

AUTO INDUSTRY DASHBOARD



HERE for AMERICA

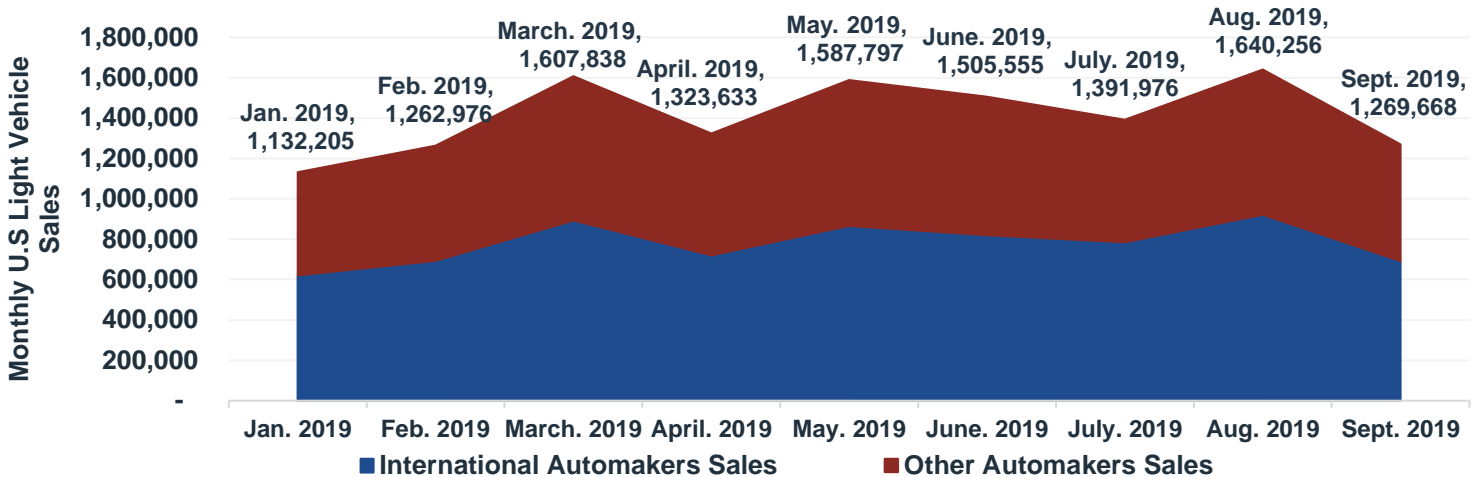
October 2019:

Summary: Sales figures from September 2019 indicate the August sales bump may have been due to a calendar fluke rather than recovering sales. Sales volume in September **decreased 11%** year-over-year (YoY). Production figures for the month **fell 5.5%** from Sept. 2018 volumes. August U.S. new light vehicle exports **increased 16%** YoY. Concerns remain over ongoing trade conflicts creating uncertainty over U.S. access to growing foreign auto markets such as China, where U.S. auto exports have almost recovered to pre-tariff levels.

"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.

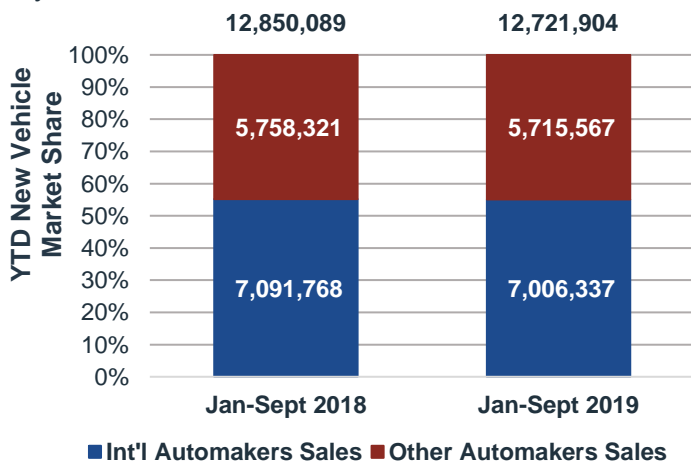
Light Vehicle Sales Report

Auto sales **decreased by 162,000 (-11.3%)** units in September 2019 from September 2018, wiping out August's sales gain of 160,000 and causing year-to-date (YTD) sales to fall back **below last year's levels**.

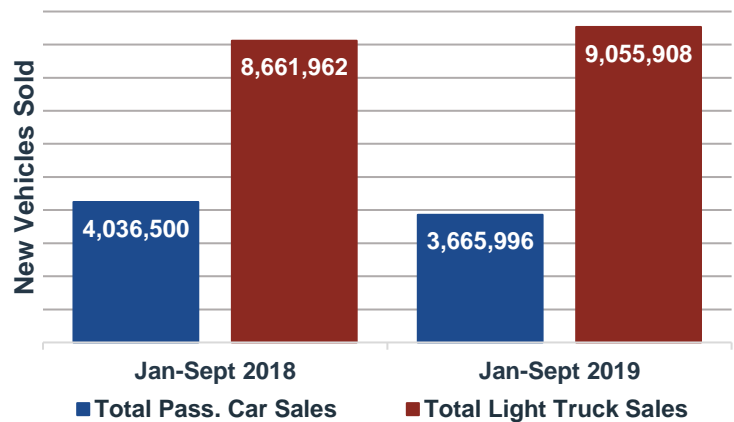


Source: WardsAuto InfoBank, Monthly U.S. LV Sales Report, monthly values subject to change

YTD sales have fallen back **below 2018 levels**. International automakers have **sold 55%** of all new vehicles in the U.S., keeping with last year's trend.



Light truck sales have **increased 4.5%** this year, while passenger car sales **declined 8.9%** compared to Jan-Sept. 2018. **Over 71%** of these light trucks are SUV/CUV-type vehicles (**more than 6.4 million total**).

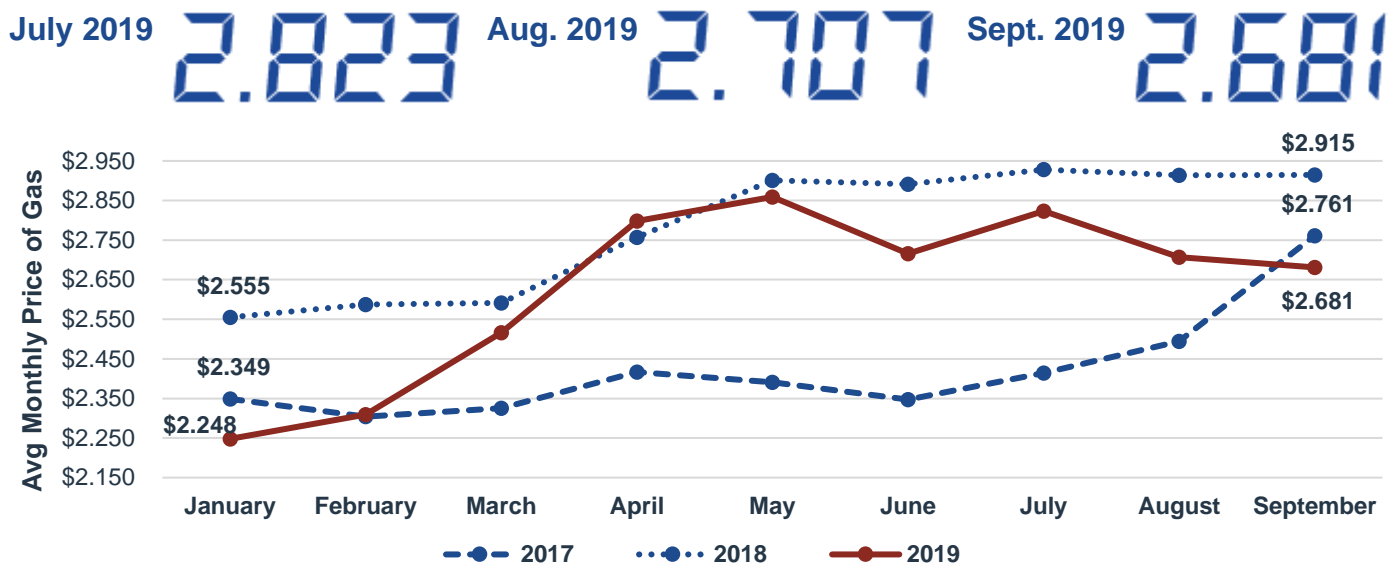


Source: WardsAuto InfoBank, Monthly U.S. LV Sales Report, monthly values subject to change



National Average Gas Prices

September 2019 gas prices are at a **three-year low** for the month but the national price is still **\$0.453 higher** than it was in January 2019.

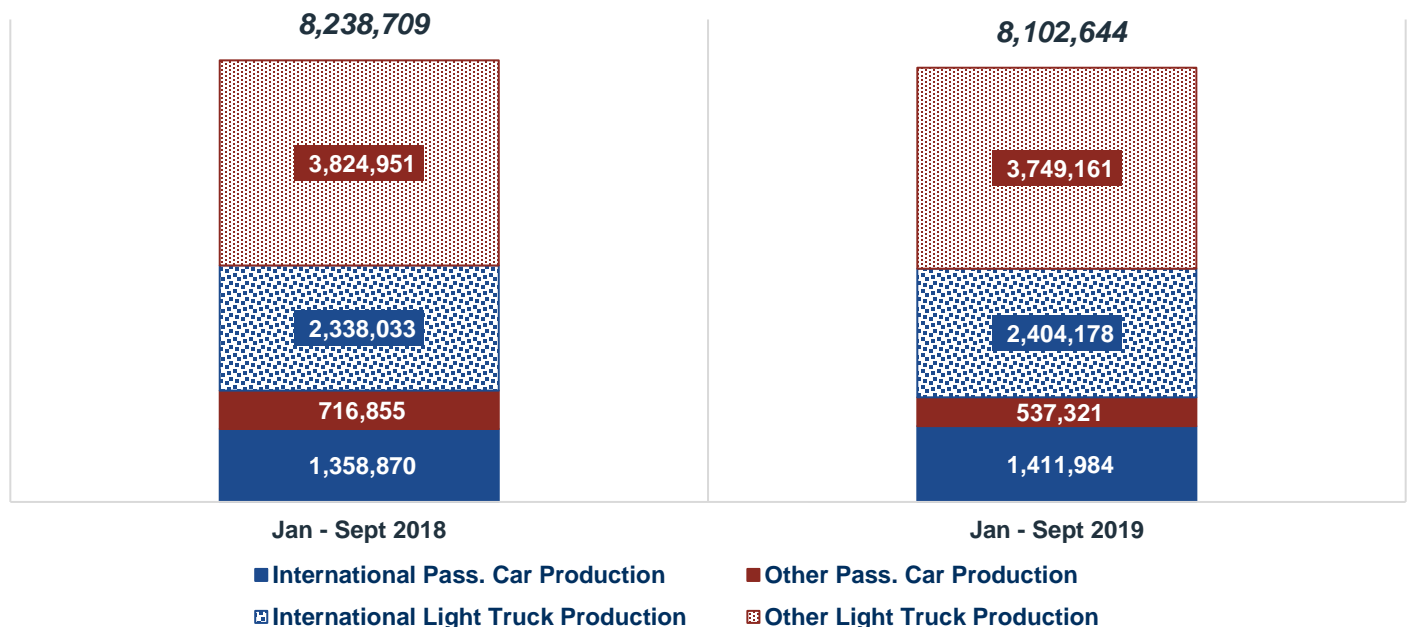


Source: U.S. Energy Information Administration



Light Vehicle Production Report

Total U.S. passenger car and light truck production continued its downward trend in September 2019. However, int'l automaker production has **increased by 53,100 (+4%)** passenger cars and by **66,100 (+2.8%)** light trucks this year over 2018. Other automakers have decreased production by **179,500 (-25%)** passenger cars and **75,800 (-0.7%)** light trucks this year.

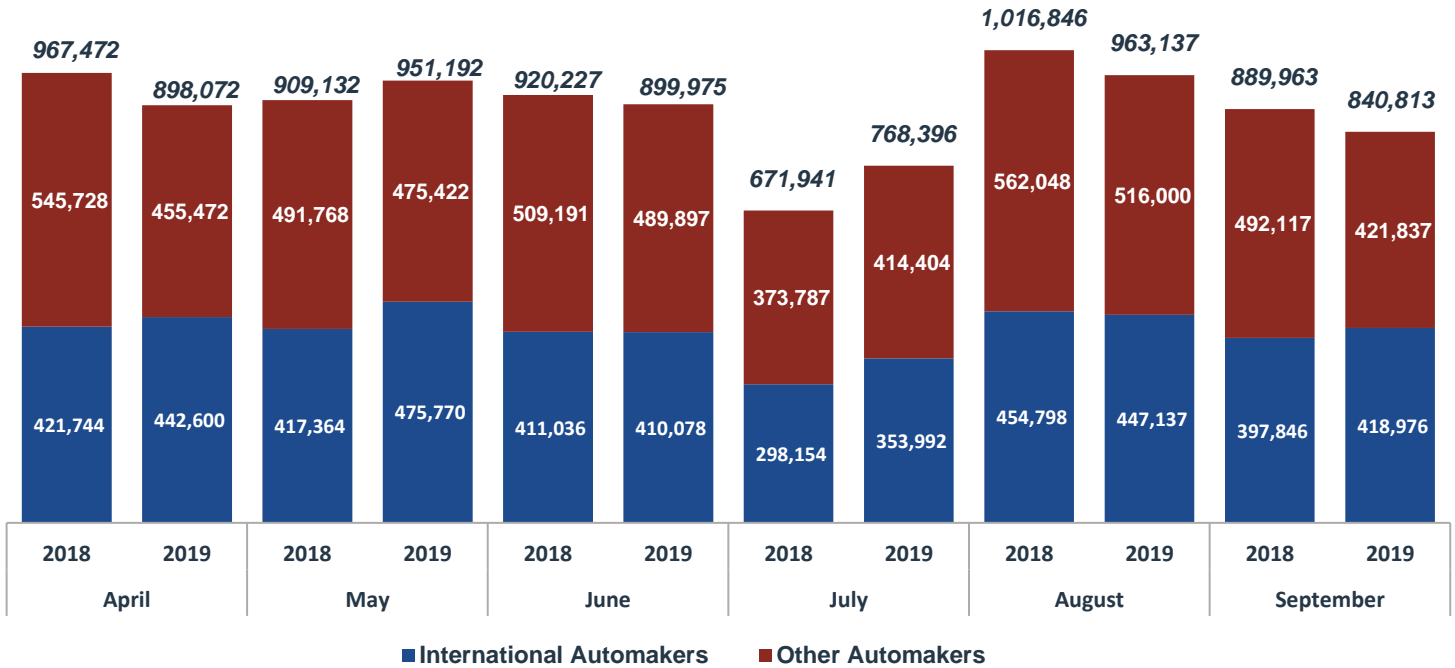


Source: WardsAuto InfoBank, Monthly NA Production Reports



Light Vehicle Production Report

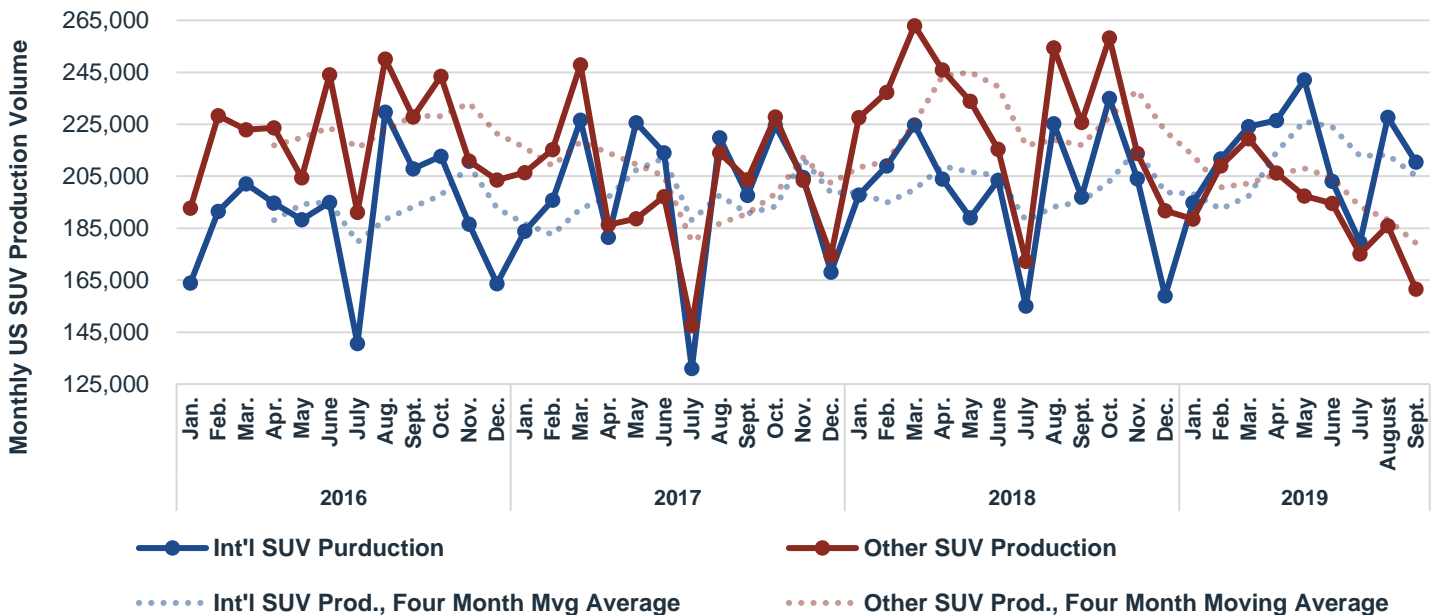
U.S. new vehicle production fell 5.7% in September, -5.4% for September and August combined. International automaker production increased 5% in September and 2% for the two month period while other automakers decreased production by 14% in September and 11% for the two months.



Source: WardsAuto InfoBank, Monthly NA Production Reports

Auto Production Fun Fact:

International Automakers have produced 52% of all U.S. made SUV/CUV vehicles in 2019. More than 1.92 million SUVs and CUVs were produced in Jan-Sept 2019, a 115,000 (+6.3%) YoY unit increase. Other automakers experienced a unit decrease, building 1.74 million SUVs and CUVs this year, a 338,000 (16%) YoY unit decrease.

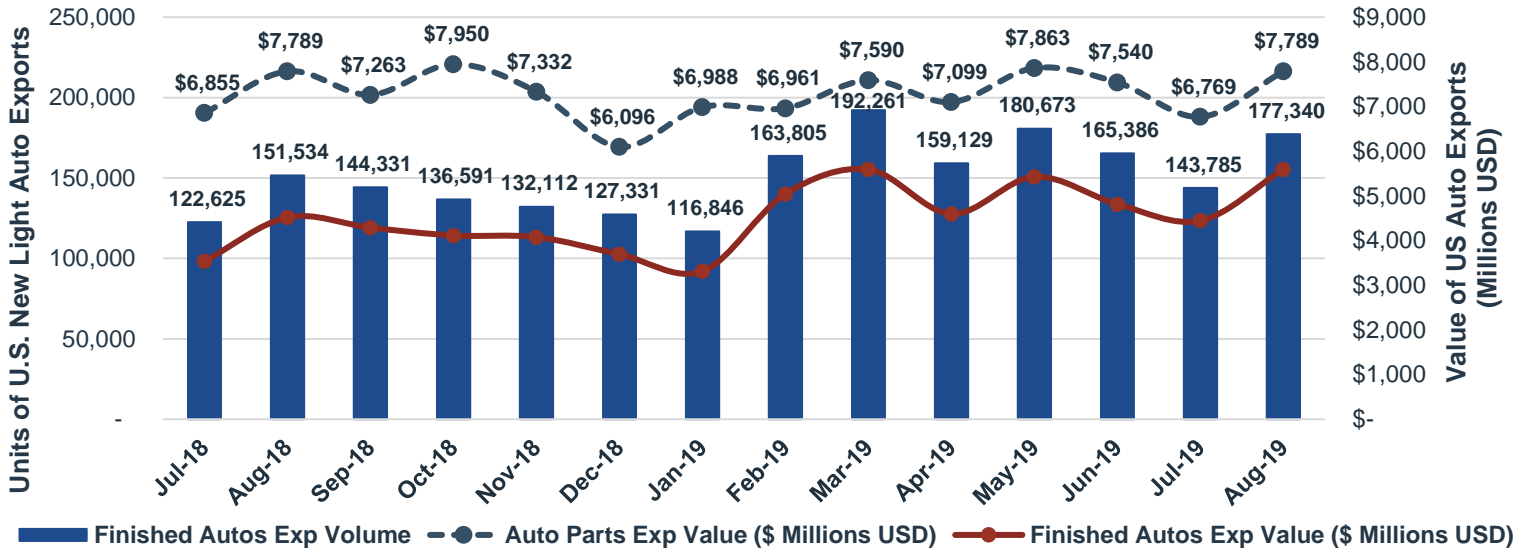


Source: WardsAuto InfoBank, Monthly NA Production Reports, by model unit prod. SUV/CUV Models as defined by Edmunds



U.S. New Vehicles Trade Report

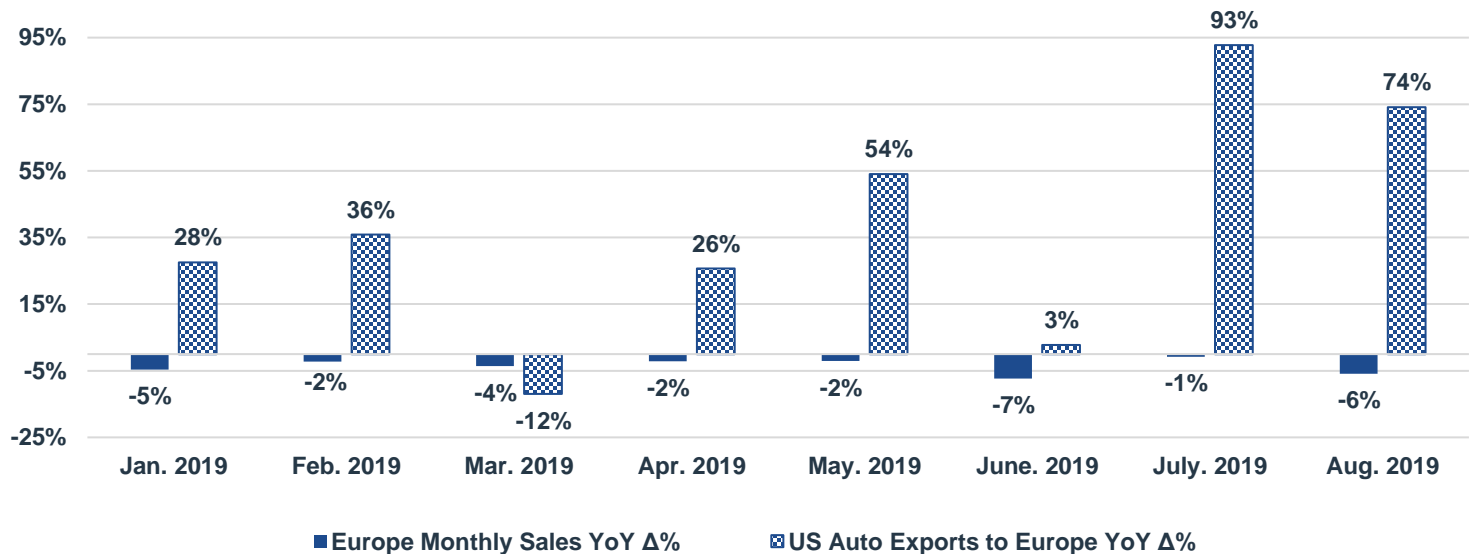
U.S. vehicle exports increased in August from July by **33,500 (+25%)** units, less than the average seasonal increase of **+34%**. Jan-Aug. 2019 U.S. new vehicle exports have increased by **36,500 (+2.9%)** compared to this time period last year. This increase is primarily due to **increased exports** to Europe and the absence of Chinese retaliatory tariffs levied on U.S.-made autos from July-December 2018.



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

Europe is leading this increase in U.S. exported vehicles due to rising European sales of Battery Electric Vehicles (BEVs) and midsize SUVs.¹

U.S. new-vehicle exports to Europe have **increased 33% YoY to 241,600** units this year and are not impacted by Europe's recently decline in sales this year (**-3.7% YoY**).



¹ACEA, EU new vehicle registrations by body.

Source: US Census Bureau, USA Online Trade Database. Light vehicle exports definition consistent with ITA definition. WardsAuto Database