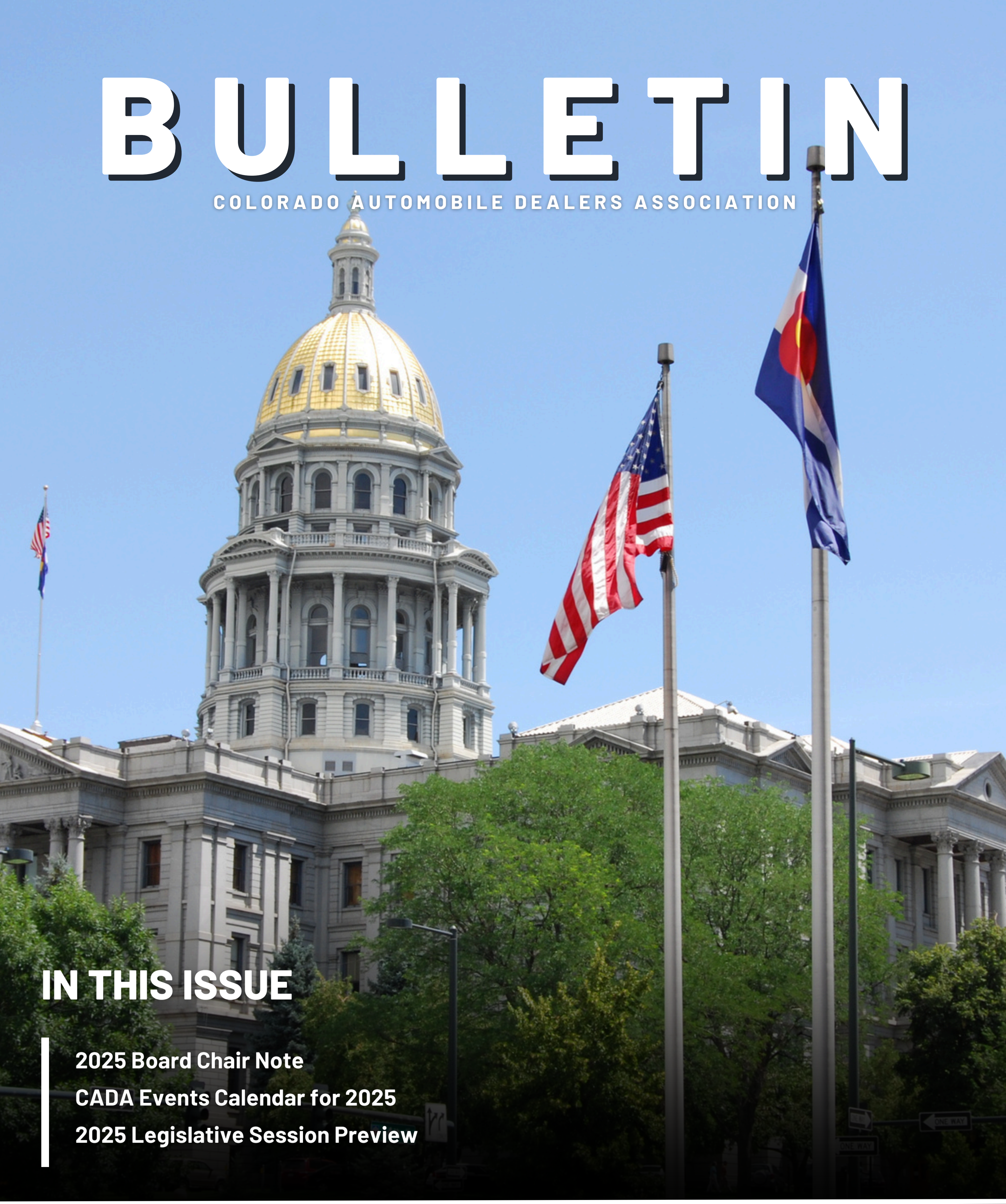
BULLETIN

COLORADO AUTOMOBILE DEALERS ASSOCIATION



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COLORADO AUTOMOBILE DEALERS ASSOCIATION

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2025 EVENTS CALENDAR

January - May	**Colorado Legislative Session**
February 12	**Q1 Board Meeting**
April 17-20	**Colorado Auto Show**
June 11	**Q2 Board Meeting**
June - August	**Regional Meetings**
Sept. 8-10	**Project DC & Q3 Board Meeting**
October 8	**Golf Event - Clear the Air Foundation**
November 13-14	**Strategic Planning Retreat**
November 13	**Colorado Automotive Hall of Fame**
December 10	**Holiday Luncheon & Q4 Board Meeting**

More details will be provided about each of these events. For questions, please reach out to Margo Finer at margo@colorado.auto.

Jeff Taylor
Chairman of the Board

Taking the Reins in 2025

I'm honored to step into the role of Board Chair for the Colorado Automobile Dealers Association, and I don't take this responsibility lightly. As someone who has spent years in the trenches of the dealership world—whether in automotive, RVs, or powersports—I know how tough things can get. We're at a crossroads, and the road ahead is anything but smooth. But with the right approach, we can continue to thrive, and I'm here to make sure we do just that.

First off, I want to acknowledge something that's been overdue: we need to stop looking at ourselves as separate industries. The car dealers, RV sellers, and powersports shops all face the same challenges. We all sell vehicles, we all rely on a network of skilled workers, and we all depend on the strength of our relationships with customers. So, it's time we stop thinking of ourselves as distinct groups and come together as one unified force. Under my leadership, the association will work to incorporate RV and powersports dealers, creating a collective voice that can't be ignored. The problems we face are too big to tackle alone. By joining forces, we can push harder, speak louder, and ensure that all of us —whether we're selling cars, campers, or motorcycles—are represented fairly and effectively.

Now, I'd be lying if I didn't tell you that we've got a hell of a fight ahead. The two biggest threats we're facing right now are direct-to-consumer (D2C) sales and the ever-evolving maze of air quality regulations. Let's talk about D2C first. Some manufacturers think they can cut out the middleman— the pillar of our communities —and go straight to the customer. This isn't just an inconvenience; it's a direct attack on our livelihoods. The dealer network is essential to the success of these manufacturers. We provide the expertise, the relationships, and the customer service that the factories just can't replicate. They want to sidestep us? That's not going to fly. It's my job —and all of ours—to make sure lawmakers, regulators, and manufacturers know we're not going to sit by while they try to erase the dealer model. We've got the experience, the trust, and the customer loyalty on our side. Let's use it.

The other threat is the uncertain and shifting air quality regulations. Environmental standards are becoming more stringent, and while I'm all for cleaner air and more sustainable practices, the way these regulations are being rolled out is a nightmare.

We're seeing state and federal governments introduce new mandates with little regard for how they'll impact our businesses. We're already dealing with skyrocketing costs and labor shortages, and now we've got to deal with rules that change by the day. I'll be at the table, making sure we have a say in how these regulations are crafted, and that the solutions are realistic. We need a balance—one that protects the environment without killing our businesses in the process.

In closing, I want you to know that I'm committed to fighting for every dealer, whether you sell cars, RVs, or powersports. These challenges are real, but they're not insurmountable. We've weathered storms before, and we'll weather this one too. But we need to stand together. If we do that, we'll be stronger, tougher, and ready for whatever comes next.

Let's get to work.

personally

It’s not just business. It’s personal.

Our dedicated Account Executives work hand in hand with you because we care about your business as much as you do. Plus, it’s always a good time when we’re working together. That’s the kind of joyride we live for.

We’re all better off with an ally.

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ally do it right.

finance | insurance | remarketing


2025 Dealer of the Year Award
TIME
Ivette Dominguez Drawe
Littleton, Colorado
Nominated by Colorado Auto Dealers Association
TIME
DEALER OF THE YEAR
IN PARTNERSHIP WITH ally

Matthew Groves
President/CEO

Finding New Ways to Create Expected Value

At the beginning of each year, CADA's staff struggle to wrap their heads around the same question: how can we provide more value for our dealers. In other words, how can we ensure that when you pay your dues, you believe that CADA is one of the best investments that you make every month/quarter. Last year, we focused on one-stop shopping. Once you pay your dues, all educational events, regional meetings, attendance at events, participation in Committees or legislative activities are included. The only additional charge in the year is a table at our Automotive Hall of Fame, should you choose to attend.

This Christmas break, however, I have been reading Nate Silver's book on statistical value that shines a light on a logical error I have made. Bear with me, this is going to get a little nerdy:

By the book, expected value is the anticipated value of an investment, used to estimate its value relative to its risk. In other words, it is the perceived value of the Association to a dealer.

In our case, there is a gap between actual value – the range of services that the Association provides – and expected (perceived) value. If we are not properly communicating and encouraging dealers to take advantage of our services, we widen that gap. The gap means the perception of the Association's value to you is lower than its actual value - or - we are leaving value on the table. The gap also creates a perception bias for those highly engaged dealers, making the collective value of CADA to dealers more volatile.

Thus, this year's mission is going to center on raising the expected value to dealers. Rather than building new capacity, we aim for more 1:1 conversation about what currently exists and opportunities to participate directly in those services. Higher participation will raise the perceived value of CADA. But, quite simply, you cannot participate in those things you don't know about. We will attempt to highlight existing successes, like our consumer mediation program and dealer compliance guide, as well as our partnerships to assist any dimension of the dealership.

I have held out every available Friday this year to make visits to dealerships – focusing on those we were not able to visit in 2024. I am also resolving in 2025 to hold periodic check-ins by phone to see what areas we may be missing within the dealerships. A calendar year should never go by where you don't hear from/see our staff at least 3 times.

Back to our analogy. There is a rule in statistics called the 67/95/99.5.This says that 67 percent of all data points fall within one standard deviation of the average (95 percent in 2 deviations, etc). The rule helps you visualize a range of outcomes relative to the average experience.

If the range of outcomes is each of your perceptions of us based on your level of engagement, we can drive up the average engagement by better individualized outreach. The value we provide is based on your level of engagement.

You wouldn't be a member if we weren't doing something right. Because value equals engagement, bringing the dealer body into a more tightly knit grouping at the higher end of the range improves expected value for each member. This method controls for outliers – or the perception that some members are having a better experience than others.

More importantly, because the services we provided were mostly dealer-created or dealer-approved, higher engagement will not only mean your perception of value goes up, but as you engage with CADA services, that actual value increases at the same time.

If you're still with me, thank you for reading. If you do not prefer math analogies, I'll revert to my standard military analogies. "The tighter the formation, the faster it moves." Our strategic goal at CADA is to build cohesion between Colorado's (now) 272 rooftops. We have always acted as one before the legislature. This year, we want to ensure that we can present the dealer body as one to the industry as well, because of our level of engagement and coordination with each of you.

Membership Benefits of:

COLORADO AUTOMOBILE DEALERS ASSOCIATION

Legislative Representation

CADA has a constant presence at the state Capitol and in various counties and municipalities. We represent dealer interests in Colorado Franchise Law as well as consumer finance, transportation appropriations, labor/employment law, and Titling and Registration regulations. We are also able to connect participating dealers into political events for first-hand experience in policymaking and politics.

Regulatory Updates/Reminders

In addition to the Colorado Capitol, CADA actively participates in rulemakings with the State's Motor Vehicle Dealer Board, Air Quality Control Commission, and Department of Revenue to shape the implementation details of recent legislation. Following rulemaking, we will frequently hold educational seminars or create training videos to help dealers understand the state's ongoing expectations. CADA also produces a 500+ page compliance guide every three years for a comprehensive and notated explanation of what Colorado dealers must prepare for to do business in the state.

Consumer Mediation

Consumers often come to CADA to make inquiries when they are disatisfied with their buying/service experience. CADA will hear their concerns, relay them to the GM while identifying any potential regulatory concerns. Resolution is then left to the consumer and the GM. CADA heard around 200 consumer inquiries last year, and was able to help resolve ~70% before they became regulatory complaints at the Dealer Board.

Workforce Development

CADA knows that competent technicians are a constant need for dealers. This is why Clear the Air Foundation (CTAF) exists: to provide scholarships for automotive students who will soon work in your dealerships. 2024 was a record year, with 65 scholarships were awarded to automotive technicians. CTAF is looking forward to another record year in 2025 of providing dealers techs!

Access to Affiliate Organizations

Legislative work is always a team sport that necessitates coalition building. CADA, or Matthew personally, holds board positions on several issue-based organizations to protect dealer interests. This includes the Coalition to Simplify Colorado Sales Tax, the Colorado Civil Justice League, participation in the Colorado Chamber's Political Action Committee, as well as participation in One Main Street and Colorado Concern. These organizations defend broader business issues that are not limited to the automotive industry. Victories in this area have included the development of the Sales & Use Tax System (SUTS) and the elimination of several private rights of interests and the preservation of the public impact test for class actions.

Networking Events

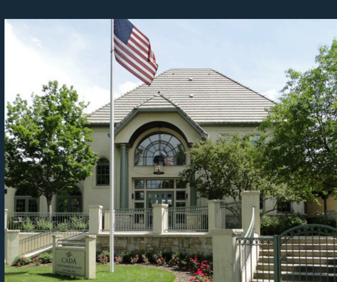
While many neighboring dealers are competitors, we share far more common ground than differences. At Regional Meetings, Title and Compliance trainings, and the Economic Impact Dinner you'll discussions start to reveal trends in industry that later become CADA's legislative goals. Our Hall of Fame Gala honors the lifetime accomplishments of long-time dealers, and our golf tournament engages your employees in a fun day of networking. A list of our 2025 events can be found on page 2.

Verified Service Providers

CADA keeps two levels of affiliated service providers - Allied and Endorsed - to ensure that we can recommend someone to meet every need of a dealership. These organizations all participate with fellow Colorado dealers and have established a relationship with CADA to show their expertise and stability in operations. Many also offer special pricing to CADA members.

Use of CADA Building at 290 Speer

CADA's Bud Wells Board Room and 290 Media Center are available for any visiting dealers, OEM, LMA, or community non-profit. With a full kitchen and loading dock, dealers are encouraged to utilize CADA's building free of charge for their business meetings.



Salesperson Mastery Exam Facilitation

CADA offers administration of the State-required Salesperson Mastery Test at our building in Denver. The testing center is open 8am – 2pm. Our testing center requires no appointments, making it a convenient location for testing.

Auto Dealership **Construction**

As they do each fall, the IRS recently announced adjustments affecting the dollar limitations on 401(k) plans, IRAs, and other retirement-related items for tax year 2025. The changes from 2024 to 2025 are summarized below.

The contribution limit for employees who participate in their 401(k) plan increased to $23,500, with the catch-up contribution limit remaining at $7,500 for employees age 50 and up. IRA contributions remained at $7,000, with a catch-up contribution limit of $1,000. For lower- and moderate-income employees, the income limit for the saver's credit will increase to $79,000 for married couples filing jointly and $39,500 for singles.

As a business owner and plan sponsor, you may find that a few key changes could impact your personal situation:

- The Annual Compensation Limit affecting 401(k) plans has been increased to $350,000.
- The Limitation for Defined Contribution Plans has been increased to $70,000.
- The maximum amount of earnings subject to the Social Security tax (taxable maximum) will increase from $168,600 to $176,100.

Description	2024	2025
Maximum Pretax 401(k) Contribution (not including catch-up contributions for participants age 50 and older)	$23,000	$23,500
Catch-Up Contribution Limit (for participants age 50 or older)	$7,500	$7,500
Annual Addition Dollar Limit (not including catch-up contributions for participants age 50 and older)	$69,000	$70,000
Compensation Limit	$345,000	$350,000
Compensation Limit for Highly Compensated Employees	$155,000	$160,000
Compensation Limit for Key Employee Officers	$220,000	$230,000
Social Security Wage Base	$168,600	$176,100

This was brought to you by the NADA Retirement Program from Empower, our partner for dealership 401(k) solutions. Empower provides service excellence, constant innovation, thought leadership and outstanding people to help plan sponsors and participants get involved in and help plan for their financial future. The National Automobile Dealers Association and Empower have created a unique relationship through which Empower offers flexible, competitive 401(k) plans with an award-winning service model and fiduciary support at a negotiated NADA member price. If you work with a local financial professional, be sure to ask them about the NADA Retirement Program or visit **nadaretirement.com**.

Contact your dedicated NADA Retirement Director today

Todd Adrian I 970-581-3548633 I Todd.Adrian@empower.com

Mark Zeigler
Clear the Air
Foundation Director

2024: A Record-Breaking Year for Clear the Air Foundation

2024 was a banner year for the [Clear the Air Foundation]! Thanks to the tremendous success of the Vehicle Exchange Colorado (VXC) program, we recycled an impressive 1,743 vehicles, nearly doubling our previous record of 911 vehicles in 2020. This significant increase in vehicle donations provided us with the resources to award 70 scholarships to deserving auto tech students, totaling a remarkable $330,000.

New car dealers play a vital role in supporting our mission. By donating your old trade-in vehicles to the Clear the Air Foundation, you not only contribute to environmental sustainability by ensuring proper vehicle recycling but also directly support the future of the automotive industry. These recycled vehicles provide crucial funding for scholarships, helping to attract and train the next generation of skilled auto technicians. Investing in these young professionals benefits the entire industry, ensuring a skilled workforce for your dealerships and a brighter future for the automotive sector.

This increased revenue allows us to implement exciting new initiatives that will directly benefit dealerships. First, we are reviving the popular career fair in conjunction with the Colorado Auto Show. On April 18th, the Foundation will underwrite the cost of providing dealers with tables at the career fair, allowing them to connect with talented automotive students from across the state. To participate in this FREE career fair, click the button below.

Career Fair Registration

Secondly, we are partnering with the former Program Director for the Skilled Trades and Technical Sciences from the Colorado Community College System to enhance our collaboration with the ASE Education Field Manager in Colorado. This partnership will focus on securing greater support for automotive programs, helping schools maintain or achieve accreditation and establishing formal apprenticeship programs. By upholding the highest educational standards, we hope to ensure that graduates are exceptionally well-prepared to excel in your service departments.

We encourage all new car dealers to contribute to this vital work. Together, we can create a more sustainable future for the automotive industry while ensuring a steady stream of highly skilled technicians.

CLEAR THE AIR FOUNDATION

The skills and knowledge I'm gaining are extremely valuable and are setting me up for a promising career. I can confidently say that this scholarship is helping me become a more competent and skilled professional, ready to make an impact in the field.

— Eli

These life-changing scholarships support auto techs who will work in YOUR dealerships!

Jackson Piggott
Billow Barrow Fellow
for Government Affairs

2025 Legislative Session Preview

The Colorado General Assembly's 2025 legislative session kicked off on January 8th, marking the start of the 75th session. With a constitutionally mandated 120-day duration, the session is already off to a rapid start with over 175 bills introduced on opening day. This should represent a significant portion of the overall bills, as the word around the Capitol is that permission to run late bills will be restricted this year. The bills already introduced cover a wide range of issues, setting the stage for what promises to be an active and impactful period for business in Colorado. Here is a breakdown of key developments and what they mean for member dealers.

Legislative Priorities and Early Bills

Of the 175+ bills have been introduced, the topics range from labor issues to healthcare. Notable proposals include:

- Combating wage theft and regulating unionization efforts;
- Continued development of a streamlined sales tax system;
- Building contours around the use of artificial intelligence in housing platforms.

Many high-stakes debates, including education reform, housing, and climate change are anticipated as the session progresses. These developments will have ripple effects across industry as legislators tackle a tightening state budget and regulatory challenges. The last report from the state economist was that Colorado's economy would end 2025 with a deficit of several hundred million dollars.

Governor Polis' State of the State Address

Governor Jared Polis delivered his 2025 State of the State address, emphasizing a vision for economic growth, housing affordability, and reducing regulatory burdens. Key themes included: reducing red tape, with a focus on streamlining processes to foster a pro-business environment while maintaining consumer and worker protections. Another focus is housing affordability, which means addressing Colorado's housing crisis through cost reductions and expanded housing initiatives like building housing near rails. He also highlighted transportation and infrastructure, asking the legislature for investments in transit and rail systems to improve air quality, reduce commute times, and "enhance economic competitiveness." CADA's partnership with the state to improve the transition to clean, auto-based transportation has played a significant factor in stabilizing the number of new and used automobile sales.

CADA's Role in Key Fights

CADA is actively tracking nearly a dozen bills that could directly impact member dealers. We are committed to advocating for policies that:

<u>Promote Pro-Business Environments</u>: Ensure any regulatory changes made in the legislature align with the Governor's call to reduce regulations hampering the flow of commerce throughout Colorado.

<u>Defend Colorado's Labor Peace Act</u>: After 82 years of successful labor relations under the Labor Peace Act, legislative efforts seek to unwind it to open the door to unionization.

<u>Address Industry-Specific Issues</u>: The Senate Transportation Committee has revived efforts to create a fee-based enterprise for "vulnerable road users" at the local level, which would pull county registration fees out of parity between Colorado's 65 counties.

Staying Informed

As the session progresses, we encourage members to reach out with questions or concerns about legislative matters by calling 303-831-1722 and asking for Jackson, as your input is crucial to shaping our advocacy strategies.

Looking Ahead

With less than 120 days to address a packed legislative agenda, this session promises to be both dynamic and challenging. CADA will remain vigilant in representing dealer interests, ensuring our voices are heard on issues critical to the automotive industry. Stay tuned for updates and analysis as we navigate this year's legislative landscape together.

Fourth Quarter 2024 **Released January, 2025**

COLORADO AUTOMOBILE DEALERS ASSOCATION

Colorado Auto Outlook™

Coverage of the Colorado new and used vehicle markets

FORECAST

Colorado New Vehicle Market Predicted to Improve in 2025

Below is a list of six primary questions and answers regarding the Colorado new retail light vehicle market.

How did the market perform in 2024?
State new light vehicle registrations increased 6.2% from 2023 to 2024, off slightly from the 7.6% improvement from 2022 to 2023.

What is the outlook for 2025?
Registrations for all of this year are predicted to exceed 226,000 units and increase 2.0% from 2024 (see graph below).

What are the key factors impacting new vehicle sales this year?
Potential changes in government policies during 2025 (i.e, possible tax cuts, increase in tariffs, and reductions in labor force due to deportations) introduce elevated uncertainty into the outlook for new vehicle sales. Most economists agree that collectively, these policy initiatives would accelerate inflation, potentially reversing recent improvements in affordability. Despite these potential negatives, we think a strong labor market and pent-up demand accumulated during five years of below average sales should be sufficient to push the market higher in 2025. A big increase does not seem likely, however.

Which brands posted gains during all of 2024 and which finished the year strong?
State new retail registrations for Nissan, Land Rover, Hyundai, GMC, Chevrolet, Lexus, and VW increased by more than 5% last year. Volvo, BMW, Hyundai, Land Rover, and Ram gained some momentum as the year ended, with 4Q ‘24 registrations increasing by more than 12% from 3Q.

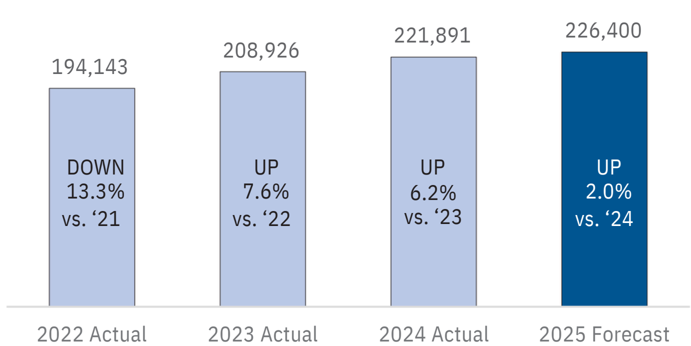
Based on a comparison to U.S. market share, which brands are strong performers in Colorado?
The analysis on page 5 compares actual registrations in the state for each of the top 30 selling brands to a calculated target. The target equals state registrations required for the brand to attain the same state market share as in the Nation. Actual registrations significantly exceeded target for Subaru, Nissan, Tesla, Toyota, and Mazda.

What are recent trends in the battery electric vehicle market?
BEV registrations were up 65% last year, boosted by significantly higher sales of the Nissan Leaf and Ariya. BEV market share reached 24.8% in the Fourth Quarter of last year, up from 21.9% in the Third Quarter (see page 6).

Six Key facts for State New Vehicle Mar ket

1. State market was up 6.2% in 2024. U.S. improved 3.1%
2. Total registrations approached 222,000 last year, up from the recent low of 194,143 in 2022.
3. Market was up 11.2% in 4Q ‘24 vs. year earlier, stronger than the 6.0% increase in 3Q.
4. State Japanese brand market share was higher than U.S. (see page 3).
5. Nissan, Land Rover, and Hyundai had the largest percentage gains last year (see page 4). Nissan registrations were up 86% due to big gains for Leaf and Ariya.
6. F-Series, RAV4, and Model Y were top three sellers in state market (see page 5).

Forecast for State New Retail Light Vehicle Registrations



The graph above shows annual new retail light vehicle registrations from 2022 through 2024, and Auto Outlook's projection for 2025.
Historical data sourced from Experian Automotive.

Market Summary

	2023 Annual	2024 Annual	% Chg. '23 to '24	Mkt. Share 2024
TOTAL	208,926	221,891	6.2%	
Car	25,510	28,119	10.2%	12.7%
Light Truck	183,416	193,772	5.6%	87.3%
Domestic	79,486	80,365	1.1%	36.2%
European	23,541	24,244	3.0%	10.9%
Japanese	83,075	91,602	10.3%	41.3%
Korean	22,824	25,680	12.5%	11.6%

Domestics consist of vehicles sold by GM, Ford, Stellantis (excluding Alfa Romeo and FIAT), Tesla, Rivian, and Lucid.
Data sourced from Experian Automotive.

KEY TRENDS IN COLORADO NEW VEHICLE MARKET

STATE MARKET VS. U.S.

% Change In New Retail Market 2024 vs. 2023	Colorado	U.S.
	UP 6.2%	UP 3.1%

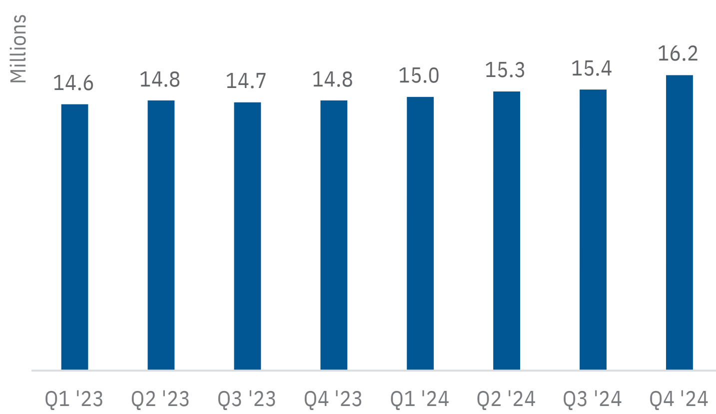
New retail light vehicle registrations in the state increased 6.2% from 2023 to 2024, stronger than the 3.1% improvement in the Nation.

Data sourced from Experian Automotive.

QUARTERLY RESULTS

Colorado Quarterly Registrations

Seasonally Adjusted Annual Rate, Converted to Equivalent U.S. New Vehicle Market SAAR (millions of units)



The graph on the left provides an easily recognizable way to gauge the strength of the state market. It shows quarterly registrations based on a seasonally adjusted annual rate. These figures are then indexed to SAAR sales figures for the U.S. new vehicle market. So just like in the national market, when the quarterly SAAR is above 17 million units, the state market is strong, 15 million is about average, and below 13 million is weak. Equivalent SAAR levels in the state increased from 15.4 million in the Third Quarter of 2024 to 16.2 million in the Fourth Quarter.

Data sourced from Experian Automotive. SAAR estimates: Auto Outlook.

% Change in quarterly registrations vs. year earlier (4Q ‘24 vs. 4Q ‘23) UP 11.2%

% Change in registrations vs. previous quarter (4Q ‘24 vs. 3Q ‘24) UP 2.0%

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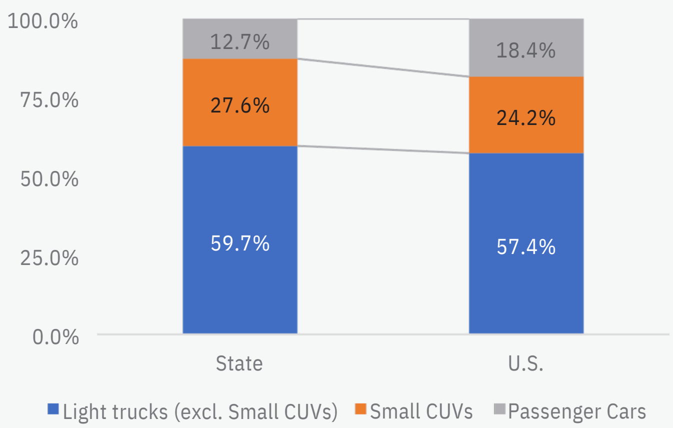
KEY TRENDS IN COLORADO NEW VEHICLE MARKET

VEHICLE AND BRAND SEGMENTS - STATE AND U.S. (2024)

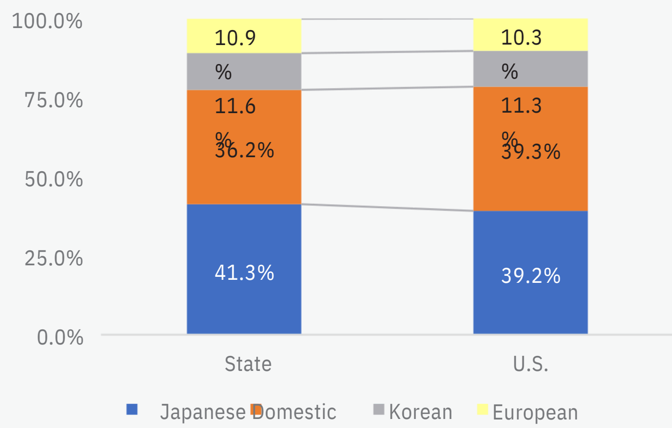
Market Share by Type of Vehicle



Combining the blue and orange sections in the graph above corresponds to the standard industry definition of light trucks. Small cross- overs are broken out, however, since many are more similar to com- pact hatchbacks than to trucks. Light truck share (excluding small CUVs) was **59.7%** in 2024, above the **57.4%** share in the U.S.

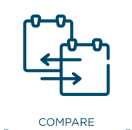
Data sourced from Experian Automotive.

Domestic, European, Japanese, & Korean Brand Share



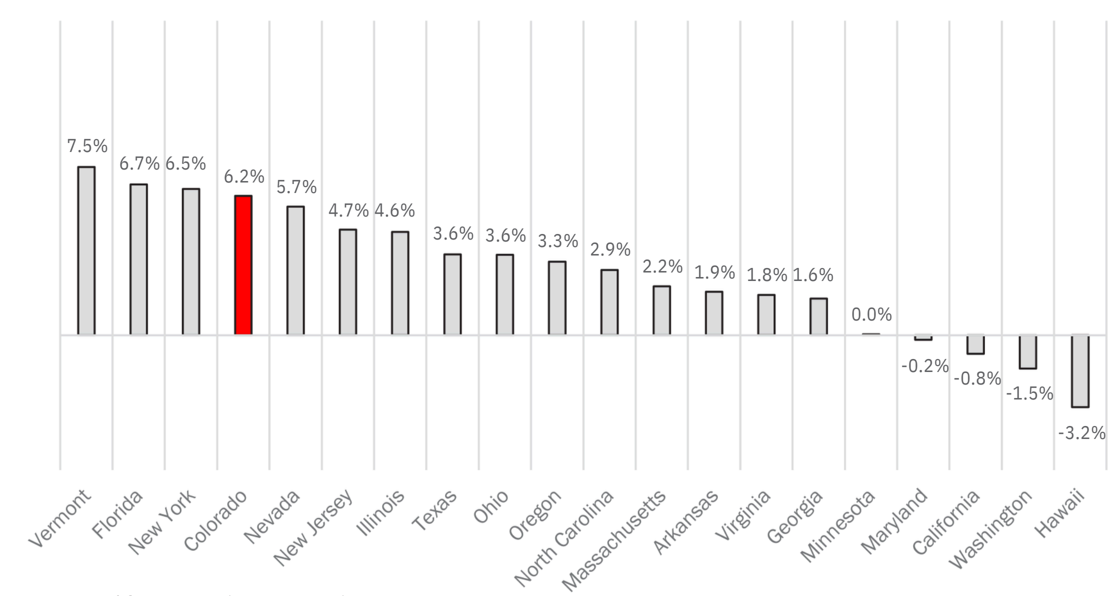
Japanese brand market share in the state was higher than U.S. levels: **41.3%** vs. **39.2%**. State Domestic brand share (which includes Tesla and Rivian) was **36.2%** last year. Korean and European brands accounted for a higher share of the state market than in the Nation.

Data sourced from Experian Automotive.



COMPARISON OF STATE MARKETS

Percent Change in New Retail Light Vehicle Registrations - 2024 vs. 2023



Data sourced from Experian Automotive.

Observations and Key Facts

» Colorado registrations increased **6.2%** from 2023 to 2024, above average compared to other markets. The Vermont market improved by **7.5%**.

» BEV market share in the state was **19.5%** vs. **9.0%** in the Nation. BEV penetration was highest in California - **23.5%**

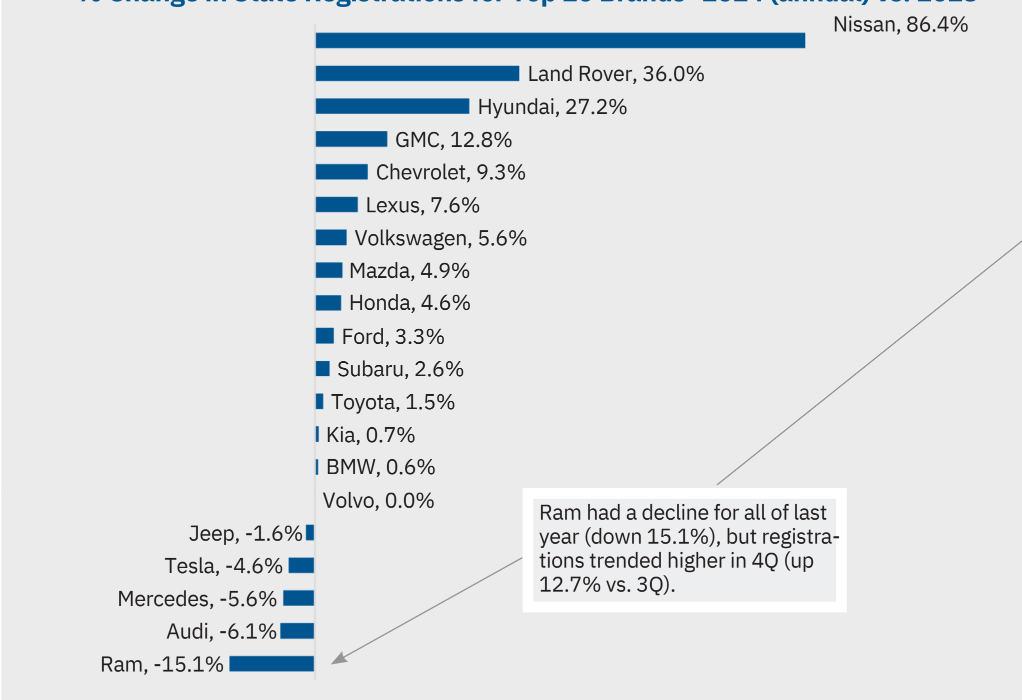
» Toyota was the best-selling brand in the state last year and was also the leader in 12 out of the other 20 markets. Highest share for Toyota was in Oregon (**23.4%**).

BRANDS AND MODELS

WINNERS AND LOSERS

The primary metric used to identify winning and losing brands is the percent change in registrations vs. year earlier, shown on the graph below. Nissan had by far the largest gain in the state market last year among the top 20 brands. BUT this snapshot does not capture the shorter term trend in sales, and this matters! Registrations for a brand may have posted a big year-over year increase (definitely a positive), but if growth has stalled during the most recent quarter, that's significant. The tables to the right of the graph show results from the Third to the Fourth Quarters of 2024.

% Change in State Registrations for Top 20 Brands- 2024 (annual) vs. 2023



Data sourced from Experian Automotive.

Brands Gaining Ground

Largest % increases from 3Q '24 to 4Q '24

Volvo	Up	46.7%
BMW	Up	32.3%
Hyundai	Up	18.9%
Land Rover	Up	15.7%
Ram	Up	12.7%

Brands Losing Ground

Largest % declines from 3Q '24 to 4Q '24

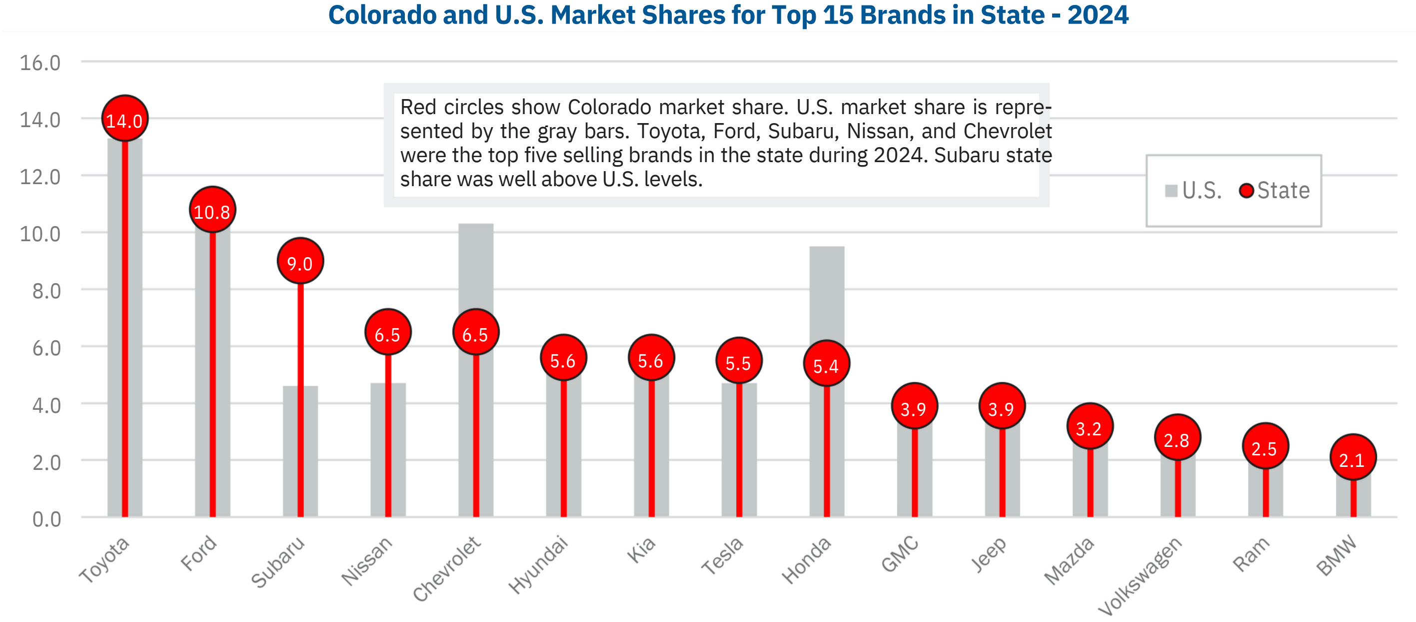
Volkswagen	Down	26.8%
Subaru	Down	6.8%
Toyota	Down	5.1%
Jeep	Down	5.0%
Honda	Down	3.7%

Largest % increases during 2024 vs. 2023: Nissan, Land Rover, Hyundai, GMC, and Chevrolet.

Largest % increases in 4Q '24 vs. 3Q '24: Volvo, BMW, Hyundai, Land Rover, and Ram.

TOP SELLING BRANDS

Colorado and U.S. Market Shares for Top 15 Brands in State - 2024



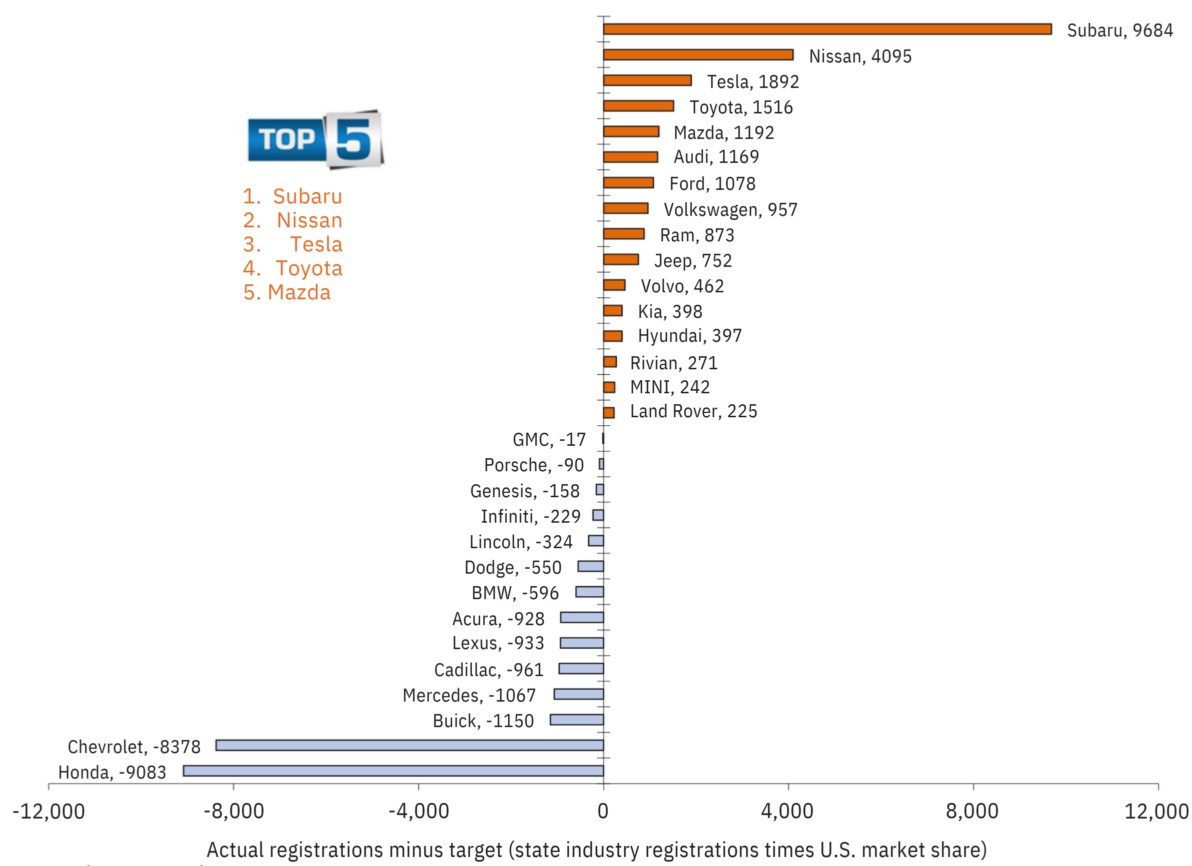
Data sourced from Experian Automotive.

BRANDS AND MODELS

BRAND SALES PERFORMANCE

The graph below provides an indicator of brands that are popular in Colorado (relative to the National standard), and those that are not. Here's how it works: For the top 30 selling brands, each brand's share of the U.S. market is multiplied by industry retail registrations in the state in 2024. This yields a "target" for the state market. Target registrations are subtracted from actual registrations to derive the measurement of sales performance. Brands at the top of the graph (i.e., Subaru, Nissan, Tesla, Toyota, Ford, and Mazda) are relatively strong sellers in the state, with actual registrations exceeding calculated targets by large margins. For instance, Subaru registrations exceeded the target by 9,684 units.

Colorado Retail Market Performance based on registrations during 2024
Actual registrations minus target (state industry registrations times U.S. market share)



Data sourced from Experian Automotive.

TOP SELLING MODELS

Top 20 Selling Models during 2024 - Market Share and % Change in Registrations vs. 2023

Rank	Model	State Share %	% chg. '23 to '24	Rank	Model	State Share %	% chg. '23 to '24
1	Ford F-Series	4.1	3.1	11	Hyundai Ioniq 5	2.0	299.6
2	Toyota RAV4 Tesla	3.9	5.3	12	Subaru Forester	1.9	4.6
3	Model Y Subaru	3.7	-13.5	13	Nissan Ariya	1.8	398.1
4	Crosstrek Nissan	2.8	5.8	14	Toyota Tacoma	1.7	-27.4
5	Leaf GMC Sierra	2.5	827.2	15	Toyota 4Runner	1.6	-22.6
6	Subaru Outback	2.3	4.3	16	Jeep Wrangler	1.6	28.0
7	Chevrolet Silverado	2.3	4.6	17	Toyota Tundra	1.6	19.0
8	Ram Pickup Honda	2.2	-6.2	18	Tesla Model 3	1.2	6.7
9	CR-V	2.2	-15.3	19	Hyundai Tucson	1.1	-10.5
10		2.1	0.1	20	Jeep Grand Cherokee	1.1	10.8

Table on the left presents the top 20 selling models in the state during all of 2024. Share of industry registrations and the per- cent change versus 2023 are also shown. Models with the five largest per- centage increase are shad- ed blue. Data sourced from Experi- an Automotive.

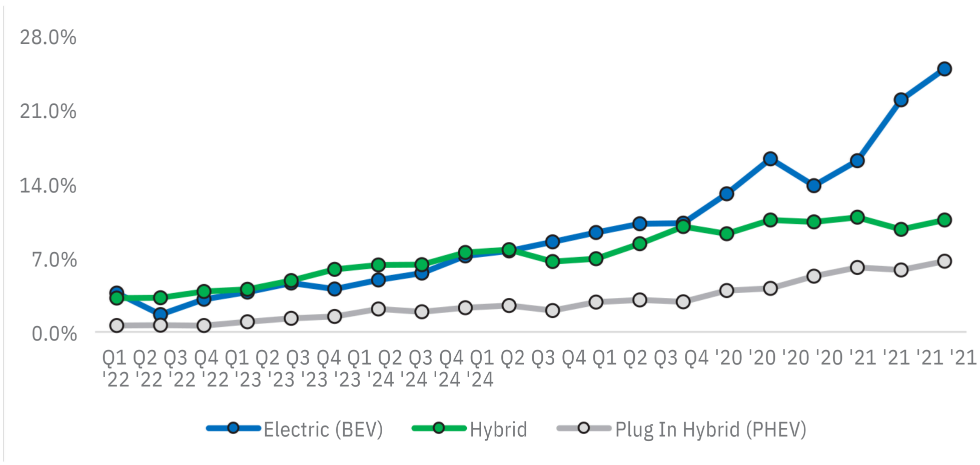
ALTERNATIVE POWERTRAIN MARKET

FIVE KEY TRENDS

1. 2024 recap: Industry registrations increased 6.2% vs. '23. BEVs were up 65%, hybrids rose 15%, & PHEVs climbed 82%.
2. BEV gains have continued. BEV share increased by 4.4 points from '22 to '23 and was up by another 7.0 points in '24.
3. BEV sales at franchised dealerships increased 165% last year vs. the 10.7% decline for direct sellers!
4. PHEV sales have accelerated. PHEV vehicle market share increased from 3.5% in 2023 to 6.0% last year.
5. 4Q '24 recap: Market share increased from 3Q to 4Q for BEVs, Hybrids, and PHEVs.

BEV, PHEV, AND HYBRID MARKET SHARE

Percent Share of Industry Registrations by Powertrain Type



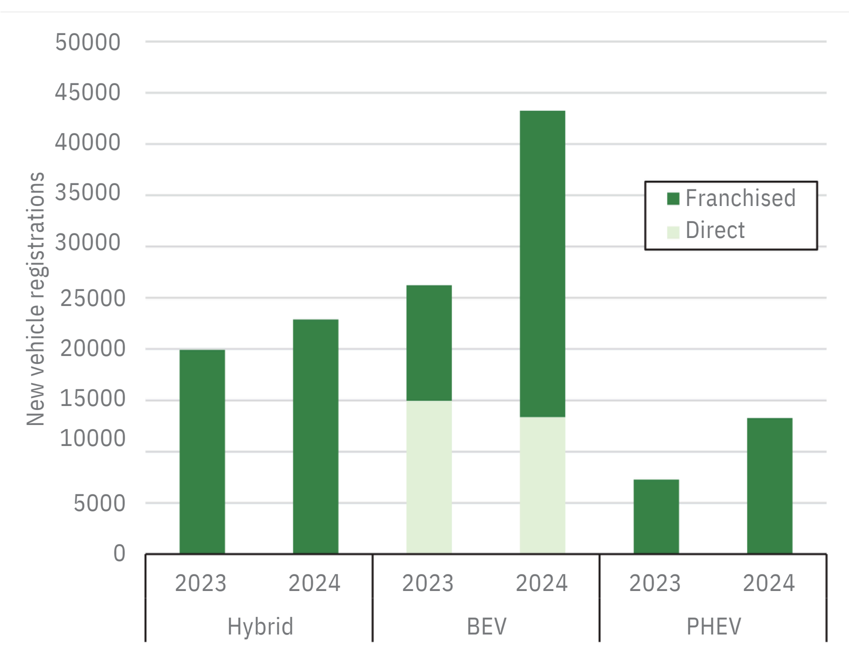
Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

Annual Totals	2023	2024
Electric (BEV)	12.5%	19.5%
Hybrid	9.5%	10.3%
Plug In Hybrid (PHEV)	3.5%	6.0%

Quarterly	3Q '24	4Q '24
Electric (BEV)	21.9%	24.8%
Hybrid	9.7%	10.5%
Plug In Hybrid (PHEV)	5.8%	6.7%

FRANCHISED DEALERSHIPS AND DIRECT SELLERS

New Hybrid, BEV, and PHEV Registrations in Colorado by Type of Selling Dealership



Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

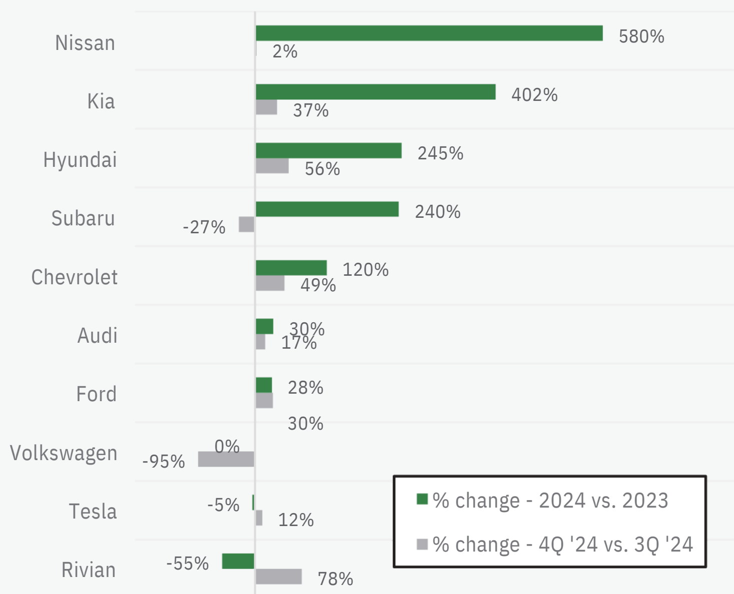
BEV Registrations and Market Share	Franchised Dealerships	Direct Sellers
2023 Annual	11,254	14,962
2024 Annual	29,909	13,355
% change	165.8%	-10.7%
2023 mkt. share %	42.9	57.1
2024 mkt. share %	69.1	30.9
change	26.2	-26.2
3Q '24 regs.	9,500	3,482
4Q '24 regs.	11,028	3,974
% change	16.1%	14.1%
3Q '24 mkt. share %	73.2	26.8
4Q '24 mkt. share %	73.5	26.5
change	0.3	-0.3

The dark green areas in the graph show sales by powertrain type for franchised dealerships. Sum of the green areas is 66,085 registrations, 83% of the overall total.

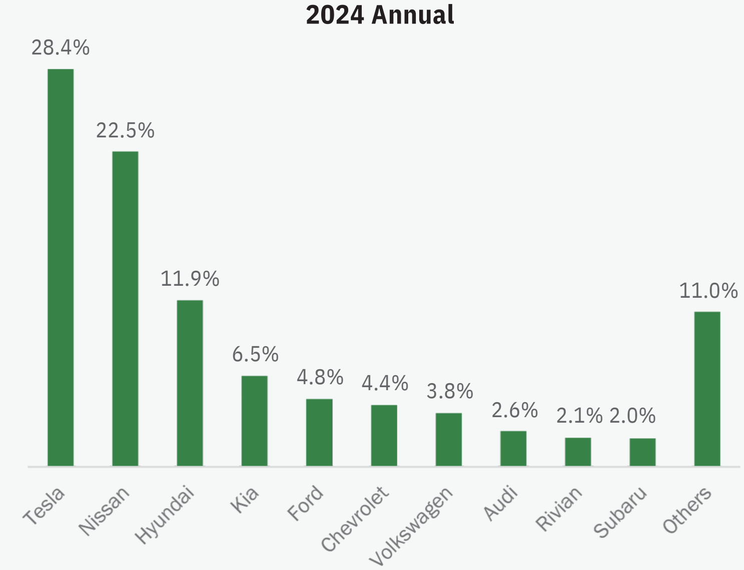
ALTERNATIVE POWERTRAIN MARKET

MAKES AND MODELS

% Change in BEV Registrations for Top 10 Brands 2024 vs. 2023 and 4Q '24 vs. 3Q '24



Brand Share of Colorado BEV Market (%) 2024 Annual



Obser vations

» Nissan had the largest % increase in BEV registrations from 2023 to 2024 (up 580%).

» BEV registrations increased from 3Q '24 to 4Q '24 for 8 of the top 10 selling brands.

» Tesla share of the BEV market was 28.4% last year.

Data sourced from Experian Automotive. Hybrid registrations exclude mild hybrids.

Top Five Brands by type of Powertrain Registrations for 2023 and 2024

	Rank	Brand	2023 Regs.	2024 Regs.	% chg.	2024 Share
BEV	1	Tesla	12,867	12,274	-4.6%	28.4%
	2	Nissan	1,430	9,727	580.2%	22.5%
	3	Hyundai	1,492	5,140	244.5%	11.9%
	4	Kia	560	2,809	401.6%	6.5%
	5	Ford	1,636	2,095	28.1%	4.8%
PHEV	1	Jeep	2,486	3,776	51.9%	28.4%
	2	Toyot	1,644	2,439	48.4%	18.4%
	3	a	220	1,627	639.5%	12.3%
	4	Mazda	555	1,074	93.5%	8.1%
	5	Volvo	402	856	112.9%	6.4%
		Kia				
HYBRID	1	Toyota	9,356	12,403	32.6%	54.2%
	2	Honda	3,140	2,930	-6.7%	12.8%
	3	Ford	1,911	1,985	3.9%	8.7%
	4	Hyunda	1,537	1,950	26.9%	8.5%
	5	i Lexus	1,811	1,928	6.5%	8.4%

Market Share for Top 15 Selling BEVs, PHEVs, and Hybrids - 2024

Rank	Model	Type	2024 Share
1	Tesla Model Y	BEV	10.5%
2	Nissan Leaf	BEV	7.1%
3	Toyota RAV4	Hybrid	5.7%
4	Hyundai Ioniq 5	BEV	5.6%
5	Nissan Ariya	BEV	5.2%
6	Tesla Model 3	BEV	3.3%
7	Honda CR-V	Hybrid	3.1%
8	Jeep Wrangler	PHEV	3.0%
9	Toyota RAV4	PHEV	2.4%
10	Volkswagen ID.4	BEV	2.1%
11	Jeep Grand Cherokee	PHEV	1.7%
12	Kia EV9	BEV	1.7%
13	Kia EV6	BEV	1.6%
14	Mazda CX-90	PHEV	1.5%
15	Ford Mustang Mach-E	BEV	1.4%

Brand Registrations Report Colorado New Retail Car and Light Truck Registrations												
	Fourth Quarter						Annual Totals					
	Registrations			Market Share (%)			Registrations			Market Share (%)		
	4Q '23	4Q '24	% change	4Q '23	4Q '24	Change	2023	2024	% change	2023	2024	Change
TOTAL	54,472	60,584	11.2				208,926	221,891	6.2			
Cars	6,264	7,711	23.1	11.5	12.7	1.2	25,510	28,119	10.2	12.2	12.7	0.5
Light Trucks	48,208	52,873	9.7	88.5	87.3	-1.2	183,416	193,772	5.6	87.8	87.3	-0.5
Domestic Brands	20,439	21,921	7.3	37.5	36.2	-1.3	79,486	80,365	1.1	38.0	36.2	-1.8
European Brands	6,470	6,524	0.8	11.9	10.8	-1.1	23,541	24,244	3.0	11.3	10.9	-0.4
Japanese Brands	22,199	24,431	10.1	40.8	40.3	-0.5	83,075	91,602	10.3	39.8	41.3	1.5
Korean Brands	5,364	7,708	43.7	9.8	12.7	2.9	22,824	25,680	12.5	10.9	11.6	0.7
Acura	245	339	38.4	0.4	0.6	0.2	1,209	1,079	-10.8	0.6	0.5	-0.1
Alfa Romeo	32	16	-50.0	0.1	0.0	-0.1	108	104	-3.7	0.1	0.0	-0.1
Audi	1,077	1,042	-3.2	2.0	1.7	-0.3	4,098	3,849	-6.1	2.0	1.7	-0.3
BMW	1,315	1,431	8.8	2.4	2.4	0.0	4,679	4,706	0.6	2.2	2.1	-0.1
Buick	356	387	8.7	0.7	0.6	-0.1	1,608	1,527	-5.0	0.8	0.7	-0.1
Cadillac	293	390	33.1	0.5	0.6	0.1	1,172	1,387	18.3	0.6	0.6	0.0
Chevrolet	3,289	4,002	21.7	6.0	6.6	0.6	13,191	14,421	9.3	6.3	6.5	0.2
Chrysler	101	129	27.7	0.2	0.2	0.0	470	442	-6.0	0.2	0.2	0.0
Dodge	239	310	29.7	0.4	0.5	0.1	1,001	1,223	22.2	0.5	0.6	0.1
Ford	5,393	6,216	15.3	9.9	10.3	0.4	23,154	23,924	3.3	11.1	10.8	-0.3
Genesis	200	260	30.0	0.4	0.4	0.0	751	862	14.8	0.4	0.4	0.0
GMC	1,923	2,438	26.8	3.5	4.0	0.5	7,764	8,754	12.8	3.7	3.9	0.2
Honda	3,024	3,116	3.0	5.6	5.1	-0.5	11,548	12,082	4.6	5.5	5.4	-0.1
Hyundai	2,388	4,037	69.1	4.4	6.7	2.3	9,787	12,448	27.2	4.7	5.6	0.9
Infiniti	157	156	-0.6	0.3	0.3	0.0	693	630	-9.1	0.3	0.3	0.0
Jaguar	20	12	-40.0	0.0	0.0	0.0	103	82	-20.4	0.0	0.0	0.0
Jeep	2,025	2,228	10.0	3.7	3.7	0.0	8,698	8,563	-1.6	4.2	3.9	-0.3
Kia	2,776	3,411	22.9	5.1	5.6	0.5	12,286	12,368	0.7	5.9	5.6	-0.3
Land Rover			54.9	0.6	0.8	0.2	1,181	1,606	36.0	0.6	0.7	0.1
Lexus	304	471		2.4	2.0	-0.4	4,329	4,656	7.6	2.1	2.1	0.0
Lincoln	1,326	1,211	-8.7	0.5	0.5	0.0	955	1,235	29.3	0.5	0.6	0.1
Maserati	250	317	26.8	0.0	0.0	0.0	88	57	-35.2	0.0	0.0	0.0
Mazda	19	7	-63.2	2.8	3.2	0.4	6,768	7,097	4.9	3.2	3.2	0.0
Mercedes	1,540	1,925	25.0	1.6	1.4	-0.2	3,525	3,329	-5.6	1.7	1.5	-0.2
MINI	884	870	-1.6	0.3	0.3	0.0	605	653	7.9	0.3	0.3	0.0
Mitsubishi	176	200	13.6	0.3	0.2	-0.1	638	485	-24.0	0.3	0.2	-0.1
Nissan	146	134	-8.2	3.3	8.4	5.1	7,788	14,514	86.4	3.7	6.5	2.8
Polestar	1,806	5,067	180.6	0.1	0.0	-0.1	116	157	35.3	0.1	0.1	0.0
Porsche	32	23	-28.1	0.4	0.4	0.0	1,039	933	-10.2	0.5	0.4	-0.1
Ram	228	267	17.1	3.2	2.5	-0.7	6,518	5,537	-15.1	3.1	2.5	-0.6
Rivian	1,725	1,530	-11.3	1.3	0.4	-0.9	1,988	896	-54.9	1.0	0.4	-0.6
Subaru	698	226	-67.6	9.4	8.3	-1.1	19,427	19,928	2.6	9.3	9.0	-0.3
Tesla	5,129	5,037	-1.8	7.6	6.2	-1.4	12,867	12,274	-4.6	6.2	5.5	-0.7
Toyota	4,114	3,730	-9.3	16.2	12.3	-3.9	30,675	31,131	1.5	14.7	14.0	-0.7
Volkswagen	8,826	7,446	-15.6	3.4	2.1	-1.3	5,838	6,163	5.6	2.8	2.8	0.0
Volvo	1,853	1,281	-30.9	0.9	1.2	0.3	2,014	2,014	0.0	1.0	0.9	-0.1
Other	478	704	47.3	0.2	0.4	0.2	247	775	213.8	0.1	0.3	0.2
	85	218	156.5									
Data sourced from Experian Automotive.												

The table shows new retail light vehicle (car and light truck) registrations in the Colorado market. Figures are shown for the Fourth Quarters of '23 and '24, and annual totals. The top ten ranked brands in each change category are shaded yellow.

MODEL RANKINGS

F-Series and RAV4 Were Top Sellers in State Market During 2024

The table below shows the top five selling models in 2024 in 20 segments. In addition to unit registrations, it also shows each model's market share in its respective seg- ment.

BEST SELLERS IN PRIMARY SEGMENTS

Small Cars: Nissan Leaf

Mid Size & Large Cars: Toyota Camry

Near Luxury Car: Tesla Model 3

Full Size Pickup: Ford F-Series

Subcompact SUV: Subaru Crosstrek

Compact SUV: Toyota RAV4

2 Row Mid Size SUV: Subaru Outback

Luxury Midsize SUV: Lexus RX

Top Selling Models in Each Segment - New Retail Light Vehicle Registrations (2024 Annual Total)

Small Cars

Model	Nissan	Regs.	Share
Leaf	Honda	5628	39.1
Civic	Toyota	1386	9.6
Corolla	Subaru	1071	7.4
Impreza	Toyota	858	6.0
Prius		770	5.3

Mid Size and Large Cars

Model	Regs.	Share
Toyota Camry	1576	31.6
Honda Accord	670	13.4
Kia K5	544	10.9
Hyundai Ioniq 6	447	9.0
Subaru Legacy	429	8.6

Sports/Pony Cars

Model	Regs.	Share
Ford Mustang	339	31.1
Dodge Challenger	291	26.7
Toyota 86	146	13.4
Mazda MX5	111	10.2
Chevrolet Camaro	81	7.4

Near Luxury Cars

Model	Regs.	Share
Tesla Model 3	2624	47.3
BMW i4	463	8.4
BMW 3-Series	251	4.5
Audi A5	212	3.8
BMW 2-Series	185	3.3

Luxury and High End Sports Cars

Model	Regs.	Share
Chevrolet Corvette	386	18.5
Porsche 911	213	10.2
Tesla Model S	174	8.3
Mercedes E-Class	131	6.3
BMW i5	91	4.4

Compact/Mid Size Pickup

Model	Regs.	Share
Toyota Tacoma	3830	33.5
Chevrolet Colorado	1843	16.1
Ford Maverick	1664	14.6
Nissan Frontier	893	7.8
Ford Ranger	805	7.1

Full Size Pickup

Model	Regs.	Share
Ford F-Series	9020	30.2
GMC Sierra	5170	17.3
Chevrolet Silverado	4895	16.4
Ram Pickup	4833	16.2
Toyota Tundra	3505 11.7	

Mini Van

Model	Regs.	Share
Toyota Sienna	915	41.8
Kia Carnival	454	20.7
Honda Odyssey	394	18.0
Chrysler Pacifica	374	17.1
Chrysler Voyager	35	1.6

Large Van

Model	Regs.	Share
Ford Transit Connect	1296	40.4
Mercedes Sprinter	850	26.5
Ram Promaster	704	21.9
Chevrolet Express	197	6.1
Ford E-Series	101	3.1

Subcompact SUV

Model	Regs.	Share
Subaru Crosstrek	6268	35.7
Honda HR-V	1586	9.0
Mazda CX-30	1532	8.7
Chevrolet Trax	1249	7.1
Toyota Corolla Cross	1140 6.5	

Compact SUV

Model	Regs.	Share
Toyota RAV4	8735	16.8
Honda CR-V	4682	9.0
Hyundai Ioniq 5	4436	8.5
Subaru Forester	4224	8.1
Nissan Ariya	4099 7.9	

2 Row Mid Size SUV

Model	Regs.	Share
Subaru Outback	5094	27.1
Toyota 4Runner	3592	19.1
Jeep Grand Cherokee	2466	13.1
Hyundai Santa Fe	1494	7.9
Ford Mustang Mach-E	1151 6.1	

3 Row Mid Size SUV

Model	Regs.	Share
Kia Telluride	2437	12.7
Kia Sorento	1773	9.2
Ford Explorer	1668	8.7
Honda Pilot	1578	8.2
Subaru Ascent	1465 7.6	

Large SUV

Model Ford Bronco	Regs.	Share
Toyota Land Cruiser	2240	27.0
Chevrolet Tahoe	1081	13.0
Toyota Sequoia	947	11.4
Ford Expedition	771	9.3
	718	8.7

Luxury Subcompact SUV

Model Regs. Share
Audi Q4 E-Tron64529.3
Volvo XC4036016.3
Audi Q329513.4
BMW X129413.3
Audi Q4 Sportback E-Tron1928.7

Luxury Compact SUV

Model	Regs.	Share
Tesla Model Y	8307	52.5
Audi Q5	1336	8.4
Lexus NX	1196	7.6
BMW X3	863	5.5
Volvo XC60	757	4.8

Luxury Mid Size SUV

Model	Regs.	Share
Lexus RX	1782	17.9
BMW X5	1270	12.8
Mercedes GLE-Class	638	6.4
Volvo XC90	612	6.1
Lexus GX	526	5.3

Luxury Large SUV

Model Regs. Share Rivian R1S68021.6 Cadillac Escalade46014.6 Lexus TX39812.7 BMW X736011.5 Land Rover Range Rov31510.0

Top Selling Passenger Cars

Model	Regs.	Share
Nissan Leaf	5628	20.0
Tesla Model 3	2624	9.3
Toyota Camry	1576	5.6
Honda Civic	1386	4.9
Toyota Corolla	1071 3.8	

Top Selling Light Trucks

Model	Regs.	Share
Ford F-Series	9020	4.7
Toyota RAV4	8735	4.5
Tesla Model Y	8307	4.3
Subaru Crosstrek	6268	3.2
GMC Sierra	5170 2.7	

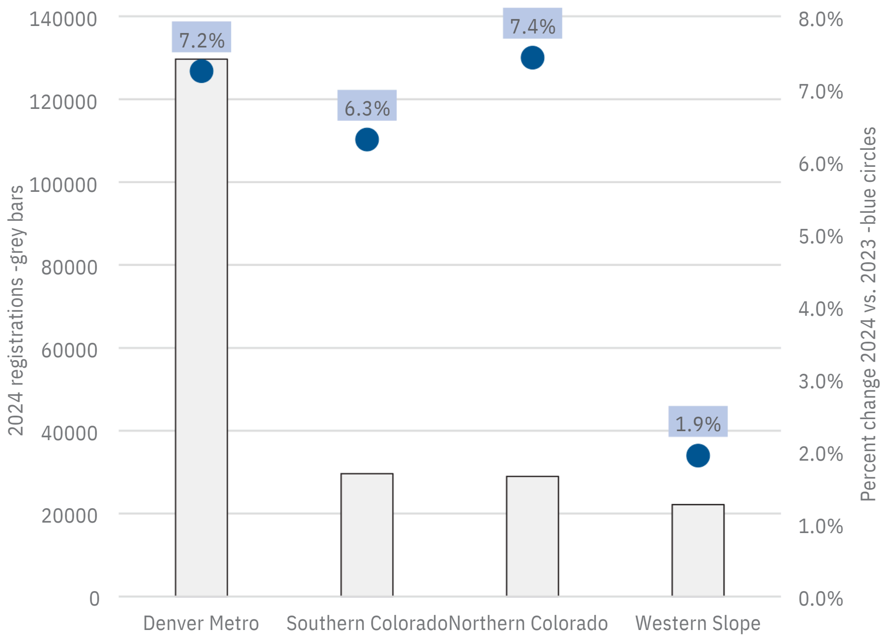
Data sourced from Experian Automotive.

REGIONAL MARKETS

Denver Metro and Northern Colorado Markets Up by More Than 7% in 2024

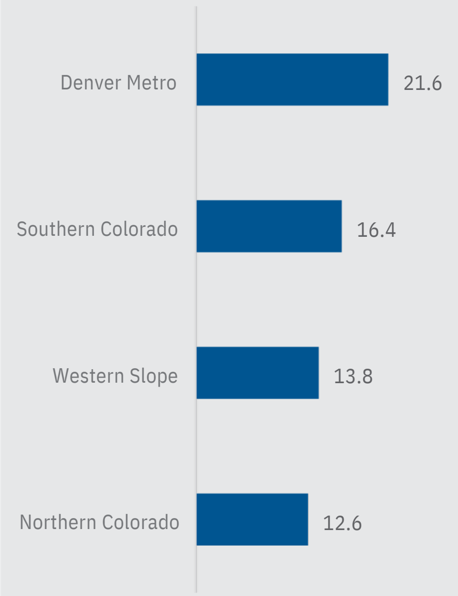
The graphs and tables on these two pages show specific data on each of the state's four regional markets. The figures represent new vehicles registered to retail customers residing in each of the regions, and includes both purchase and lease transactions.

Regional New Retail Light Vehicle Registrations
2024 Annual and Percent Change vs. 2023



The graph above shows new vehicle registrations in 2024 (grey bars and left axis) and percent change vs. 2023 (blue circles with labels and right axis). Data sourced from Experian Automotive.

Luxury Brand Market Share
2024



Data sourced from Experian Automotive.

REGIONAL MARKETS REVIEW

	Industry Registrations			Battery Electric Vehicle Market Share (%)			Luxury Brand Market Share (%)		
	2023 Annual	2024 Annual	% change '24 vs. '23	2023 Annual	2024 Annual	change '24 vs. '23	2023 Annual	2024 Annual	change '24 vs. '23
Denver Metro	120,882	129,634	7.2%	15.7	24.0	8.3	23.9	21.6	-2.3
Northern Colorado	26,992	28,997	7.4%	9.3	16.5	7.2	13.4	12.6	-0.8
Southern Colorado	27,872	29,627	6.3%	9.4	15.3	5.9	16.6	16.4	-0.2
Western Slope	21,776	22,198	1.9%	7.4	8.9	1.5	13.8	13.8	0.0

Top Regional Markets

Biggest Mar ket

Denver Metro:
129,634 registrations

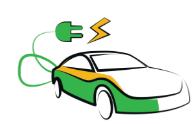
Largest % Increase

Northern Colorado:
Up 7.4%

Highest BEV Share

Denver Metro:

24.0%



Data sourced from Experian Automotive.

COUNTY MARKETS

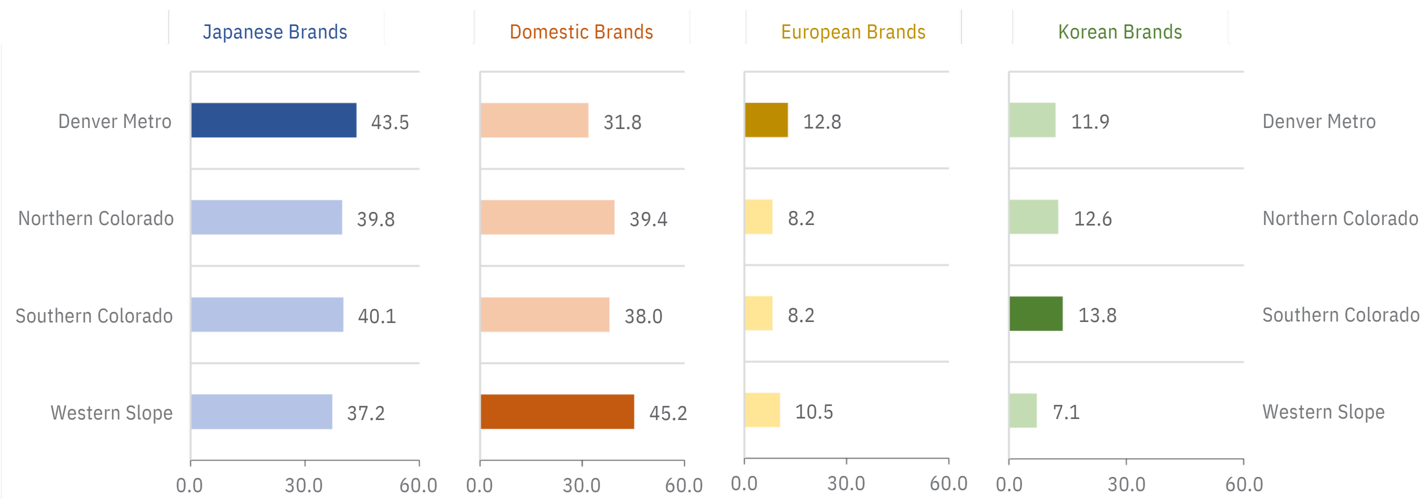
BEV Market Share Reached 24% in Denver Metro Region

Brand Market Share - 2024 (for top 10 selling brands in Colorado market)

County	Toyota	Ford	Subaru	Nissan	Chevrolet	Hyundai	Tesla	Kia	Honda	Jeep
Denver Metro	13.5	8.3	9.0	7.8	5.3	5.9	6.6	5.5	5.6	3.6
Northern Colorado	13.6	12.6	9.0	7.0	6.8	5.7	3.8	6.8	5.5	3.8
Southern Colorado	14.0	11.6	8.4	4.8	6.8	7.1	5.8	6.2	6.8	4.2
Western Slope	18.0	17.1	10.3	2.9	9.5	2.7	2.7	4.3	3.7	4.2

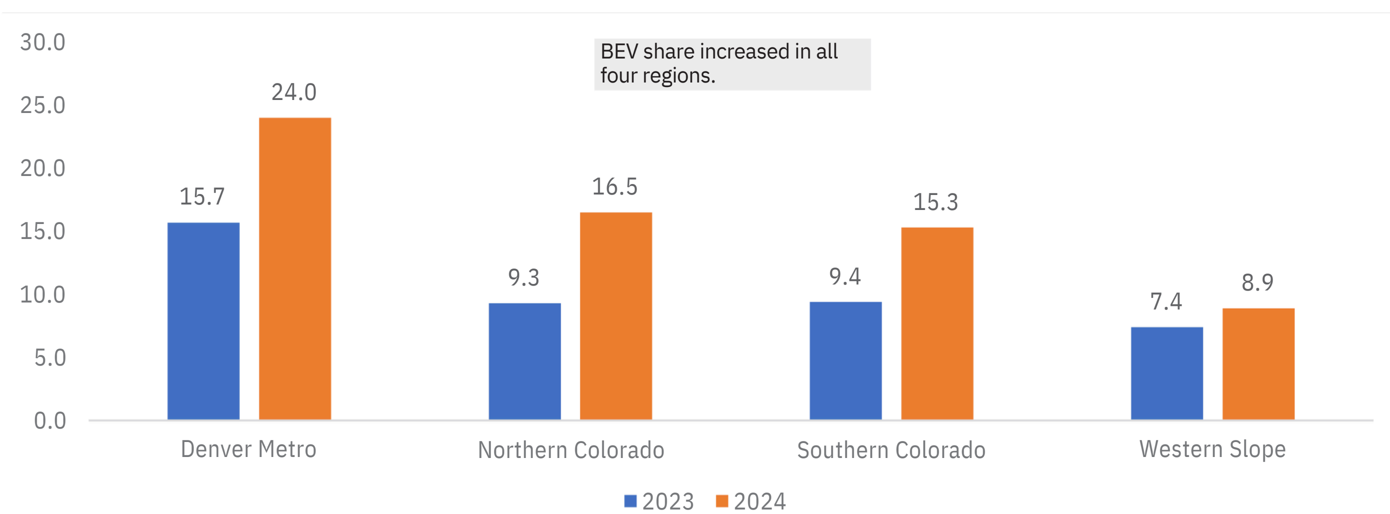
The table above shows brand market shares in each of the four regional markets. (Includes top ten selling brands in the area.) Highest market share for each brand is shaded grey. Data sourced from Experian Automotive.

Regional Market Shares for Japanese, Domestic, European, and Korean Brands - 2024



The graphs above show market shares by brand segments. Darker colors show the highest rated region for each segment. Data sourced from Experian Automotive.

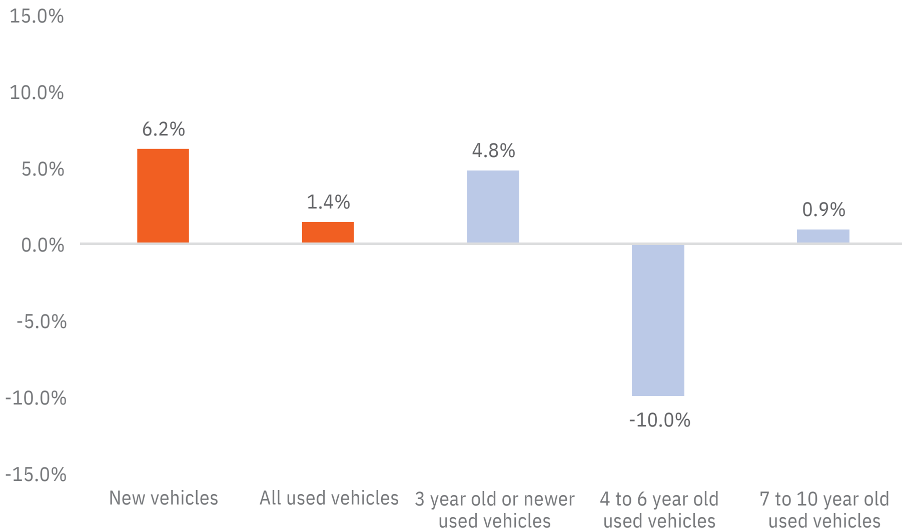
BEV Market Share in Regions - 2023 and 2024



COLORADO USED VEHICLE MARKET

Used Vehicle Market Up By Just 1.4% in 2024

Percent Change in New and Used Vehicle Registrations 2024 vs. 2023



Data sourced from Experian Automotive.

THREE KEY TRENDS IN USED VEHICLE MARKET

01. 02. 03.

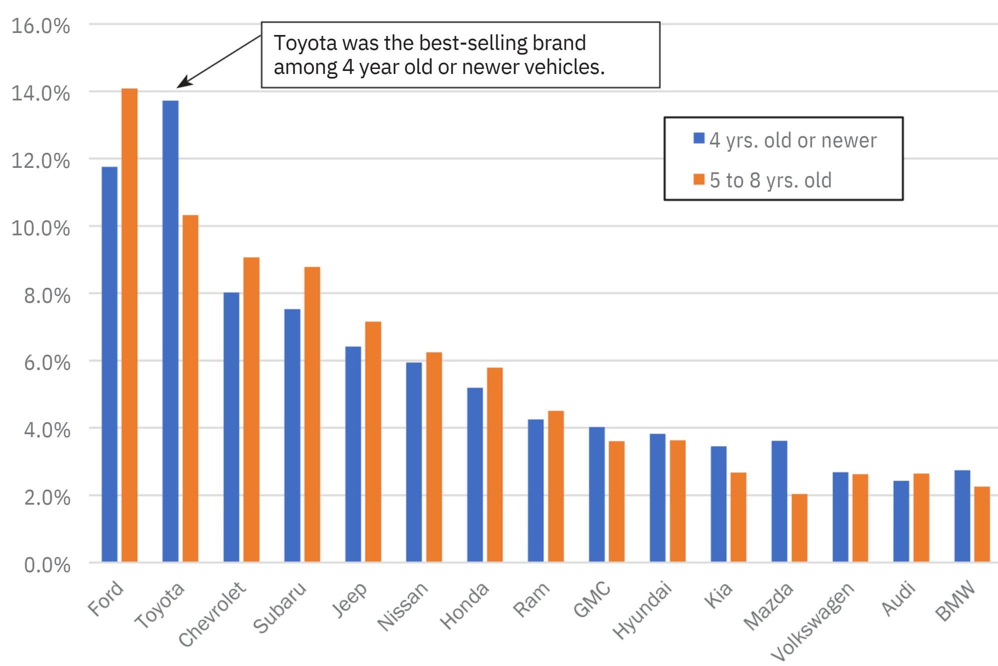
The Colorado used vehicle mar- ket increased 1.4% from 2023 to 2024. The new vehicle market im- proved by 6.2% last year. As shown on the graph to the left, three year old or newer vehicles had the largest percentage gain in the used vehicle market last year. Reg- istrations of 4 to 6 year old vehicles fell 10%. Weak new vehicle sales in 2022 and falling lease penetra- tion will result in tighter supplies of three year old vehicles in 2025. The state's pre- owned electric vehi- cle market is growing. BEV used ve- hicle registrations increased from 7,067 units in 2023 to 8,966 last year, up 27%. Used PHEV registra- tions increased 33% - 2,978 units in 2023 and 3,959 last year.

USED VEHICLE BRAND REGISTRATIONS

Mazda Used Vehicle Registrations Increased 10.8% in 2024

The graph below shows used light vehicle registrations by brand for two age categories: vehicles newer than four years old, and vehicles five to eight years old. Brands are positioned from left to right based on total market share. The table below shows the percent change in used registrations from 2023 to 2024 for the top 15 selling brands. Data sourced from Experian Automotive.

Brand Market Share for Top 15 Selling Brands, by Vehicle Age (2024)



% Change in Registrations 2024 vs. 2023 8 yr. old or newer vehicles

Brand	% change
Mazda	10.8%
Hyundai	4.7%
BMW	2.7%
Toyota	2.6%
Audi	-1.2%
Volkswagen	-1.5%
Honda	-1.9%
Kia	-2.4%
Subaru	-2.6%
Ram	-2.8%
Ford	-3.0%
GMC	-3.2%
Nissan	-3.7%
Chevrolet	-4.9%
Jeep	-9.3%

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