



MARKET BEAT

September 2018

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Through September, U.S. light-vehicle sales were up 0.5%. When compared to September 2017, sales were down 4.0%. New-vehicle sales in September 2017 were boosted by vehicle-replacement demand following Hurricane Harvey, which pushed sales up higher than usual. September 2018 sales also were affected by hurricanes, but this time sales were lower than normal. So far, it appears there won't be as much replacement demand following Hurricane Florence, but we may see a slight bump in October sales as storm recovery efforts progress. Car segments continued to fall in September and represented only 31.3% of new-vehicle sales this year. The cross-utility segment continues to be the most popular segment and added 4.2 percentage points of market share compared to this time last year. According to J.D. Power, average incentive spending per unit fell \$152 to \$3,910 compared to September 2017. Average spending per unit on cars fell \$371, while spending on trucks and SUVs fell by \$52. We expect new-vehicle sales to close out the year around 17 million units.

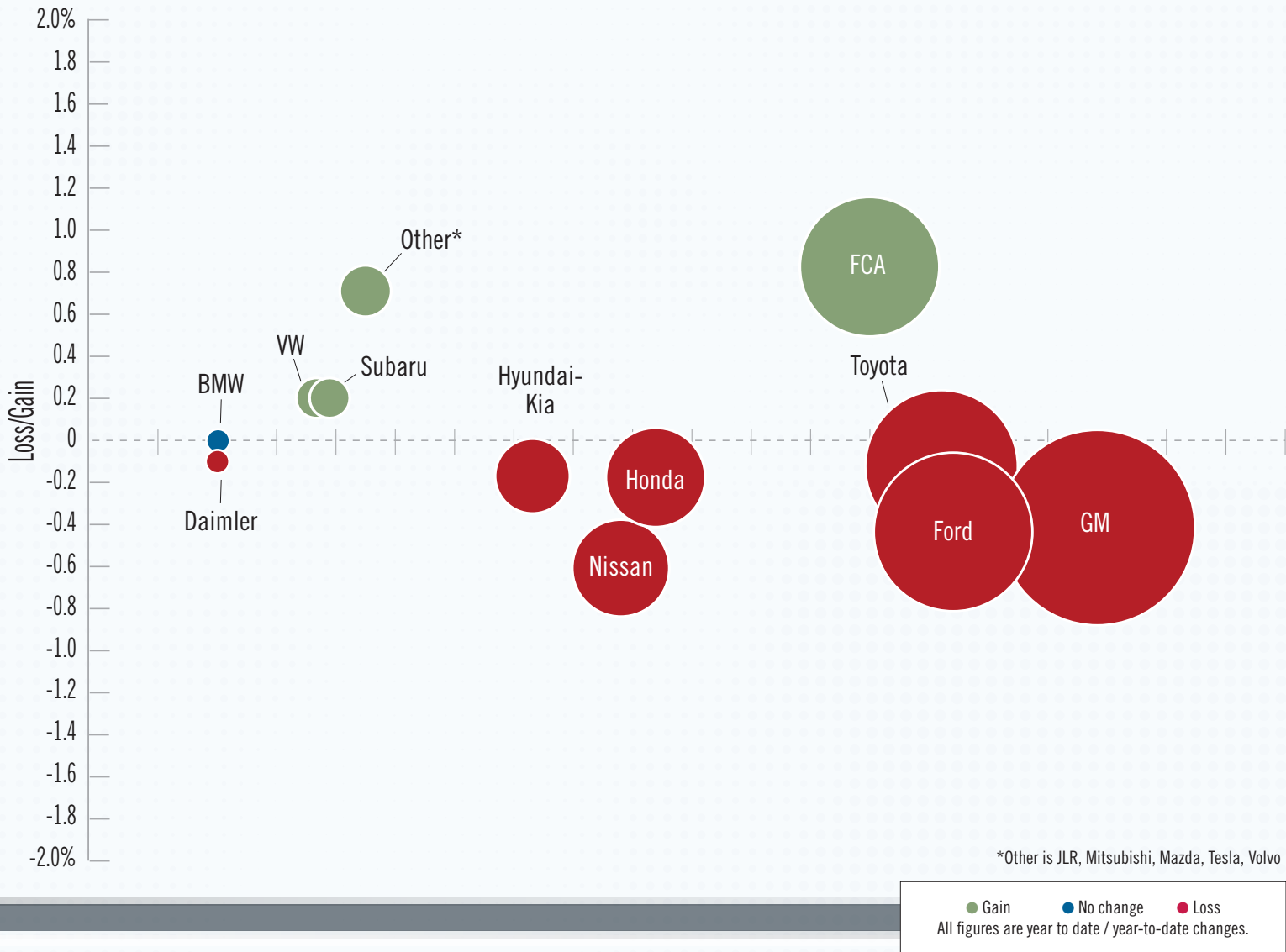
U.S. Light-Vehicle Sales

(Seasonally Adjusted at Annual Rates)

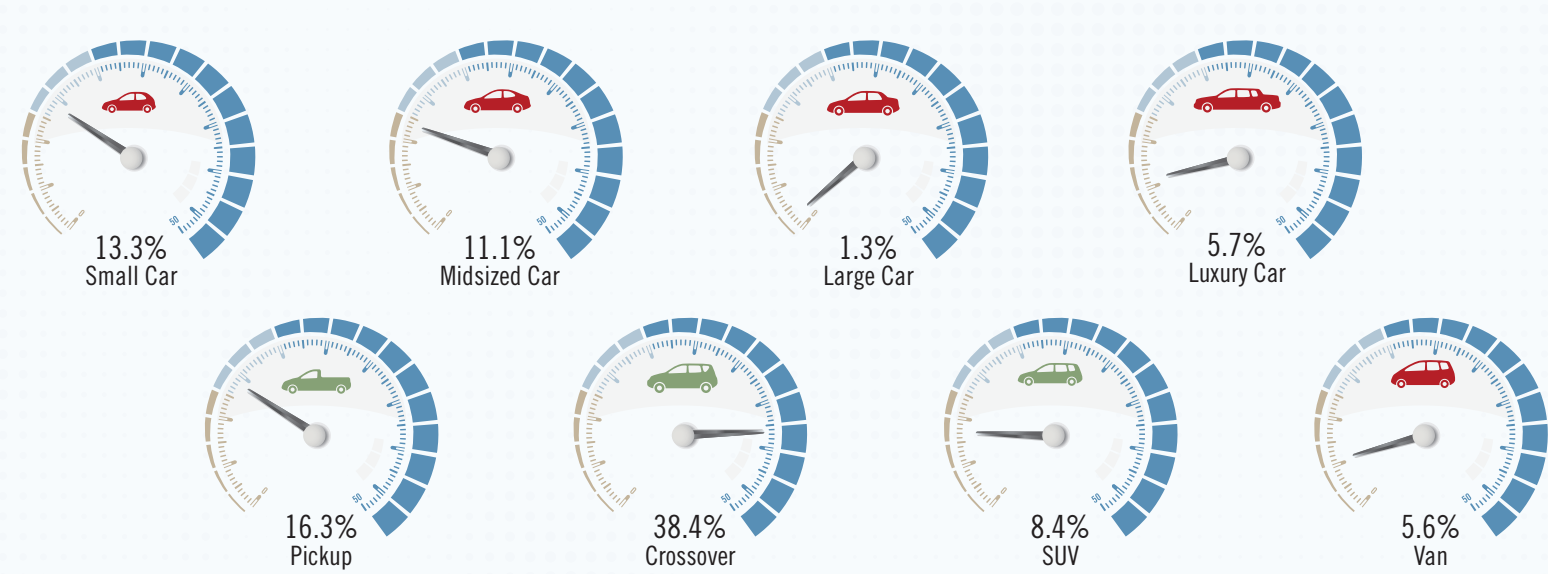


	Sep 2018	Y/Y Change %	Jan - Sep 2018	YTD Change%
Total Car	5.21	-18.7%	5.27	-13.6%
Total Light Truck	12.16	4.1%	11.79	8.3%
Domestic Light Vehicle	13.31	-4.7%	13.11	-0.4%
Import Light Vehicle	4.05	-1.9%	3.96	3.7%
Total Light Vehicle SAAR	17.36	-4.0%	17.07	0.5%

Market Share, by manufacturer



Market Share, by segment



Market Share, by powertrain

