

AUTO INDUSTRY DASHBOARD



HERE for AMERICA

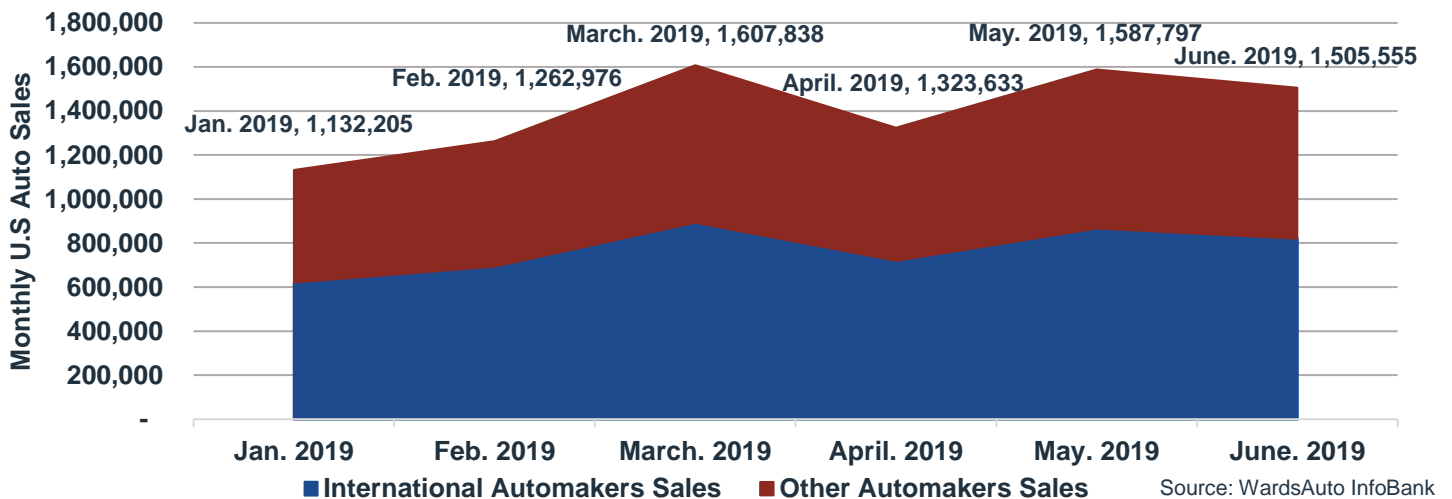
"International Automakers" refers to BMW, Honda, Hyundai, Kia, Jaguar Land Rover, Mazda, Mercedes-Benz, Mitsubishi Motors, Nissan, Subaru, Toyota, Volkswagen Group, Volvo and their related auto brands. "Other Automakers" refers to FCA, Ford, GM, Tesla and their related auto brands. HERE FOR AMERICA is an advocacy and public awareness initiative supporting the contributions of international automakers to the U.S. economy and auto industry.

July 2019 Edition:

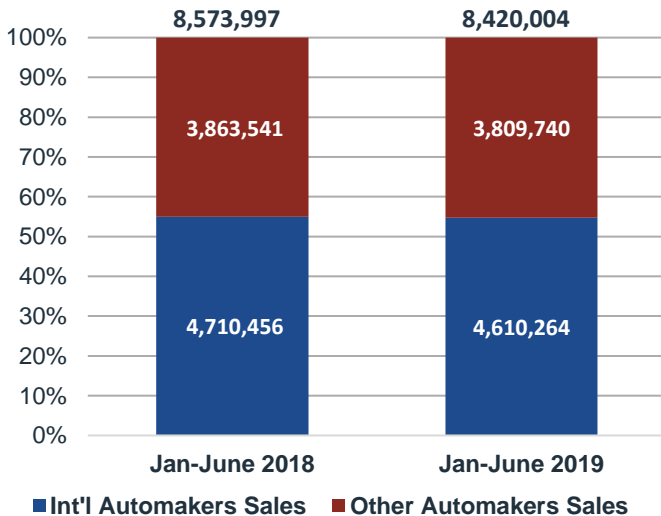
Summary: U.S. new vehicle sales declined in June, marking the sixth month of lower year-over-year (YoY) monthly sales in 2019. Correspondingly, **light vehicle (LV) production** declined in June, and continues to decline compared to 2018 volumes. **U.S. auto exports** increased in May up from April by 20,000 units. Overall, Jan-May export volumes are at the lowest levels since 2012. These declines, combined with looming China 301 and 232 auto tariffs, suggest that industry headwinds will not soon subside.

June 2019 Light Vehicle Sales Report

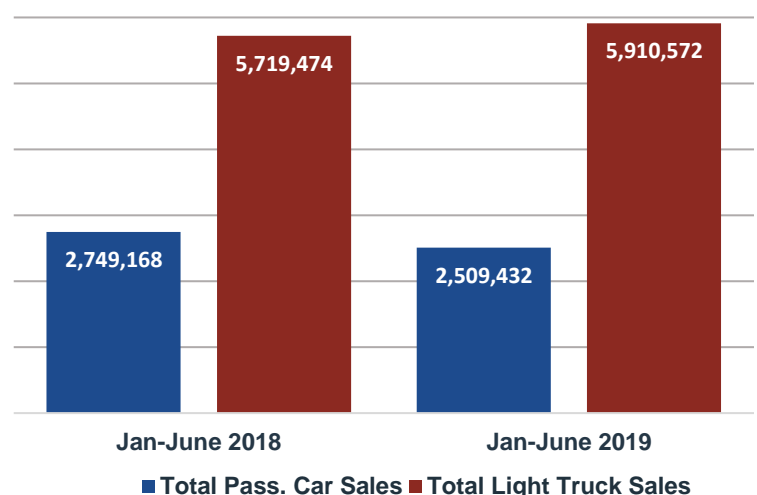
Auto sales decreased by over 82,000 units in June from May. Overall U.S. auto sales are down 1.8% this year compared to 2018.



International automakers have sold **55%** of all new vehicles bought in the U.S. in 2019, matching market shares recorded in 2018.



Light truck sales **increased 3.3%** in the first half of 2019, while passenger car sales **declined 8.7%** compared to this time last year.



Source: WardsAuto InfoBank



National Average Gas Prices

The national average price of regular gasoline **fell 14 cents** in June. The average price of gas is **still 47 cents higher** than the Jan. 2019 avg price of \$2.248.

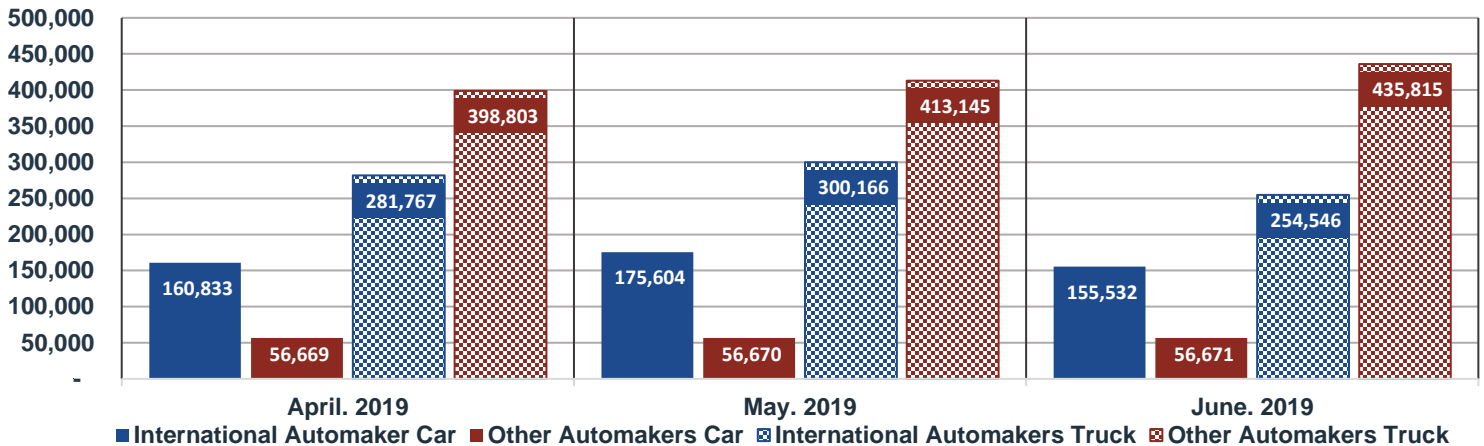
Apr. 2019 **2.798** May 2019 **2.859** June 2019 **2.716**

Source: U.S. Energy Information Administration



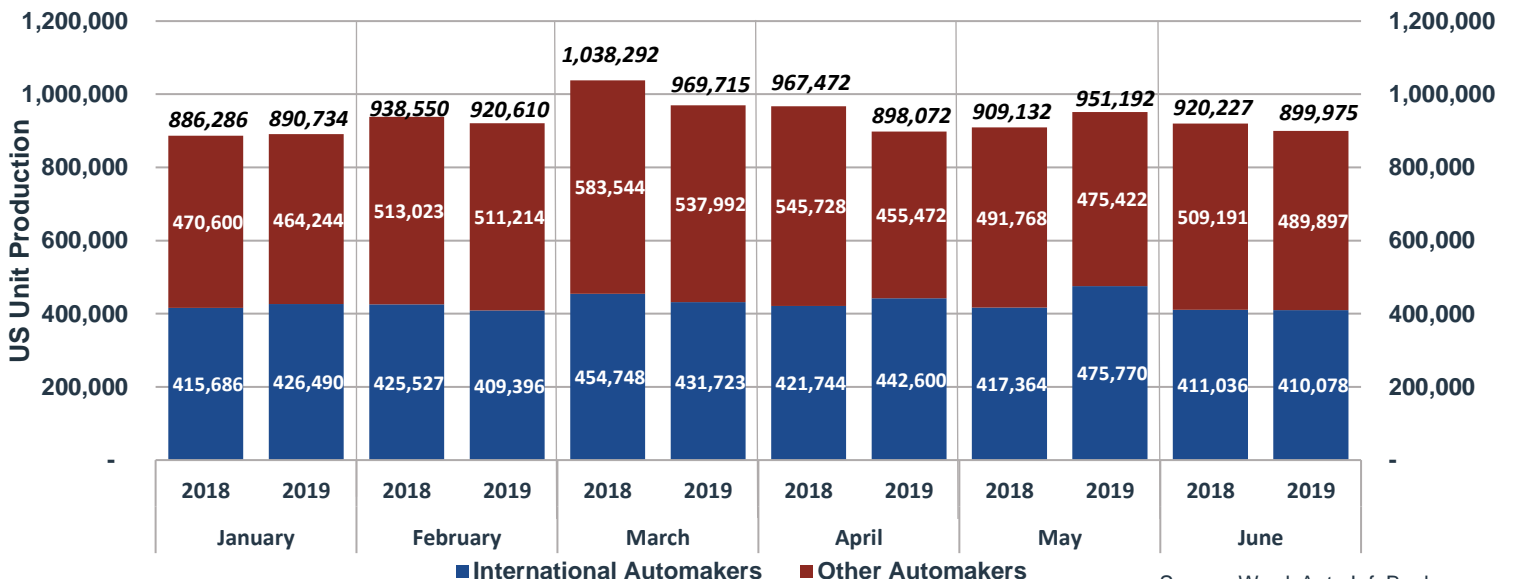
June 2019 Light Vehicle Production Report

Both passenger car and light truck production fell in June from May 2019. Cars **fell 28,300 (-11%) units** and light trucks **fell 23,000 (-3.2%)**. For this six month period, international automakers have **produced 72%** of US-made passenger vehicles, higher than 2018's figure of 67%.



Source: WardsAuto InfoBank, Monthly NA Production Reports

June 2019 light vehicle (LV) production **decreased 2.2% compared to June 2018**. However, international automakers have **produced 50,000 (+2%) more units** in 2019 compared to Jan-June 2018. While other automakers have **decreased production by over 180,000 (-5.8%)** this year.

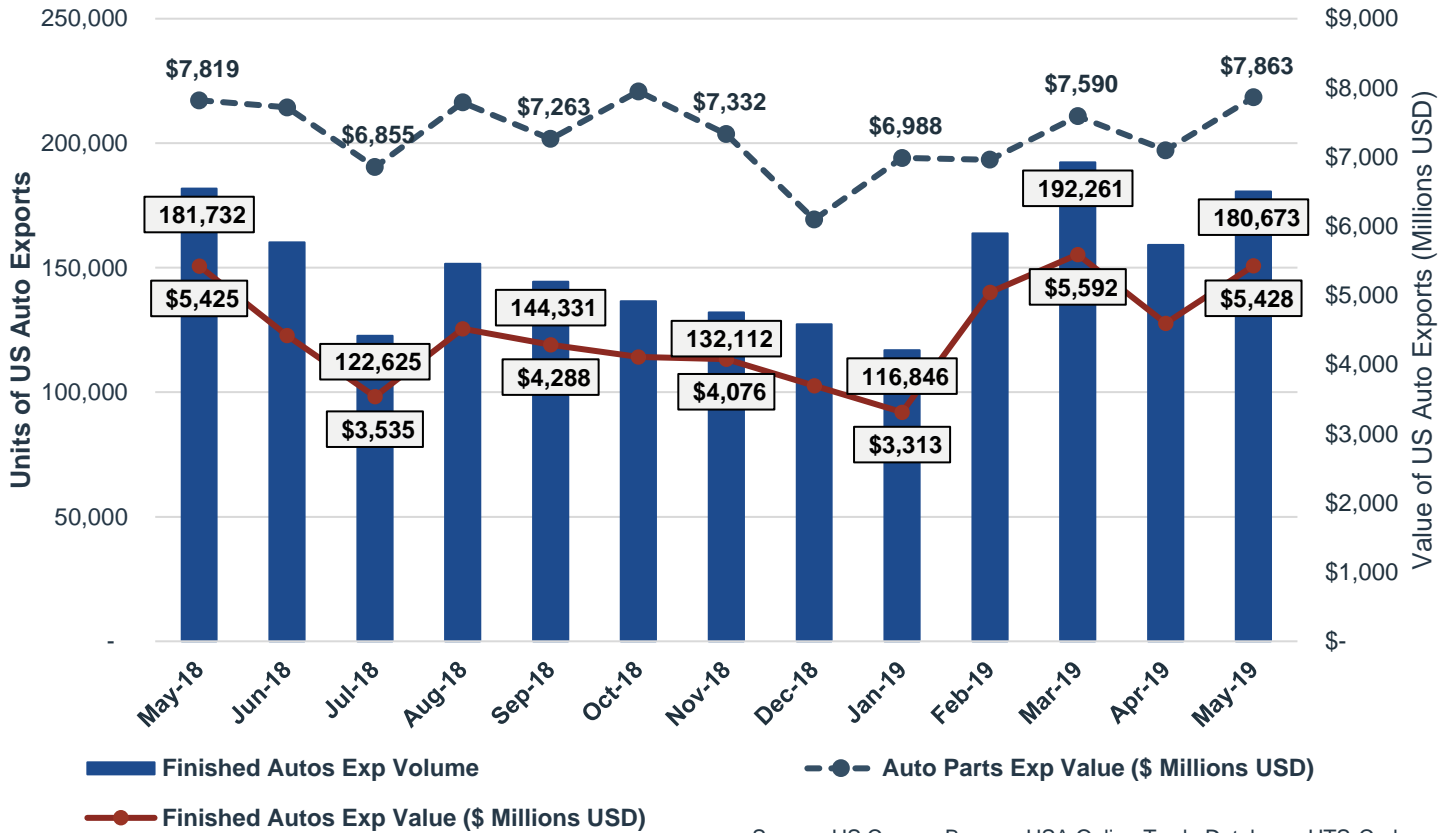


Source: WardsAuto InfoBank, Monthly NA Production Reports



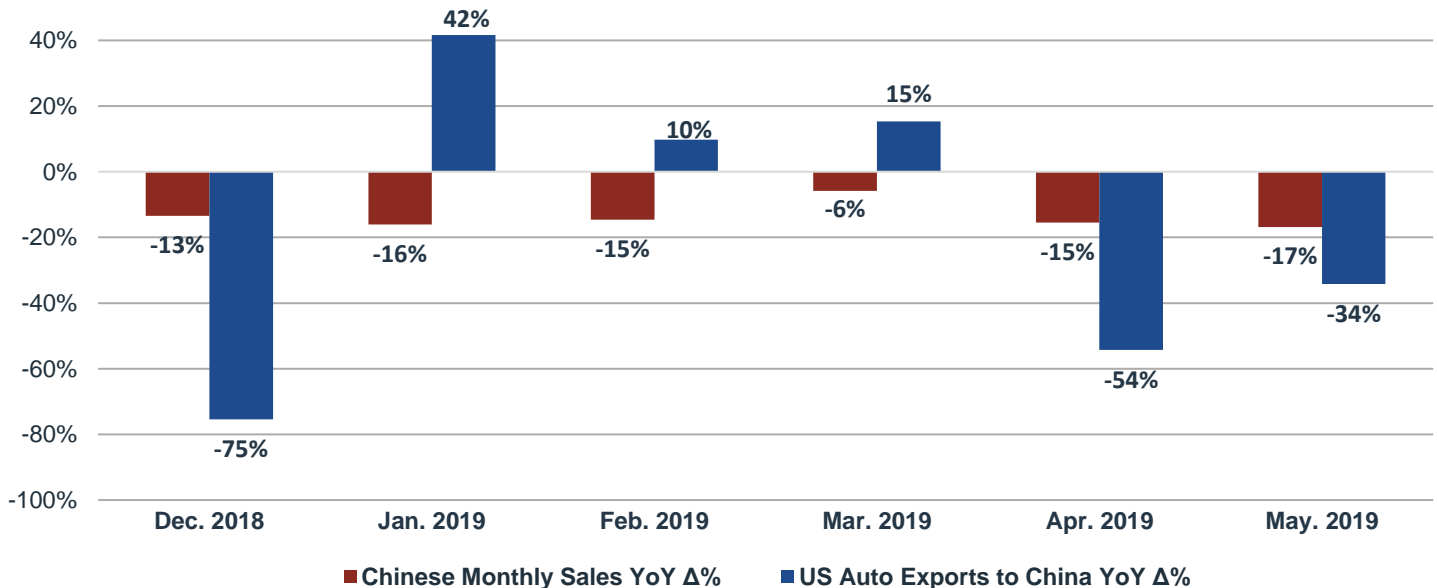
May 2019 U.S. New Vehicles Trade Report

U.S. light vehicle exports increased in May from April by **20,000 (13.5%) units**, well above the seasonal norm of 6%. The average value of a vehicle exported in May **increased to \$30,000**. Parts exports increased **approximately \$800 million** since April.



Source: US Census Bureau, USA Online Trade Database. HTS-Codes sourced from ITA. July 2019 USA Trade Data Release

U.S. light vehicle exports to China saw a YoY **decrease in May**. This is a similar trend to when China imposed a 25% retaliatory tariff (Jul.-Dec. 2018). The drop in U.S. vehicle exports to China is **significantly disproportional** to the decline in Chinese domestic vehicle sales.



Source: US Census Bureau, USA Online Trade Database. Light vehicle exports definition consistent with ITA definition. July 2019 USA Trade Data Release



May 2019 USD Exchange Rates

.89 EUR

110.00 JPY

6.85 CNY

0.78 GBP

1,182.59 KRW

19.09 MXN

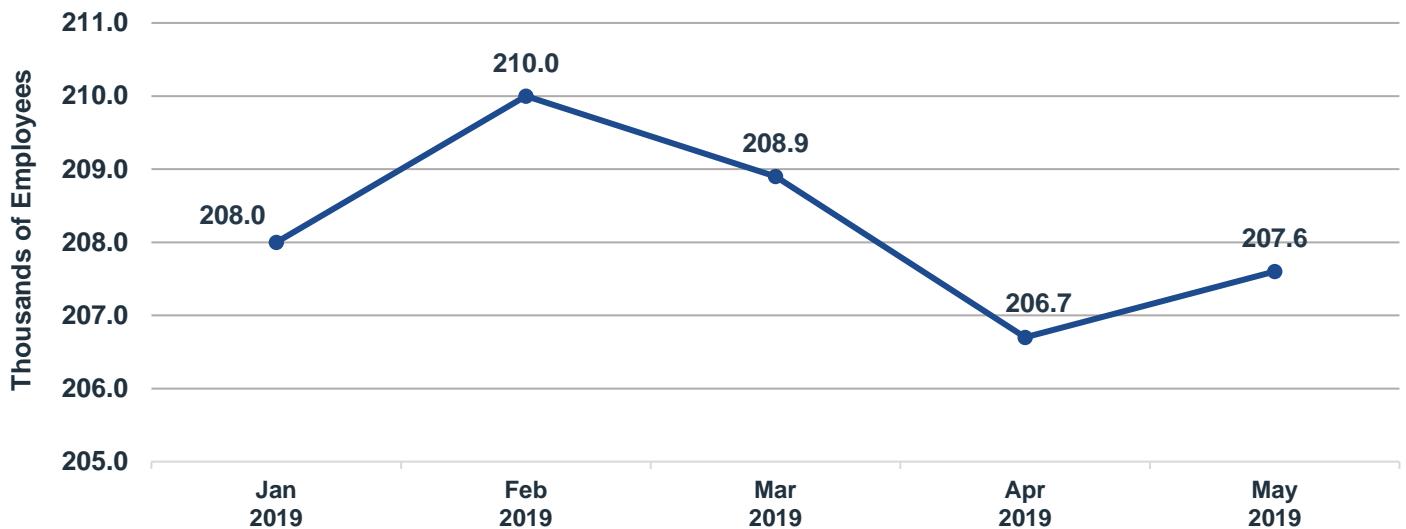
1.34 CAD

9.59 SEK



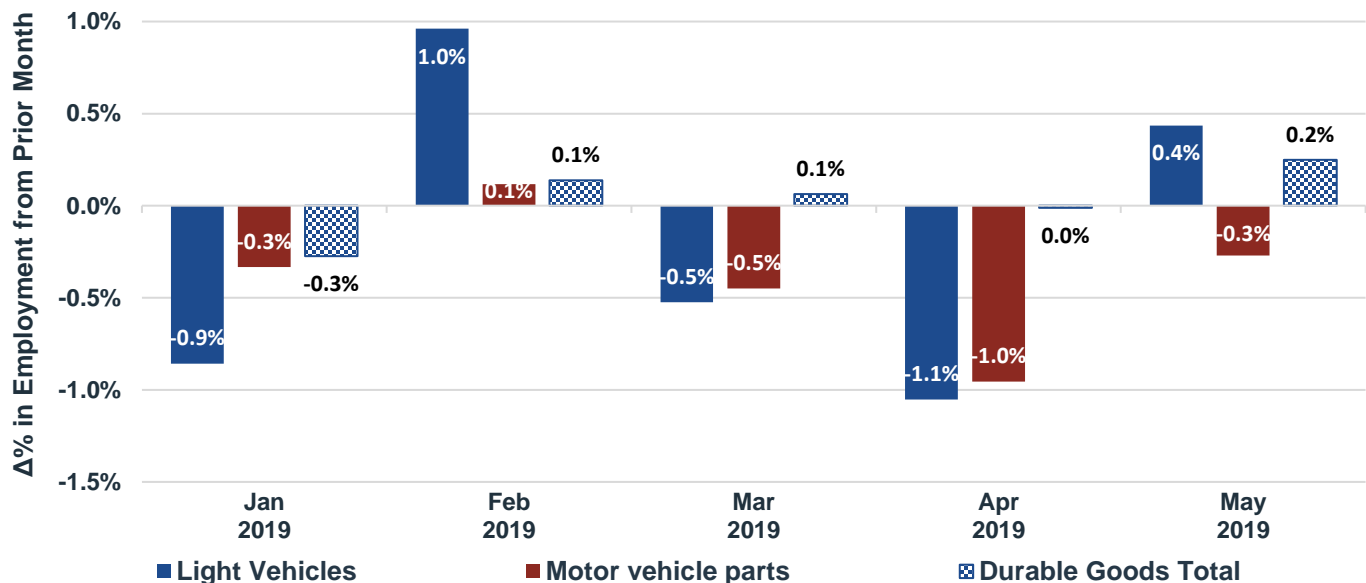
May 2019 Employment Report

Employment in light vehicle production **increased by approximately 1,100** from April to May 2019.



Source: Bureau of Labor Statistics, July Employment Data Release

Light vehicle manufacturing employment saw a **month-over-month increase** while parts manufacturing employment **decreased**. Overall durable goods manufacturing employment experienced a **slight increase in May from April**.



Source: Bureau of Labor Statistics, July Employment Data Release