

# Houston Auto Market News

July 2025

INSIGHTS TO THE HOUSTON VEHICLE MARKET

Volume 16 Issue 2



## Sound Bites

- Q2-2025 Retail & Total Vehicle Sales level out after previous record highs. **See Page 1.**
- Houston Suburban Market Share breaks records for June 2025 & Q2-2025. **See Page 3.**

## Inside Story

- The Average Retail Sales price cools after steady climb. **See page 3.**
- Gains by Electrified Vehicles continued. **See page 5.**

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## INFONATION, INC.



**Detailed new auto sales results by brand and dealer are available in the TexAuto Facts Report from InfoNation, Inc., the provider of data for Houston Auto Market News.**

**See page 7.**

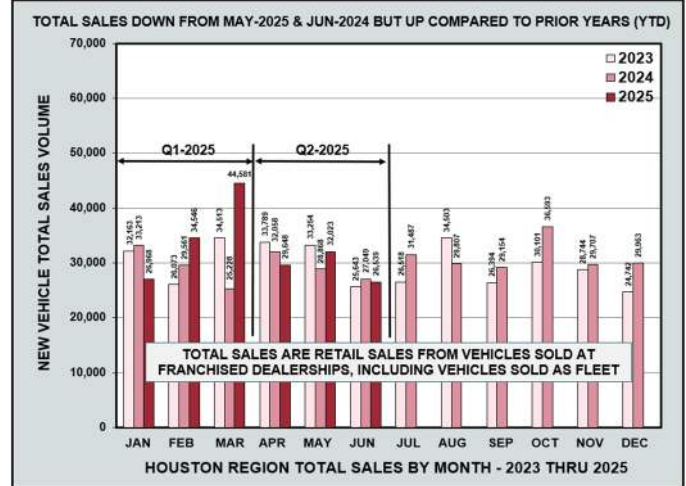
## Total Sales Up In Q2-2025 vs Q2-2024

Houston Region Total Sales were down in Q2-2025 at 88,210 units compared to Q1-2025 at 106,095 units sold and up compared to Q2-2024 at 87,975 units. However, Total Sales YTD were 194,305 which was higher than the past six years at this same point in time.

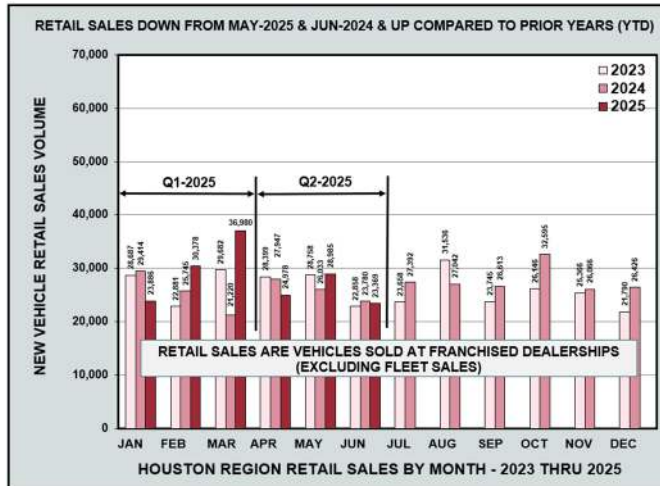
The Houston Region Retail Sales for Q2-2025 were down at 77,332 units compared to Q1-2025 at 91,244 units, and down from 77,760 units sold in Q2-2024. The same with Retail Sales in that the Retail Sales YTD were 168,576 units sold, higher than prior years.

The Retail Auto Segment sold 14,586 units in Q2-2025 for the Houston Region, was down compared to Q1-2025 with 16,570 units sold and down from 16,455 units sold in Q2-2024.

The Retail Truck/SUV Segment sold 62,746 units for Q2-2025, this was down compared to Q1-2025 with 74,674 units sold and down from Q2-2024 with 61,305 units sold.



PRE-PANDEMIC	PANDEMIC	POST-PANDEMIC				
2019 (YTD)	2020 (YTD)	2021 (YTD)	2022 (YTD)	2023 (YTD)	2024 (YTD)	2025 (YTD)
147,550	121,731	154,234	159,060	185,435	175,977	194,305



PRE-PANDEMIC	PANDEMIC	POST-PANDEMIC				
2019 (YTD)	2020 (YTD)	2021 (YTD)	2022 (YTD)	2023 (YTD)	2024 (YTD)	2025 (YTD)
122,061	105,574	138,303	146,461	161,265	154,139	168,576

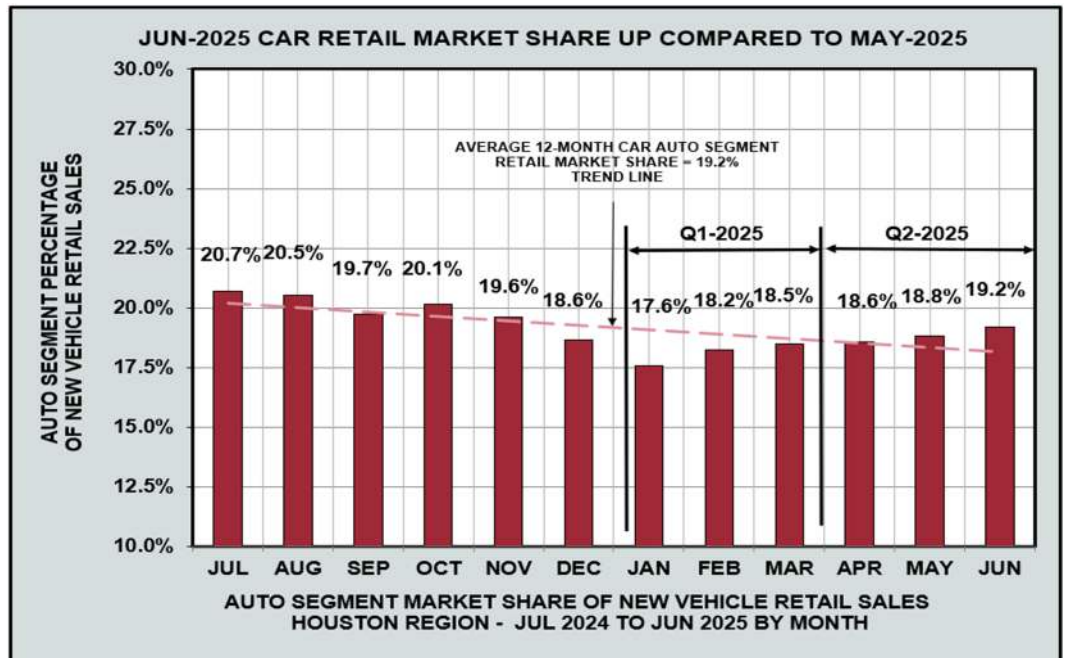
*Note: Due to the supply chain issues, some sales figures & data in 2025 may be skewed due to the lag time from registering the automobiles at the dealership vs. titling at the Texas DMV.*

## LOOKING AHEAD

As consumers continue their love affair with the SUV/TRUCK segment...expect more & more new trucks & SUVs to be unveiled in the coming 2026-year. Ford will introduce the "Lightning" electric version of the Ranger & the more utilitarian 2-door Ford Ranchero (yes, Ford is rumored to be bringing back that nameplate after an almost 50-year hiatus). Toyota will launch a re-designed model of its ever popular RAV4 SUV for 2026. Vietnamese automaker VinFast, will release its own electric pickup, the VF Wild. Anticipate Ram to get in on the action & re-launch its own midsize truck, perhaps the Americanized version of the South American "Rampage" or the 2011 discontinued "Dakota". Lastly, the highly anticipated Chevrolet Corvette luxury sports SUV will make its debut next year. Some love affairs are meant to last & never end!

## Q2-2025 Retail Auto Market Share Up From Q1-2025

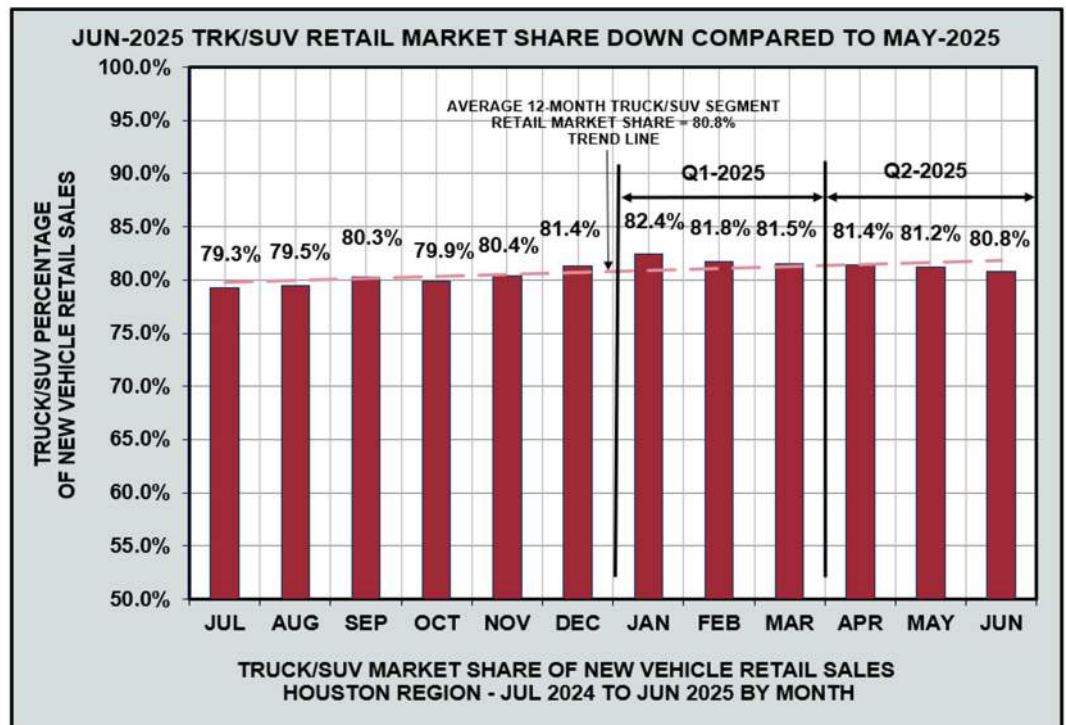
The 12 month average for the Auto Segment Retail Market Share was 19.2%.



The Q2-2025 Auto Segment Retail Market Share increased from 18.9% compared to Q1-2025 at 18.1% (all-time low) . Q2-2025 was down compared to Q2-2024 at 21.1% for the Houston Region.

## Q2-2025 Retail Truck/SUV Market Share Up From Q2-2024

The 12 month average for the Truck/SUV Retail Market Share was high at 80.8%



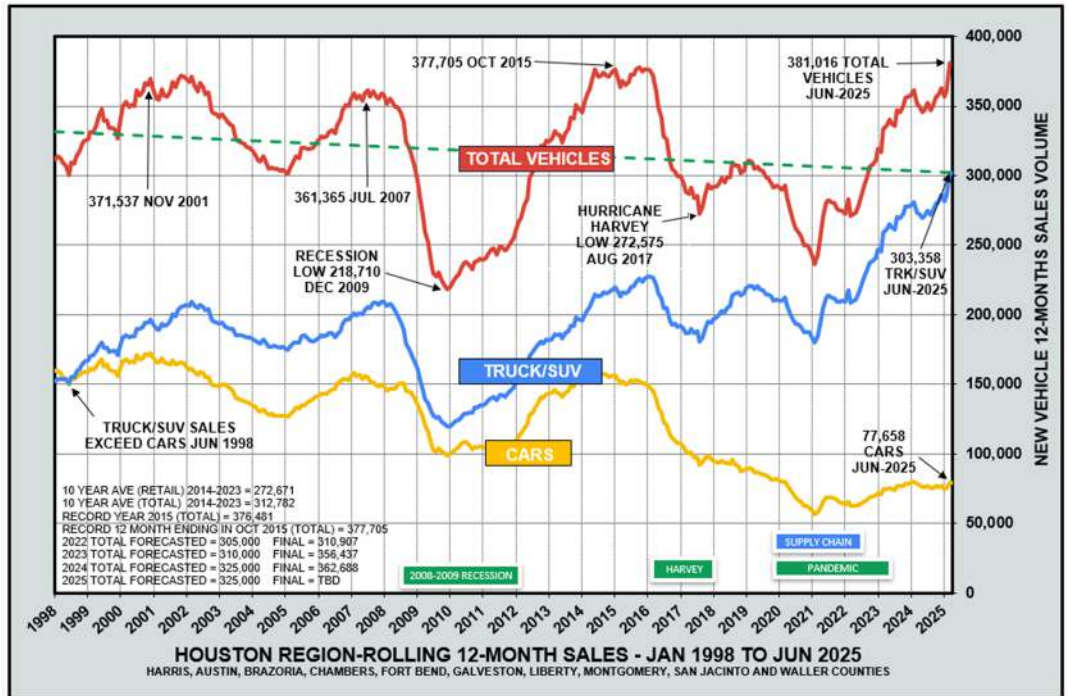
The Q2-2025 Truck/SUV Retail Market Share was down at 81.1% compared to Q1-2025 of 81.9% (all-time high) and up from Q2-2024 at 78.9% .

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## Houston Region Sales 12-Month Rolling Chart for Cars, Trucks/SUVs and Total Vehicles

The 12-Month Rolling Total Sales record low was recorded in December 2009 with 218,710 units.



May 2025 saw the highest 12-Month Rolling Total Sales at 381,526, breaking the old record of 380,781 recorded in March 2025.

## Suburban Market Share Holding Steady

The Suburban Dealer Market Share for June 2025 was record breaking at 27.4%.



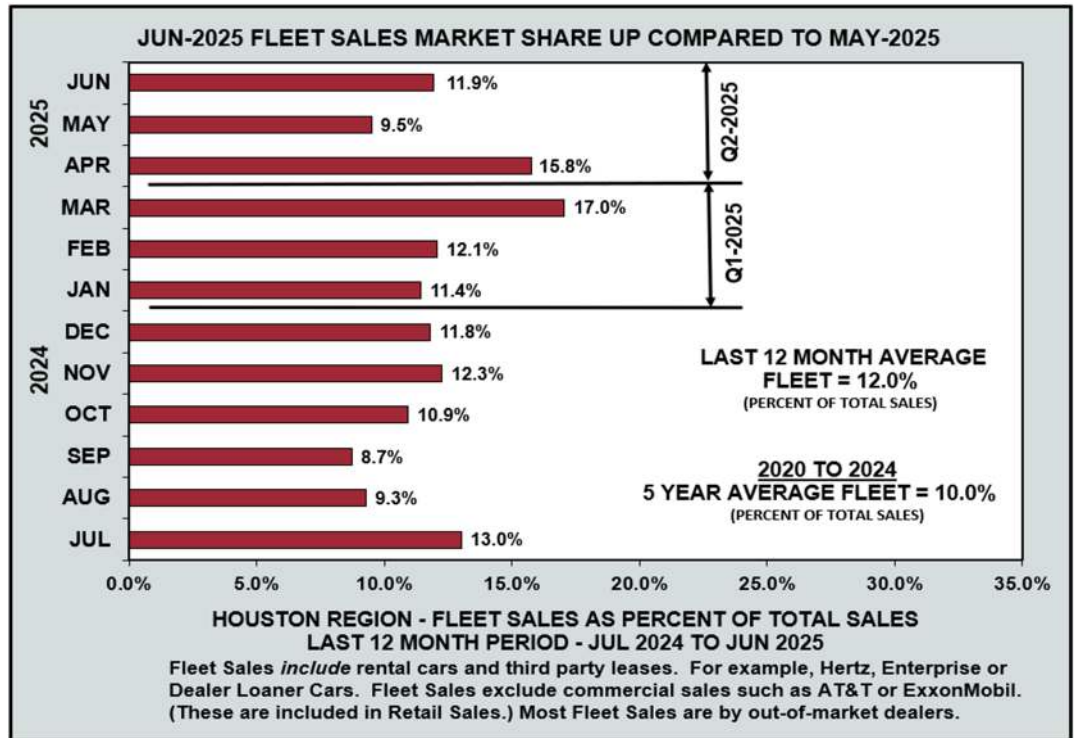
The Q2-2025 Suburban Dealer Market Share was up at 27.0% (all-time high) compared to Q1-2025 at 26.4% and up compared to Q2-2024 at 25.3%.

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**Q2-2025 Fleet Market Share Soars vs Q1-2025 & Q2-2024**

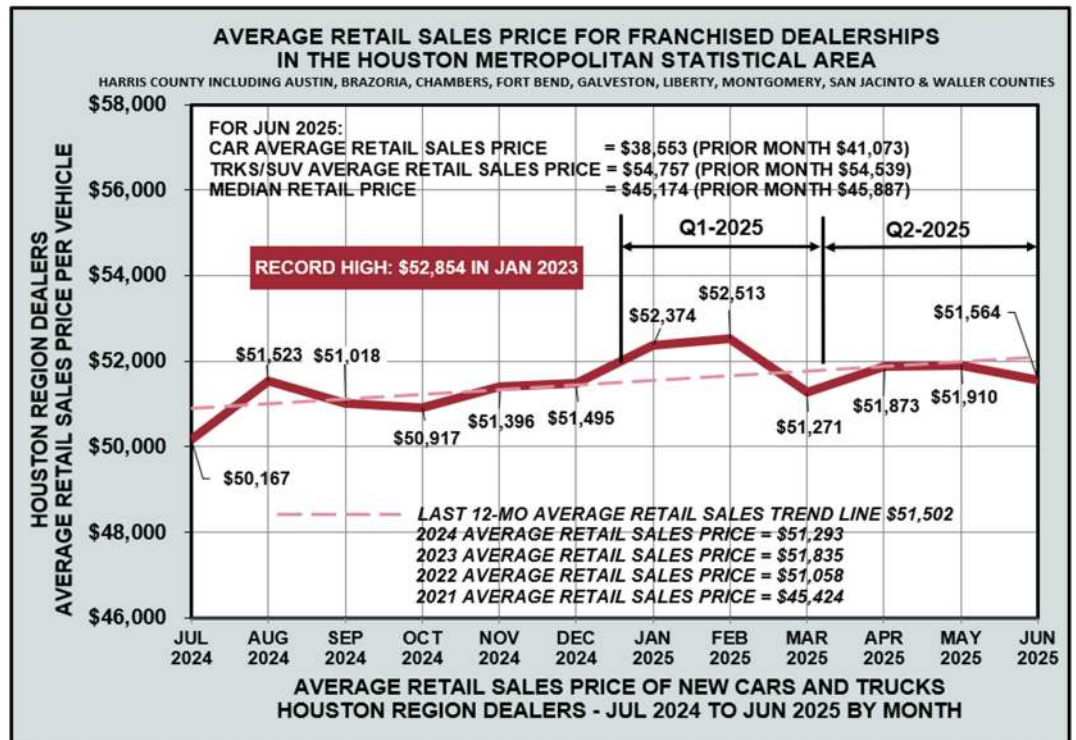
Q2-2025 Fleet Sales Market Share average was 12.0% for the last 12 months.



Fleet Sales Market Share was down at 12.4% for Q2-2025 compared to 13.5% in Q1-2025 and up from Q2-2024 at 11.6%. The Fleet Sales can be an indicator of general business conditions and confidence. Fleet Sales include rental vehicles and third party leases.

**Average Retail Sales Price For Q2-2025**

The Q2-2025 Average Retail Sales Price for Trucks/SUVs was the \$54,516.



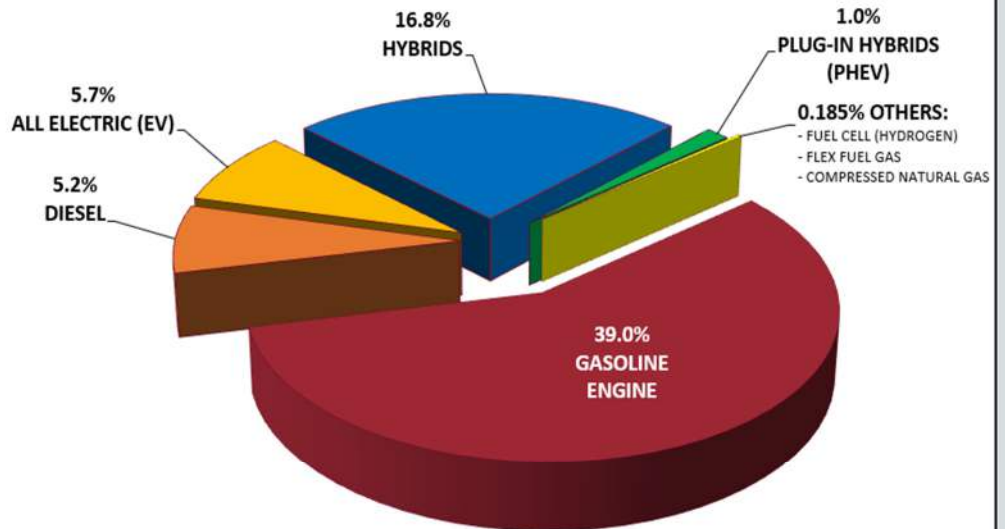
The Average Retail Sales Price for Q2-2025 was \$51,782, down compared to Q1-2025 at \$52,053 and up compared to Q2-2024 at \$51,302. Retail Sales Prices are vehicles sold at franchised dealerships.

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**Q2-2025 YTD Houston Total Market Share for Automobiles by Engine/Fuel Type**

Q2-2025 YEAR-TO-DATE (JAN-JUN) TOTAL MARKET SHARE BY ENGINE TYPE



TOTAL MARKET SHARE  
 106,095 TOTAL AUTOS SOLD IN THE HOUSTON REGION (MSA) Q1-2025  
 88,210 TOTAL AUTOS SOLD IN THE HOUSTON REGION (MSA) Q2-2025  
 194,305 TOTAL AUTOS YEAR-TO-DATE

In Q2-2025 all Electric Vehicles were 23.5% of the Total Market Share vs 15.9% in Q2-2024.

**HOUSTON Q2-2025 TOTAL MARKET SHARE FOR ELECTRIC VEHICLES (EV), HYBRID AND PLUG-IN HYBRIDS**

TOP EV'S, HYBRID'S & PHEV'S MFG'S	
MAKE/BRAND	MKT SHARE
TOYOTA MOTOR COMPANY	34%
TESLA	11%
MERCEDES-BENZ	10%
AMERICAN HONDA	9%
BMW GROUP	8%
FORD MOTOR COMPANY	6%
HYUNDAI GROUP	5%
VW GROUP OF AMERICA	5%
GENERAL MOTORS	3%
JAGUAR/LANDROVER	3%
MAZDA MOTOR CORPORATION	2%
VOLVO CARS USA	2%
STELLANTIS (FORMERLY FCA)	1.1%
RIVIAN	0.5%
SUBARU OF NA	0.4%
LUCID	0.2%
NISSAN NORTH AMERICA	0.09%
FERRARI	0.04%
MASERATI	0.03%
OTHER	0.04%

Electric Vehicles (EV)

Hybrid (Gas/Battery Engine)

Plug-in Hybrid Electric Vehicle (PHEV)

TOP 10 ELECTRIC VEHICLES (EV)		
RANK	MAKE/MODEL	MKT SHARE
1	TESLA MODEL Y	25.3%
2	TESLA MODEL 3	21.4%
3	CHEVROLET EQUINOX	4.2%
4	CADILLAC LYRIQ	2.8%
5	BMW I4	2.8%
6	TESLA CYBERTRUCK	2.6%
7	HONDA PROLOGUE	2.1%
8	FORD MUSTANG MACH-E	2.0%
9	BMW IX	2.0%
10	AUDI Q6 E-TRON	1.9%

TOP 10 HYBRID VEHICLES		
RANK	MAKE/MODEL	MKT SHARE
1	TOYOTA CAMRY	16.8%
2	HONDA CR-V	5.9%
3	TOYOTA RAV4	3.9%
4	TOYOTA SIENNA	3.6%
5	FORD F-150	3.1%
6	MERCEDES-BENZ GLE-CLASS	3.0%
7	MERCEDES-BENZ GLC-CLASS	2.8%
8	HONDA ACCORD	2.8%
9	BMW X5	2.8%
10	FORD MAVERICK	2.5%

TOP 10 PLUG-IN HYBRID VEHICLES (PHEV)		
RANK	MAKE/MODEL	MKT SHARE
1	TOYOTA RAV4	14.0%
2	MERCEDES-BENZ GLE-CLASS	12.6%
3	BMW X5	7.3%
4	MERCEDES-BENZ GLC-CLASS	5.7%
5	CHRYSLER PACIFICA	5.5%
6	JEEP GRAND CHEROKEE	5.5%
7	AUDI Q5	5.5%
8	LAND ROVER RANGE ROVER	5.0%
9	JEEP WRANGLER UNLIMITED	4.9%
10	LEXUS RX	4.5%

PlugShare is a comprehensive app for locating charging stations world wide (APPLE/ANDROID).

Toyota continues to be the Top Manufacturer of EV's, Hybrids & PHEV's.

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**SAVE THE DATE!**

**HADA BUSINESS & BENEFITS EXPO**

(Breakfast, Lunch & prizes included)

Wednesday, August 13, 2025

8:30am-2:00pm

Location: Omni Houston



**HOUSTON  
AUTO  
SHOW**

**HADA FALL LUNCHEON**

**Featuring Senator Bernie Moreno**

Wednesday, October 15, 2025

11:30am-1:30pm

Location: Houston Country Club

**CAREER FAIR & TECHNICIAN**

**COMPETITION**

Friday, November 14, 2025

9am-2:30pm

Location: Texas State Technical College (Auto Building)

**Houston Auto Show**

January 28-February 1, 2026

NRG Center

One NRG Park, Houston, Texas

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The Houston Auto Dealer Association is comprised of approximately 184 franchised new car and truck dealers, employing over 30,000 people in the Houston area alone, HADA is proud to serve as the local backbone for Houston's automotive industry.

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