Through February, new light-vehicle sales were down 2.5% compared to this time last year. The monthly SAAR of 16.53 million units represented the lowest monthly SAAR since February 2015. The crossover segment continued to make major gains, ending the month with almost 40% market share year-to-date. Sales in the first two months of the year have been held back by crippling winter storms, the federal government shutdown and uncertainty surrounding tax refunds. Vehicle affordability will be a concern throughout the year as new-vehicle prices and borrowing costs both continue to rise. We expect many consumers will gravitate to the used-vehicle market, with dealer lots full of off-lease vehicles offering many of the same features as today’s new vehicles—but at a significant discount. We expect 2019 to end with light-vehicle sales of 16.8 million units.

Patrick Manzi
NADA Senior Economist
Boyi Xu
Economist

U.S. Light-Vehicle Sales
(Seasonally Adjusted at Annual Rates)

<table>
<thead>
<tr>
<th>Segment</th>
<th>Feb 2019</th>
<th>YTD Change</th>
<th>Jan - Feb 2019</th>
<th>YTD Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Light Vehicle</td>
<td>12.66%</td>
<td>-1.7%</td>
<td>12.77%</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Import Light Vehicle</td>
<td>3.87%</td>
<td>-4.2%</td>
<td>3.82%</td>
<td>-4.7%</td>
</tr>
<tr>
<td>Total Light Vehicle SAAR</td>
<td>16.53%</td>
<td>-2.3%</td>
<td>16.59%</td>
<td>-2.5%</td>
</tr>
</tbody>
</table>

Market Share, by manufacturer

- **BMW**
- **Toyota**
- **GM**
- **Honda**
- **Ford**
- **Other*”
- **Hyundai-Kia**

*Other is Jaguar-Land Rover, Mercedes, Mazda, Tata, Mazda

### Market Share, by segment

- **Small Car** - 12.4%
- **Large Car** - 12.2%
- **Luxury Car** - 6.7%
- **SUV** - 16.2%
- **Van** - 5.1%
- **Pickup** - 16.2%
- **Crossover** - 39.6%
- **Sport Utility Vehicle** - 39.6%
- **Minivan** - 8.6%
- **Small Van** - 8.6%

### Market Share, by powertrain

- **Gasoline** - 92.6%
- **Diesel** - 3.1%
- **Electric** - 2.0%
- **Hybrid** - 1.8%
- **Plug-in hybrid** - 3.5%

SOURCE: WardsAuto; Autodata