (YTD 09)
- GB Cruiser C1: 88 (YTD 10)
- Others: 1,718 (YTD 10), 2,483 (YTD 09)

YTD 10, YTD 09
2.4 TRUCKS

Trucks Market split September 2009 – September 2010 in volume

<table>
<thead>
<tr>
<th>Segment</th>
<th>September 2009</th>
<th>September 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mini Pickup /Van</td>
<td>57</td>
<td>104</td>
</tr>
<tr>
<td>Pickup</td>
<td>1,772</td>
<td>2,308</td>
</tr>
<tr>
<td>Light Trucks</td>
<td>119</td>
<td>179</td>
</tr>
<tr>
<td>Light Medium Trucks</td>
<td>396</td>
<td>841</td>
</tr>
<tr>
<td>Medium Trucks</td>
<td>9</td>
<td>19</td>
</tr>
<tr>
<td>Heavy Trucks</td>
<td>71</td>
<td>74</td>
</tr>
<tr>
<td><strong>Truck Volume</strong></td>
<td><strong>2,424</strong></td>
<td><strong>3,525</strong></td>
</tr>
</tbody>
</table>

Trucks segment increased by **45%**, mainly due to Pickup segment increased by **30%** which has the highest contribution in volume.
Trucks Market split YTD 2009 – YTD 2010 in volume

<table>
<thead>
<tr>
<th>Segment</th>
<th>YTD 2009</th>
<th>YTD 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mini Pickup /Van</td>
<td>1000</td>
<td>1629</td>
</tr>
<tr>
<td>Pickup</td>
<td>16655</td>
<td>19605</td>
</tr>
<tr>
<td>Light Trucks</td>
<td>1447</td>
<td>1549</td>
</tr>
<tr>
<td>Light Medium Trucks</td>
<td>3845</td>
<td>5484</td>
</tr>
<tr>
<td>Medium Trucks</td>
<td>223</td>
<td>521</td>
</tr>
<tr>
<td>Heavy Trucks</td>
<td>929</td>
<td>778</td>
</tr>
<tr>
<td><strong>Truck Volume</strong></td>
<td>24,099</td>
<td>29,566</td>
</tr>
</tbody>
</table>

Trucks segment grew by **22.7%**, mainly due to Pickup segment growth of **17.7%** which has the highest contribution in volume.
Trucks Market September 2010 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.

* September 2010 sales are higher than 2010 YTD average by 7.3%
* September 2010 sales are higher than 2009 YTD average by 31.6%
* September 2010 sales are higher than 2009 average by 26.5%
* September 2010 sales are higher than September 2009 by 45.4%
* September 2010 sales are Lower than August 2010 by -12.1%

Performance in September 2010 is higher than the YTD 2010 average, the YTD 2009 average, 2009 Average, September 2009 Sales but lower than August 2010 Sales.
Trucks Market YTD 2009 – YTD 2010 by Origin in volume

CKD increased by **30.9%** and CBU decreased by **-0.8%**. However, CKD volume has much more influence on YTD volume than CBU.
Trucks Market by Brand YTD 2009 – YTD2010 in volume

- **Chevrolet**: 19,620
  - YTD 10: 14,527
  - YTD 09: 5,093

- **Nissan**: 2,426
  - YTD 10: 2,056
  - YTD 09: 370

- **Toyota**: 3,073
  - YTD 10: 2,280
  - YTD 09: 793

- **JAC**: 1,099
  - YTD 10: 568
  - YTD 09: 531

- **Mitsubishi**: 1,009
  - YTD 10: 735
  - YTD 09: 274

- **MCV/Mercedes**: 875
  - YTD 10: 511
  - YTD 09: 364

- **Suzuki**: 551
  - YTD 10: 404
  - YTD 09: 147

- **Iveco**: 274
  - YTD 10: 328
  - YTD 09: 54

- **VW**: 176
  - YTD 10: 651
  - YTD 09: 465

- **Others**: 1,256
  - YTD 10: 1,436
  - YTD 09: 19,620
Trucks Market by Brand Market Share YTD 2009 – YTD 2010

- CHEVROLET: 66.4%
- Nissan: 6.6%
- TOYOTA: 12.8%
- JAC: 3.4%
- MITSUBISHI: 3.0%
- MCV/MERCEDES: 3.0%
- SUZUKI: 1.7%
- IVECO: 1.4%
- VW: 1.9%
- Others: 6.0%

Sponsored by:

Trucks Market by Brand Market Share YTD 2009 – YTD2010

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0%

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Trucks Models Market Share By Segment YTD 10 in Volume

Pickup Segment
19605

Light Medium Trucks Segment
5484

Heavy Trucks Segment
778

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## Trucks by Model YTD 2009 – YTD2010 in volume

<table>
<thead>
<tr>
<th>Model</th>
<th>YTD 09</th>
<th>YTD 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevrolet NPR 66</td>
<td>2,546</td>
<td>3,578</td>
</tr>
<tr>
<td>Nissan Pickup S/C</td>
<td>181</td>
<td>2,383</td>
</tr>
<tr>
<td>Toyota/Hiux</td>
<td>80</td>
<td>2,253</td>
</tr>
<tr>
<td>Mitsubishi CANTER</td>
<td>555</td>
<td>1,620</td>
</tr>
<tr>
<td>Chevrolet/NQR 71</td>
<td>383</td>
<td>2,652</td>
</tr>
<tr>
<td>JAC HFCL</td>
<td>11,019</td>
<td>14,521</td>
</tr>
<tr>
<td>Suzuki Pickup</td>
<td>320</td>
<td>591</td>
</tr>
<tr>
<td>Daihatsu V 118</td>
<td>611</td>
<td>591</td>
</tr>
<tr>
<td>Suzuki Van</td>
<td>17</td>
<td>320</td>
</tr>
<tr>
<td>JAC HFCM</td>
<td>246</td>
<td>336</td>
</tr>
<tr>
<td>Mitsubishi L200</td>
<td>215</td>
<td>246</td>
</tr>
<tr>
<td>VW Crafter</td>
<td>215</td>
<td>215</td>
</tr>
<tr>
<td>Nissan Pickup/C</td>
<td>293</td>
<td>416</td>
</tr>
<tr>
<td>Others</td>
<td>38</td>
<td>135</td>
</tr>
</tbody>
</table>

*Others include: AMIC Egypt, Email: AMICEgypt@link.net, Integrated Management Consultancy (IMC), Tel./Fax: (202) 2690 1472 / 6*