

# Houston Auto Market News

January 2025



## Sound Bites

- Q4-2024 Retail & Total Vehicle Sales up from the previous quarter & year. **See Page 1.**
- Looking Ahead:** What happened in 2024 & "What's Next" for 2025? **See Page 1.**

## Inside Story

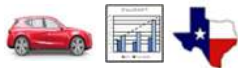
- For this quarter & year, the Car & Truck/SUV Retail Market Share & Sales hit record lows & highs...yet again! **See Pages 2 & 3.**
- Electrified Vehicles continued to see gains. **See page 5.**

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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.**

## INSIGHTS TO THE HOUSTON VEHICLE MARKET

Volume 15 Issue 4

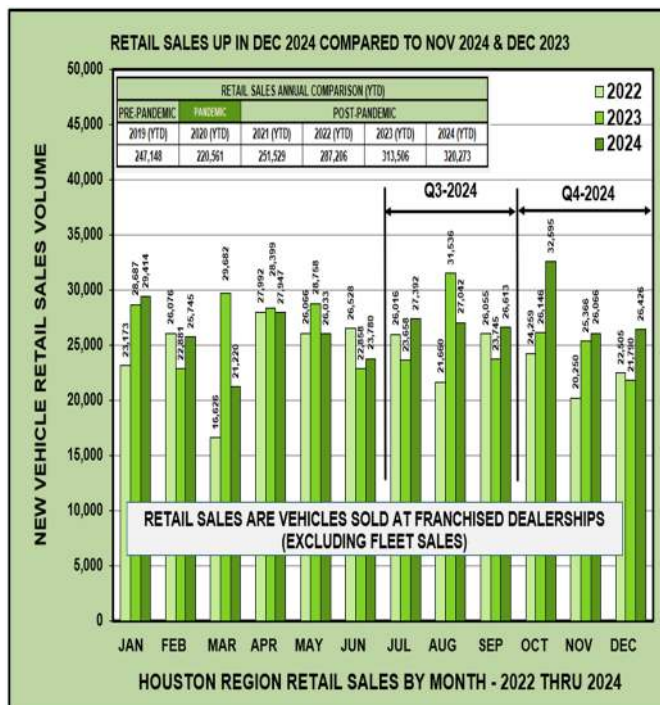
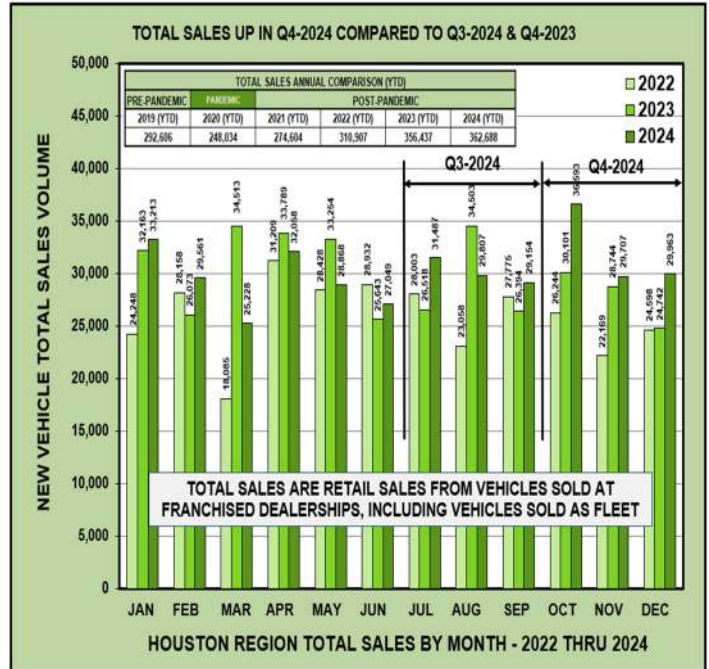
### Total & Retail Sales Up In Q4-2024

Houston Region Total Sales were up in Q4-2024 at 96,263 units compared to Q3-2024 at 90,448 units sold and up compared to Q4-2023 at 83,587 units.

The Houston Region Retail Sales for Q4-2024 were up at 85,087 units compared to Q3-2024 at 81,047 units, and up with 73,302 units sold in Q4-2023.

The Retail Auto Segment sold 16,609 units in Q4-2024 for the Houston Region, up compared to Q3-2024 with 16,463 units sold and up from 15,872 units sold in Q4-2023.

The Retail Truck/SUV Segment sold 68,478 units for Q4-2024, this was up compared to Q3-2024 with 64,584 units sold and up from Q4-2023 with 57,430 units sold.



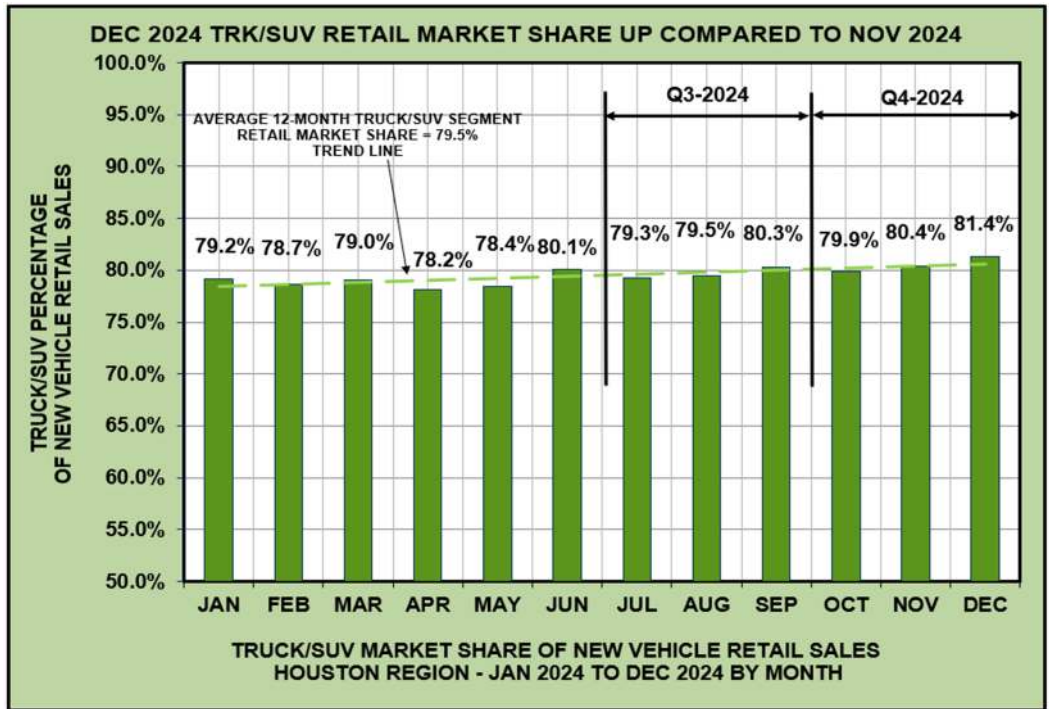
*Note: Due to the supply chain issues, some sales figures & data in 2024 may be skewed due to the lag time from registering the automobiles at the dealership*

## LOOKING AHEAD

Sometimes, when "Looking Ahead", one must check the rear-view mirror first. Just when you thought a good thing couldn't get better, 2024 happened & Auto Sales in the Houston Region proved they were better than even the stellar year of 2023. **2024** saw an outstanding year in new vehicle sales for the Houston Region outperforming 2023 at 362,688 vs 356,437 vehicles sold. **2022** with 310,907 units sold, while **2021** had 274,604 units, compared to 248,034 units in **2020** & 292,606 units for **2019**. There were 303,385 units in **2018**, 290,354 units in **2017** & 299,461 units in **2016**. With consumer confidence high, **2025** is looking to be even better than **2024**, perhaps surpassing the all-time highs of **2014** at 373,998 & **2015** at 376,481 units. "Looking ahead" seems brighter and brighter!

### Q4-2024 Retail Truck/SUV Market Share Up From Q3-2024 & Q4-2023

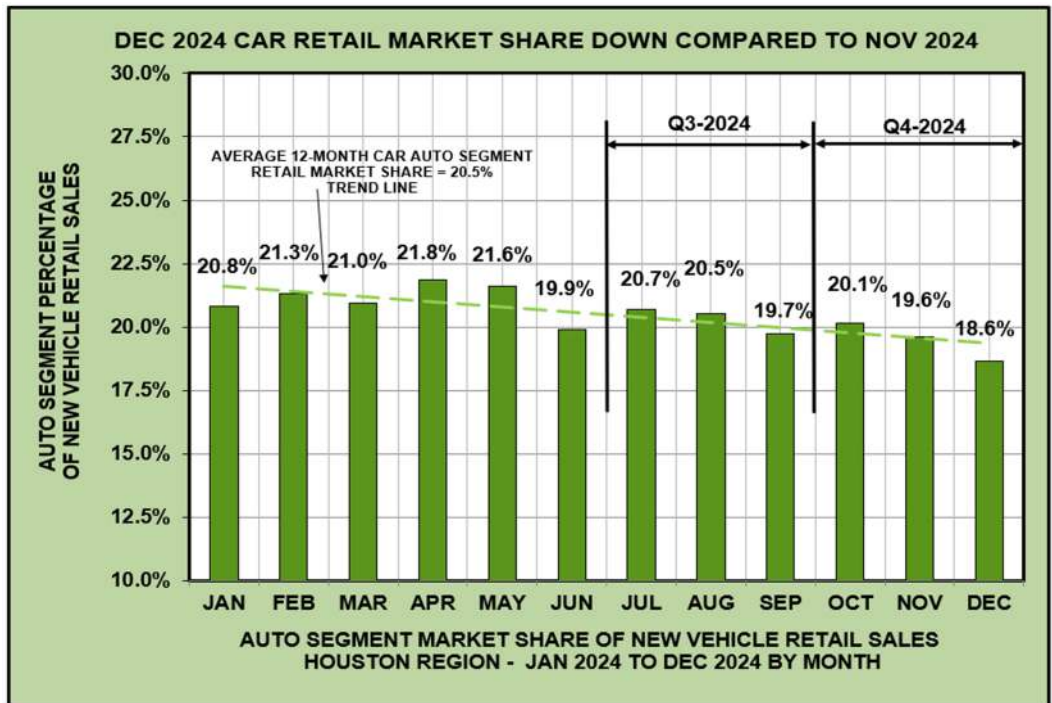
The Truck/SUV Retail Market Share hit another all-time high of 81.4% in December 2024.



The Q4-2024 Truck/SUV Retail Market Share was up at 80.5% (a record high) compared to Q3-2024 of 79.7% and up from Q4-2023 at 77.4%.

### Q4-2024 Retail Auto Market Share Down Compared to Q4-2023 & Q3-2024

The 12 month average for the Auto Segment Retail Market Share was 20.5%.



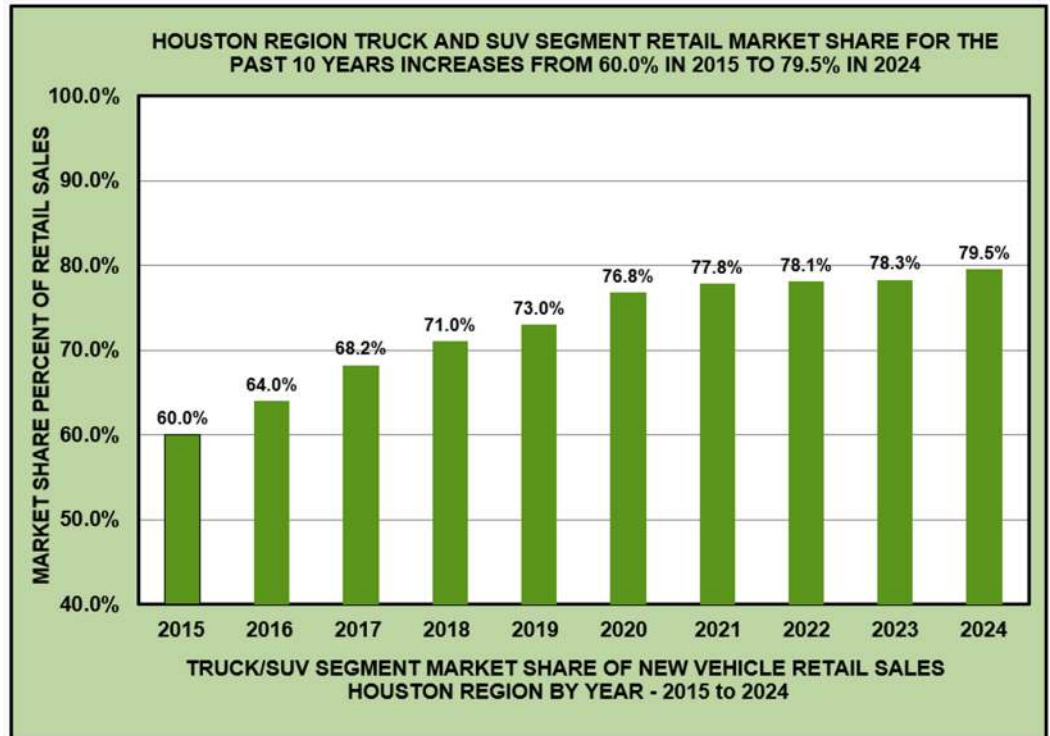
The Q4-2024 Auto Segment Retail Market Share decreased to 19.5% (a record low) compared to Q3-2024 at 20.3%. Q4-2024 was also down compared to Q4-2023 at 21.6% for the Houston Region.

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**Annual Retail Truck/SUV Market Share & Unit Sales**

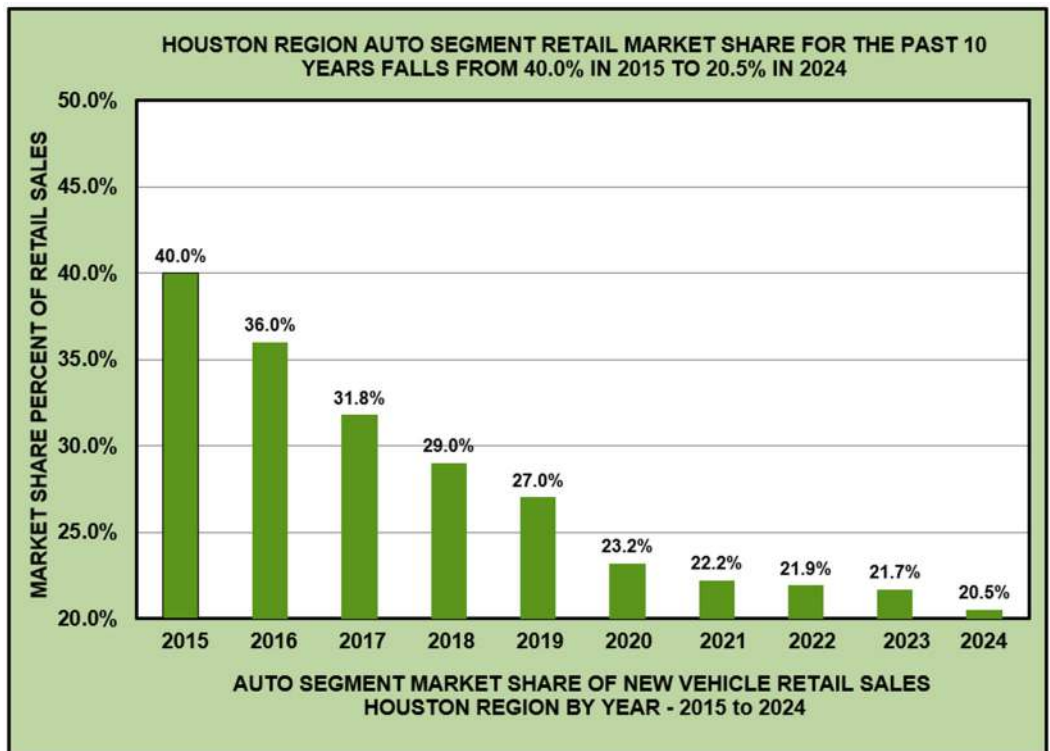
The Truck/SUV Retail Sales saw the biggest gains in 2024 at 254,687 units sold.



The Retail Sales in *units sold* for the Truck/SUV Segment were 254,687 in 2024 versus 245,456 units in 2023 with a significant increase from 182,134 units sold in 2007, at the start of Vehicle Sales tracking for the Houston Region.

**Annual Auto Retail Market Share & Unit Sales**

Despite an uptick in Q4-2024 units sold, the Auto Market Retail Share & Sales saw an overall drop in 2024.



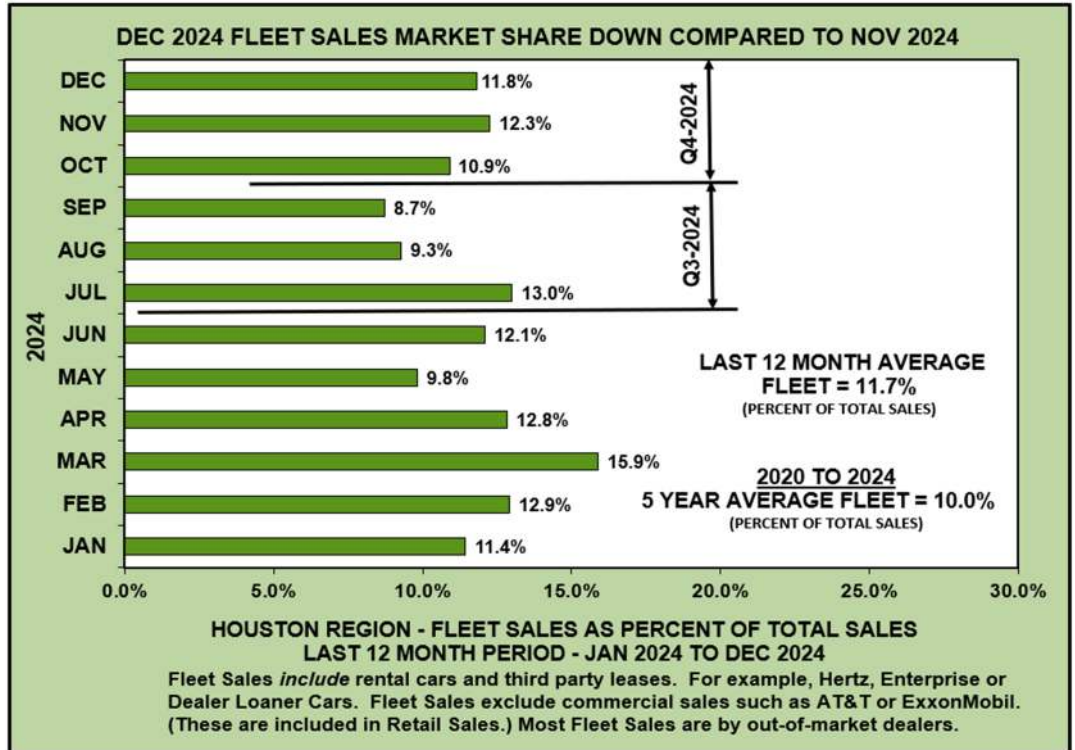
The Retail Sales in *units sold* for the Auto Segment were 65,586 in 2024 versus 68,050 units in 2023 with a significant decrease from 116,621 units sold in 2007, at the start of Vehicle Sales tracking for the Houston Region.

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### Q4-2024 Fleet Market Share Increased From Q3-2024

The Average Fleet Sales Market Share for the last 12 Months was 11.7%.

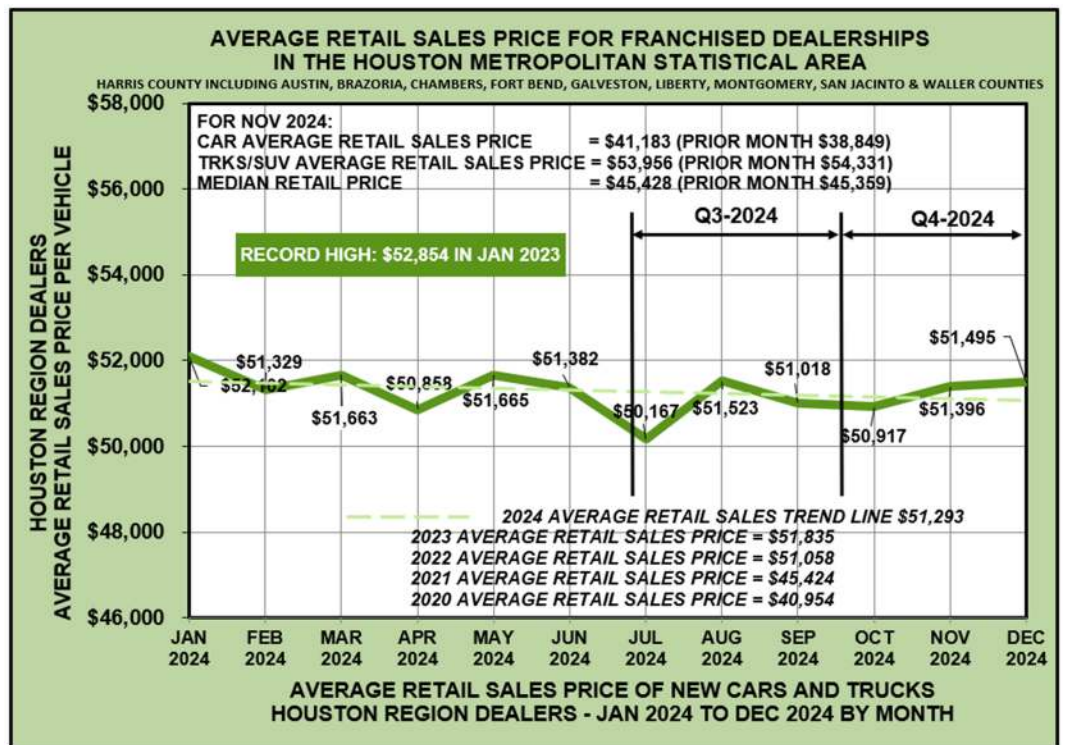


Fleet Sales Market Share was up at 11.7% for Q4-2024 compared to 10.3% in Q3-2024 and down from Q4-2023 at 12.3%. Fleet Sales can be an indicator of general business conditions and confidence. Fleet Sales include rental vehicles and third party leases.

### Average Retail Sales Price For Q4-2024

The Q4-2024 Average Retail Sales Price for Trucks/SUVs was \$54,124, up from Q3-2024 at \$53,575 & down from the high of \$55,063 in Q1-2023.

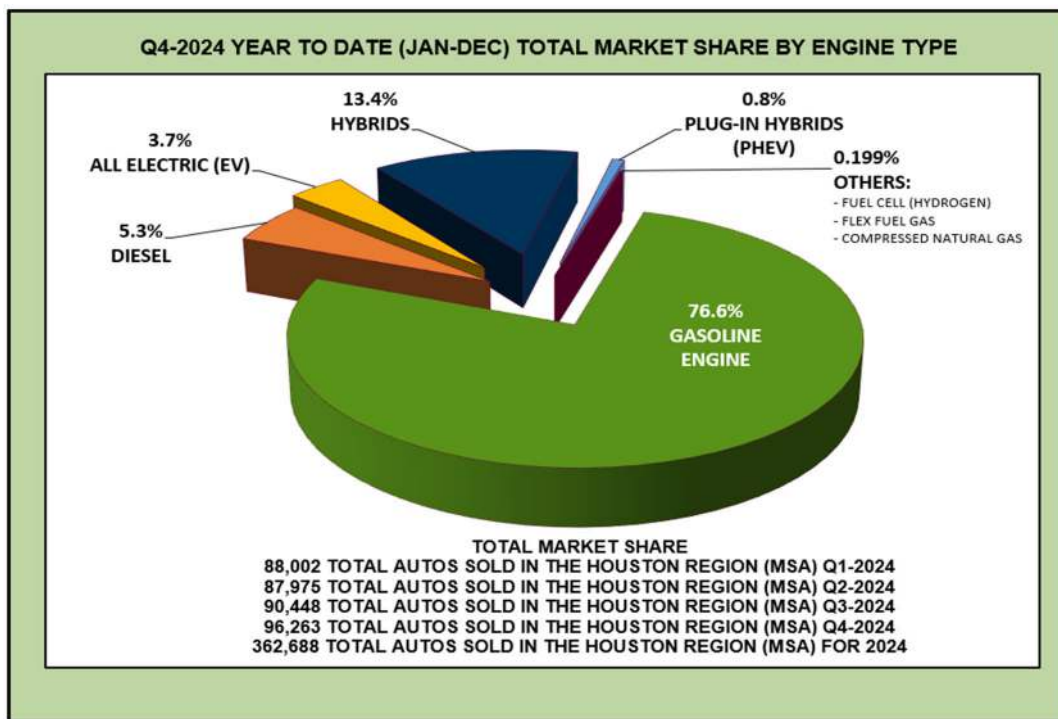
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The Average Retail Sales Price for Q4-2024 was \$51,269, up compared to Q3-2024 at \$50,903 and down compared to Q4-2023 at \$51,442. Retail Sales Prices are vehicles sold at franchised dealerships.

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### Q4-2024 YTD Houston Total Market Share for Automobiles by Engine/Fuel Type



In 2024-YTD, Electric (EV), Hybrid & Plug-in Hybrids (PHEV) Vehicles account for 17.9% Of The Market Share.

Electric Vehicles (EV)



Hybrid (Gas/Battery Engine)



Plug-in Hybrid Electric Vehicle (PHEV)



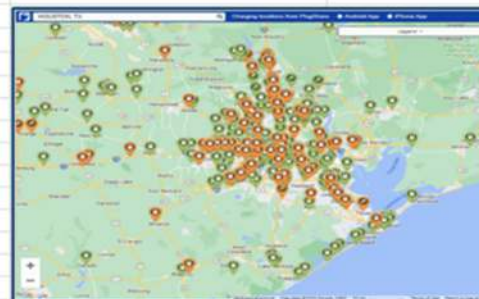
### Q4-2024 Houston Top Performing Manufactures of Electric

TOP EV'S, HYBRID'S & PHEV'S MFG'S	
MAKE/BRAND	MKT SHARE
TOYOTA MOTOR COMPANY	29.5%
TESLA	11.8%
MERCEDES-BENZ	11.0%
AMERICAN HONDA	10.9%
HYUNDAI GROUP	5.8%
VW GROUP OF AMERICA	5.7%
FORD MOTOR COMPANY	5.2%
JAGUAR/LANDROVER	3.6%
BMW GROUP	2.9%
MAZDA MOTOR CORPORATION	2.37%
GENERAL MOTORS	2.19%
VOLVO CARS USA	1.49%
STELLANTIS (FORMERLY FCA)	0.73%
RIVIAN	0.30%
LUCID	0.22%
NISSAN NORTH AMERICA	0.22%
SUBARU OF NA	0.13%
FERRARI	0.02%
MCLAREN	0.01%
OTHER	0.01%

TOP 10 ELECTRIC VEHICLES (EV)		
RANK	MAKE/MODEL	MKT SHARE
1	TESLA MODEL Y	25.8%
2	TESLA MODEL 3	17.9%
3	TESLA CYBERTRUCK	6.6%
4	HONDA PROLOGUE	6.1%
5	FORD MUSTANG MACH-E	3.3%
6	CADILLAC LYRIQ	2.6%
7	HYUNDAI IONIQ 5	2.5%
8	KIA EV9	2.3%
9	KIA EQUINOX EV	2.2%
10	BMW IX	1.8%

TOP 10 HYBRID VEHICLES		
RANK	MAKE/MODEL	MKT SHARE
1	TOYOTA CAMRY	15.9%
2	HONDA CR-V	6.4%
3	TOYOTA RAV4	4.8%
4	HONDA ACCORD	4.1%
5	TOYOTA SIENNA	3.8%
6	MERCEDES-BENZ GLE-CLASS	3.6%
7	MERCEDES-BENZ GLC-CLASS	3.5%
8	BMW X5	3.4%
9	FORD MAVERICK	2.5%
10	MAZDA CX-90	2.2%

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



TOP 10 PLUG-IN HYBRID VEHICLES (PHEV)		
RANK	MAKE/MODEL	MKT SHARE
1	AUDI Q5	10.5%
2	BMW X5	10.2%
3	JEEP WRANGLER UNLIMITED	7.3%
4	MERCEDES-BENZ GLE-CLASS	7.0%
5	LAND ROVER RANGE ROVER	6.4%
6	VOLVO XC90	6.3%
7	TOYOTA RAV4	5.6%
8	MAZDA CX-90	4.4%
9	CHRYSLER PACIFICA	3.5%
10	LAND ROVER RANGE ROVER	3.3%

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Despite Toyota's slight dip & GM's & Ford's increases in Total Sales for 2024 vs 2023, Toyota remains the top-selling brand.

**2024 NEW AUTO SALES BY BRAND FOR THE HOUSTON METROPOLITAN STATISTICAL AREA**

**TEXACTO FACTS**  
SUMMARY BY MANUFACTURER  
NEW CARS AND TRUCKS REGISTERED IN HOUSTON REGION  
DECEMBER & HOUSTON/US 2024 YEAR END SALES

MANUFACTURER	THIS MONTH		YEAR TO DATE		2023 YTD		2024 YTD		2023 YTD		% CHNG 24 VS 23		2024	
	RETAIL	IQIAL	RETAIL	IQIAL	RETAIL	IQIAL	RETAIL	IQIAL	RETAIL	IQIAL	RETAIL	IQIAL	12 MOS / Q4'	12 MOS / Q4'
AMERICAN HONDA	2344	2355	31066	31335	27031	27242	9.7%	8.6%	8.6%	7.6%	14.9%	15.0%	8.8%	
BMW GROUP	786	830	8956	9158	9420	9694	2.8%	2.5%	3.0%	2.7%	-4.9%	-5.5%	0.5%	
STELLANTIS (FORMERLY FCA)**	1600	1764	19757	26085	23328	30046	6.2%	7.2%	7.4%	8.4%	-15.3%	-13.2%	-14.6%	
FORD MOTOR CO	3582	3957	41128	47645	39204	45027	12.8%	13.1%	12.5%	12.6%	4.9%	5.8%	4.2%	
GENERAL MOTORS	4422	5454	55573	63873	51532	59027	17.4%	17.6%	16.5%	16.6%	7.7%	8.2%	4.3%	
HYUNDAI KIA GROUP	2698	2976	33035	36183	33921	36059	10.3%	10.0%	10.8%	10.1%	-2.6%	0.3%	3.4%	
ISUZU	26	35	328	409	328	382	0.1%	0.1%	0.1%	0.1%	-0.6%	7.1%	0.0%	
JAGUAR LAND ROVER NA	333	343	3358	3406	2762	2791	1.0%	0.9%	0.9%	0.8%	21.6%	22.0%	23.4%	
MAZDA	470	945	6851	8744	6195	7399	2.1%	2.4%	2.0%	2.1%	10.6%	18.2%	16.8%	
McLAREN AUTOMOTIVE	4	4	31	32	23	24	0.0%	0.0%	0.0%	0.0%	34.8%	33.3%	16.5%	
MERCEDES-BENZ USA	753	791	8541	8726	8656	8653	2.7%	2.4%	2.8%	2.5%	-1.3%	-1.5%	0.3%	
MINI	30	164	1075	2086	1671	1965	0.3%	0.6%	0.6%	0.6%	-42.5%	6.2%	25.8%	
NISSAN NORTH AMERICA	1354	1528	17769	21917	16685	23030	5.5%	6.0%	5.3%	6.5%	6.5%	-4.8%	2.8%	
SUBARU	632	650	7141	7269	6760	6836	2.2%	2.0%	2.2%	1.9%	5.6%	6.3%	5.6%	
TESLA	737	739	5431	5446	12667	12667	1.7%	1.5%	4.0%	3.6%	-57.1%	-57.0%	-6.0%	
TOYOTA MOTOR SALES	5021	5513	61094	68390	51712	53711	19.1%	18.9%	16.5%	16.8%	18.1%	14.5%	3.7%	
VOLVO	96	98	1073	1140	1420	1739	0.3%	0.3%	0.5%	0.5%	-24.4%	-34.4%	-2.7%	
VW GROUP OF AMERICA	1211	1477	15055	16374	15765	18475	4.7%	4.7%	5.0%	5.2%	-4.5%	-8.1%	2.9%	
OTHER	261	340	3013	3870	4166	5464	0.9%	1.1%	1.3%	1.5%	-27.7%	-29.2%	13.6%	
<b>TOTAL</b>	<b>26426</b>	<b>29963</b>	<b>320273</b>	<b>362688</b>	<b>313506</b>	<b>358437</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>2.2%</b>	<b>1.75%</b>	<b>2.5%</b>	

NOTE: RETAIL SALES EXCLUDES RENTAL CARS AND THIRD PARTY LEASES, DEFINED AS FLEET SALES. FOR EXAMPLE, TO HERTZ, ENTERPRISE OR DEALER LOANER CARS. RETAIL INCLUDES COMMERCIAL SALES. FOR EXAMPLE, FOR BUSINESS USE SUCH AS TO RELIANT ENERGY OR EXXONMOBIL.

\* SOURCE: AUTOMOTIVE NEWS DATA CENTER. QUARTERLY US SALES REPORTED BY THE MANUFACTURERS MAY DIFFER FROM NUMBERS CALCULATED BY OTHER SOURCES.

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For 2024 in the Houston Region the rankings by brand in Total Sales: #1 Toyota 68,390, #2 GM 63,873, #3 Ford 47,645, #4 Hyundai 36,183, #5 Honda 31,335, #6 Stellantis 26,085, #7 Nissan 21,917, #8 VW 16,974, #9 BMW 9,158 and #10 Mazda 8,744.

**SAVE THE DATE!**

**Installation Luncheon**

Wednesday, February 18, 2025

Location: Omni Riverway

Speakers from SBD Automotive

**Dealer Appreciation Golf Tournament**

Hosted by HADA

Monday, May 05, 2025

Locations: Sugar Creek & Riverbend Country Clubs

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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.

[www.houstoncardealers.com](http://www.houstoncardealers.com)

### Highlighted Member Service

#### MOTORIST ASSISTANCE PROGRAM (MAP)

The Motorist Assistance Program (MAP) has a significant impact on every Houston motorist, providing crucial support during times of distress. Being stranded on a freeway can be a daunting and potentially hazardous situation, but the arrival of a MAP patrol vehicle brings a sense of relief and reassurance.

Originally launched in 1986 with two service vans, the MAP fleet has expanded to include eighteen specially-equipped vehicles operated by Harris County Sheriff's deputies. These dedicated officers traverse Houston-area freeways tirelessly, covering hundreds of miles each weekday, around the clock. Their primary objective is to identify motorists in need of basic roadside assistance, such as fuel or other essential services. By promptly and safely attending to these motorists, the MAP deputies contribute to reducing traffic congestion.

Since the MAP program's inception, HADA has donated and placed more than 120 new vehicles into service and nearly 1 million drivers have been assisted. The program is administered by the Harris County Sheriff's Department and funded by METRO, Texas Department of Transportation, City of Houston, Houston TranStar and HADA. #

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