

# THE U.S. AUTOMOBILE INDUSTRY MONTHLY REPORT ON SELECTED ECONOMIC INDICATORS

Report to the Subcommittee on Trade,  
Committee on Ways and Means,  
on Investigation No. 332-207  
Under Section 332 of the  
Tariff Act of 1930

USITC PUBLICATION 2356

JANUARY 1991

United States International Trade Commission  
Washington, DC 20436



**UNITED STATES INTERNATIONAL TRADE COMMISSION**

**COMMISSIONERS**

**Anne E. Brunsdale, Acting Chairman**

**Seeley G. Lodwick**

**David B. Rohr**

**Don E. Newquist**

---

Office of Industries  
Robert A. Rogowsky, Director

---

*This report was prepared principally by*

Michael J. Hagey  
Transportation Branch  
Machinery and Equipment Division

**Address all communications to  
Kenneth R. Mason, Secretary to the Commission  
United States International Trade Commission  
Washington, DC 20436**

## C O N T E N T S

Page

### Tables

1. New passenger automobiles: U.S. retail sales of domestic production, production, inventory, days' supply, and employment, by specified periods, January 1989-December 1990...	1
2. New passenger automobiles: U.S. imports, by principal sources and by specified periods, December 1988-November 1990.....	2
3. Lightweight automobile trucks and bodies and cab/chassis for lightweight automobile trucks: U.S. imports, by principal sources and by specified periods, December 1988-November 1990..	3
4. New passenger automobiles: U.S. exports of domestic merchandise, by principal markets and by specified periods, December 1988-November 1990.....	4
5. Lightweight automobile trucks and bodies and cab/chassis for lightweight automobile trucks: U.S. exports of domestic merchandise, by principal markets and by specified periods, December 1988-November 1990.....	5
6. New passenger automobiles: Sales of domestic and imported passenger automobiles and sales of imported passenger automobiles as a percent of total U.S. sales, by specified periods, 1989 and 1990.....	6
7. New passenger automobiles: Price indexes, by specified periods, 1989 and 1990.....	6
8. New passenger automobiles: Retail price changes in the U.S. market during December 1990.....	7
9. Manufacturers' suggested retail prices of selected U.S. and Japanese automobiles, April 1981-January 1991.....	8



Table 1  
 New passenger automobiles: U.S. retail sales of domestic production, production, inventory, days' supply, and employment, by specified periods, January 1989-December 1990

(In thousands of units; thousands of employees)

Item	1990			1989	
	Nov. 1990	Dec. 1990	Jan. 1990- Dec. 1990	Dec. 1989	Jan. 1989- Dec. 1989
Retail sales of domestic production:					
Subcompact.....	85	75	1,190	69	1,307
Compact.....	113	100	1,745	109	1,929
Intermediate.....	152	157	2,401	155	2,647
Standard.....	76	78	1,278	77	1,110
Luxury.....	55	60	695	46	676
Total.....	480	471	7,309	456	7,668
Production:					
Subcompact.....	82	58	961	61	1,181
Compact.....	149	114	1,862	109	1,877
Intermediate.....	131	98	2,226	157	2,332
Standard.....	35	28	1,476	51	840
Luxury.....	47	39	728	53	765
Total.....	443	337	7,253	430	6,994
Inventory					
Subcompact.....	261	221	<u>1/</u>	283	<u>1/</u>
Compact.....	346	294	<u>1/</u>	310	<u>1/</u>
Intermediate.....	467	462	<u>1/</u>	732	<u>1/</u>
Standard.....	233	230	<u>1/</u>	205	<u>1/</u>
Luxury.....	169	177	<u>1/</u>	139	<u>1/</u>
Total.....	1,472	1,386	<u>1/</u>	1,669	<u>1/</u>
Days' supply: <u>2/</u>					
Subcompact.....	77	74	<u>1/</u>	103	<u>1/</u>
Compact.....	77	74	<u>1/</u>	71	<u>1/</u>
Intermediate.....	77	74	<u>1/</u>	118	<u>1/</u>
Standard.....	77	74	<u>1/</u>	67	<u>1/</u>
Luxury.....	77	74	<u>1/</u>	76	<u>1/</u>
Average.....	77	74	<u>1/</u>	92	<u>1/</u>
Employment: <u>3/</u>					
Total employees.....	<u>4/</u> 807	<u>5/</u> 753	<u>1/</u>	<u>6/</u> 832	<u>1/</u>
Production workers...	<u>4/</u> 617	<u>5/</u> 570	<u>1/</u>	<u>6/</u> 640	<u>1/</u>

1/ Not applicable.

2/ Days' supply is an average for each class size which is determined by the previous month's retail sales.

3/ Employment data are for SIC 371 (motor vehicles and motor vehicle equipment).

4/ Data are for October 1989, revised.

5/ Data are for November 1990.

6/ Data are for November 1989.

Source: Production and retail sales, Data Resources, Inc. Auto Information Bank; days' supply and inventory, Automotive News; and employment, U.S. Department of Labor.

Note.--Because of rounding, figures may not add to the totals shown.

Table 2

New passenger automobiles: U.S. imports, by principal sources and by specified periods, December 1988–November 1990 1/

Source	1989-90			1988-89	
	Oct. 1990	Nov. 1990	Dec. 1989- Nov. 1990	Nov. 1989	Dec. 1988- Nov. 1989
	Quantity (units)				
Japan.....	180,736	186,372	1,868,848	171,384	2,083,405
Canada.....	127,586	110,596	1,219,706	116,014	1,146,002
West Germany.....	20,066	20,889	250,342	21,548	231,784
Korea.....	24,549	17,709	197,703	19,550	293,826
Sweden.....	8,701	7,917	96,362	7,634	102,494
Mexico.....	28,401	24,545	201,749	7,766	140,478
Yugoslavia.....	0	0	1,669	1	2,333
United Kingdom...	2,156	2,744	26,644	4,078	29,568
Italy.....	1,022	629	10,888	777	9,549
France.....	262	13	1,735	3	5,492
Brazil.....	1,072	7	14,403	5,061	44,458
All other.....	5,042	3,674	43,974	2,001	25,168
Total.....	399,593	375,095	3,934,023	355,817	4,114,557
	Value (1,000 dollars)				
Japan.....	1,852,294	2,008,870	19,368,879	1,660,566	20,320,706
Canada.....	1,456,732	1,268,466	13,731,161	1,315,321	12,816,577
West Germany.....	520,683	554,535	5,823,484	475,552	5,400,749
Korea.....	134,395	96,936	1,095,806	108,686	1,745,910
Sweden.....	145,968	134,251	1,574,783	126,978	1,661,435
Mexico.....	288,457	245,626	2,019,323	75,246	1,231,617
Yugoslavia.....	0	0	5,555	3	6,946
United Kingdom...	77,765	92,397	866,275	122,262	945,584
Italy.....	36,202	16,970	282,303	24,467	264,272
France.....	3,062	273	21,840	29	65,761
Brazil.....	6,557	43	89,154	31,375	270,932
All other.....	57,879	46,601	594,595	33,179	394,283
Total.....	4,579,995	4,464,968	45,473,157	3,973,665	45,124,775

1/ Data include imports into Puerto Rico and TSUSA items 692.1005–692.1008; data do not include automobiles assembled in U.S. foreign trade zones.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 3  
 Lightweight automobile trucks 1/ and bodies and cab/chassis for lightweight  
 automobile trucks: U.S. imports, by principal sources and by specified periods,  
 December 1988-November 1990 2/

Source	1989-90			1988-89	
	Oct. 1990	Nov. 1990	Dec. 1989- Nov. 1990	Nov. 1989	Dec. 1988- Nov. 1989
	Quantity (units) <u>3/</u>				
Japan.....	27,092	24,707	308,258	28,666	440,416
Canada.....	41,094	32,651	430,045	44,233	444,732
Mexico.....	1,225	745	19,586	2,100	8,061
All other.....	12	24	533	126	751
Total.....	69,424	58,127	758,422	75,125	893,960
	Value (1,000 dollars)				
Japan.....	156,231	147,286	1,751,586	165,974	2,715,605
Canada.....	541,825	449,932	5,653,907	560,716	5,531,228
Mexico.....	15,416	9,577	242,511	26,004	101,023
All other.....	2,785	2,400	54,360	4,970	68,640
Total.....	716,257	609,195	7,702,365	757,664	8,416,496

1/ Defined as not over 10,000 pounds gw.

2/ Partially estimated, all data include imports into Puerto Rico.

3/ Quantity data include complete trucks and cab/chassis, but exclude bodies.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Note.--Because of rounding, figures may not add to the totals shown.

Table 4

New passenger automobiles: U.S. exports of domestic merchandise, by principal markets and by specified periods, December 1988–November 1990 <sup>1/</sup>

Market	1989-90			1988-89	
	Oct. 1990	Nov. 1990	Dec. 1989- Nov. 1990	Nov. 1989	Dec. 1988- Nov. 1989
Quantity (units)					
Canada.....	40,142	33,897	529,117	45,194	569,255
Japan.....	4,279	2,253	33,924	2,297	21,201
All other.....	19,999	17,455	214,173	20,640	182,976
Total.....	64,420	53,605	777,214	68,131	773,432
Value (1,000 dollars)					
Canada.....	470,076	397,375	6,176,547	494,511	6,100,590
Japan.....	82,057	40,162	572,844	42,833	321,475
All other.....	288,363	239,214	2,650,931	278,809	2,321,545
Total.....	840,497	676,752	9,400,323	816,153	8,743,610

<sup>1/</sup> 1989 data revised.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.



Table 5  
 Lightweight automobile trucks <sup>1/</sup> and bodies and cab/chassis for lightweight  
 automobile trucks: U.S. exports of domestic merchandise, by principal markets and  
 by specified periods, December 1988-November 1990 <sup>2/</sup>

Market	1989-90			1988-89	
	Oct. 1990	Nov. 1990	Dec. 1989- Nov. 1990	Nov. 1989	Dec. 1988- Nov. 1989
	Quantity (units) <sup>3/</sup>				
Canada.....	7,997	7,986	113,745	10,056	143,839
All other.....	2,913	1,901	17,844	627	15,749
Total.....	10,909	9,888	131,590	10,683	159,589
	Value (1,000 dollars)				
Canada.....	96,934	100,835	1,362,481	129,128	1,681,923
All other.....	42,258	41,529	233,956	8,921	199,926
Total.....	139,192	142,364	1,596,438	138,049	1,881,849

<sup>1/</sup> Defined as not over 10,000 pounds gwv.

<sup>2/</sup> Partially estimated.

<sup>3/</sup> Quantity data include complete trucks and cab/chassis, but exclude bodies.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Note.--Because of rounding, figures may not add to the totals shown.

Table 6

New passenger automobiles: Sales of domestic and imported passenger automobiles and sales of imported passenger automobiles as a percent of total U.S. sales, by specified periods, 1989 and 1990 <sup>1/</sup>

Period	Sales of- Domestic automobiles <sup>2/</sup>		Imported automobiles <sup>3/</sup>		Total U.S. sales <sup>2/ 3/</sup>		Ratio of import sale to total sales <sup>2/ 3/</sup>	
	1990	1989	1990	1989	1990	1989	1990	1989
	Quantity (units)				--Percent--			
January...	544,605	509,760	208,694	208,856	753,299	718,616	27.7	29.1
February..	531,546	552,042	193,912	198,825	725,458	750,867	26.7	26.5
Jan.-Feb..	1,076,151	1,061,802	402,606	407,681	1,478,757	1,469,483	27.2	27.7
March.....	622,949	639,631	228,221	245,161	851,170	884,792	26.8	27.7
Jan.-Mar..	1,699,100	1,701,433	630,827	652,842	2,329,927	2,354,275	27.1	27.7
April.....	596,428	667,444	242,661	242,555	839,089	909,999	28.9	26.7
Jan.-Apr..	2,295,528	2,368,877	873,488	895,395	3,169,016	3,264,274	27.6	27.4
May.....	641,749	710,478	230,273	259,737	872,022	970,215	26.4	26.8
Jan.-May..	2,937,277	3,079,355	1,103,761	1,154,132	4,041,038	4,234,489	27.3	27.3
June.....	628,781	640,673	227,891	258,179	856,672	898,852	25.4	28.7
Jan.-June.	3,566,058	3,720,028	1,331,652	1,413,313	4,897,716	5,133,341	27.2	27.5
July.....	590,476	596,725	218,643	239,774	809,119	836,499	27.0	28.7
Jan.-July.	4,156,534	4,316,753	1,550,295	1,653,087	5,706,835	5,969,840	27.2	27.7
August....	564,411	678,948	221,546	282,964	785,957	961,912	28.2	29.4
Jan.-Aug..	4,720,964	4,964,088	1,714,794	1,928,589	6,435,758	6,892,677	26.6	28.0
September.	578,958	605,207	193,152	223,003	772,110	828,210	25.0	26.9
Jan.-Sept.	5,303,033	5,569,295	1,899,714	2,151,592	7,202,747	7,720,887	26.4	27.9
October...	591,944	520,589	195,335	217,786	787,279	738,375	24.8	29.5
Jan.-Oct..	5,894,977	6,089,884	2,090,266	2,367,644	7,985,243	8,457,528	26.2	28.0
November..	480,477	471,007	180,509	200,304	660,986	671,311	27.3	29.8
Jan.-Nov..	6,375,454	6,560,891	2,270,758	2,567,948	8,646,212	9,128,839	26.3	28.1
December..	470,520	453,959	180,294	186,198	650,814	640,157	27.7	29.1
Jan.-Dec..	6,842,733	7,014,851	2,452,999	2,756,171	9,295,732	9,771,022	26.4	28.2

<sup>1/</sup> Monthly totals may not sum to the year-to-date totals because Automotive News may make revisions to its monthly totals.

<sup>2/</sup> Domestic automobile sales include U.S.-, Canadian- and Mexican-built automobiles sold in the United States.

<sup>3/</sup> Does not include automobiles imported from Canada and Mexico.

Source: Automotive News.

Table 7

New passenger automobiles: Price indexes, by specified periods, 1989 and 1990 <sup>1/</sup>

Item	1990			1989-90		
	Sept. 1990	Oct. 1990	Percent change	Oct. 1989	Oct. 1990	Percent change
Consumer Price Index:						
Unadjusted..	120.5	122.1	+1.3	120.5	122.1	+1.3
Seasonally adjusted..	120.7	121.4	+0.6	119.6	121.4	+1.5
Producer Price Index:						
Unadjusted..	123.7	124.1	+0.3	120.7	124.1	+2.8
Seasonally adjusted..	119.1	121.3	+1.8	116.4	121.3	+4.2

<sup>1/</sup> Consumer price index, 1982-1984 = 100. Producer price index, 1982 = 100.

Table 8  
 New passenger automobiles: Retail price changes in the U.S. market during  
 December 1990 1/

Country source/make	Retail price changes December 1990 (+ or -)
U.S. producers:	
General Motors.....	No change.
Ford.....	No change.
Chrysler.....	No change.
Japanese producers:	
Toyota Motors.....	No change.
Mazda.....	No change.
American Honda.....	No change.
Acura Division.....	No change.
Subaru.....	No change.
European producers:	
Volkswagen.....	+2.3 percent
BMW.....	No change.
Audi.....	+2.3 percent
Porsche.....	No change.
Mercedes-Benz.....	No change.
Korean producer:	
Hyundai.....	No change.

1/ Average retail price change for all models.

Source: Automotive News, December 1990.

Table 9

Manufacturers' suggested retail prices of selected U.S. and Japanese automobiles, April 1981-January 1991 1/

Company, model, and options <u>2/</u>	April 1, 1981		Oct. 1, 1990		Percent change in optionally	
	Option- ally Base model <u>3/</u>	Option- ally equipped model <u>3/</u>	Option- ally Base model <u>3/</u>	Option- ally equipped model <u>3/</u>	Dec. 1990- Jan. 1991	Apr. 1981- Jan. 1991
General Motors:						
Cavalier, 2 door..... <u>4/</u>	\$6,966	\$6,966	\$8,000	\$8,000	0.0	+14.8
De Ville, 4 door.....	14,198	14,198	29,935	29,935	0.0	+110.8
Ford:						
Escort Pony 2 door HB (RWD, TG).....	5,556	5,857	8,381	8,501	0.0	+45.1
Tempo GL 4 door (RWD, AT, TG) <u>5/</u> .....	6,421	6,953	10,178	11,041	0.0	+58.8
LTD Crown Victoria, 4 door .....	8,519	10,102	18,222	18,222	0.0	+80.4
Chrysler:						
Dynasty, 4 door (AC) <u>6/</u> .....	6,672	7,502	13,650	14,471	0.0	+92.9
Toyota:						
Corolla, Deluxe, 4 door (R).....	5,688	5,793	9,998	10,208	0.0	+76.1
Cressida, 4 door.....	11,599	11,599	22,198	22,198	0.0	+91.4
Nissan (Datsun):						
Sentra E, 2 door <u>7/</u> .....	5,369	5,369	7,999	7,999	0.0	+50.0
Stanza GXE, 4 door (AT) <u>7/</u> .....	6,839	7,749	15,225	16,025	0.0	+106.8
Maxima GXE, 4 door.....	10,379	10,379	18,459	19,084	0.0	+77.8
Honda:						
Civic 1500, 2 door HB (R) <u>8/</u> .....	4,599	4,694	6,895	7,217	0.0	+53.7
Accord DX, 4 door (R).....	7,645	7,950	12,545	12,837	0.0	+61.5

1/ Suggested retail prices do not include any dealer incentives, below-market financing or rebates.2/ The following codes apply: RWD = rear window defroster; TG = tinted glass; HB = hatchback; AT = automatic transmission; AC = air conditioning; R = radio.3/ Base models are 2 door or 2 door hatchback and 4 door or 4 door hatchback models. Optionally equipped models are base models which have been equipped with the options listed in parenthesis.4/ Cavalier not sold until May 21, 1981.5/ Tempo replaced the Fairmont Futura.6/ Dynasty replaced the Diplomat.7/ Sentra replaced the 210; Stanza replaced the 510.8/ Civic 1500 replaced the Civic 1300.Source: Compiled from data supplied by U.S. manufacturers, Japanese importers, and Automotive News.

Note: Some 1981-91 models have been discontinued; these models have been replaced by comparable models where possible. In addition, some equipment that was optional on prior models is now included in the base price or equipment that was standard has been deleted, making price comparisons of prior-year models difficult.