

COMMERCIAL VEHICLES || STATE OF THE INDUSTRY

NORTH AMERICA CLASSES 5-8 VEHICLES BY COUNTRY

REPORT VERSION PUBLISHED NOVEMBER 2019

2019 LAWRENCE R. KLEIN BLUE CHIP AWARD WINNER

Contributor to Blue Chip Economic Indicators and WSJ Economic Forecast Panel



SAMPLE REPORT OVERVIEW:

Thank you for your interest in ACT Research and our work. The objective of this sample report is to share an understanding of the market, economy, and insight to analysis at the time of publication. **We share this report from 2017 for market context, an assessment of our historical and current data recordings, and a look into the market indicators we gather from the participating OEMs.**

State of the Industry: N.A. Classes 5-8 Vehicles by Country

A monthly State of the Industry report that reviews the market statistics of classes 5-8 trucks for the United States, Canada, and Mexico. Statistics reviewed covers year-to-date, current month, six views of the industry performance, and export classes 5-8.

With this report you will receive:

- Monthly market indicators by country for Class 5 and Classes 6-7 chassis and Class 8 trucks and tractors: backlog, build, inventory, new orders, cancellations, net orders retail sales.
- Class 5 and Classes 6-7 segmented by Trucks, Buses, RVs, and Step Vans, Class 8 segmented by tractors with and without sleepers and trucks with and without sleepers.
- Published about two weeks after the end of the month.

Click the buttons below to access more!

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[GRAPH PACK](#)



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Report Dashboard Overview:

With your subscription to the *SOI: N.A. Classes 5-8 Vehicles by Country*, you will gain access to our report dashboard. Below is a listing, as well as a screenshot, of this dashboard and the support material you will receive with your report.

1.PDF of Current Month Report

2.Tables including:

- A. Classes 5-8 All Geographies
- B. Build & Sales Days per Month
- C. Monthly Market Indicators - U.S., Canada, Mexico, Export

3.Graph pack complete with 140+ graphs covering:

- A. Annual Statistics
- B. Annual Statistics N.A. Tractors, Straight Trucks
- C. U.S Class 5, 6-7, 8
- D. U.S. Class 5-7
- E. U.S. Class 8 Tractors, Straight Trucks
- F. Canada Class 5, 6-7, 8
- G. Canada Class 8 Tractors, Straight Trucks
- H. Exports Classes 6-7, 8
- I. Exports Class 8 Tractors, Straight Trucks
- J. Mexico Classes 6-7, 8
- K. Mexico Class 8 Tractors, Straight Trucks



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[SOI: Country Report – Classes 5-8 Vehicles](#)

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DATA - Classes 5-8 All Geographies

1996 - Present (April 2020)

Monthly Market Indicators - U.S., Canada, Mexico, Export

Modified: 2020-05-18

[Download](#)

DATA - Build and Sales Days per Month

Excel

Modified: 2020-04-17

[Download](#)

REPORT - May 2020 (April data)

PDF - Next report due mid- June

Modified: 2020-05-19

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GRAPHS - May 2020 (April data)

Powerpoint

Modified: 2020-05-18

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GLOSSARY

PDF

Modified: 2017-03-14

[Download](#)



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August 11-13, 2020 - Columbus, Indiana - The Commons
[Click Here](#) for more Information



SOI: N.A. Classes 5-8 Vehicles by Country - Sample Report Overview



Report Distribution & FAQs

When is the report published?

The *SOI: N.A. Classes 5-8 Vehicles by Country* is published mid-month.

How many individuals in my company may access the report?

ACT Research allows for a maximum distribution of 4 users per report. Additional access may be purchased at \$60 per person, per report.

Can the individuals with report access be changed?

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How do I become aware of the release of the latest publication?

A notice, via email, will be sent to those users on your distribution list upon the publication and availability of the *SOI: N.A. Classes 5-8 Vehicles by Country*. Users can then access the report via dashboard login.

Is support for ACT Research analyst available should questions arise?

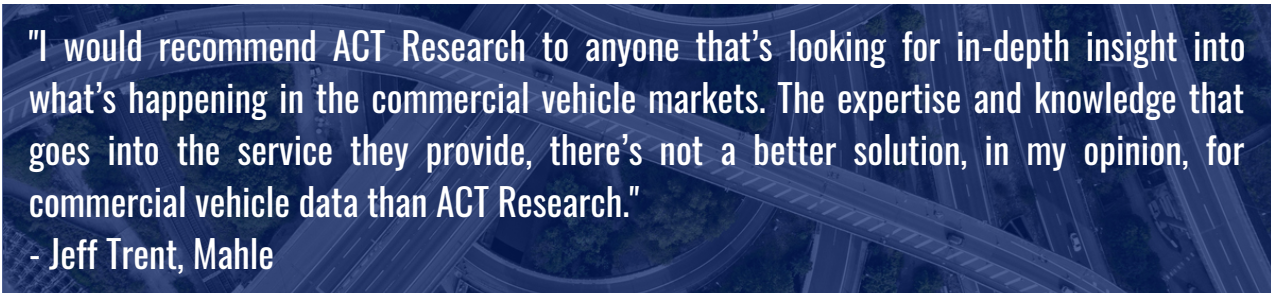
Yes, we highly encourage our subscribers to call or email our staff with questions or concerns. Our analysts take great pride in being accessible and are willing to answer questions as needed.

May I utilize aspects of the report within my organization?

Yes, but we do request that all tables, graphs, charts, or analysis cite ACT Research as the source.

May I utilize aspects of the report for external presentations? (conferences, trade organizations, etc.)

Yes. ACT's copyright policy requires that any external presentations utilizing ACT data be sourced and cited appropriately. Furthermore, we request that external sourcing be limited to charts and/or graphs. If you are uncertain if your presentation meets our copyright requirements, contact us at 812.379.2085 or trucks@actresearch.net to inquire.



"I would recommend ACT Research to anyone that's looking for in-depth insight into what's happening in the commercial vehicle markets. The expertise and knowledge that goes into the service they provide, there's not a better solution, in my opinion, for commercial vehicle data than ACT Research."

- Jeff Trent, Mahle

SOI: N.A. Classes 5-8 Vehicles by Country - Sample Report Overview

State of the Industry: N.A. Classes 5-8 Vehicles by Country

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BUILD LOCATION: The geography of a built unit reflects the market for which it is destined, NOT the country in which the actual production takes place. Current N.A. OEM build occurs in the United States, Canada, and Mexico.

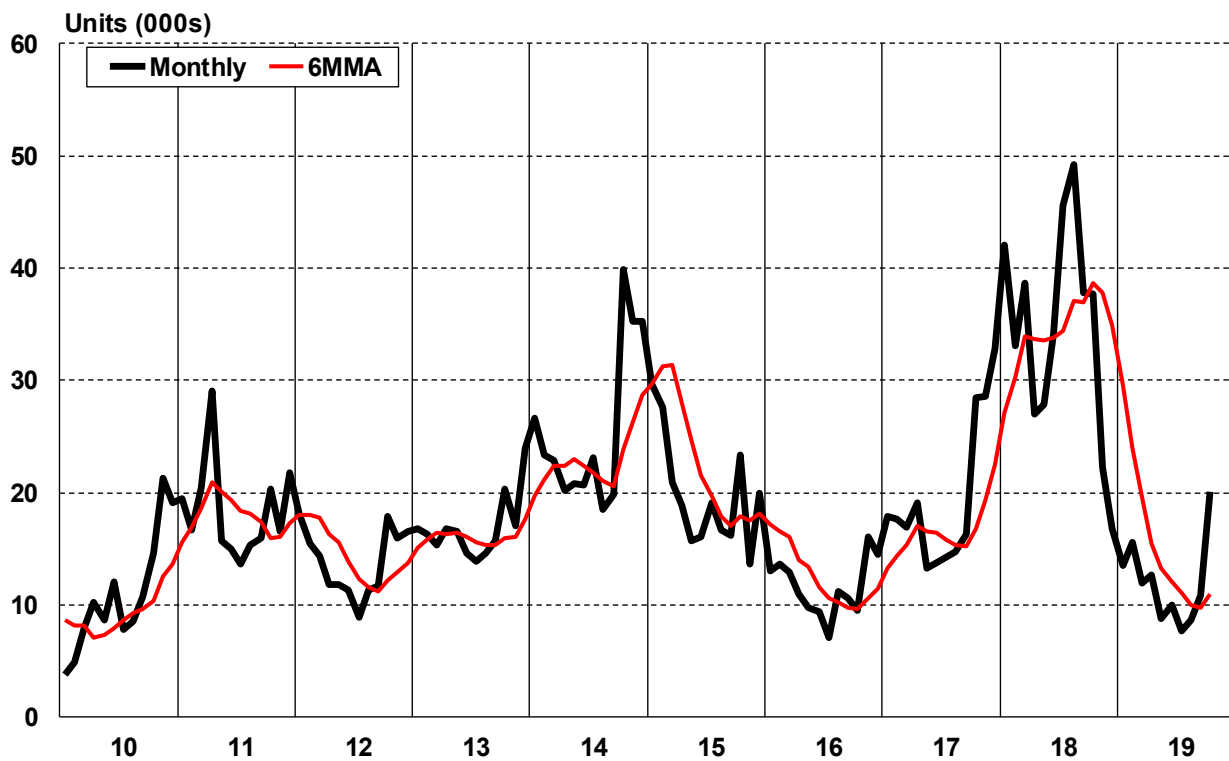


UNITED STATES

OCTOBER & YTD 2019 DATA

U.S. Class 8: Net Orders

January 2010 - October 2019



Source: ACT Research Co., LLC: Copyright 2019

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

CURRENT MONTH STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
. Build	8,054	-	140	768	8,962	7,586	1,869	768	392	10,615	9,769	6,707	267	5,578	331	22,652
. Inventory	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
. New Orders	8,126	-	110	115	8,351	5,402	947	811	140	7,300	9,628	6,928	64	4,556	346	21,522
. Orders Cancel	603	-	-	6	609	478	29	27	69	603	707	468	2	272	16	1,465
. Net Orders	7,523	-	110	109	7,742	4,924	918	784	71	6,697	8,921	6,460	62	4,284	330	20,057
. Retail Sales	6,663	8	775	320	7,766	9,783	2,384	1,582	511	14,260	9,733	7,259	123	5,900	331	23,346
MEMO: Sales of Japanese Imports					765					1,064						

MONTHLY PERFORMANCE:

October

23 Build Days

23 Order/Sales Days

. Build: units/day	350	-	6	33	390	330	81	33	17	462	425	292	12	243	14	985
. Net Orders: un/dy.	327	-	5	5	337	214	40	34	3	291	388	281	3	186	14	872
. Retail Sales:un/dy.	290	0	34	14	338	425	104	69	22	620	423	316	5	257	14	1,015
. Orders Cancel: % BL	4.4%	-	0.0%	0.4%	3.9%	1.8%	0.4%	1.9%	7.3%	1.7%	1.4%	1.3%	0.1%	1.0%	3.3%	1.3%
. Backlog/Build @ rate in months**	1.9	-	3.3	2.1	1.9	3.8	3.9	2.1	2.7	3.7	5.5	5.7	6.4	5.2	1.6	5.4
. Inventory/R.S. @ rate in months**	4.2	0.8	0.4	6.2	3.9	3.4	1.9	0.4	2.0	2.8	2.6	2.0	7.8	4.5	0.5	2.9

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of Classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

YEAR-TO-DATE STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRACTOR</u> <u>SLEEPER</u>	<u>TRACTOR</u> <u>DAY CAB</u>	<u>TRUCK</u> <u>SLEEPER</u>	<u>TRUCK</u> <u>DAY CAB</u>	<u>OTHER</u>	<u>TOTAL</u>
. Backlog	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
. Build	74,972	6	3,020	4,635	82,633	94,878	29,542	10,856	2,723	137,999	114,527	73,843	1,990	60,130	4,293	254,783
. Inventory	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
. New Orders	76,812	6	3,018	4,900	84,736	69,697	29,288	11,183	2,830	112,998	55,305	47,054	1,553	41,141	4,507	149,560
. Orders Cancel	4,549	-	-	202	4,751	5,944	638	270	112	6,964	17,966	6,618	110	4,964	215	29,873
. Net Orders	72,263	6	3,018	4,698	79,985	63,753	28,650	10,913	2,718	106,034	37,339	40,436	1,443	36,177	4,292	119,687
. Retail Sales	66,291	15	3,230	3,464	73,000	91,729	29,377	10,983	2,521	134,610	104,744	71,346	1,491	57,250	4,293	239,124
MEMO: Sales of Japanese Imports					6,927					9,254						

YEAR-TO-DATE PERFORMANCE:

October

212 Build Days

215 Order/Sales Days

. Build: units/day	354	0	14	22	390	448	139	51	13	651	540	348	9	284	20	1,202
. Net Orders: un/dy.	336	0	14	22	372	297	133	51	13	493	174	188	7	168	20	557
. Retail Sales:un/dy.	308	0	15	16	340	427	137	51	12	626	487	332	7	266	20	1,112
. Orders Cancel: % BL	33.1%	-	0.0%	13.7%	30.4%	22.4%	9.5%	18.5%	11.8%	19.5%	36.4%	19.1%	7.1%	18.8%	44.8%	26.6%
. Backlog/Build @ rate in months**	1.9	-	1.4	3.2	1.9	2.8	2.3	1.4	3.5	2.6	4.4	4.7	7.9	4.4	1.1	4.5
. Inventory/R.S. @ rate in months**	3.9	4.0	1.0	5.3	3.8	3.4	1.4	0.5	3.7	2.7	2.2	1.9	5.9	4.3	0.4	2.6

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

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TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. PAST MONTH

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
b.PAST MO.	14,278	-	457	2,128	16,863	29,126	7,617	1,383	1,271	39,397	49,404	35,018	1,740	27,727	480	114,369
UNIT CHANGE a-b	(532)	-	(30)	(654)	(1,216)	(2,541)	(936)	76	(322)	(3,723)	(33)	(292)	(189)	(1,347)	-	(1,861)
% CHANGE	-3.7%	-	-6.6%	-30.7%	-7.2%	-8.7%	-12.3%	5.5%	-25.3%	-9.4%	-0.1%	-0.8%	-10.9%	-4.9%	0.0%	-1.6%
BUILD:																
a.CURRENT MO.	8,054	-	140	768	8,962	7,586	1,869	768	392	10,615	9,769	6,707	267	5,578	331	22,652
b.PAST MO.	7,700	-	227	760	8,687	8,112	3,046	889	178	12,225	10,174	6,888	211	6,014	352	23,639
UNIT CHANGE a-b	354	-	(87)	8	275	(526)	(1,177)	(121)	214	(1,610)	(405)	(181)	56	(436)	(21)	(987)
% CHANGE	4.6%	-	-38.3%	1.1%	3.2%	-6.5%	-38.6%	-13.6%	120.2%	-13.2%	-4.0%	-2.6%	26.5%	-7.2%	-6.0%	-4.2%
INVENTORY:																
a.CURRENT MO.	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
b.PAST MO.	24,270	14	829	1,356	26,469	32,536	4,661	1,531	1,009	39,737	21,962	14,474	739	24,022	150	61,347
UNIT CHANGE a-b	1,390	(8)	(517)	459	1,324	(2,050)	(505)	(933)	(89)	(3,577)	1,022	(1,001)	136	185	-	342
% CHANGE	5.7%	-57.1%	-62.4%	33.8%	5.0%	-6.3%	-10.8%	-60.9%	-8.8%	-9.0%	4.7%	-6.9%	18.4%	0.8%	0.0%	0.6%
NET ORDERS:																
a.CURRENT MO.	7,523	-	110	109	7,742	4,924	918	784	71	6,697	8,921	6,460	62	4,284	330	20,057
b.PAST MO.	6,862	-	190	403	7,455	4,594	3,158	778	224	8,754	3,698	3,566	121	3,137	352	10,874
UNIT CHANGE a-b	661	-	(80)	(294)	287	330	(2,240)	6	(153)	(2,057)	5,223	2,894	(59)	1,147	(22)	9,183
% CHANGE	9.6%	-	-42.1%	-73.0%	3.8%	7.2%	-70.9%	0.8%	-68.3%	-23.5%	141.2%	81.2%	-48.8%	36.6%	-6.3%	84.4%
CANCELLATION RATE:																
a.CURRENT MO.	7.4%	-	0.0%	5.2%	7.3%	8.8%	3.1%	3.3%	49.3%	8.3%	7.3%	6.8%	3.1%	6.0%	4.6%	6.8%
b.PAST MO.	7.2%	-	0.0%	0.0%	6.7%	8.8%	3.7%	2.3%	2.6%	6.3%	35.5%	7.1%	14.2%	17.8%	4.9%	21.8%
PP CHANGE	0.2	-	-	5.2	0.6	0.1	(0.6)	1.1	46.7	2.0	(28.2)	(0.4)	(11.1)	(11.8)	(0.2)	(15.0)
RETAIL SALES:																
a.CURRENT MO.	6,663	8	775	320	7,766	9,783	2,384	1,582	511	14,260	9,733	7,259	123	5,900	331	23,346
b.PAST MO.	6,393	-	211	447	7,051	9,277	3,523	823	207	13,830	12,423	8,033	117	7,699	352	28,624
UNIT CHANGE a-b	270	8	564	(127)	715	506	(1,139)	759	304	430	(2,690)	(774)	6	(1,799)	(21)	(5,278)
% CHANGE	4.2%	-	267.3%	-28.4%	10.1%	5.5%	-32.3%	92.2%	146.9%	3.1%	-21.7%	-9.6%	5.1%	-23.4%	-6.0%	-18.4%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. SAME MONTH ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
b.SAME 1 YR. AGO	14,180	-	491	1,047	15,718	50,370	7,130	1,706	1,249	60,455	134,049	69,593	2,090	58,105	480	264,317
UNIT CHANGE a-b	(434)	-	(64)	427	(71)	(23,785)	(449)	(247)	(300)	(24,781)	(84,678)	(34,867)	(539)	(31,725)	-	(151,809)
% CHANGE	-3.1%	-	-13.0%	40.8%	-0.5%	-47.2%	-6.3%	-14.5%	-24.0%	-41.0%	-63.2%	-50.1%	-25.8%	-54.6%	0.0%	-57.4%
BUILD:																
a.CURRENT MO.	8,054	-	140	768	8,962	7,586	1,869	768	392	10,615	9,769	6,707	267	5,578	331	22,652
b.SAME 1 YR. AGO	7,981	-	268	368	8,617	8,590	2,474	1,400	206	12,670	11,533	7,213	153	5,634	405	24,938
UNIT CHANGE a-b	73	-	(128)	400	345	(1,004)	(605)	(632)	186	(2,055)	(1,764)	(506)	114	(56)	(74)	(2,286)
% CHANGE	0.9%	-	-47.8%	108.7%	4.0%	-11.7%	-24.5%	-45.1%	90.3%	-16.2%	-15.3%	-7.0%	74.5%	-1.0%	-18.3%	-9.2%
INVENTORY:																
a.CURRENT MO.	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
b.SAME 1 YR. AGO	17,887	15	438	281	18,621	27,531	4,240	932	560	33,263	15,526	9,998	370	19,319	150	45,363
UNIT CHANGE a-b	7,773	(9)	(126)	1,534	9,172	2,955	(84)	(334)	360	2,897	7,458	3,475	505	4,888	-	16,326
% CHANGE	43.5%	-60.0%	-28.8%	545.9%	49.3%	10.7%	-2.0%	-35.8%	64.3%	8.7%	48.0%	34.8%	136.5%	25.3%	0.0%	36.0%
NET ORDERS:																
a.CURRENT MO.	7,523	-	110	109	7,742	4,924	918	784	71	6,697	8,921	6,460	62	4,284	330	20,057
b.SAME 1 YR. AGO	6,053	-	155	450	6,658	12,440	1,738	1,206	197	15,581	19,161	9,356	280	8,523	405	37,725
UNIT CHANGE a-b	1,470	-	(45)	(341)	1,084	(7,516)	(820)	(422)	(126)	(8,884)	(10,240)	(2,896)	(218)	(4,239)	(75)	(17,668)
% CHANGE	24.3%	-	-29.0%	-75.8%	16.3%	-60.4%	-47.2%	-35.0%	-64.0%	-57.0%	-53.4%	-31.0%	-77.9%	-49.7%	-18.5%	-46.8%
CANCELLATION RATE:																
a.CURRENT MO.	7.4%	-	0.0%	5.2%	7.3%	8.8%	3.1%	3.3%	49.3%	8.3%	7.3%	6.8%	3.1%	6.0%	4.6%	6.8%
b.SAME 1 YR. AGO	7.8%	-	0.0%	0.0%	7.1%	17.8%	6.8%	3.1%	0.5%	15.5%	24.8%	18.4%	1.1%	16.2%	4.7%	21.1%
PP CHANGE	(0.4)	-	-	5.2	0.2	(8.9)	(3.7)	0.3	48.8	(7.2)	(17.4)	(11.6)	2.1	(10.2)	(0.1)	(14.3)
RETAIL SALES:																
a.CURRENT MO.	6,663	8	775	320	7,766	9,783	2,384	1,582	511	14,260	9,733	7,259	123	5,900	331	23,346
b.SAME 1 YR. AGO	6,615	-	421	452	7,488	8,196	2,336	1,589	200	12,321	12,352	7,498	143	5,029	405	25,427
UNIT CHANGE a-b	48	8	354	(132)	278	1,587	48	(7)	311	1,939	(2,619)	(239)	(20)	871	(74)	(2,081)
% CHANGE	0.7%	-	84.1%	-29.2%	3.7%	19.4%	2.1%	-0.4%	155.5%	15.7%	-21.2%	-3.2%	-14.0%	17.3%	-18.3%	-8.2%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

UNIT & PERCENT CHANGE: CURRENT 3 MONTHS VS. SAME 3 MONTHS ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
b.SAME 1 YR. AGO	14,180	-	491	1,047	15,718	50,370	7,130	1,706	1,249	60,455	134,049	69,593	2,090	58,105	480	264,317
UNIT CHANGE a-b	(434)	-	(64)	427	(71)	(23,785)	(449)	(247)	(300)	(24,781)	(84,678)	(34,867)	(539)	(31,725)	-	(151,809)
% CHANGE	-3.1%	-	-13.0%	40.8%	-0.5%	-47.2%	-6.3%	-14.5%	-24.0%	-41.0%	-63.2%	-50.1%	-25.8%	-54.6%	0.0%	-57.4%
BUILD:																
a.CURRENT 3 MO.	25,827	1	660	2,105	28,593	25,764	8,228	2,596	718	37,306	31,408	21,547	732	17,582	1,089	72,358
b.SAME 1 YR. AGO	21,772	-	1,134	1,403	24,309	25,362	8,712	4,384	950	39,408	33,921	20,692	497	16,398	1,300	72,808
UNIT CHANGE a-b	4,055	1	(474)	702	4,284	402	(484)	(1,788)	(232)	(2,102)	(2,513)	855	235	1,184	(211)	(450)
% CHANGE	18.6%	-	-41.8%	50.0%	17.6%	1.6%	-5.6%	-40.8%	-24.4%	-5.3%	-7.4%	4.1%	47.3%	7.2%	-16.2%	-0.6%
INVENTORY:																
a.CURRENT MO.	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
b.SAME 1 YR. AGO	17,887	15	438	281	18,621	27,531	4,240	932	560	33,263	15,526	9,998	370	19,319	150	45,363
UNIT CHANGE a-b	7,773	(9)	(126)	1,534	9,172	2,955	(84)	(334)	360	2,897	7,458	3,475	505	4,888	-	16,326
% CHANGE	43.5%	-60.0%	-28.8%	545.9%	49.3%	10.7%	-2.0%	-35.8%	64.3%	8.7%	48.0%	34.8%	136.5%	25.3%	0.0%	36.0%
NET ORDERS:																
a.CURRENT 3 MO.	23,872	-	506	647	25,025	13,909	6,694	2,505	738	23,846	15,623	11,932	282	10,605	1,088	39,530
b.SAME 1 YR. AGO	21,878	-	950	886	23,714	30,583	7,691	3,939	1,199	43,412	64,625	31,633	766	26,439	1,299	124,762
UNIT CHANGE a-b	1,994	-	(444)	(239)	1,311	(16,674)	(997)	(1,434)	(461)	(19,566)	(49,002)	(19,701)	(484)	(15,834)	(211)	(85,232)
% CHANGE	9.1%	-	-46.7%	-27.0%	5.5%	-54.5%	-13.0%	-36.4%	-38.4%	-45.1%	-75.8%	-62.3%	-63.2%	-59.9%	-16.2%	-68.3%
CANCELLATION RATE:																
a.CURRENT 3 MO.	6.6%	-	0.0%	0.9%	6.3%	9.2%	2.6%	2.5%	9.2%	6.8%	20.4%	11.7%	8.4%	11.5%	4.7%	15.1%
b.SAME 1 YR. AGO	5.4%	-	0.0%	0.0%	5.0%	18.9%	2.7%	3.1%	0.1%	14.7%	17.7%	10.7%	0.5%	11.1%	4.8%	14.5%
PP CHANGE	1.1	-	-	0.9	1.3	(9.7)	(0.1)	(0.6)	9.1	(7.9)	2.6	1.0	7.9	0.4	(0.0)	0.7
RETAIL SALES:																
a.CURRENT 3 MO.	20,761	9	1,204	1,011	22,985	27,579	10,580	3,243	833	42,235	32,235	22,959	435	19,140	1,089	75,858
b.SAME 1 YR. AGO	19,310	1	1,270	1,508	22,089	23,260	9,959	4,526	1,066	38,811	35,733	21,853	429	14,614	1,300	73,929
UNIT CHANGE a-b	1,451	8	(66)	(497)	896	4,319	621	(1,283)	(233)	3,424	(3,498)	1,106	6	4,526	(211)	1,929
% CHANGE	7.5%	800.0%	-5.2%	-33.0%	4.1%	18.6%	6.2%	-28.3%	-21.9%	8.8%	-9.8%	5.1%	1.4%	31.0%	-16.2%	2.6%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
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UNIT & PERCENT CHANGE: YEAR-TO-DATE VS. YEAR-TO-DATE ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
b.SAME 1 YR. AGO	14,180	-	491	1,047	15,718	50,370	7,130	1,706	1,249	60,455	134,049	69,593	2,090	58,105	480	264,317
UNIT CHANGE a-b	(434)	-	(64)	427	(71)	(23,785)	(449)	(247)	(300)	(24,781)	(84,678)	(34,867)	(539)	(31,725)	-	(151,809)
% CHANGE	-3.1%	-	-13.0%	40.8%	-0.5%	-47.2%	-6.3%	-14.5%	-24.0%	-41.0%	-63.2%	-50.1%	-25.8%	-54.6%	0.0%	-57.4%
BUILD:																
a.CURRENT YTD	74,972	6	3,020	4,635	82,633	94,878	29,542	10,856	2,723	137,999	114,527	73,843	1,990	60,130	4,293	254,783
b.PAST YTD	66,921	-	3,720	3,515	74,156	85,174	29,982	15,127	2,539	132,822	97,250	64,832	1,336	51,258	4,144	218,820
UNIT CHANGE a-b	8,051	6	(700)	1,120	8,477	9,704	(440)	(4,271)	184	5,177	17,277	9,011	654	8,872	149	35,963
% CHANGE	12.0%	-	-18.8%	31.9%	11.4%	11.4%	-1.5%	-28.2%	7.2%	3.9%	17.8%	13.9%	49.0%	17.3%	3.6%	16.4%
INVENTORY:																
a.CURRENT MO.	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
b.SAME 1 YR. AGO	17,887	15	438	281	18,621	27,531	4,240	932	560	33,263	15,526	9,998	370	19,319	150	45,363
UNIT CHANGE a-b	7,773	(9)	(126)	1,534	9,172	2,955	(84)	(334)	360	2,897	7,458	3,475	505	4,888	-	16,326
% CHANGE	43.5%	-60.0%	-28.8%	545.9%	49.3%	10.7%	-2.0%	-35.8%	64.3%	8.7%	48.0%	34.8%	136.5%	25.3%	0.0%	36.0%
NET ORDERS:																
a.CURRENT YTD	72,263	6	3,018	4,698	79,985	63,753	28,650	10,913	2,718	106,034	37,339	40,436	1,443	36,177	4,292	119,687
b.PAST YTD	67,612	-	3,679	3,480	74,771	108,018	30,013	14,748	3,072	155,851	172,954	105,194	2,753	88,189	4,141	373,231
UNIT CHANGE a-b	4,651	6	(661)	1,218	5,214	(44,265)	(1,363)	(3,835)	(354)	(49,817)	(135,615)	(64,758)	(1,310)	(52,012)	151	(253,544)
% CHANGE	6.9%	-	-18.0%	35.0%	7.0%	-41.0%	-4.5%	-26.0%	-11.5%	-32.0%	-78.4%	-61.6%	-47.6%	-59.0%	3.6%	-67.9%
CANCELLATION RATE:																
a.CURRENT YTD	5.9%	0.0%	0.0%	4.1%	5.6%	8.5%	2.2%	2.4%	4.0%	6.2%	32.5%	14.1%	7.1%	12.1%	4.8%	20.0%
b.PAST YTD	5.3%	-	0.0%	0.0%	4.8%	9.1%	4.3%	2.6%	1.3%	7.5%	13.4%	8.5%	4.9%	6.6%	4.8%	10.4%
PP CHANGE	0.6	-	-	4.1	0.8	(0.6)	(2.2)	(0.2)	2.7	(1.3)	19.0	5.6	2.1	5.5	(0.1)	9.6
RETAIL SALES:																
a.CURRENT 3 MO.	66,291	15	3,230	3,464	73,000	91,729	29,377	10,983	2,521	134,610	104,744	71,346	1,491	57,250	4,293	239,124
b.SAME 1 YR. AGO	63,008	3	3,602	3,792	70,405	79,249	29,204	14,997	2,607	126,057	91,263	62,922	1,303	47,871	4,144	207,503
UNIT CHANGE a-b	3,283	12	(372)	(328)	2,595	12,480	173	(4,014)	(86)	8,553	13,481	8,424	188	9,379	149	31,621
% CHANGE	5.2%	400.0%	-10.3%	-8.6%	3.7%	15.7%	0.6%	-26.8%	-3.3%	6.8%	14.8%	13.4%	14.4%	19.6%	3.6%	15.2%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
UNITED STATES
October 2019

SELECT PERIODS: ANNUALIZED

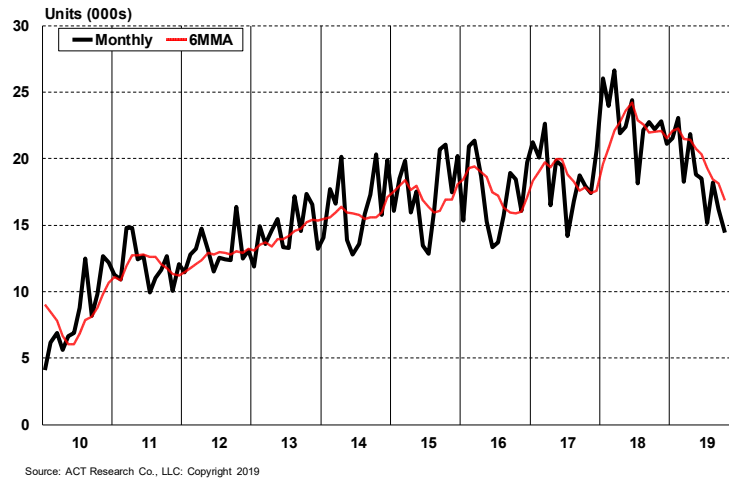
	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG**:																
. CURRENT MO.	13,746	-	427	1,474	15,647	26,585	6,681	1,459	949	35,674	49,371	34,726	1,551	26,380	480	112,508
. 3 MO AGO	15,698	1	581	2,907	19,187	38,432	8,047	1,463	957	48,899	65,966	45,200	1,983	33,775	480	147,404
. 6 MO AGO	15,338	4	627	1,544	17,513	51,282	11,113	1,597	987	64,979	102,129	61,244	2,045	43,396	480	209,294
. 12 MO AGO	14,180	-	491	1,047	15,718	50,370	7,130	1,706	1,249	60,455	134,049	69,593	2,090	58,105	480	264,317
BUILD:																
. CURRENT MO.	96,648	-	1,680	9,216	107,544	91,032	22,428	9,216	4,704	127,380	117,228	80,484	3,204	66,936	3,972	271,824
. PAST 3 MO.	103,308	4	2,640	8,420	114,372	103,056	32,912	10,384	2,872	149,224	125,632	86,188	2,928	70,328	4,356	289,432
. PAST 6 MO.	99,586	12	3,270	6,366	109,234	109,908	35,898	10,956	3,468	160,230	138,222	90,108	2,514	71,732	4,754	307,330
. PAST 12 MO.	88,350	6	3,524	5,200	97,080	110,806	34,252	13,258	3,766	162,082	133,544	87,534	2,240	70,580	5,197	299,095
INVENTORY**:																
. CURRENT MO.	25,660	6	312	1,815	27,793	30,486	4,156	598	920	36,160	22,984	13,473	875	24,207	150	61,689
. 3 MO AGO	20,557	14	738	691	22,000	32,152	6,797	1,368	1,033	41,350	23,505	14,270	606	25,021	150	63,552
. 6 MO AGO	17,887	15	636	649	19,187	31,126	6,294	1,463	846	39,729	18,561	12,919	559	24,472	150	56,661
. 12 MO AGO	17,887	15	438	281	18,621	27,531	4,240	932	560	33,263	15,526	9,998	370	19,319	150	45,363
NET ORDERS:																
. CURRENT MO.	90,276	-	1,320	1,308	92,904	59,088	11,016	9,408	852	80,364	107,052	77,520	744	51,408	3,960	240,684
. PAST 3 MO.	95,488	-	2,024	2,588	100,100	55,636	26,776	10,020	2,952	95,384	62,492	47,728	1,128	42,420	4,352	158,120
. PAST 6 MO.	95,264	4	2,870	6,226	104,364	56,386	27,496	11,048	3,458	98,388	42,788	40,188	1,478	42,666	4,752	131,872
. PAST 12 MO.	87,307	6	3,460	5,591	96,364	83,676	33,054	13,355	3,567	133,652	55,057	51,710	1,763	45,022	5,194	158,746
CANCELLATION RATE:																
. CURRENT MO.	7.4%	-	0.0%	5.2%	7.3%	8.8%	3.1%	3.3%	49.3%	8.3%	7.3%	6.8%	3.1%	6.0%	4.6%	6.8%
. PAST 3 MO.	6.6%	-	0.0%	0.9%	6.3%	9.2%	2.6%	2.5%	9.2%	6.8%	20.4%	11.7%	8.4%	11.5%	4.7%	15.1%
. PAST 6 MO.	6.0%	0.0%	0.0%	0.5%	5.5%	12.2%	3.5%	2.4%	4.3%	8.6%	34.5%	16.2%	6.8%	12.4%	4.8%	21.8%
. PAST 12 MO.	5.9%	0.0%	0.0%	3.5%	5.6%	7.9%	1.9%	2.5%	3.0%	5.9%	31.9%	15.5%	5.9%	12.0%	4.8%	20.8%
RETAIL SALES:																
. CURRENT MO.	79,956	96	9,300	3,840	93,192	117,396	28,608	18,984	6,132	171,120	116,796	87,108	1,476	70,800	3,972	280,152
. PAST 3 MO.	83,044	36	4,816	4,044	91,940	110,316	42,320	12,972	3,332	168,940	128,940	91,836	1,740	76,560	4,356	303,432
. PAST 6 MO.	83,984	30	4,154	4,062	92,230	110,434	40,410	12,456	3,326	166,626	129,344	90,414	1,848	74,180	4,754	300,540
. PAST 12 MO.	80,495	15	3,768	3,642	87,920	107,900	33,763	13,472	3,405	158,540	126,608	85,724	1,789	68,131	5,197	287,449

*Actual data not seasonally adjusted.

** Since BACKLOG and INVENTORY are non-additive, 3, 6, and 12 month data points are actuals.

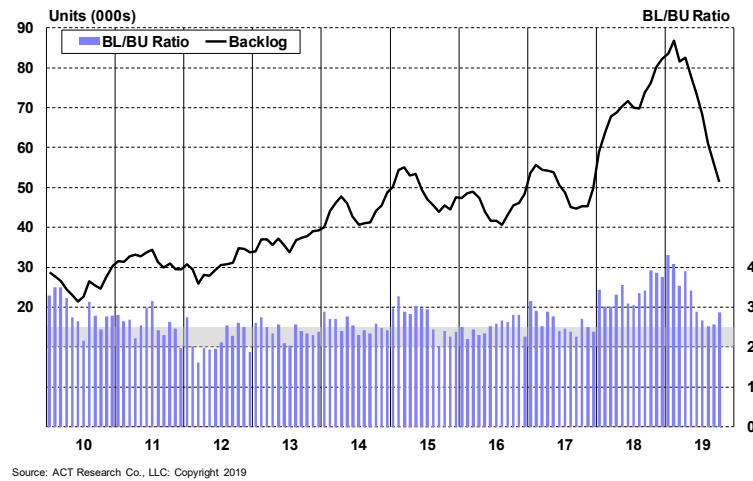
U.S. Classes 5-7: Net Orders

January 2010 - October 2019



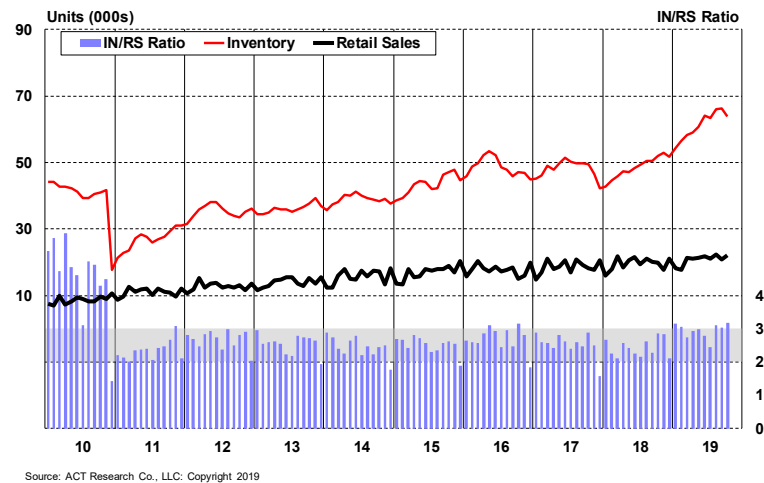
U.S. Classes 5-7: Backlog and Backlog/Build Ratio

January 2010 - October 2019



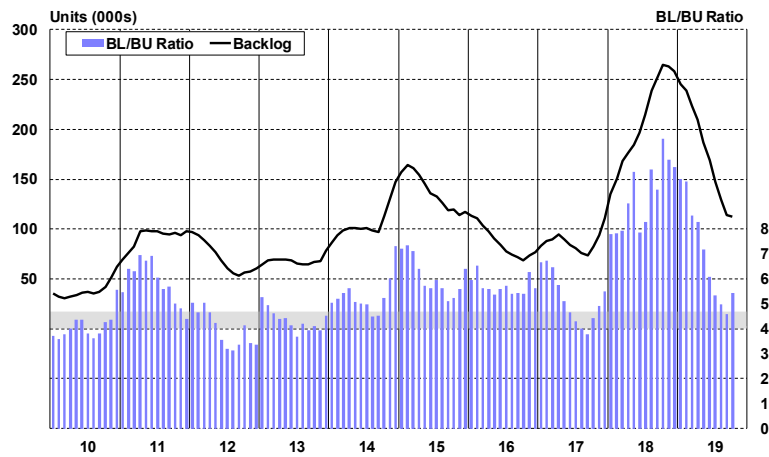
U.S. Classes 5-7: Inventory & Retail Sales

January 2010 - October 2019



U.S. Class 8: Backlog and Backlog/Build Ratio

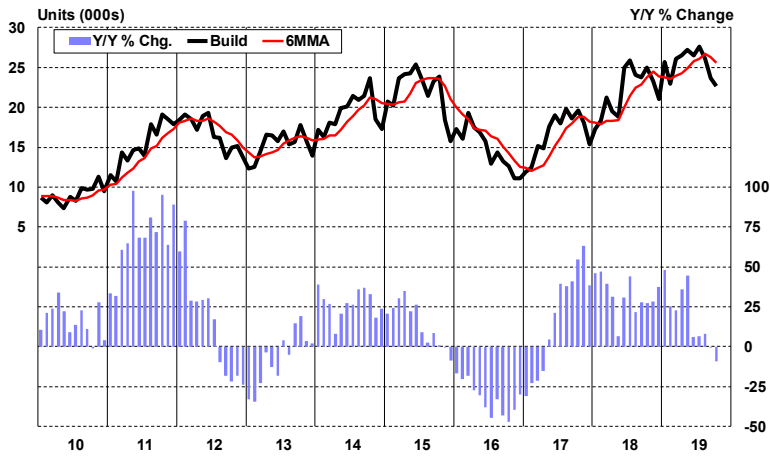
January 2010 - October 2019



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U.S. Class 8: Build

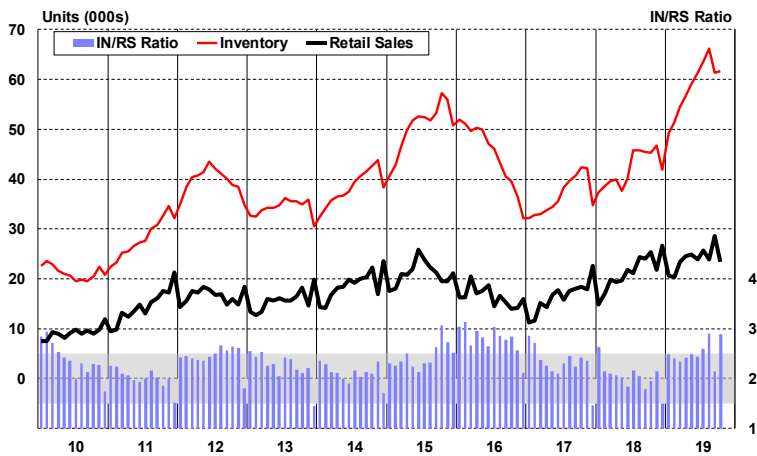
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

U.S. Class 8: Inventory & Retail Sales Ratio

January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

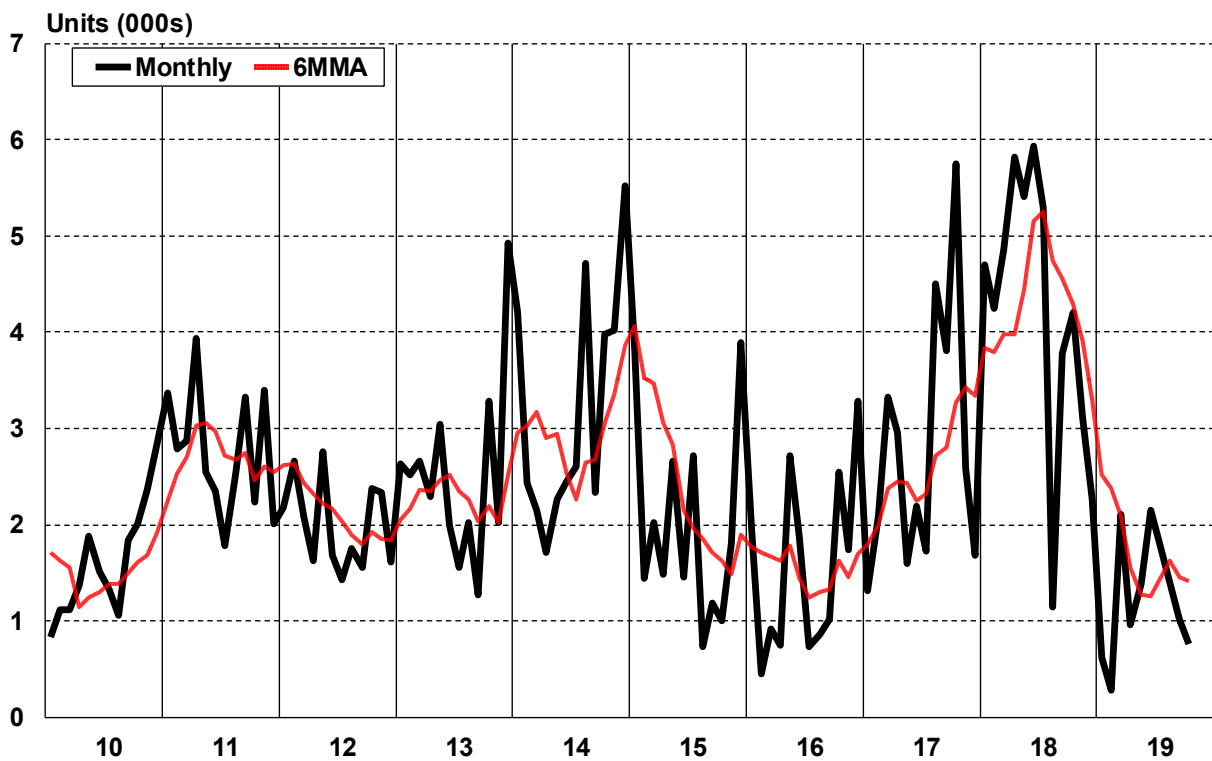


CANADA

OCTOBER & YTD 2019 DATA

Canada Class 8: Net Orders

January 2010 - October 2019



Source: ACT Research Co., LLC: Copyright 2019

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

CURRENT MONTH STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
. Build	852	-	-	2	854	394	193	-	-	587	1,332	449	27	764	-	2,572
. Inventory	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
. New Orders	1,030	-	-	-	1,030	265	298	-	-	563	297	142	4	467	-	910
. Orders Cancel	30	-	-	-	30	18	4	-	-	22	95	24	2	29	-	150
. Net Orders	1,000	-	-	-	1,000	247	294	-	-	541	202	118	2	438	-	760
. Retail Sales	860	-	-	2	862	498	202	-	1	701	1,206	534	30	872	-	2,642
MEMO: Sales of Japanese Imports					157					95						

MONTHLY PERFORMANCE:

October

23 Build Days

23 Order/Sales Days

. Build: units/day	37	-	-	0	37	17	8	-	-	26	58	20	1	33	-	112
. Net Orders: un/dy.	43	-	-	-	43	11	13	-	-	24	9	5	0	19	-	33
. Retail Sales:un/dy.	37	-	-	0	37	22	9	-	0	30	52	23	1	38	-	115
. Orders Cancel: % BL	2.2%	-	-	0.0%	2.2%	1.5%	0.9%	-	0.0%	1.3%	1.3%	1.3%	1.4%	0.9%	-	1.2%
. Backlog/Build @ rate in months**	1.7	-	-	12.0	1.8	3.4	2.5	-	-	3.2	5.9	4.6	6.0	4.8	-	5.3
. Inventory/R.S. @ rate in months**	0.6	-	-	4.4	0.6	3.3	0.7	-	5.5	2.6	5.5	4.1	10.0	6.6	-	5.6

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of Classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

YEAR-TO-DATE STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
. Build	7,231	-	-	17	7,248	6,226	1,673	-	9	7,908	15,938	5,567	445	8,747	-	30,697
. Inventory	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
. New Orders	7,519	-	-	37	7,556	4,070	2,202	-	12	6,284	7,944	2,884	194	5,765	-	16,787
. Orders Cancel	226	-	-	8	234	245	55	-	-	300	2,432	863	61	968	-	4,324
. Net Orders	7,293	-	-	29	7,322	3,825	2,147	-	12	5,984	5,512	2,021	133	4,797	-	12,463
. Retail Sales	7,199	-	-	24	7,223	6,283	2,749	-	55	9,087	14,222	5,138	298	8,096	-	27,754
MEMO: Sales of Japanese Imports					2,146					1,259						

YEAR-TO-DATE PERFORMANCE:

October

212 Build Days

215 Order/Sales Days

. Build: units/day	34	-	-	0	34	29	8	-	0	37	75	26	2	41	-	145
. Net Orders: un/dy.	34	-	-	0	34	18	10	-	0	28	26	9	1	22	-	58
. Retail Sales:un/dy.	33	-	-	0	34	29	13	-	0	42	66	24	1	38	-	129
. Orders Cancel: % BL	16.8%	-	-	36.4%	17.1%	19.8%	12.3%	-	0.0%	17.7%	34.1%	45.4%	41.5%	28.8%	-	34.4%
. Backlog/Build @ rate in months**	1.9	-	-	13.1	1.9	2.0	2.7	-	7.9	2.2	4.5	3.4	3.3	3.9	-	4.1
. Inventory/R.S. @ rate in months**	0.6	-	-	3.4	0.6	2.5	0.5	-	0.9	1.9	4.3	4.0	9.4	6.6	-	5.0

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of classes 5-8 vehicle statistics through "FIRST CALL" & other electronic media is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. PAST MONTH

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
b.PAST MO.	1,195	-	-	24	1,219	1,377	341	-	7	1,725	8,220	2,298	167	3,645	-	14,330
UNIT CHANGE a-b	148	-	-	(2)	146	(137)	105	-	-	(32)	(1,079)	(397)	(20)	(280)	-	(1,776)
% CHANGE	12.4%	-	-	-8.3%	12.0%	-9.9%	30.8%	-	0.0%	-1.9%	-13.1%	-17.3%	-12.0%	-7.7%	-	-12.4%
BUILD:																
a.CURRENT MO.	852	-	-	2	854	394	193	-	-	587	1,332	449	27	764	-	2,572
b.PAST MO.	731	-	-	2	733	442	226	-	-	668	1,709	523	56	823	-	3,111
UNIT CHANGE a-b	121	-	-	-	121	(48)	(33)	-	-	(81)	(377)	(74)	(29)	(59)	-	(539)
% CHANGE	16.6%	-	-	0.0%	16.5%	-10.9%	-14.6%	-	-	-12.1%	-22.1%	-14.1%	-51.8%	-7.2%	-	-17.3%
INVENTORY:																
a.CURRENT MO.	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
b.PAST MO.	449	-	-	6	455	1,605	177	-	6	1,788	5,836	1,880	270	5,233	-	13,219
UNIT CHANGE a-b	(8)	-	-	2	(6)	(89)	(54)	-	(1)	(144)	205	109	3	(5)	-	312
% CHANGE	-1.8%	-	-	33.3%	-1.3%	-5.5%	-30.5%	-	-16.7%	-8.1%	3.5%	5.8%	1.1%	-0.1%	-	2.4%
NET ORDERS:																
a.CURRENT MO.	1,000	-	-	-	1,000	247	294	-	-	541	202	118	2	438	-	760
b.PAST MO.	1,006	-	-	-	1,006	311	52	-	-	363	547	146	5	323	-	1,021
UNIT CHANGE a-b	(6)	-	-	-	(6)	(64)	242	-	-	178	(345)	(28)	(3)	115	-	(261)
% CHANGE	-0.6%	-	-	-	-0.6%	-20.6%	465.4%	-	-	49.0%	-63.1%	-19.2%	-60.0%	35.6%	-	-25.6%
CANCELLATION RATE:																
a.CURRENT MO.	2.9%	-	-	-	2.9%	6.8%	1.3%	-	-	3.9%	32.0%	16.9%	50.0%	6.2%	-	16.5%
b.PAST MO.	2.3%	-	-	-	2.3%	4.9%	18.8%	-	-	7.2%	11.2%	31.8%	37.5%	30.4%	-	21.6%
PP CHANGE	0.6	-	-	-	0.6	1.9	(17.4)	-	-	(3.3)	20.8	(14.9)	12.5	(24.2)	-	(5.1)
RETAIL SALES:																
a.CURRENT MO.	860	-	-	2	862	498	202	-	1	701	1,206	534	30	872	-	2,642
b.PAST MO.	732	-	-	2	734	511	347	-	2	860	1,475	405	24	913	-	2,817
UNIT CHANGE a-b	128	-	-	-	128	(13)	(145)	-	(1)	(159)	(269)	129	6	(41)	-	(175)
% CHANGE	17.5%	-	-	0.0%	17.4%	-2.5%	-41.8%	-	-50.0%	-18.5%	-18.2%	31.9%	25.0%	-4.5%	-	-6.2%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. SAME MONTH ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
b.SAME 1 YR. AGO	1,594	-	-	20	1,614	3,423	186	-	22	3,631	18,127	5,228	597	7,263	-	31,215
UNIT CHANGE a-b	(251)	-	-	2	(249)	(2,183)	260	-	(15)	(1,938)	(10,986)	(3,327)	(450)	(3,898)	-	(18,661)
% CHANGE	-15.7%	-	-	10.0%	-15.4%	-63.8%	139.8%	-	-68.2%	-53.4%	-60.6%	-63.6%	-75.4%	-53.7%	-	-59.8%
BUILD:																
a.CURRENT MO.	852	-	-	2	854	394	193	-	-	587	1,332	449	27	764	-	2,572
b.SAME 1 YR. AGO	540	-	-	-	540	640	5	-	15	660	1,588	557	32	741	-	2,918
UNIT CHANGE a-b	312	-	-	2	314	(246)	188	-	(15)	(73)	(256)	(108)	(5)	23	-	(346)
% CHANGE	57.8%	-	-	-	58.1%	-38.4%	3760.0%	-	-100.0%	-11.1%	-16.1%	-19.4%	-15.6%	3.1%	-	-11.9%
INVENTORY:																
a.CURRENT MO.	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
b.SAME 1 YR. AGO	509	-	-	4	513	1,525	499	-	38	2,062	4,069	1,273	201	4,579	-	10,122
UNIT CHANGE a-b	(68)	-	-	4	(64)	(9)	(376)	-	(33)	(418)	1,972	716	72	649	-	3,409
% CHANGE	-13.4%	-	-	100.0%	-12.5%	-0.6%	-75.4%	-	-86.8%	-20.3%	48.5%	56.2%	35.8%	14.2%	-	33.7%
NET ORDERS:																
a.CURRENT MO.	1,000	-	-	-	1,000	247	294	-	-	541	202	118	2	438	-	760
b.SAME 1 YR. AGO	414	-	-	-	414	587	112	-	2	701	2,297	684	134	1,093	-	4,208
UNIT CHANGE a-b	586	-	-	-	586	(340)	182	-	(2)	(160)	(2,095)	(566)	(132)	(655)	-	(3,448)
% CHANGE	141.5%	-	-	-	141.5%	-57.9%	162.5%	-	-100.0%	-22.8%	-91.2%	-82.7%	-98.5%	-59.9%	-	-81.9%
CANCELLATION RATE:																
a.CURRENT MO.	2.9%	-	-	-	2.9%	6.8%	1.3%	-	-	3.9%	32.0%	16.9%	50.0%	6.2%	-	16.5%
b.SAME 1 YR. AGO	3.3%	-	-	-	3.3%	4.7%	0.0%	-	0.0%	4.0%	16.5%	7.1%	0.7%	11.4%	-	13.3%
PP CHANGE	(0.4)	-	-	-	(0.4)	2.1	1.3	-	-	(0.1)	15.5	9.8	49.3	(5.1)	-	3.2
RETAIL SALES:																
a.CURRENT MO.	860	-	-	2	862	498	202	-	1	701	1,206	534	30	872	-	2,642
b.SAME 1 YR. AGO	543	-	-	-	543	728	207	-	-	935	1,705	619	53	846	-	3,223
UNIT CHANGE a-b	317	-	-	2	319	(230)	(5)	-	1	(234)	(499)	(85)	(23)	26	-	(581)
% CHANGE	58.4%	-	-	-	58.7%	-31.6%	-2.4%	-	-	-25.0%	-29.3%	-13.7%	-43.4%	3.1%	-	-18.0%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

UNIT & PERCENT CHANGE: CURRENT 3 MONTHS VS. SAME 3 MONTHS ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
b.SAME 1 YR. AGO	1,594	-	-	20	1,614	3,423	186	-	22	3,631	18,127	5,228	597	7,263	-	31,215
UNIT CHANGE a-b	(251)	-	-	2	(249)	(2,183)	260	-	(15)	(1,938)	(10,986)	(3,327)	(450)	(3,898)	-	(18,661)
% CHANGE	-15.7%	-	-	10.0%	-15.4%	-63.8%	139.8%	-	-68.2%	-53.4%	-60.6%	-63.6%	-75.4%	-53.7%	-	-59.8%
BUILD:																
a.CURRENT 3 MO.	2,469	-	-	5	2,474	1,264	568	-	-	1,832	4,655	1,543	113	2,588	-	8,899
b.SAME 1 YR. AGO	1,644	-	-	2	1,646	2,086	676	-	18	2,780	4,939	1,636	133	2,540	-	9,248
UNIT CHANGE a-b	825	-	-	3	828	(822)	(108)	-	(18)	(948)	(284)	(93)	(20)	48	-	(349)
% CHANGE	50.2%	-	-	150.0%	50.3%	-39.4%	-16.0%	-	-100.0%	-34.1%	-5.8%	-5.7%	-15.0%	1.9%	-	-3.8%
INVENTORY:																
a.CURRENT MO.	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
b.SAME 1 YR. AGO	509	-	-	4	513	1,525	499	-	38	2,062	4,069	1,273	201	4,579	-	10,122
UNIT CHANGE a-b	(68)	-	-	4	(64)	(9)	(376)	-	(33)	(418)	1,972	716	72	649	-	3,409
% CHANGE	-13.4%	-	-	100.0%	-12.5%	-0.6%	-75.4%	-	-86.8%	-20.3%	48.5%	56.2%	35.8%	14.2%	-	33.7%
NET ORDERS:																
a.CURRENT 3 MO.	2,729	-	-	-	2,729	885	351	-	7	1,243	1,566	438	(18)	1,192	-	3,178
b.SAME 1 YR. AGO	1,852	-	-	19	1,871	1,456	174	-	33	1,663	4,739	1,791	205	2,392	-	9,127
UNIT CHANGE a-b	877	-	-	(19)	858	(571)	177	-	(26)	(420)	(3,173)	(1,353)	(223)	(1,200)	-	(5,949)
% CHANGE	47.4%	-	-	-100.0%	45.9%	-39.2%	101.7%	-	-78.8%	-25.3%	-67.0%	-75.5%	-	-50.2%	-	-65.2%
CANCELLATION RATE:																
a.CURRENT 3 MO.	2.7%	-	-	100.0%	3.0%	6.2%	5.1%	-	0.0%	5.8%	18.0%	42.6%	166.7%	23.2%	-	25.3%
b.SAME 1 YR. AGO	2.4%	-	-	0.0%	2.4%	14.7%	1.7%	-	5.7%	13.3%	36.2%	19.6%	1.0%	18.5%	-	28.7%
PP CHANGE	0.3	-	-	100.0	0.6	(8.6)	3.4	-	(5.7)	(7.5)	(18.2)	23.0	165.7	4.8	-	(3.4)
RETAIL SALES:																
a.CURRENT 3 MO.	2,494	-	-	4	2,498	1,461	1,416	-	7	2,884	3,992	1,339	87	2,648	-	8,066
b.SAME 1 YR. AGO	1,645	-	-	-	1,645	2,015	1,386	-	-	3,401	4,859	1,671	121	2,524	-	9,175
UNIT CHANGE a-b	849	-	-	4	853	(554)	30	-	7	(517)	(867)	(332)	(34)	124	-	(1,109)
% CHANGE	51.6%	-	-	-	51.9%	-27.5%	2.2%	-	-	-15.2%	-17.8%	-19.9%	-28.1%	4.9%	-	-12.1%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

UNIT & PERCENT CHANGE: YEAR-TO-DATE VS. YEAR-TO-DATE ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRACTOR</u> <u>SLEEPER</u>	<u>TRACTOR</u> <u>DAY CAB</u>	<u>TRUCK</u> <u>SLEEPER</u>	<u>TRUCK</u> <u>DAY CAB</u>	<u>OTHER</u>	<u>TOTAL</u>
BACKLOG:																
a.CURRENT MO.	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
b.SAME 1 YR. AGO	1,594	-	-	20	1,614	3,423	186	-	22	3,631	18,127	5,228	597	7,263	-	31,215
UNIT CHANGE a-b	(251)	-	-	2	(249)	(2,183)	260	-	(15)	(1,938)	(10,986)	(3,327)	(450)	(3,898)	-	(18,661)
% CHANGE	-15.7%	-	-	10.0%	-15.4%	-63.8%	139.8%	-	-68.2%	-53.4%	-60.6%	-63.6%	-75.4%	-53.7%	-	-59.8%
BUILD:																
a.CURRENT YTD	7,231	-	-	17	7,248	6,226	1,673	-	9	7,908	15,938	5,567	445	8,747	-	30,697
b.PAST YTD	6,504	-	-	2	6,506	6,350	2,019	-	45	8,414	15,704	5,810	397	8,993	-	30,904
UNIT CHANGE a-b	727	-	-	15	742	(124)	(346)	-	(36)	(506)	234	(243)	48	(246)	-	(207)
% CHANGE	11.2%	-	-	750.0%	11.4%	-2.0%	-17.1%	-	-80.0%	-6.0%	1.5%	-4.2%	12.1%	-2.7%	-	-0.7%
INVENTORY:																
a.CURRENT MO.	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
b.SAME 1 YR. AGO	509	-	-	4	513	1,525	499	-	38	2,062	4,069	1,273	201	4,579	-	10,122
UNIT CHANGE a-b	(68)	-	-	4	(64)	(9)	(376)	-	(33)	(418)	1,972	716	72	649	-	3,409
% CHANGE	-13.4%	-	-	100.0%	-12.5%	-0.6%	-75.4%	-	-86.8%	-20.3%	48.5%	56.2%	35.8%	14.2%	-	33.7%
NET ORDERS:																
a.CURRENT YTD	7,293	-	-	29	7,322	3,825	2,147	-	12	5,984	5,512	2,021	133	4,797	-	12,463
b.PAST YTD	6,917	-	-	19	6,936	7,882	2,096	-	40	10,018	24,758	8,014	574	12,044	-	45,390
UNIT CHANGE a-b	376	-	-	10	386	(4,057)	51	-	(28)	(4,034)	(19,246)	(5,993)	(441)	(7,247)	-	(32,927)
% CHANGE	5.4%	-	-	52.6%	5.6%	-51.5%	2.4%	-	-70.0%	-40.3%	-77.7%	-74.8%	-76.8%	-60.2%	-	-72.5%
CANCELLATION RATE:																
a.CURRENT YTD	3.0%	-	-	21.6%	3.1%	6.0%	2.5%	-	0.0%	4.8%	30.6%	29.9%	31.4%	16.8%	-	25.8%
b.PAST YTD	2.3%	-	-	0.0%	2.3%	7.4%	3.0%	-	4.8%	6.5%	15.2%	10.3%	0.5%	9.5%	-	12.7%
PP CHANGE	0.7	-	-	21.6	0.8	(1.4)	(0.5)	-	(4.8)	(1.7)	15.4	19.6	30.9	7.3	-	13.0
RETAIL SALES:																
a.CURRENT 3 MO.	7,199	-	-	24	7,223	6,283	2,749	-	55	9,087	14,222	5,138	298	8,096	-	27,754
b.SAME 1 YR. AGO	6,508	2	-	20	6,530	6,155	2,570	-	8	8,733	15,115	5,483	394	7,694	-	28,686
UNIT CHANGE a-b	691	(2)	-	4	693	128	179	-	47	354	(893)	(345)	(96)	402	-	(932)
% CHANGE	10.6%	-100.0%	-	20.0%	10.6%	2.1%	7.0%	-	587.5%	4.1%	-5.9%	-6.3%	-24.4%	5.2%	-	-3.2%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
CANADA
October 2019

SELECT PERIODS: ANNUALIZED

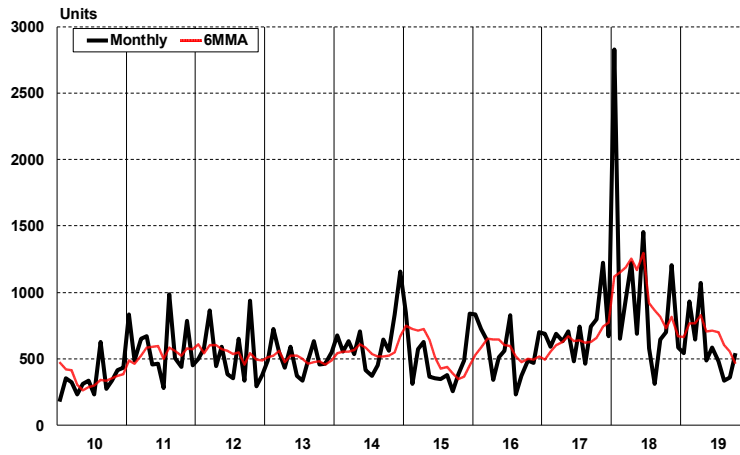
	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG**:																
. CURRENT MO.	1,343	-	-	22	1,365	1,240	446	-	7	1,693	7,141	1,901	147	3,365	-	12,554
. 3 MO AGO	1,083	-	-	26	1,109	1,639	705	-	-	2,344	10,706	3,033	271	4,889	-	18,899
. 6 MO AGO	1,306	-	-	4	1,310	2,611	945	-	5	3,561	12,588	3,754	293	5,718	-	22,353
. 12 MO AGO	1,594	-	-	20	1,614	3,423	186	-	22	3,631	18,127	5,228	597	7,263	-	31,215
BUILD:																
. CURRENT MO.	10,224	-	-	24	10,248	4,728	2,316	-	-	7,044	15,984	5,388	324	9,168	-	30,864
. PAST 3 MO.	9,876	-	-	20	9,896	5,056	2,272	-	-	7,328	18,620	6,172	452	10,352	-	35,596
. PAST 6 MO.	9,736	-	-	32	9,768	6,348	2,660	-	10	9,018	19,222	5,928	478	10,232	-	35,860
. PAST 12 MO.	8,262	-	-	37	8,299	7,305	1,699	-	28	9,032	18,855	6,627	511	9,986	-	35,979
INVENTORY**:																
. CURRENT MO.	441	-	-	8	449	1,516	123	-	5	1,644	6,041	1,989	273	5,228	-	13,531
. 3 MO AGO	464	-	-	7	471	1,691	276	-	10	1,977	5,604	1,411	267	5,186	-	12,468
. 6 MO AGO	557	-	-	18	575	1,923	243	-	36	2,202	4,749	1,885	316	5,401	-	12,351
. 12 MO AGO	509	-	-	4	513	1,525	499	-	38	2,062	4,069	1,273	201	4,579	-	10,122
NET ORDERS:																
. CURRENT MO.	12,000	-	-	-	12,000	2,964	3,528	-	-	6,492	2,424	1,416	24	5,256	-	9,120
. PAST 3 MO.	10,916	-	-	-	10,916	3,540	1,404	-	28	4,972	6,264	1,752	(72)	4,768	-	12,712
. PAST 6 MO.	10,010	-	-	48	10,058	3,812	1,772	-	14	5,598	8,706	2,558	68	5,660	-	16,992
. PAST 12 MO.	8,120	-	-	29	8,149	5,226	2,531	-	13	7,770	7,921	3,483	202	6,243	-	17,849
CANCELLATION RATE:																
. CURRENT MO.	2.9%	-	-	-	2.9%	6.8%	1.3%	-	-	3.9%	32.0%	16.9%	50.0%	6.2%	-	16.5%
. PAST 3 MO.	2.7%	-	-	100.0%	3.0%	6.2%	5.1%	-	0.0%	5.8%	18.0%	42.6%	166.7%	23.2%	-	25.3%
. PAST 6 MO.	2.9%	-	-	25.0%	3.0%	6.9%	4.6%	-	0.0%	6.2%	24.0%	30.7%	57.5%	18.1%	-	23.5%
. PAST 12 MO.	3.9%	-	-	21.6%	3.9%	5.1%	2.2%	-	0.0%	4.2%	27.0%	21.1%	23.2%	13.9%	-	21.7%
RETAIL SALES:																
. CURRENT MO.	10,320	-	-	24	10,344	5,976	2,424	-	12	8,412	14,472	6,408	360	10,464	-	31,704
. PAST 3 MO.	9,976	-	-	16	9,992	5,844	5,664	-	28	11,536	15,968	5,356	348	10,592	-	32,264
. PAST 6 MO.	9,790	-	-	34	9,824	7,038	4,214	-	76	11,328	17,088	5,920	404	10,908	-	34,320
. PAST 12 MO.	8,230	-	-	24	8,254	7,412	2,799	-	61	10,272	17,212	6,215	382	9,552	-	33,361

*Actual data not seasonally adjusted.

** Since BACKLOG and INVENTORY are non-additive, 3, 6, and 12 month data points are actuals.

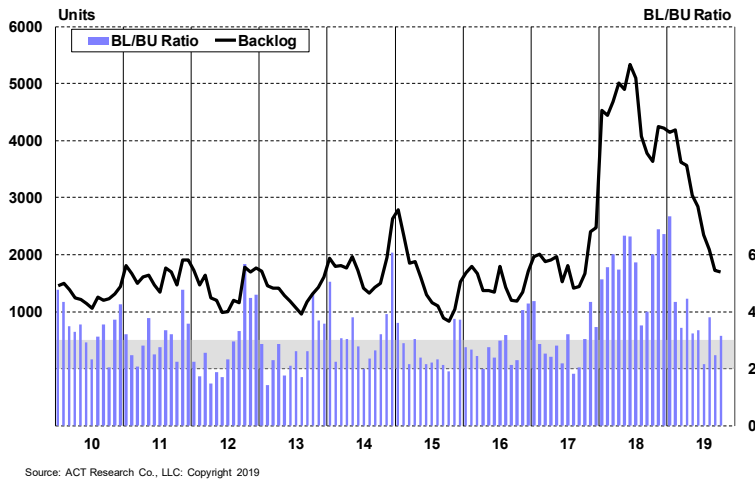
Canada Classes 6-7: Net Orders

January 2010 - October 2019



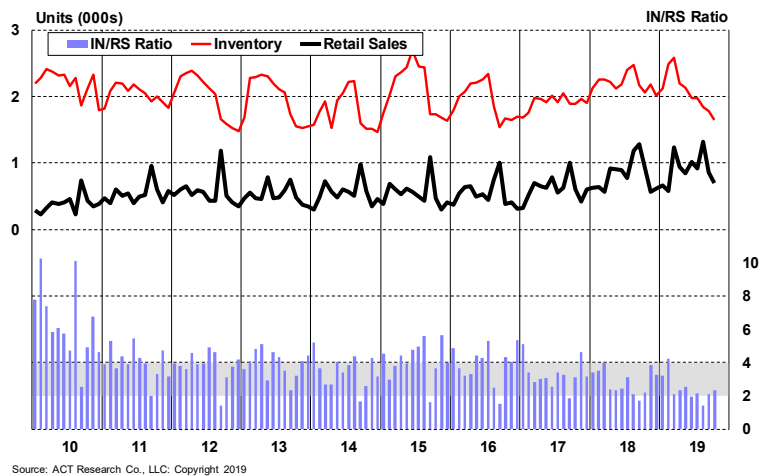
Canada Classes 6-7: Backlog & Backlog/Build Ratio

January 2010 - October 2019



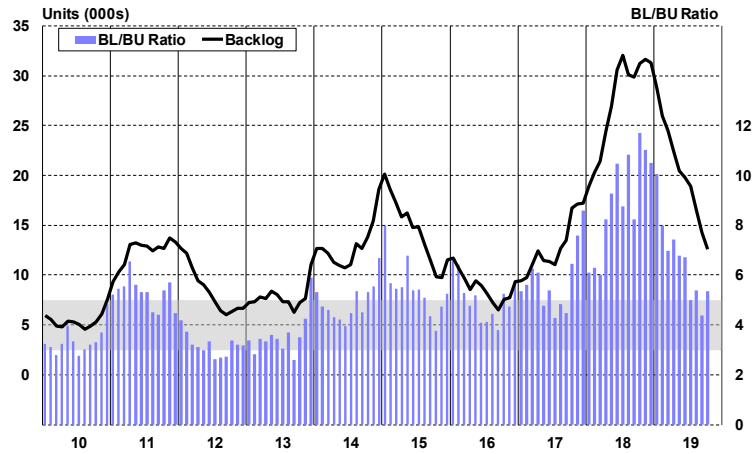
Canada Classes 6-7: Inventory & Retail Sales

January 2010 - October 2019



Canada Class 8: Backlog & Backlog/Build Ratio

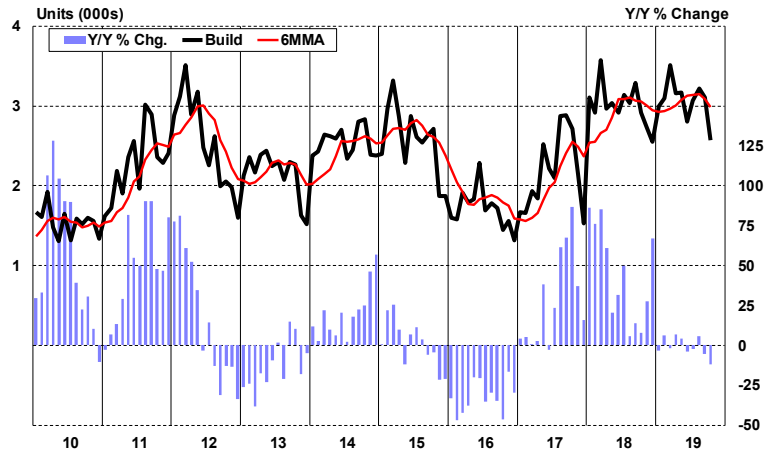
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

Canada Class 8: Build

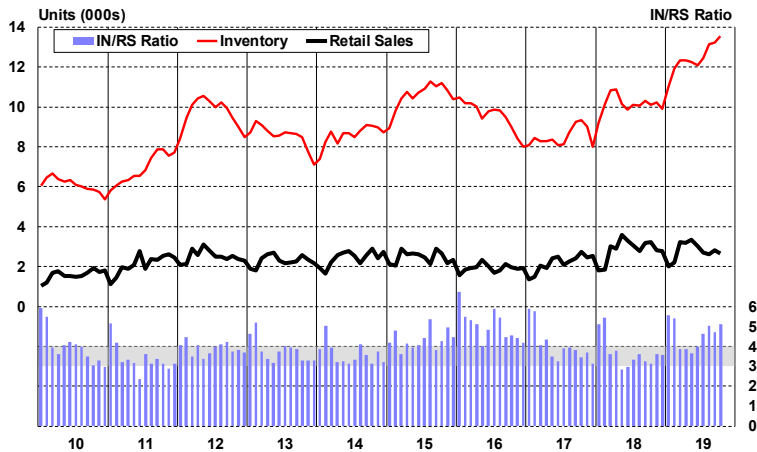
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

Canada Class 8: Inventory & Retail Sales

January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

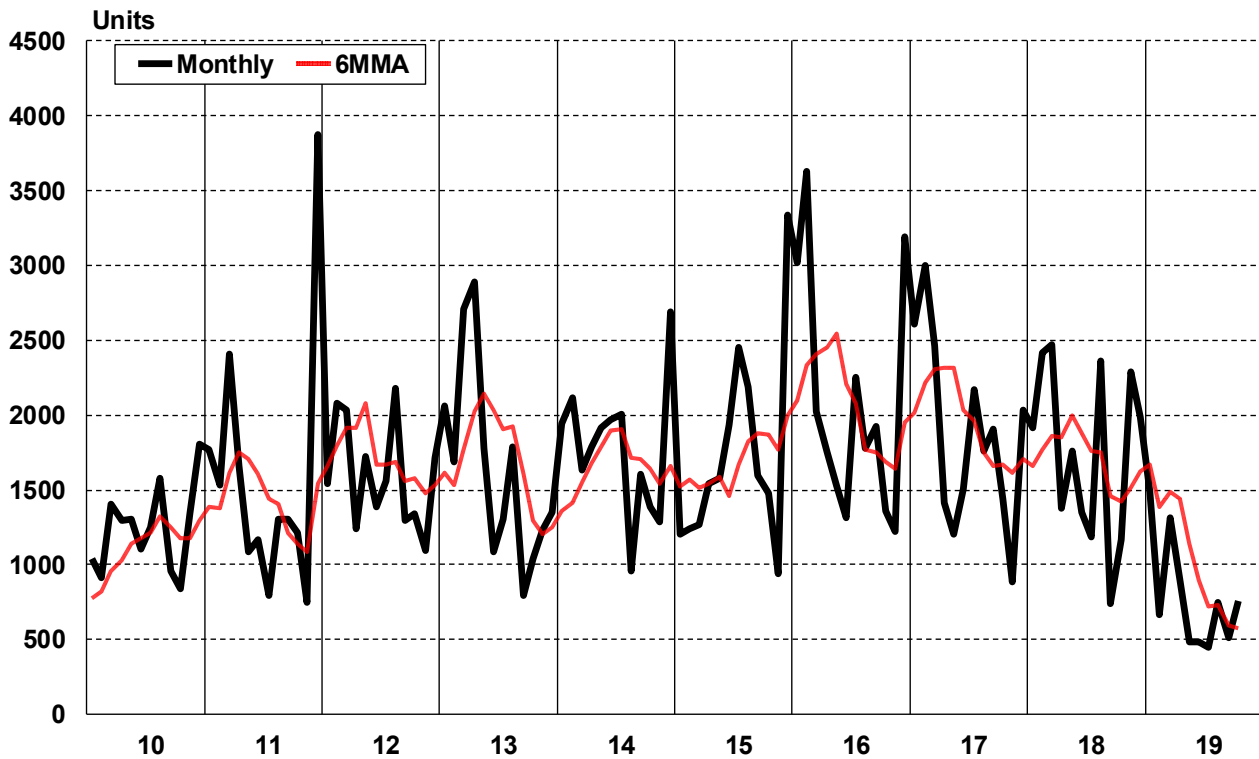


MEXICO

OCTOBER & YTD 2019 DATA

Mexico Class 8: Net Orders

January 2010 - October 2019



Source: ACT Research Co., LLC: Copyright 2019

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

CURRENT MONTH STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
. Build	16	30	-	-	46	316	268	-	-	584	657	208	29	287	-	1,181
. Inventory	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
. New Orders	17	32	-	-	49	383	271	-	-	654	395	145	24	211	-	775
. Orders Cancel	1	2	-	-	3	6	12	-	-	18	14	-	-	1	-	15
. Net Orders	16	30	-	-	46	377	259	-	-	636	381	145	24	210	-	760
. Retail Sales	63	30	-	-	93	254	374	-	-	628	667	259	27	250	-	1,203
MEMO: Sales of Japanese Imports					-					-						

MONTHLY PERFORMANCE:

October

23 Build Days

23 Order/Sales Days

. Build: units/day	1	1	-	-	2	14	12	-	-	25	29	9	1	12	-	51
. Net Orders: un/dy.	1	1	-	-	2	16	11	-	-	28	17	6	1	9	-	33
. Retail Sales:un/dy.	3	1	-	-	4	11	16	-	-	27	29	11	1	11	-	52
. Orders Cancel: % BL	3.1%	3.3%	-	-	3.3%	0.8%	3.8%	-	-	1.7%	1.4%	0.0%	0.0%	0.3%	-	0.9%
. Backlog/Build @ rate in months**	2.2	2.2	-	-	2.2	2.5	1.3	-	-	1.9	1.7	1.5	1.7	1.5	-	1.6
. Inventory/R.S. @ rate in months**	3.5	3.4	-	-	3.5	0.6	1.5	-	-	1.1	5.0	1.3	0.8	9.6	-	5.1

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

YEAR-TO-DATE STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
. Build	160	300	-	-	460	2,529	3,937	-	-	6,466	7,028	3,194	276	2,632	-	13,130
. Inventory	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
. New Orders	170	320	-	-	490	2,659	3,914	-	-	6,573	4,322	1,828	277	2,009	-	8,436
. Orders Cancel	10	20	-	-	30	55	180	-	-	235	394	177	-	46	-	617
. Net Orders	160	300	-	-	460	2,604	3,734	-	-	6,338	3,928	1,651	277	1,963	-	7,819
. Retail Sales	536	300	-	-	836	2,660	3,990	-	-	6,650	7,284	3,182	270	2,805	-	13,541
MEMO: Sales of Japanese Imports					-					-						

YEAR-TO-DATE PERFORMANCE:

October

212 Build Days

215 Order/Sales Days

. Build: units/day	1	1	-	-	2	12	19	-	-	31	33	15	1	12	-	62
. Net Orders: un/dy.	1	1	-	-	2	12	17	-	-	29	18	8	1	9	-	36
. Retail Sales:un/dy.	2	1	-	-	4	12	19	-	-	31	34	15	1	13	-	63
. Orders Cancel: % BL	31.3%	33.3%	-	-	32.6%	7.6%	57.1%	-	-	22.6%	38.4%	60.8%	0.0%	12.0%	-	35.4%
. Backlog/Build @ rate in months**	2.0	2.0	-	-	2.0	2.9	0.8	-	-	1.6	1.5	0.9	1.6	1.5	-	1.3
. Inventory/R.S. @ rate in months**	3.8	3.1	-	-	3.6	0.5	1.3	-	-	1.0	4.3	1.0	0.8	8.0	-	4.2

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

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TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. PAST MONTH

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
b.PAST MO.	32	60	-	-	92	666	324	-	-	990	1,280	397	49	495	-	2,221
UNIT CHANGE a-b	-	-	-	-	-	58	(9)	-	-	49	(255)	(106)	(4)	(113)	-	(478)
% CHANGE	0.0%	0.0%	-	-	0.0%	8.7%	-2.8%	-	-	4.9%	-19.9%	-26.7%	-8.2%	-22.8%	-	-21.5%
BUILD:																
a.CURRENT MO.	16	30	-	-	46	316	268	-	-	584	657	208	29	287	-	1,181
b.PAST MO.	16	30	-	-	46	215	258	-	-	473	463	200	24	175	-	862
UNIT CHANGE a-b	-	-	-	-	-	101	10	-	-	111	194	8	5	112	-	319
% CHANGE	0.0%	0.0%	-	-	0.0%	47.0%	3.9%	-	-	23.5%	41.9%	4.0%	20.8%	64.0%	-	37.0%
INVENTORY:																
a.CURRENT MO.	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
b.PAST MO.	199	92	-	-	291	198	531	-	-	729	3,046	447	19	2,257	-	5,769
UNIT CHANGE a-b	2	-	-	-	2	(69)	(5)	-	-	(74)	9	(133)	1	(67)	-	(190)
% CHANGE	1.0%	0.0%	-	-	0.7%	-34.8%	-0.9%	-	-	-10.2%	0.3%	-29.8%	5.3%	-3.0%	-	-3.3%
NET ORDERS:																
a.CURRENT MO.	16	30	-	-	46	377	259	-	-	636	381	145	24	210	-	760
b.PAST MO.	16	30	-	-	46	144	268	-	-	412	245	60	22	185	-	512
UNIT CHANGE a-b	-	-	-	-	-	233	(9)	-	-	224	136	85	2	25	-	248
% CHANGE	0.0%	0.0%	-	-	0.0%	161.8%	-3.4%	-	-	54.4%	55.5%	141.7%	9.1%	13.5%	-	48.4%
CANCELLATION RATE:																
a.CURRENT MO.	5.9%	6.3%	-	-	6.1%	1.6%	4.4%	-	-	2.8%	3.5%	0.0%	0.0%	0.5%	-	1.9%
b.PAST MO.	5.9%	6.3%	-	-	6.1%	3.4%	4.6%	-	-	4.2%	11.6%	0.0%	0.0%	0.5%	-	6.1%
PP CHANGE	-	-	-	-	-	(1.8)	(0.2)	-	-	(1.4)	(8.0)	-	-	(0.1)	-	(4.1)
RETAIL SALES:																
a.CURRENT MO.	63	30	-	-	93	254	374	-	-	628	667	259	27	250	-	1,203
b.PAST MO.	34	30	-	-	64	227	424	-	-	651	552	177	22	199	-	950
UNIT CHANGE a-b	29	-	-	-	29	27	(50)	-	-	(23)	115	82	5	51	-	253
% CHANGE	85.3%	0.0%	-	-	45.3%	11.9%	-11.8%	-	-	-3.5%	20.8%	46.3%	22.7%	25.6%	-	26.6%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. SAME MONTH ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
b.SAME 1 YR. AGO	32	60	-	-	92	949	404	-	-	1,353	2,672	854	41	693	-	4,260
UNIT CHANGE a-b	-	-	-	-	-	(225)	(89)	-	-	(314)	(1,647)	(563)	4	(311)	-	(2,517)
% CHANGE	0.0%	0.0%	-	-	0.0%	-23.7%	-22.0%	-	-	-23.2%	-61.6%	-65.9%	9.8%	-44.9%	-	-59.1%
BUILD:																
a.CURRENT MO.	16	30	-	-	46	316	268	-	-	584	657	208	29	287	-	1,181
b.SAME 1 YR. AGO	16	30	-	-	46	310	622	-	-	932	1,074	329	31	348	-	1,782
UNIT CHANGE a-b	-	-	-	-	-	6	(354)	-	-	(348)	(417)	(121)	(2)	(61)	-	(601)
% CHANGE	0.0%	0.0%	-	-	0.0%	1.9%	-56.9%	-	-	-37.3%	-38.8%	-36.8%	-6.5%	-17.5%	-	-33.7%
INVENTORY:																
a.CURRENT MO.	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
b.SAME 1 YR. AGO	183	92	-	-	275	164	524	-	-	688	3,173	354	31	2,452	-	6,010
UNIT CHANGE a-b	18	-	-	-	18	(35)	2	-	-	(33)	(118)	(40)	(11)	(262)	-	(431)
% CHANGE	9.8%	0.0%	-	-	6.5%	-21.3%	0.4%	-	-	-4.8%	-3.7%	-11.3%	-35.5%	-10.7%	-	-7.2%
NET ORDERS:																
a.CURRENT MO.	16	30	-	-	46	377	259	-	-	636	381	145	24	210	-	760
b.SAME 1 YR. AGO	16	30	-	-	46	153	292	-	-	445	687	197	27	254	-	1,165
UNIT CHANGE a-b	-	-	-	-	-	224	(33)	-	-	191	(306)	(52)	(3)	(44)	-	(405)
% CHANGE	0.0%	0.0%	-	-	0.0%	146.4%	-11.3%	-	-	42.9%	-44.5%	-26.4%	-11.1%	-17.3%	-	-34.8%
CANCELLATION RATE:																
a.CURRENT MO.	5.9%	6.3%	-	-	6.1%	1.6%	4.4%	-	-	2.8%	3.5%	0.0%	0.0%	0.5%	-	1.9%
b.SAME 1 YR. AGO	5.9%	6.3%	-	-	6.1%	36.3%	3.9%	-	-	18.2%	3.8%	4.8%	0.0%	7.6%	-	4.7%
PP CHANGE	-	-	-	-	-	(34.7)	0.5	-	-	(15.4)	(0.2)	(4.8)	-	(7.2)	-	(2.8)
RETAIL SALES:																
a.CURRENT MO.	63	30	-	-	93	254	374	-	-	628	667	259	27	250	-	1,203
b.SAME 1 YR. AGO	37	30	-	-	67	327	458	-	-	785	961	370	31	305	-	1,667
UNIT CHANGE a-b	26	-	-	-	26	(73)	(84)	-	-	(157)	(294)	(111)	(4)	(55)	-	(464)
% CHANGE	70.3%	0.0%	-	-	38.8%	-22.3%	-18.3%	-	-	-20.0%	-30.6%	-30.0%	-12.9%	-18.0%	-	-27.8%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

UNIT & PERCENT CHANGE: CURRENT 3 MONTHS VS. SAME 3 MONTHS ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
b.SAME 1 YR. AGO	32	60	-	-	92	949	404	-	-	1,353	2,672	854	41	693	-	4,260
UNIT CHANGE a-b	-	-	-	-	-	(225)	(89)	-	-	(314)	(1,647)	(563)	4	(311)	-	(2,517)
% CHANGE	0.0%	0.0%	-	-	0.0%	-23.7%	-22.0%	-	-	-23.2%	-61.6%	-65.9%	9.8%	-44.9%	-	-59.1%
BUILD:																
a.CURRENT 3 MO.	48	90	-	-	138	782	791	-	-	1,573	1,556	621	77	678	-	2,932
b.SAME 1 YR. AGO	48	90	-	-	138	1,290	1,457	-	-	2,747	2,655	796	86	1,027	-	4,564
UNIT CHANGE a-b	-	-	-	-	-	(508)	(666)	-	-	(1,174)	(1,099)	(175)	(9)	(349)	-	(1,632)
% CHANGE	0.0%	0.0%	-	-	0.0%	-39.4%	-45.7%	-	-	-42.7%	-41.4%	-22.0%	-10.5%	-34.0%	-	-35.8%
INVENTORY:																
a.CURRENT MO.	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
b.SAME 1 YR. AGO	183	92	-	-	275	164	524	-	-	688	3,173	354	31	2,452	-	6,010
UNIT CHANGE a-b	18	-	-	-	18	(35)	2	-	-	(33)	(118)	(40)	(11)	(262)	-	(431)
% CHANGE	9.8%	0.0%	-	-	6.5%	-21.3%	0.4%	-	-	-4.8%	-3.7%	-11.3%	-35.5%	-10.7%	-	-7.2%
NET ORDERS:																
a.CURRENT 3 MO.	48	90	-	-	138	785	785	-	-	1,570	994	381	75	571	-	2,021
b.SAME 1 YR. AGO	48	90	-	-	138	527	971	-	-	1,498	2,467	856	74	876	-	4,273
UNIT CHANGE a-b	-	-	-	-	-	258	(186)	-	-	72	(1,473)	(475)	1	(305)	-	(2,252)
% CHANGE	0.0%	0.0%	-	-	0.0%	49.0%	-19.2%	-	-	4.8%	-59.7%	-55.5%	1.4%	-34.8%	-	-52.7%
CANCELLATION RATE:																
a.CURRENT 3 MO.	5.9%	6.3%	-	-	6.1%	2.1%	4.5%	-	-	3.3%	7.0%	3.3%	0.0%	3.4%	-	5.1%
b.SAME 1 YR. AGO	5.9%	6.3%	-	-	6.1%	20.4%	12.4%	-	-	15.4%	10.7%	3.6%	0.0%	3.9%	-	7.9%
PP CHANGE	-	-	-	-	-	(18.3)	(7.9)	-	-	(12.0)	(3.7)	(0.3)	-	(0.6)	-	(2.8)
RETAIL SALES:																
a.CURRENT 3 MO.	147	90	-	-	237	724	1,220	-	-	1,944	1,763	636	75	680	-	3,154
b.SAME 1 YR. AGO	132	90	-	-	222	837	1,443	-	-	2,280	2,647	908	88	920	-	4,563
UNIT CHANGE a-b	15	-	-	-	15	(113)	(223)	-	-	(336)	(884)	(272)	(13)	(240)	-	(1,409)
% CHANGE	11.4%	0.0%	-	-	6.8%	-13.5%	-15.5%	-	-	-14.7%	-33.4%	-30.0%	-14.8%	-26.1%	-	-30.9%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

UNIT & PERCENT CHANGE: YEAR-TO-DATE VS. YEAR-TO-DATE ONE YEAR AGO

	CI. 5	CI. 5	CI. 5	CI. 5	CI. 5	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 6-7	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8	CI. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
b.SAME 1 YR. AGO	32	60	-	-	92	949	404	-	-	1,353	2,672	854	41	693	-	4,260
UNIT CHANGE a-b	-	-	-	-	-	(225)	(89)	-	-	(314)	(1,647)	(563)	4	(311)	-	(2,517)
% CHANGE	0.0%	0.0%	-	-	0.0%	-23.7%	-22.0%	-	-	-23.2%	-61.6%	-65.9%	9.8%	-44.9%	-	-59.1%
BUILD:																
a.CURRENT YTD	160	300	-	-	460	2,529	3,937	-	-	6,466	7,028	3,194	276	2,632	-	13,130
b.PAST YTD	160	300	-	-	460	2,861	4,772	-	-	7,633	9,056	2,425	267	4,138	-	15,886
UNIT CHANGE a-b	-	-	-	-	-	(332)	(835)	-	-	(1,167)	(2,028)	769	9	(1,506)	-	(2,756)
% CHANGE	0.0%	0.0%	-	-	0.0%	-11.6%	-17.5%	-	-	-15.3%	-22.4%	31.7%	3.4%	-36.4%	-	-17.3%
INVENTORY:																
a.CURRENT MO.	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
b.SAME 1 YR. AGO	183	92	-	-	275	164	524	-	-	688	3,173	354	31	2,452	-	6,010
UNIT CHANGE a-b	18	-	-	-	18	(35)	2	-	-	(33)	(118)	(40)	(11)	(262)	-	(431)
% CHANGE	9.8%	0.0%	-	-	6.5%	-21.3%	0.4%	-	-	-4.8%	-3.7%	-11.3%	-35.5%	-10.7%	-	-7.2%
NET ORDERS:																
a.CURRENT YTD	160	300	-	-	460	2,604	3,734	-	-	6,338	3,928	1,651	277	1,963	-	7,819
b.PAST YTD	160	300	-	-	460	2,501	4,477	-	-	6,978	9,393	3,209	279	3,864	-	16,745
UNIT CHANGE a-b	-	-	-	-	-	103	(743)	-	-	(640)	(5,465)	(1,558)	(2)	(1,901)	-	(8,926)
% CHANGE	0.0%	0.0%	-	-	0.0%	4.1%	-16.6%	-	-	-9.2%	-58.2%	-48.6%	-0.7%	-49.2%	-	-53.3%
CANCELLATION RATE:																
a.CURRENT YTD	5.9%	6.3%	-	-	6.1%	2.1%	4.6%	-	-	3.6%	9.1%	9.7%	0.0%	2.3%	-	7.3%
b.PAST YTD	5.9%	6.3%	-	-	6.1%	22.7%	10.0%	-	-	15.0%	13.9%	3.5%	0.0%	4.5%	-	9.8%
PP CHANGE	-	-	-	-	-	(20.6)	(5.4)	-	-	(11.5)	(4.8)	6.2	-	(2.3)	-	(2.5)
RETAIL SALES:																
a.CURRENT 3 MO.	536	300	-	-	836	2,660	3,990	-	-	6,650	7,284	3,182	270	2,805	-	13,541
b.SAME 1 YR. AGO	435	300	-	-	735	2,796	4,448	-	-	7,244	8,637	2,526	278	3,844	-	15,285
UNIT CHANGE a-b	101	-	-	-	101	(136)	(458)	-	-	(594)	(1,353)	656	(8)	(1,039)	-	(1,744)
% CHANGE	23.2%	0.0%	-	-	13.7%	-4.9%	-10.3%	-	-	-8.2%	-15.7%	26.0%	-2.9%	-27.0%	-	-11.4%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
MEXICO
October 2019

SELECT PERIODS: ANNUALIZED

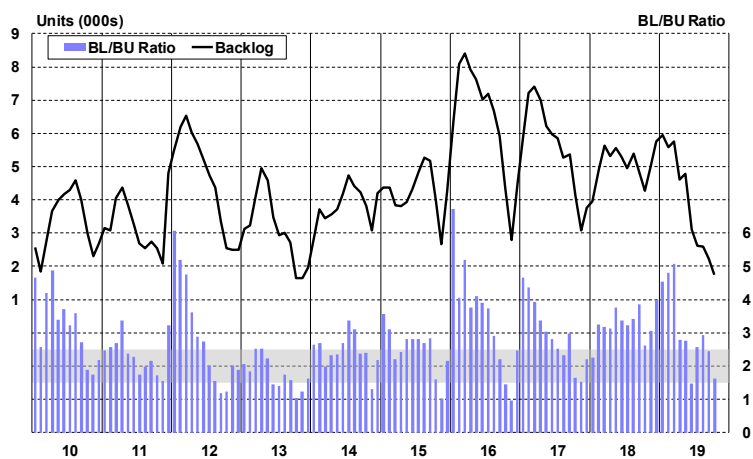
	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG**:																
. CURRENT MO.	32	60	-	-	92	724	315	-	-	1,039	1,025	291	45	382	-	1,743
. 3 MO AGO	32	60	-	-	92	724	323	-	-	1,047	1,590	514	49	478	-	2,631
. 6 MO AGO	32	60	-	-	92	906	1,314	-	-	2,220	3,062	877	44	622	-	4,605
. 12 MO AGO	32	60	-	-	92	949	404	-	-	1,353	2,672	854	41	693	-	4,260
BUILD:																
. CURRENT MO.	192	360	-	-	552	3,792	3,216	-	-	7,008	7,884	2,496	348	3,444	-	14,172
. PAST 3 MO.	192	360	-	-	552	3,128	3,164	-	-	6,292	6,224	2,484	308	2,712	-	11,728
. PAST 6 MO.	192	360	-	-	552	3,230	5,092	-	-	8,322	8,782	3,360	324	3,118	-	15,584
. PAST 12 MO.	192	360	-	-	552	2,839	4,557	-	-	7,396	8,513	3,778	329	3,304	-	15,924
INVENTORY**:																
. CURRENT MO.	201	92	-	-	293	129	526	-	-	655	3,055	314	20	2,190	-	5,579
. 3 MO AGO	192	92	-	-	284	225	517	-	-	742	3,076	329	20	2,303	-	5,728
. 6 MO AGO	226	92	-	-	318	258	524	-	-	782	3,244	427	25	2,391	-	6,087
. 12 MO AGO	183	92	-	-	275	164	524	-	-	688	3,173	354	31	2,452	-	6,010
NET ORDERS:																
. CURRENT MO.	192	360	-	-	552	4,524	3,108	-	-	7,632	4,572	1,740	288	2,520	-	9,120
. PAST 3 MO.	192	360	-	-	552	3,140	3,140	-	-	6,280	3,976	1,524	300	2,284	-	8,084
. PAST 6 MO.	192	360	-	-	552	2,872	3,098	-	-	5,970	3,214	1,212	322	2,136	-	6,884
. PAST 12 MO.	192	360	-	-	552	3,010	4,471	-	-	7,481	5,516	3,022	392	3,163	-	12,093
CANCELLATION RATE:																
. CURRENT MO.	5.9%	6.3%	-	-	6.1%	1.6%	4.4%	-	-	2.8%	3.5%	0.0%	0.0%	0.5%	-	1.9%
. PAST 3 MO.	5.9%	6.3%	-	-	6.1%	2.1%	4.5%	-	-	3.3%	7.0%	3.3%	0.0%	3.4%	-	5.1%
. PAST 6 MO.	5.9%	6.3%	-	-	6.1%	2.8%	5.1%	-	-	4.0%	8.1%	5.2%	0.0%	3.3%	-	5.8%
. PAST 12 MO.	5.9%	6.3%	-	-	6.1%	1.9%	4.4%	-	-	3.4%	13.9%	7.2%	0.0%	2.7%	-	9.1%
RETAIL SALES:																
. CURRENT MO.	756	360	-	-	1,116	3,048	4,488	-	-	7,536	8,004	3,108	324	3,000	-	14,436
. PAST 3 MO.	588	360	-	-	948	2,896	4,880	-	-	7,776	7,052	2,544	300	2,720	-	12,616
. PAST 6 MO.	524	360	-	-	884	3,010	4,804	-	-	7,814	8,728	3,362	326	3,462	-	15,878
. PAST 12 MO.	599	360	-	-	959	3,166	4,705	-	-	7,871	8,866	3,825	328	3,455	-	16,474

*Actual data not seasonally adjusted.

** Since BACKLOG and INVENTORY are non-additive, 3, 6, and 12 month data points are actuals.

Mexico Class 8: Backlog and Backlog/Build Ratio

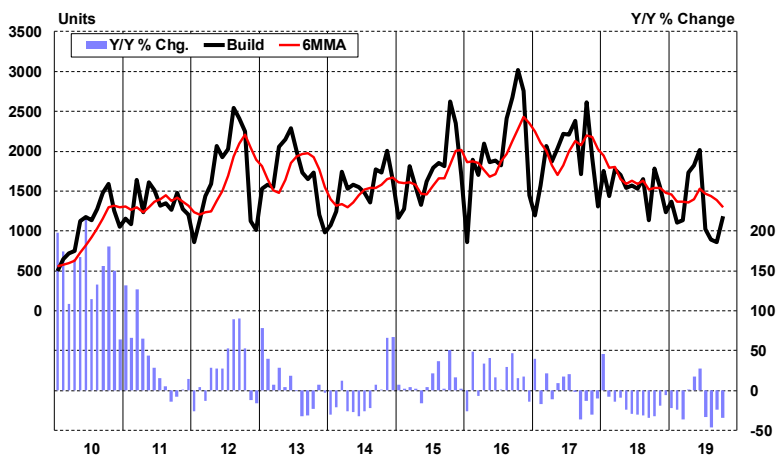
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

Mexico Class 8: Build

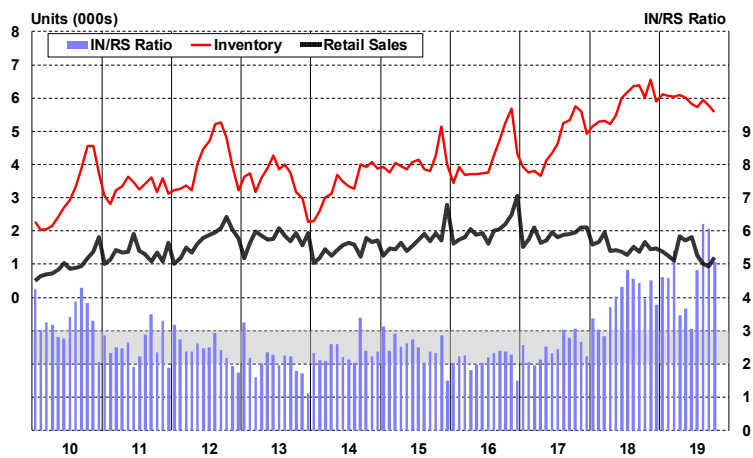
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

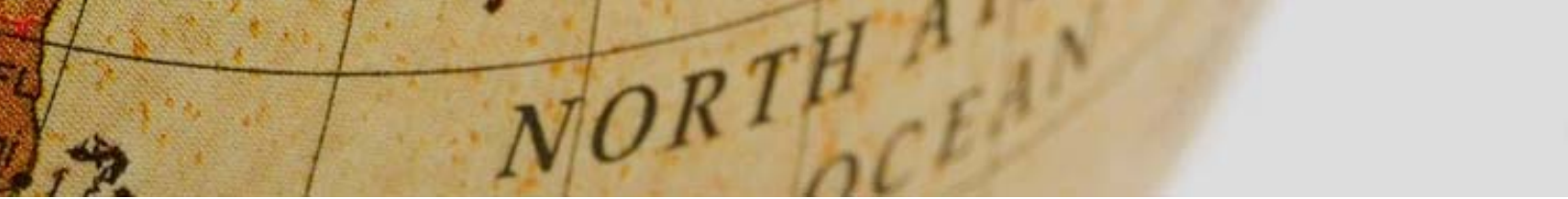
Mexico Class 8: Inventory & Retail Sales

January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

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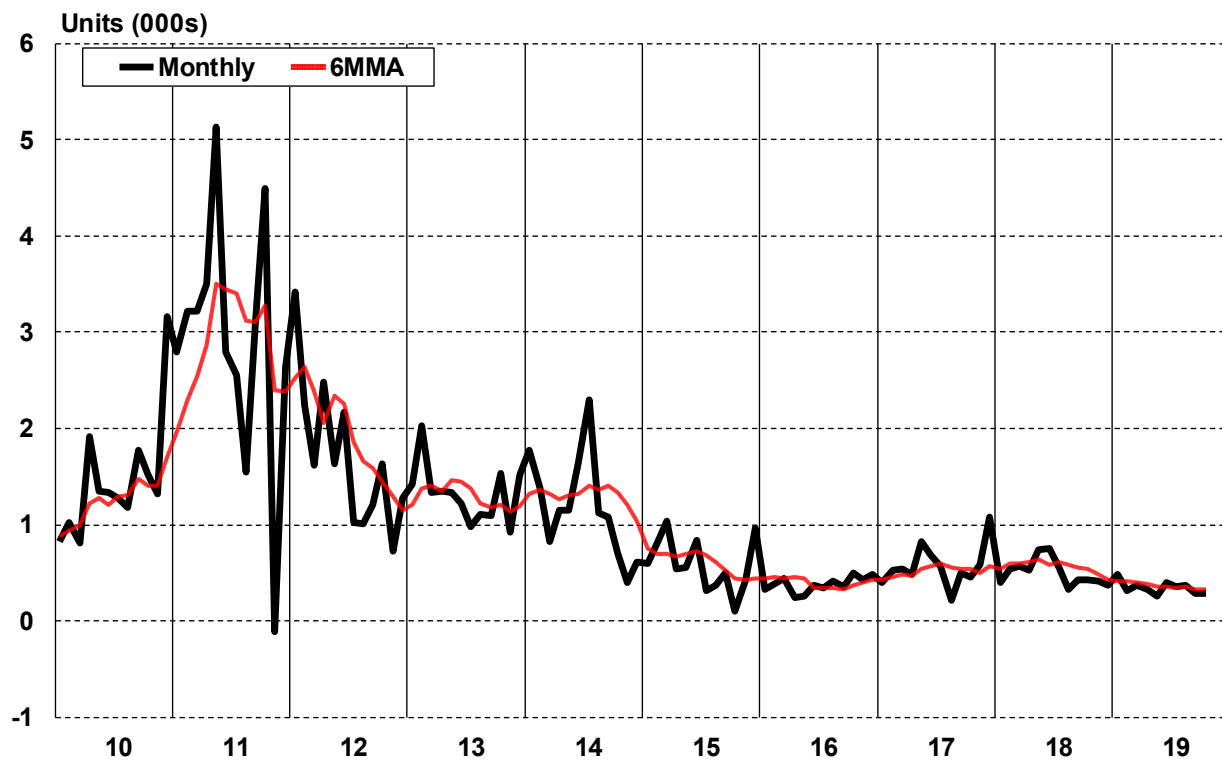


EXPORT

OCTOBER & YTD 2019 DATA

Export Class 8: Net Orders

January 2010 - October 2019



Source: ACT Research Co., LLC: Copyright 2019

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

CURRENT MONTH STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
. Build	-	-	-	-	-	36	1	-	-	37	112	89	1	135	24	361
. Inventory	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
. New Orders	-	-	-	-	-	23	1	-	-	24	66	83	-	179	26	354
. Orders Cancel	-	-	-	-	-	1	1	-	-	2	4	4	-	58	1	67
. Net Orders	-	-	-	-	-	22	-	-	-	22	62	79	-	121	25	287
. Retail Sales	-	-	-	-	-	46	17	-	-	63	70	187	-	206	24	487
MEMO: Sales of Japanese Imports					-					-						

MONTHLY PERFORMANCE:

October

23 Build Days

23 Order/Sales Days

. Build: units/day	-	-	-	-	-	2	0	-	-	2	5	4	0	6	1	16
. Net Orders: un/dy.	-	-	-	-	-	1	-	-	-	1	3	3	-	5	1	12
. Retail Sales:un/dy.	-	-	-	-	-	2	1	-	-	3	3	8	-	9	1	21
. Orders Cancel: % BL	-	-	-	-	-	1.6%	1.1%	-	-	1.3%	0.7%	0.6%	0.0%	8.7%	1.4%	3.4%
. Backlog/Build @ rate in months**	-	-	-	-	-	1.9	97.5	-	-	4.5	5.7	7.9	6.6	5.4	3.2	6.0
. Inventory/R.S. @ rate in months**	-	-	-	-	-	0.6	0.6	-	-	0.6	1.6	1.6	-	0.7	1.1	1.2

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of Classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

YEAR-TO-DATE STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
. Build	6	-	-	-	6	407	149	-	-	556	891	1,291	14	1,473	228	3,897
. Inventory	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
. New Orders	-	-	-	-	-	317	210	-	-	527	614	1,218	11	1,555	239	3,637
. Orders Cancel	-	-	-	-	-	13	5	-	-	18	39	37	-	81	10	167
. Net Orders	-	-	-	-	-	304	205	-	-	509	575	1,181	11	1,474	229	3,470
. Retail Sales	-	-	-	-	-	411	158	-	-	569	789	1,222	4	1,554	228	3,797
MEMO: Sales of Japanese Imports					-					-						

YEAR-TO-DATE PERFORMANCE:

October

212 Build Days

215 Order/Sales Days

. Build: units/day	0	-	-	-	0	2	1	-	-	3	4	6	0	7	1	18
. Net Orders: un/dy.	-	-	-	-	-	1	1	-	-	2	3	5	0	7	1	16
. Retail Sales:un/dy.	-	-	-	-	-	2	1	-	-	3	4	6	0	7	1	18
. Orders Cancel: % BL	-	-	-	-	-	20.3%	5.6%	-	-	11.8%	6.7%	5.8%	0.0%	12.1%	14.3%	8.5%
. Backlog/Build @ rate in months**	-	-	-	-	-	1.6	6.0	-	-	2.8	6.6	5.0	4.3	4.6	3.1	5.1
. Inventory/R.S. @ rate in months**	-	-	-	-	-	0.6	0.6	-	-	0.6	1.3	2.2	2.6	0.8	1.1	1.4

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of Classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. PAST MONTH

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
b.PAST MO.	-	-	-	-	-	77	91	-	-	168	605	667	5	710	70	2,057
UNIT CHANGE a-b	-	-	-	-	-	(13)	(2)	-	-	(15)	(21)	(29)	1	(42)	-	(91)
% CHANGE	-	-	-	-	-	-16.9%	-2.2%	-	-	-8.9%	-3.5%	-4.3%	20.0%	-5.9%	0.0%	-4.4%
BUILD:																
a.CURRENT MO.	-	-	-	-	-	36	1	-	-	37	112	89	1	135	24	361
b.PAST MO.	-	-	-	-	-	30	35	-	-	65	125	97	1	126	23	372
UNIT CHANGE a-b	-	-	-	-	-	6	(34)	-	-	(28)	(13)	(8)	-	9	1	(11)
% CHANGE	-	-	-	-	-	20.0%	-97.1%	-	-	-43.1%	-10.4%	-8.2%	0.0%	7.1%	4.3%	-3.0%
INVENTORY:																
a.CURRENT MO.	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
b.PAST MO.	-	-	-	-	-	59	24	-	-	83	143	292	1	206	25	667
UNIT CHANGE a-b	-	-	-	-	-	(33)	(15)	-	-	(48)	(40)	(25)	-	(79)	-	(144)
% CHANGE	-	-	-	-	-	-55.9%	-62.5%	-	-	-57.8%	-28.0%	-8.6%	0.0%	-38.3%	0.0%	-21.6%
NET ORDERS:																
a.CURRENT MO.	-	-	-	-	-	22	-	-	-	22	62	79	-	121	25	287
b.PAST MO.	-	-	-	-	-	25	82	-	-	107	49	65	1	147	23	285
UNIT CHANGE a-b	-	-	-	-	-	(3)	(82)	-	-	(85)	13	14	(1)	(26)	2	2
% CHANGE	-	-	-	-	-	-12.0%	-100.0%	-	-	-79.4%	26.5%	21.5%	-100.0%	-17.7%	8.7%	0.7%
CANCELLATION RATE:																
a.CURRENT MO.	-	-	-	-	-	4.3%	100.0%	-	-	8.3%	6.1%	4.8%	-	32.4%	3.8%	18.9%
b.PAST MO.	-	-	-	-	-	3.8%	2.4%	-	-	2.7%	10.9%	0.0%	0.0%	2.0%	4.2%	3.4%
PP CHANGE	-	-	-	-	-	0.5	97.6	-	-	5.6	(4.8)	4.8	-	30.4	(0.3)	15.5
RETAIL SALES:																
a.CURRENT MO.	-	-	-	-	-	46	17	-	-	63	70	187	-	206	24	487
b.PAST MO.	-	-	-	-	-	36	65	-	-	101	71	89	-	167	23	350
UNIT CHANGE a-b	-	-	-	-	-	10	(48)	-	-	(38)	(1)	98	-	39	1	137
% CHANGE	-	-	-	-	-	27.8%	-73.8%	-	-	-37.6%	-1.4%	110.1%	-	23.4%	4.3%	39.1%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

UNIT & PERCENT CHANGE: CURRENT MONTH VS. SAME MONTH ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
b.SAME 1 YR. AGO	-	-	-	-	-	162	39	-	-	201	681	623	6	884	70	2,264
UNIT CHANGE a-b	-	-	-	-	-	(98)	50	-	-	(48)	(97)	15	-	(216)	-	(298)
% CHANGE	-	-	-	-	-	-60.5%	128.2%	-	-	-23.9%	-14.2%	2.4%	0.0%	-24.4%	0.0%	-13.2%
BUILD:																
a.CURRENT MO.	-	-	-	-	-	36	1	-	-	37	112	89	1	135	24	361
b.SAME 1 YR. AGO	-	-	-	-	-	52	9	-	-	61	237	124	1	255	25	642
UNIT CHANGE a-b	-	-	-	-	-	(16)	(8)	-	-	(24)	(125)	(35)	-	(120)	(1)	(281)
% CHANGE	-	-	-	-	-	-30.8%	-88.9%	-	-	-39.3%	-52.7%	-28.2%	0.0%	-47.1%	-4.0%	-43.8%
INVENTORY:																
a.CURRENT MO.	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
b.SAME 1 YR. AGO	-	-	-	-	-	48	18	-	-	66	146	231	4	360	25	766
UNIT CHANGE a-b	-	-	-	-	-	(22)	(9)	-	-	(31)	(43)	36	(3)	(233)	-	(243)
% CHANGE	-	-	-	-	-	-45.8%	-50.0%	-	-	-47.0%	-29.5%	15.6%	-75.0%	-64.7%	0.0%	-31.7%
NET ORDERS:																
a.CURRENT MO.	-	-	-	-	-	22	-	-	-	22	62	79	-	121	25	287
b.SAME 1 YR. AGO	-	-	-	-	-	30	(3)	-	-	27	179	85	-	139	25	428
UNIT CHANGE a-b	-	-	-	-	-	(8)	3	-	-	(5)	(117)	(6)	-	(18)	-	(141)
% CHANGE	-	-	-	-	-	-26.7%	-	-	-	-18.5%	-65.4%	-7.1%	-	-12.9%	0.0%	-32.9%
CANCELLATION RATE:																
a.CURRENT MO.	-	-	-	-	-	4.3%	100.0%	-	-	8.3%	6.1%	4.8%	-	32.4%	3.8%	18.9%
b.SAME 1 YR. AGO	-	-	-	-	-	0.0%	250.0%	-	-	15.6%	0.0%	2.3%	-	36.8%	3.8%	16.4%
PP CHANGE	-	-	-	-	-	4.3	(150.0)	-	-	(7.3)	6.1	2.5	-	(4.4)	-	2.5
RETAIL SALES:																
a.CURRENT MO.	-	-	-	-	-	46	17	-	-	63	70	187	-	206	24	487
b.SAME 1 YR. AGO	-	-	-	-	-	63	27	-	-	90	324	135	1	210	25	695
UNIT CHANGE a-b	-	-	-	-	-	(17)	(10)	-	-	(27)	(254)	52	(1)	(4)	(1)	(208)
% CHANGE	-	-	-	-	-	-27.0%	-37.0%	-	-	-30.0%	-78.4%	38.5%	-100.0%	-1.9%	-4.0%	-29.9%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

UNIT & PERCENT CHANGE: CURRENT 3 MONTHS VS. SAME 3 MONTHS ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
											<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG:																
a.CURRENT MO.	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
b.SAME 1 YR. AGO	-	-	-	-	-	162	39	-	-	201	681	623	6	884	70	2,264
UNIT CHANGE a-b	-	-	-	-	-	(98)	50	-	-	(48)	(97)	15	-	(216)	-	(298)
% CHANGE	-	-	-	-	-	-60.5%	128.2%	-	-	-23.9%	-14.2%	2.4%	0.0%	-24.4%	0.0%	-13.2%
BUILD:																
a.CURRENT 3 MO.	6	-	-	-	6	85	56	-	-	141	308	293	5	366	72	1,044
b.SAME 1 YR. AGO	-	-	-	-	-	168	61	-	-	229	672	422	4	650	73	1,821
UNIT CHANGE a-b	6	-	-	-	6	(83)	(5)	-	-	(88)	(364)	(129)	1	(284)	(1)	(777)
% CHANGE	-	-	-	-	-	-49.4%	-8.2%	-	-	-38.4%	-54.2%	-30.6%	25.0%	-43.7%	-1.4%	-42.7%
INVENTORY:																
a.CURRENT MO.	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
b.SAME 1 YR. AGO	-	-	-	-	-	48	18	-	-	66	146	231	4	360	25	766
UNIT CHANGE a-b	-	-	-	-	-	(22)	(9)	-	-	(31)	(43)	36	(3)	(233)	-	(243)
% CHANGE	-	-	-	-	-	-45.8%	-50.0%	-	-	-47.0%	-29.5%	15.6%	-75.0%	-64.7%	0.0%	-31.7%
NET ORDERS:																
a.CURRENT 3 MO.	-	-	-	-	-	58	82	-	-	140	175	279	2	417	73	946
b.SAME 1 YR. AGO	-	-	-	-	-	90	24	-	-	114	391	275	-	445	74	1,185
UNIT CHANGE a-b	-	-	-	-	-	(32)	58	-	-	26	(216)	4	2	(28)	(1)	(239)
% CHANGE	-	-	-	-	-	-35.6%	241.7%	-	-	22.8%	-55.2%	1.5%	-	-6.3%	-1.4%	-20.2%
CANCELLATION RATE:																
a.CURRENT 3 MO.	-	-	-	-	-	4.9%	3.5%	-	-	4.1%	7.4%	2.1%	0.0%	13.8%	3.9%	8.7%
b.SAME 1 YR. AGO	-	-	-	-	-	3.2%	17.2%	-	-	6.6%	5.1%	2.1%	-	19.2%	3.9%	10.3%
PP CHANGE	-	-	-	-	-	1.7	(13.7)	-	-	(2.4)	2.3	(0.0)	-	(5.4)	0.1	(1.6)
RETAIL SALES:																
a.CURRENT 3 MO.	-	-	-	-	-	121	101	-	-	222	221	364	-	519	72	1,176
b.SAME 1 YR. AGO	-	-	-	-	-	209	84	-	-	293	731	400	3	672	73	1,879
UNIT CHANGE a-b	-	-	-	-	-	(88)	17	-	-	(71)	(510)	(36)	(3)	(153)	(1)	(703)
% CHANGE	-	-	-	-	-	-42.1%	20.2%	-	-	-24.2%	-69.8%	-9.0%	-100.0%	-22.8%	-1.4%	-37.4%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

UNIT & PERCENT CHANGE: YEAR-TO-DATE VS. YEAR-TO-DATE ONE YEAR AGO

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRACTOR</u> <u>SLEEPER</u>	<u>TRACTOR</u> <u>DAY CAB</u>	<u>TRUCK</u> <u>SLEEPER</u>	<u>TRUCK</u> <u>DAY CAB</u>	<u>OTHER</u>	<u>TOTAL</u>
BACKLOG:																
a.CURRENT MO.	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
b.SAME 1 YR. AGO	-	-	-	-	-	162	39	-	-	201	681	623	6	884	70	2,264
UNIT CHANGE a-b	-	-	-	-	-	(98)	50	-	-	(48)	(97)	15	-	(216)	-	(298)
% CHANGE	-	-	-	-	-	-60.5%	128.2%	-	-	-23.9%	-14.2%	2.4%	0.0%	-24.4%	0.0%	-13.2%
BUILD:																
a.CURRENT YTD	6	-	-	-	6	407	149	-	-	556	891	1,291	14	1,473	228	3,897
b.PAST YTD	-	-	-	-	-	751	126	-	-	877	1,679	1,440	6	2,222	231	5,578
UNIT CHANGE a-b	6	-	-	-	6	(344)	23	-	-	(321)	(788)	(149)	8	(749)	(3)	(1,681)
% CHANGE	-	-	-	-	-	-45.8%	18.3%	-	-	-36.6%	-46.9%	-10.3%	133.3%	-33.7%	-1.3%	-30.1%
INVENTORY:																
a.CURRENT MO.	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
b.SAME 1 YR. AGO	-	-	-	-	-	48	18	-	-	66	146	231	4	360	25	766
UNIT CHANGE a-b	-	-	-	-	-	(22)	(9)	-	-	(31)	(43)	36	(3)	(233)	-	(243)
% CHANGE	-	-	-	-	-	-45.8%	-50.0%	-	-	-47.0%	-29.5%	15.6%	-75.0%	-64.7%	0.0%	-31.7%
NET ORDERS:																
a.CURRENT YTD	-	-	-	-	-	304	205	-	-	509	575	1,181	11	1,474	229	3,470
b.PAST YTD	-	-	-	-	-	628	155	-	-	783	1,564	1,371	4	2,096	233	5,268
UNIT CHANGE a-b	-	-	-	-	-	(324)	50	-	-	(274)	(989)	(190)	7	(622)	(4)	(1,798)
% CHANGE	-	-	-	-	-	-51.6%	32.3%	-	-	-35.0%	-63.2%	-13.9%	175.0%	-29.7%	-1.7%	-34.1%
CANCELLATION RATE:																
a.CURRENT YTD	-	-	-	-	-	4.1%	2.4%	-	-	3.4%	6.4%	3.0%	0.0%	5.2%	4.2%	4.6%
b.PAST YTD	-	-	-	-	-	7.6%	3.1%	-	-	6.8%	2.1%	3.5%	0.0%	9.3%	4.1%	5.5%
PP CHANGE	-	-	-	-	-	(3.5)	(0.7)	-	-	(3.4)	4.3	(0.5)	-	(4.1)	0.1	(0.9)
RETAIL SALES:																
a.CURRENT 3 MO.	-	-	-	-	-	411	158	-	-	569	789	1,222	4	1,554	228	3,797
b.SAME 1 YR. AGO	-	-	-	-	-	572	113	-	-	685	1,810	1,407	7	2,011	231	5,466
UNIT CHANGE a-b	-	-	-	-	-	(161)	45	-	-	(116)	(1,021)	(185)	(3)	(457)	(3)	(1,669)
% CHANGE	-	-	-	-	-	-28.1%	39.8%	-	-	-16.9%	-56.4%	-13.1%	-42.9%	-22.7%	-1.3%	-30.5%

*Actual data not seasonally adjusted.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
EXPORT
October 2019

SELECT PERIODS: ANNUALIZED

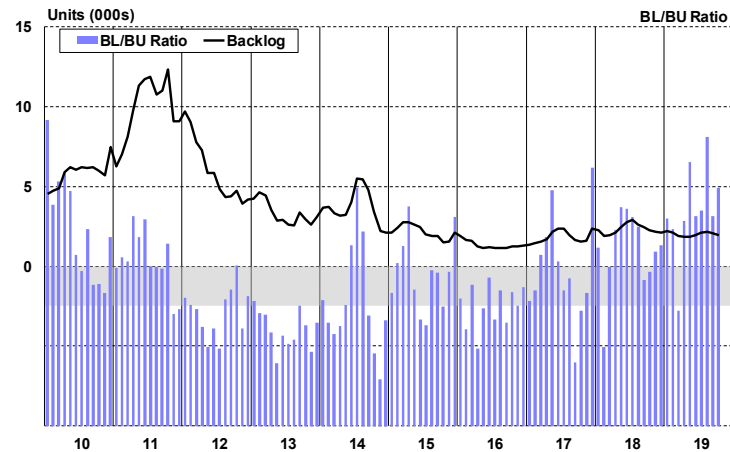
	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
BACKLOG**:																
. CURRENT MO.	-	-	-	-	-	64	89	-	-	153	584	638	6	668	70	1,966
. 3 MO AGO	-	-	-	-	-	93	98	-	-	191	618	697	8	693	70	2,086
. 6 MO AGO	-	-	-	-	-	175	106	-	-	281	510	661	7	617	70	1,865
. 12 MO AGO	-	-	-	-	-	162	39	-	-	201	681	623	6	884	70	2,264
BUILD:																
. CURRENT MO.	-	-	-	-	-	432	12	-	-	444	1,344	1,068	12	1,620	288	4,332
. PAST 3 MO.	24	-	-	-	24	340	224	-	-	564	1,232	1,172	20	1,464	288	4,176
. PAST 6 MO.	12	-	-	-	12	504	240	-	-	744	976	1,312	18	1,438	276	4,020
. PAST 12 MO.	6	-	-	-	6	521	161	-	-	682	1,140	1,496	20	1,842	274	4,772
INVENTORY**:																
. CURRENT MO.	-	-	-	-	-	26	9	-	-	35	103	267	1	127	25	523
. 3 MO AGO	-	-	-	-	-	101	17	-	-	118	55	359	1	271	25	711
. 6 MO AGO	-	-	-	-	-	44	18	-	-	62	90	269	1	243	25	628
. 12 MO AGO	-	-	-	-	-	48	18	-	-	66	146	231	4	360	25	766
NET ORDERS:																
. CURRENT MO.	-	-	-	-	-	264	-	-	-	264	744	948	-	1,452	300	3,444
. PAST 3 MO.	-	-	-	-	-	232	328	-	-	560	700	1,116	8	1,668	292	3,784
. PAST 6 MO.	-	-	-	-	-	264	202	-	-	466	706	1,252	14	1,678	278	3,928
. PAST 12 MO.	-	-	-	-	-	365	208	-	-	573	877	1,368	13	1,711	277	4,246
CANCELLATION RATE:																
. CURRENT MO.	-	-	-	-	-	4.3%	100.0%	-	-	8.3%	6.1%	4.8%	-	32.4%	3.8%	18.9%
. PAST 3 MO.	-	-	-	-	-	4.9%	3.5%	-	-	4.1%	7.4%	2.1%	0.0%	13.8%	3.9%	8.7%
. PAST 6 MO.	-	-	-	-	-	5.7%	4.7%	-	-	5.3%	6.4%	1.4%	0.0%	7.9%	4.1%	5.3%
. PAST 12 MO.	-	-	-	-	-	3.7%	3.3%	-	-	3.5%	6.3%	2.8%	0.0%	6.4%	4.2%	5.1%
RETAIL SALES:																
. CURRENT MO.	-	-	-	-	-	552	204	-	-	756	840	2,244	-	2,472	288	5,844
. PAST 3 MO.	-	-	-	-	-	484	404	-	-	888	884	1,456	-	2,076	288	4,704
. PAST 6 MO.	-	-	-	-	-	440	268	-	-	708	788	1,330	2	1,708	276	4,104
. PAST 12 MO.	-	-	-	-	-	480	176	-	-	656	1,074	1,490	7	1,981	274	4,826

*Actual data not seasonally adjusted.

** Since BACKLOG and INVENTORY are non-additive, 3, 6, and 12 month data points are actuals.

Export Class 8: Backlog and Backlog/Build Ratio

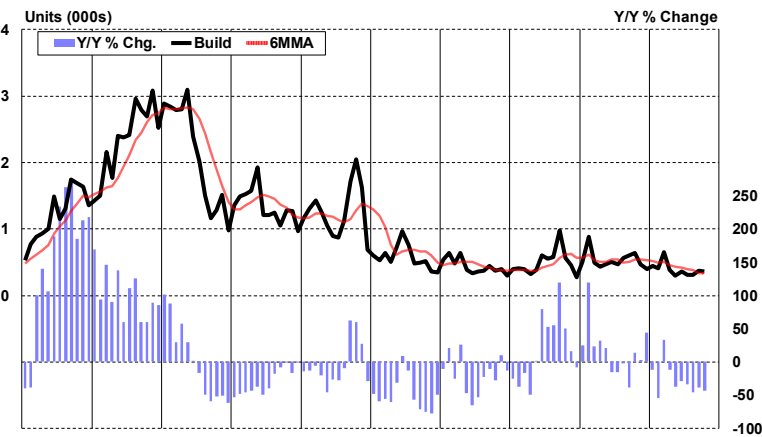
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

Export Class 8: Build

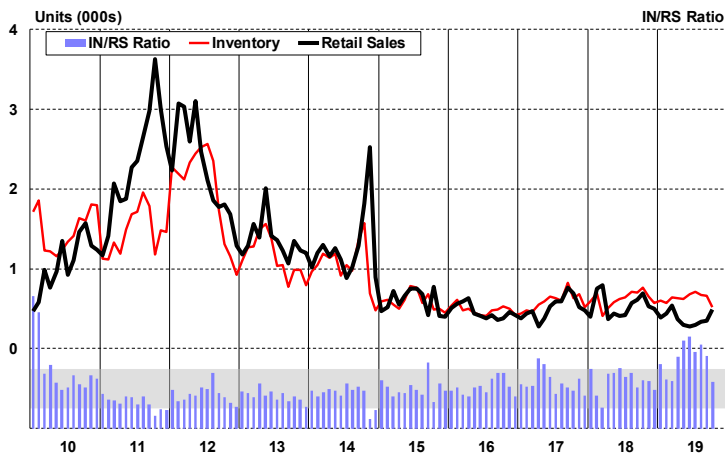
January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

Export Class 8: Inventory & Retail Sales

January 2010 - October 2019



Source: ACT Research Co., LLC. Copyright 2019

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TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
NORTH AMERICA
October 2019

CURRENT MONTH STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u>	<u>TOTAL</u>	<u>TRACTOR</u>	<u>TRACTOR</u>	<u>TRUCK</u>	<u>TRUCK</u>	<u>OTHER</u>	<u>TOTAL</u>
				<u>VAN</u>					<u>VAN</u>		<u>SLEEPER</u>	<u>DAY CAB</u>	<u>SLEEPER</u>	<u>DAY CAB</u>		
. Backlog	15,121	60	427	1,496	17,104	28,613	7,531	1,459	956	38,559	58,121	37,556	1,749	30,795	550	128,771
. Build	8,922	30	140	770	9,862	8,332	2,331	768	392	11,823	11,870	7,453	324	6,764	355	26,766
. Inventory	26,302	98	312	1,823	28,535	32,157	4,814	598	925	38,494	32,183	16,043	1,169	31,752	175	81,322
. New Orders	9,173	32	110	115	9,430	6,073	1,517	811	140	8,541	10,386	7,298	92	5,413	372	23,561
. Orders Cancel	634	2	-	6	642	503	46	27	69	645	820	496	4	360	17	1,697
. Net Orders	8,539	30	110	109	8,788	5,570	1,471	784	71	7,896	9,566	6,802	88	5,053	355	21,864
. Retail Sales	7,586	38	775	322	8,721	10,581	2,977	1,582	512	15,652	11,676	8,239	180	7,228	355	27,678
MEMO: Sales of Japanese Imports					922					1,159						

MONTHLY PERFORMANCE:

October

23 Build Days

23 Order/Sales Days

. Build: units/day	388	1	6	33	429	362	101	33	17	514	516	324	14	294	15	1,164
. Net Orders: un/dy.	371	1	5	5	382	242	64	34	3	343	416	296	4	220	15	951
. Retail Sales:un/dy.	330	2	34	14	379	460	129	69	22	681	508	358	8	314	15	1,203
. Orders Cancel: % BL	4.2%	3.3%	0.0%	0.4%	3.8%	1.8%	0.6%	1.9%	7.2%	1.7%	1.4%	1.3%	0.2%	1.2%	3.1%	1.3%
. Backlog/Build @ rate in months**	1.9	2.2	3.3	2.1	1.9	3.8	3.5	2.1	2.7	3.6	5.4	5.5	5.9	5.0	1.7	5.3
. Inventory/R.S. @ rate in months**	3.8	2.8	0.4	6.2	3.6	3.3	1.8	0.4	2.0	2.7	3.0	2.1	7.1	4.8	0.5	3.2

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

NOTE: Data supplied for your internal use only. External distribution is not permitted without prior approval. Electronic or other re-release of classes 5-8 vehicle statistics is not authorized except in written summaries (no data tables) supporting the business of the subscribing SOI company. ACT Research Co., LLC must be credited as the data source.

TRUCK, BUS, and RV INDUSTRY MANAGEMENT STATISTICS*
NORTH AMERICA
October 2019

YEAR-TO-DATE STATISTICS

	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 5	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 6-7	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8	Cl. 8
<u>VARIABLE</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRUCK</u>	<u>BUS</u>	<u>RV</u>	<u>STEP</u> <u>VAN</u>	<u>TOTAL</u>	<u>TRACTOR</u> <u>SLEEPER</u>	<u>TRACTOR</u> <u>DAY CAB</u>	<u>TRUCK</u> <u>SLEEPER</u>	<u>TRUCK</u> <u>DAY CAB</u>	<u>OTHER</u>	<u>TOTAL</u>
. Backlog	15,121	60	427	1,496	17,104	28,613	7,531	1,459	956	38,559	58,121	37,556	1,749	30,795	550	128,771
. Build	82,369	306	3,020	4,652	90,347	104,040	35,301	10,856	2,732	152,929	138,384	83,895	2,725	72,982	4,521	302,507
. Inventory	26,302	98	312	1,823	28,535	32,157	4,814	598	925	38,494	32,183	16,043	1,169	31,752	175	81,322
. New Orders	84,501	326	3,018	4,937	92,782	76,743	35,614	11,183	2,842	126,382	68,185	52,984	2,035	50,470	4,746	178,420
. Orders Cancel	4,785	20	-	210	5,015	6,257	878	270	112	7,517	20,831	7,695	171	6,059	225	34,981
. Net Orders	79,716	306	3,018	4,727	87,767	70,486	34,736	10,913	2,730	118,865	47,354	45,289	1,864	44,411	4,521	143,439
. Retail Sales	74,026	315	3,230	3,488	81,059	101,083	36,274	10,983	2,576	150,916	127,039	80,888	2,063	69,705	4,521	284,216
MEMO: Sales of Japanese Imports					9,073					10,513						

YEAR-TO-DATE PERFORMANCE:

October

212 Build Days

215 Order/Sales Days

. Build: units/day	389	1	14	22	426	491	167	51	13	721	653	396	13	344	21	1,427
. Net Orders: un/dy.	371	1	14	22	408	328	162	51	13	553	220	211	9	207	21	667
. Retail Sales:un/dy.	344	1	15	16	377	470	169	51	12	702	591	376	10	324	21	1,322
. Orders Cancel: % BL	31.6%	33.3%	0.0%	14.0%	29.3%	21.9%	11.7%	18.5%	11.7%	19.5%	35.8%	20.5%	9.8%	19.7%	40.9%	27.2%
. Backlog/Build @ rate in months**	1.9	2.0	1.4	3.2	1.9	2.8	2.2	1.4	3.5	2.5	4.2	4.5	6.5	4.3	1.2	4.3
. Inventory/R.S. @ rate in months**	3.6	3.1	1.0	5.3	3.6	3.2	1.3	0.5	3.6	2.6	2.6	2.0	5.7	4.6	0.4	2.9

*Actual data not seasonally adjusted.

** Backlog to Build and Inventory to Retail Sales Ratios are normalized to 21 days.

Class 8 Other includes Autocar, Oshkosh, and Terex Advance Mixer.

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NORTH AMERICA CLASSES 5-8 VEHICLES BY COUNTRY

SAMPLE

2019 LAWRENCE R. KLEIN BLUE CHIP AWARD WINNER

Contributor to Blue Chip Economic Indicators and WSJ Economic Forecast Panel

ACT Research Co. 2023

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