

january sales insights

stronger than expected sales lift SAAR above 17M

key insights

strong start to the year

Sales of 1.15 million in January surpassed expectations and posted a year-over-year lift of 1 percent. The month was buoyed by high incentives and continued retail demand for SUVs and pickups.

Though we expect sales to decline to 16.8 million for the year, January sales kept up the industry's momentum, leading to the fifth consecutive SAAR above 17 million.

cars face a tough year

Cars continue to cede market share to trucks and SUVs, accounting for just 32 percent of sales in January. Year-over-year car sales were down 13 percent, while sales of pickups rose 2.4 percent and SUV sales climbed 10.6 percent.

Manufacturers fought collapsing demand in 2017, and if demand continues to plummet in 2018, automakers will again face an uphill battle trying to revive the once robust segment with growing incentives.

the depth of the light-truck transition

With 68 percent of January sales coming from pickups, SUVs and vans, the transition away from cars has shifted market norms:

- Only two manufacturers, BMW and Hyundai, sold more cars than light trucks. Both will be debuting new SUVs in 2018.
- All three domestic automakers had a light-truck share above 80 percent in January; FCA's share was 90 percent light truck.
- SUVs made up 61 percent of January sales for Porsche.

New-vehicle sales **1,149,811**

SAAR (seasonally adjusted annual rate) **17.1M**

198,548 +1% YOY
Market Share: **17.3%**

167,056 +17% YOY
Market Share: **14.5%**

160,411 -6% YOY
Market Share: **14.0%**

132,803 -13% YOY
Market Share: **11.5%**

123,538 +10% YOY
Market Share: **10.7%**

104,542 -2% YOY
Market Share: **9.1%**

76,870 -6% YOY
Market Share: **6.7%**



Best-selling car
Camry: 24,638 units



Best-selling truck
F-Series: 54,425 units

january 2018 vs. january 2017 segment sales

