

# PRESS RELEASE

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Troy, MI, USA

## US VEHICLE SALES FELL BY 1.1% IN Q3 2017, DESPITE A STRONG SEPTEMBER PERFORMANCE

- SUVs, Trucks, and Vans continued to gain market share in Q3 2017, accounting for almost 60% of the total market
- The Ford F-Series maintained the top selling position; whilst the Toyota RAV4 took third place, outselling the Ram Pickup and Toyota's Camry
- Toyota recorded a significant increase in sales to become the second best-selling brand in Q3 2017, whilst Ford held on to its top spot

Car sales in the US for Q3 2017 declined by 1.1% to 4,424,655, when compared to the same period in 2016. This was the second consecutive annual decrease in US car sales for Q3 (compared to a 1.3% decline in Q3 2016 year-over-year). Despite the overall decline for the quarter, it marked the third highest Q3 performance since 2005 in terms of volume.

During the quarter, July and August recorded declines in sales, whilst September marked the first monthly increase in sales for 2017 so far. This can be attributed to the presence of one additional weekend in September and increased demand following the effects of hurricane Harvey.

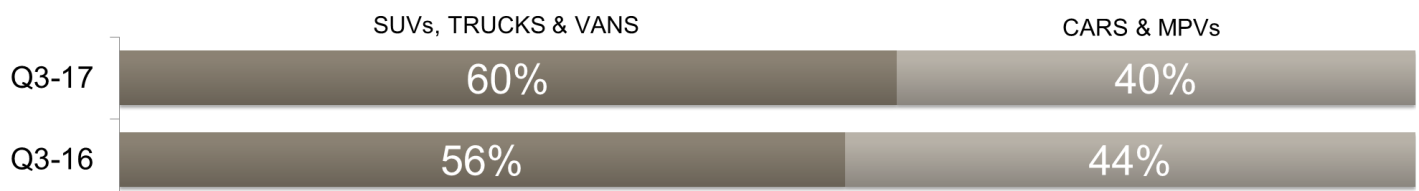
Significantly, Toyota performed strongly in Q3 to become the second best-selling car brand in Q3 2017, behind Ford. Amongst the car groups, FCA sales declined by 10.1% following its move to discontinue sales in the smaller segments. Honda benefited from this, increasing its market share to almost 10% and closing the gap with FCA to only 1.7 percentage points, compared to 3 percentage points in the same quarter of 2016. GM maintained its lead and gained market share, accounting for more than 17% of the market. Toyota Group performed exceptionally well in Q3, increasing its market share by 1.3 percentage points to take 15.3% of the market. This strong performance can be attributed to sales of its best-selling SUVs.

## USA Q3 2017 VOLUME

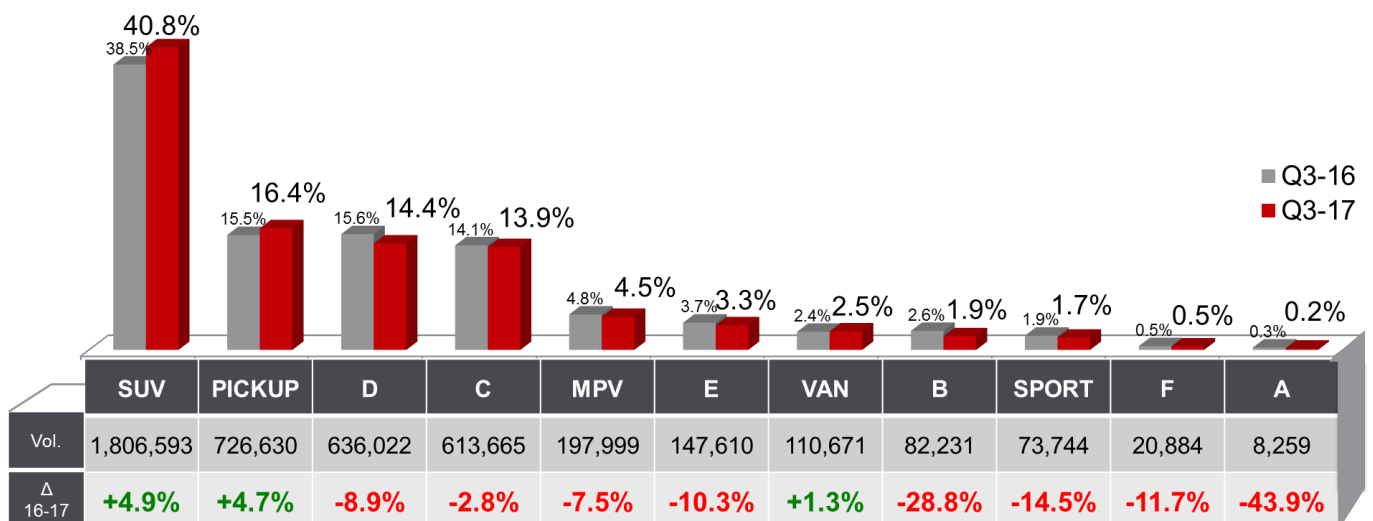
|      | JUL       | AUG       | SEP       | Q3        | Δ Q3         | SAAR       |
|------|-----------|-----------|-----------|-----------|--------------|------------|
| 2017 | 1,415,750 | 1,484,092 | 1,524,813 | 4,424,655 | <b>-1.1%</b> | 19,356,311 |
| 2016 | 1,522,716 | 1,512,777 | 1,437,174 | 4,472,667 |              |            |

As per the trend of recent years, the market share of SUVs, Trucks, and Vans continued to rise within the United States. In the third quarter of 2017, SUVs, Trucks, and Vans represented almost 60% of the total US market, an increase of 3.3 percentage points compared to Q3 2016. This increase was driven by the growing appeal of SUVs and Trucks and had a knock on effect on sales of Sedans and MPVs. The impact of this was stark, with demand for small hatchbacks and sedans declining by 8.4%, accounting for only 34% of the total market. The most significant declines were in the A and B segments though, with demand falling by 43.9% and 28.8% year-over-year respectively, while MPV sales declined by 7.5%.

## SALES BY VEHICLE TYPE



## MARKET SHARE BY SEGMENT



## TOP SELLING BRANDS

|              | Q3-17   | Q3-16   | Δ Q3 16-17 |
|--------------|---------|---------|------------|
| FORD         | 603,605 | 604,985 | -0.2%      |
| TOYOTA       | 590,298 | 524,317 | +12.6%     |
| CHEVROLET    | 547,310 | 525,022 | +4.2%      |
| HONDA        | 399,462 | 395,292 | +1.1%      |
| NISSAN       | 341,982 | 353,113 | -3.2%      |
| JEEP         | 215,951 | 241,835 | -10.7%     |
| SUBARU       | 174,038 | 167,429 | +3.9%      |
| KIA          | 162,194 | 163,437 | -0.8%      |
| HYUNDAI      | 160,197 | 210,920 | -24.0%     |
| GMC          | 142,459 | 136,845 | +4.1%      |
| RAM          | 139,098 | 140,349 | -0.9%      |
| DODGE        | 104,810 | 122,758 | -14.6%     |
| VOLKSWAGEN   | 91,220  | 82,254  | +10.9%     |
| MERCEDES     | 89,717  | 95,821  | -6.4%      |
| LEXUS        | 85,899  | 84,629  | +1.5%      |
| MAZDA        | 78,673  | 78,913  | -0.3%      |
| BMW          | 71,089  | 76,697  | -7.3%      |
| AUDI         | 57,943  | 55,245  | +4.9%      |
| BUICK        | 49,514  | 65,560  | -24.5%     |
| CADILLAC     | 41,773  | 46,055  | -9.3%      |
| CHRYSLER     | 41,714  | 56,582  | -26.3%     |
| ACURA        | 40,255  | 40,733  | -1.2%      |
| INFINITI     | 34,571  | 31,797  | +8.7%      |
| LINCOLN      | 26,385  | 27,138  | -2.8%      |
| MITSUBISHI   | 24,619  | 22,417  | +9.8%      |
| VOLVO        | 22,861  | 21,881  | +4.5%      |
| LAND ROVER   | 18,642  | 17,743  | +5.1%      |
| PORSCHE      | 13,669  | 13,538  | +1.0%      |
| MINI         | 12,582  | 13,767  | -8.6%      |
| TESLA*       | 11,162  | 12,577  | -11.3%     |
| JAGUAR       | 9,563   | 9,358   | +2.2%      |
| FIAT         | 6,570   | 8,383   | -21.6%     |
| GENESIS      | 5,183   | 2,708   | +91.4%     |
| ALFA ROMEO   | 3,633   | 121     | +2902.5%   |
| MASERATI     | 3,285   | 2,954   | +11.2%     |
| SMART        | 652     | 1,451   | -55.1%     |
| FERRARI      | 618     | 640     | -3.4%      |
| BENTLEY      | 524     | 847     | -38.1%     |
| ROLLS-ROYCE  | 366     | 300     | +22.0%     |
| LAMBORGHINI  | 241     | 244     | -1.2%      |
| ASTON MARTIN | 211     | 149     | +41.6%     |
| SCION        | 117     | 15,672  | -99.3%     |

### TOP 10 CAR GROUPS MARKET SHARE

Q3-17

|                |        |
|----------------|--------|
| GM             | 17.65% |
| Toyota         | 15.29% |
| Ford           | 14.24% |
| FCA            | 11.64% |
| Honda          | 9.94%  |
| Renault-Nissan | 9.07%  |
| Hyundai-Kia    | 7.40%  |
| Subaru         | 3.93%  |
| VW Group       | 3.70%  |
| Daimler        | 2.04%  |

### TOP 5 MKT SHARES WINNERS & LOSERS

|                |       |
|----------------|-------|
| Toyota         | +1.32 |
| GM             | +0.36 |
| VW Group       | +0.30 |
| Subaru         | +0.19 |
| Honda          | +0.19 |
| Renault-Nissan | -0.04 |
| BMW Group      | -0.13 |
| Daimler        | -0.13 |
| Hyundai-Kia    | -1.03 |
| FCA            | -1.17 |

↑ MARKET SHARE % POINTS CHANGE ↓

Hyundai-Kia's significant decline in market share can be attributed to its lack of a wide range of SUVs. VW Group sales increased by 7.5% as a result of the early success of the new VW Atlas.

## TOP SELLING MODELS

|    |                    | Q3-17   | Q3-16   | Δ Q3<br>16-17 |
|----|--------------------|---------|---------|---------------|
| 1  | F-SERIES           | 228,776 | 200,412 | +14.2%        |
| 2  | SILVERADO          | 155,650 | 151,904 | +2.5%         |
| 3  | RAV4               | 127,464 | 94,480  | +34.9%        |
| 4  | RAM PICKUP         | 124,458 | 127,803 | -2.6%         |
| 5  | CIVIC              | 108,617 | 93,943  | +15.6%        |
| 6  | CAMRY              | 105,610 | 97,693  | +8.1%         |
| 7  | CR-V               | 93,677  | 104,418 | -10.3%        |
| 8  | ACCORD             | 90,711  | 89,265  | +1.6%         |
| 9  | COROLLA            | 83,526  | 93,625  | -10.8%        |
| 10 | EQUINOX            | 79,281  | 52,416  | +51.3%        |
| 11 | ROGUE              | 78,479  | 92,145  | -14.8%        |
| 12 | ESCAPE             | 76,922  | 79,386  | -3.1%         |
| 13 | LEGACY/OUTBACK     | 66,135  | 66,079  | +0.1%         |
| 14 | GRAND CHEROKEE     | 64,866  | 53,577  | +21.1%        |
| 15 | EXPLORER           | 63,483  | 59,318  | +7.0%         |
| 16 | IMPREZA/WRX/STI/XV | 62,820  | 49,998  | +25.6%        |
| 17 | HIGHLANDER         | 58,221  | 45,116  | +29.0%        |
| 18 | MALIBU             | 57,263  | 50,064  | +14.4%        |
| 19 | SIERRA             | 55,323  | 57,974  | -4.6%         |
| 20 | ALTIMA             | 53,577  | 69,626  | -23.1%        |
| 21 | SENTRA             | 53,137  | 46,462  | +14.4%        |
| 22 | TACOMA             | 52,824  | 47,676  | +10.8%        |
| 23 | FUSION             | 52,517  | 63,629  | -17.5%        |
| 24 | WRANGLER           | 51,220  | 48,207  | +6.3%         |
| 25 | FORESTER           | 44,073  | 50,397  | -12.5%        |
| 26 | CRUZE              | 44,046  | 51,281  | -14.1%        |
| 27 | ELANTRA            | 41,226  | 56,784  | -27.4%        |
| 28 | FOCUS              | 41,106  | 36,905  | +11.4%        |
| 29 | SOUL               | 37,611  | 37,295  | +0.8%         |
| 30 | CHEROKEE           | 36,467  | 57,338  | -36.4%        |
| 31 | SANTA FE           | 35,643  | 40,862  | -12.8%        |
| 32 | JETTA              | 35,501  | 31,468  | +12.8%        |
| 33 | CX-5               | 35,473  | 30,828  | +15.1%        |
| 34 | EDGE               | 33,470  | 32,038  | +4.5%         |
| 35 | FORTE              | 33,346  | 26,866  | +24.1%        |
| 36 | COLORADO           | 32,733  | 28,820  | +13.6%        |
| 37 | TUNDRA             | 32,025  | 29,856  | +7.3%         |
| 38 | TRAVERSE           | 31,906  | 31,510  | +1.3%         |
| 39 | 4RUNNER            | 31,565  | 28,830  | +9.5%         |
| 40 | SIENNA             | 31,465  | 31,285  | +0.6%         |
| 41 | SONATA             | 31,403  | 50,870  | -38.3%        |
| 42 | TUCSON             | 31,132  | 22,669  | +37.3%        |
| 43 | PILOT              | 29,848  | 28,825  | +3.5%         |
| 44 | RX                 | 29,143  | 26,828  | +8.6%         |
| 45 | COMPASS            | 28,189  | 22,336  | +26.2%        |
| 46 | GRAND CARAVAN      | 27,725  | 28,822  | -3.8%         |
| 47 | TRANSIT            | 27,428  | 34,127  | -19.6%        |
| 48 | HR-V               | 27,406  | 21,827  | +25.6%        |
| 49 | RENEGADE           | 27,182  | 25,028  | +8.6%         |
| 50 | ODYSSEY            | 27,153  | 30,174  | -10.0%        |



The Toyota RAV4 performed well, outselling the Ram Pickup, Toyota Camry, and Honda CR-V due to the performance of its hybrid version. Ford

increased its volume gap in the pickup segment with a good performance from its popular F-Series. Other big market share winners included the Chevrolet Equinox, Nissan Rogue Sport, Honda Civic, Toyota Highlander, Subaru Impreza, and Jeep Grand Cherokee.

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**Contact:**

Nick Lawrie, +44 (0) 203 617 7240, [jatoteam@firstlightpr.com](mailto:jatoteam@firstlightpr.com)

Todd Somerville, +1 248 409 5286, [USA.enquiries@jato.com](mailto:USA.enquiries@jato.com)

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