

Houston Auto Market News

JANUARY 2022

INSIGHTS TO THE HOUSTON VEHICLE MARKET

Volume 12 Issue 1



Sound Bites

- Q4-2021 Total & Retail Vehicle Sales up from the previous quarter. See charts to the right.
- Houston Region 2021 Sales outperform US Sales. See Page 5.

Inside Story

- Retail Truck/SUV Market Share hit an all-time High. See page 2.
- Q4-2021 for Average Retail Sales Price hit an all-time high. See page 3.

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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 8.

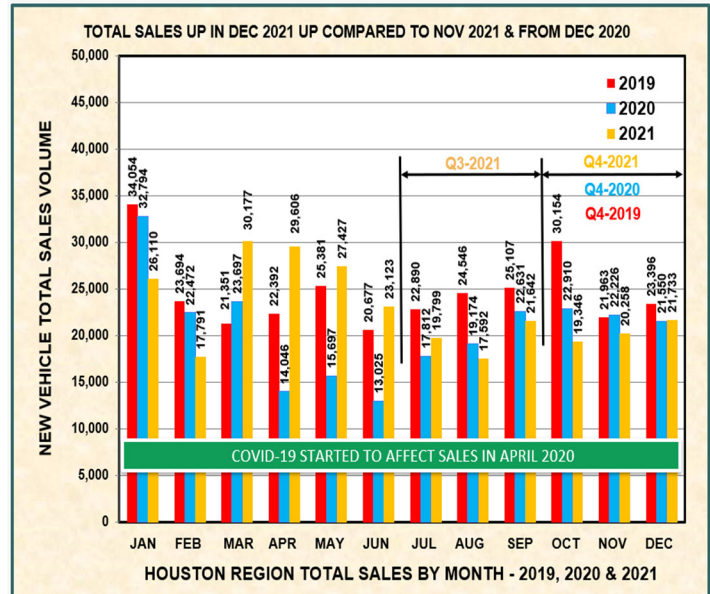
Q4-2021 Total & Retail Sales Were Up Compared To Q3-2021

Houston Region Total Sales were up in Q4-2021 at 61,337 units compared to Q3-2021 at 59,033 units sold and drastically down compared to Q4-2020 at 66,686 units.

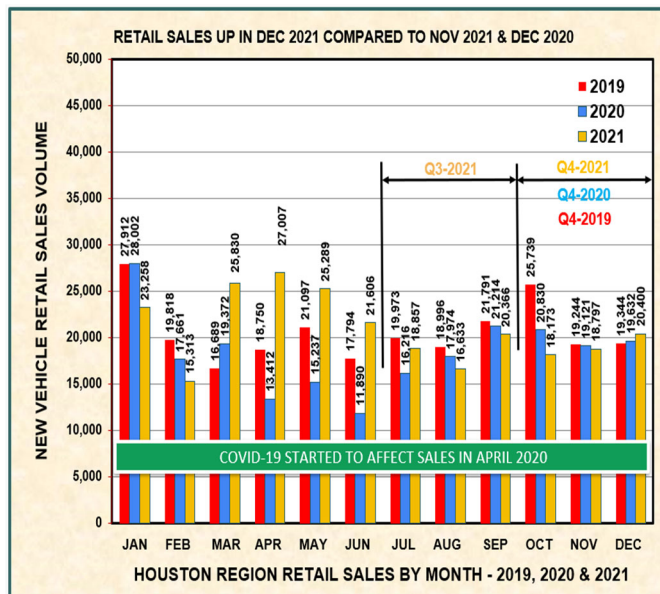
The Houston Region Retail Sales for Q4-2021 were up at 57,370 units compared to Q3-2021 at 55,856 units, and down with 59,583 units sold in Q4-2020.

The Retail Auto Segment sold 12,025 units in Q4-2021 for the Houston Region, down compared to Q3-2021 with 12,817 units sold and down from 13,755 units sold in Q4-2020.

The Retail Truck/SUV Segment sold 45,345 units for Q4-2021, this was up com-



pared to Q3-2021 with 43,039 units sold and down from Q4-2020 with 45,828 units sold in the Houston Region.



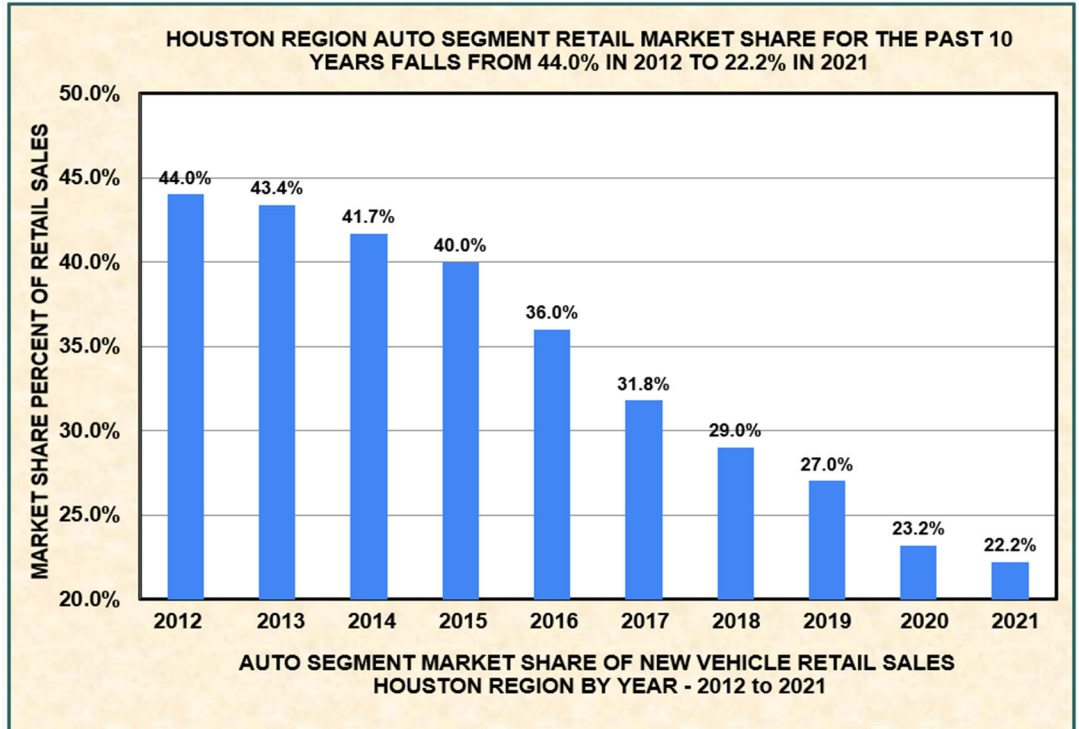
Note: Due to the global pandemic, some sales figures and data in 2021 may be skewed due to the lag time from registering the automobiles at the dealership vs. titling at the Texas DMV.

LOOKING AHEAD

The Houston Region Metropolitan Statistical Area (MSA), saw a total of 274,604 vehicles sold in 2021 compared to 248,034 units sold in 2020 and 292,606 units sold in 2019. There were 303,385 units sold in 2018 and 290,354 units sold in 2017. Despite the challenges of the Coronavirus variants, supply chain issues and the microchip shortages, there were record breaking retail sales prices for vehicles, 2021 sales still exceeded the forecasted expectation for the year and last year's sales volumes. The good news is Total Sales for the Houston Region MSA outpaced last year at 10.7% and National Sales comparatively by 3.3%. As we head into the new year, auto industry insiders are looking at 2022 optimistically as the industry challenges are resolved.

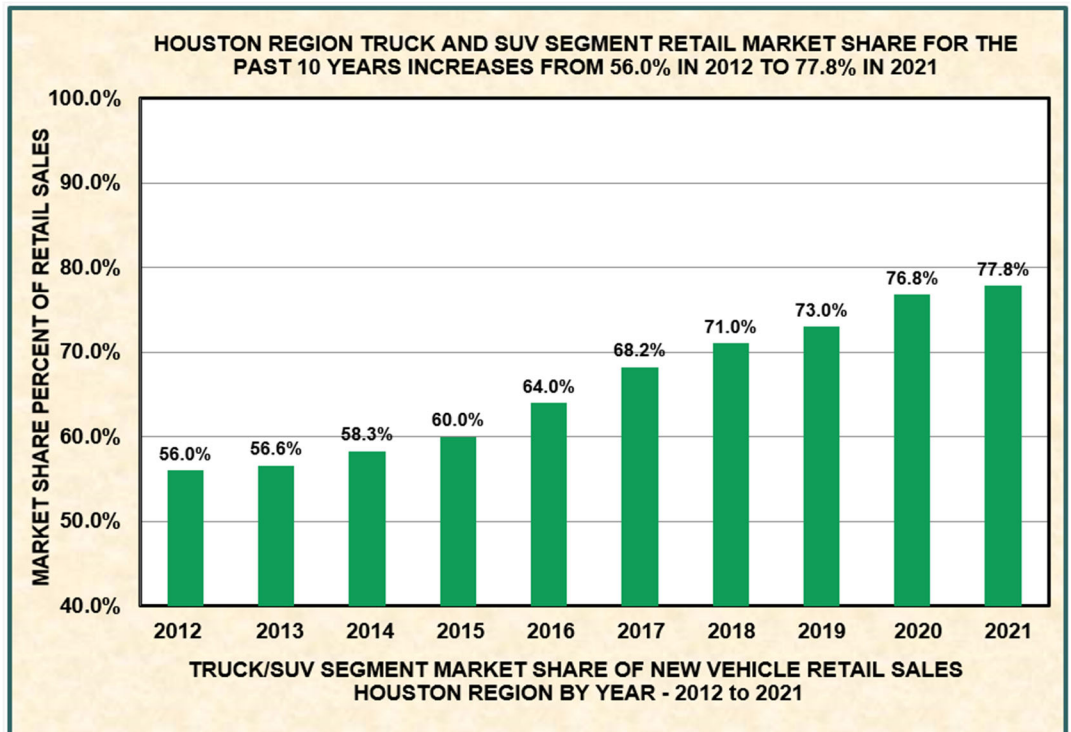
The Auto Segment Retail Market Share saw a significant drop in the last 10 years.

Retail Auto Segment Continues to Trend Down



The Retail Sales for the Auto Segment sold 119,205 units in 2012 compared to 56,031 units sold in 2021 which is a difference of 63,174 units and a decrease of 72.1% in sales. Retail Sales are vehicles sold at franchised dealerships only.

Retail Truck/SUV Market Share All-Time High



The Retail Sales for the Truck/SUV Segment sold 159,526 units in 2012 compared to 195,498 units sold in 2021 which is a difference of 35,972 units and an increase of 20.3% in sales.

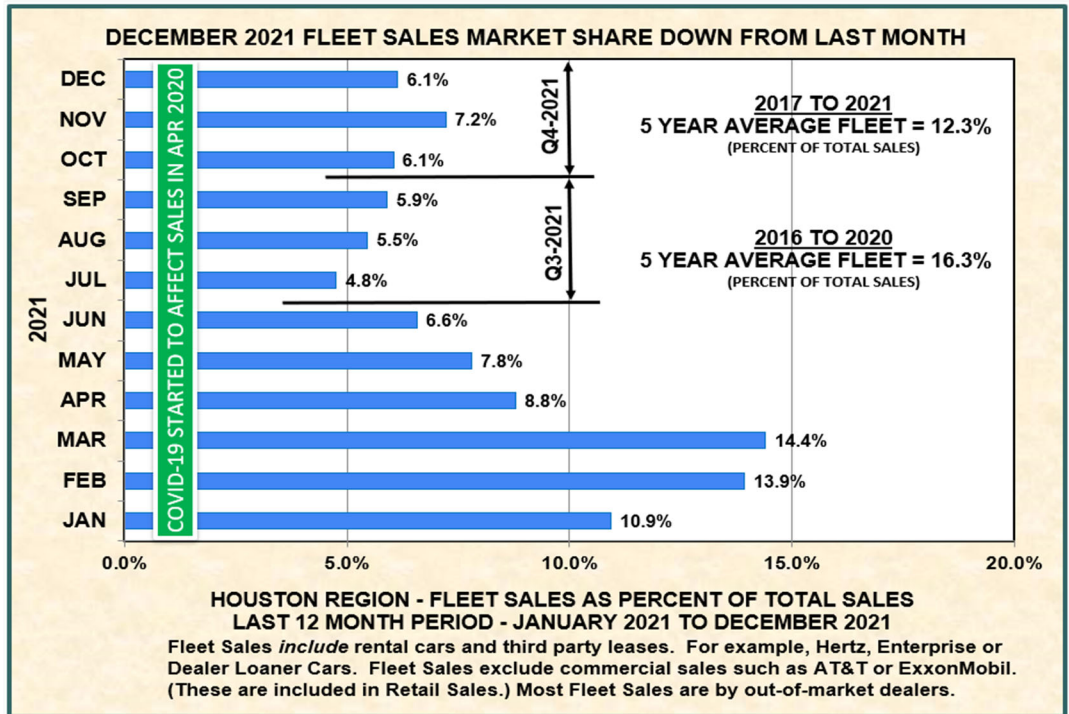
The Average Truck/SUV Retail Market Share for the last 10 Years was 66.9%

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Q4-2021 Fleet Sales Market Share Increased From Q3-2021

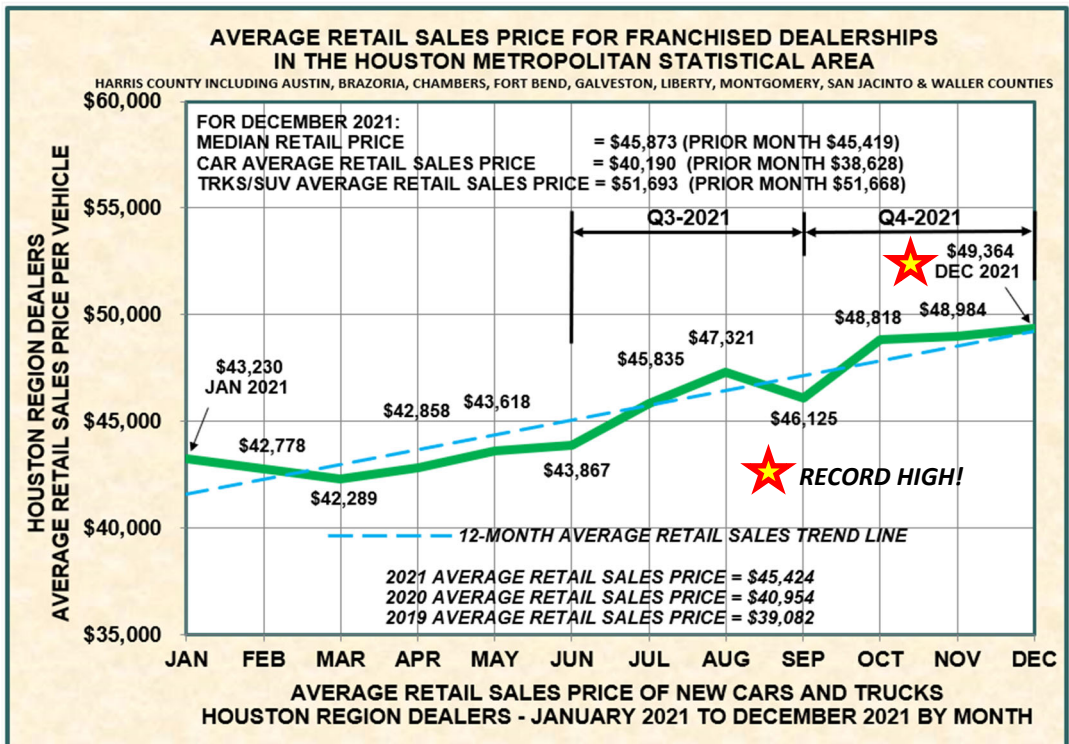
The Average Fleet Sales Market Share for the last 12 Months was 8.2%.



Fleet Sales Market Share was at 6.5% for Q4-2021 compared to 5.4% in Q3-2021 and down from Q4-2020 at 10.6%. Fleet Sales can be an indicator of general business conditions and confidence. Fleet Sales include rental vehicles and third party leases.

Q4-2021 Average Retail Sales Price Increased vs Q3-2021

The Average Retail Price for all vehicles (Cars, Pickup Trucks & SUVs) for the last 12 Months was \$45,424.



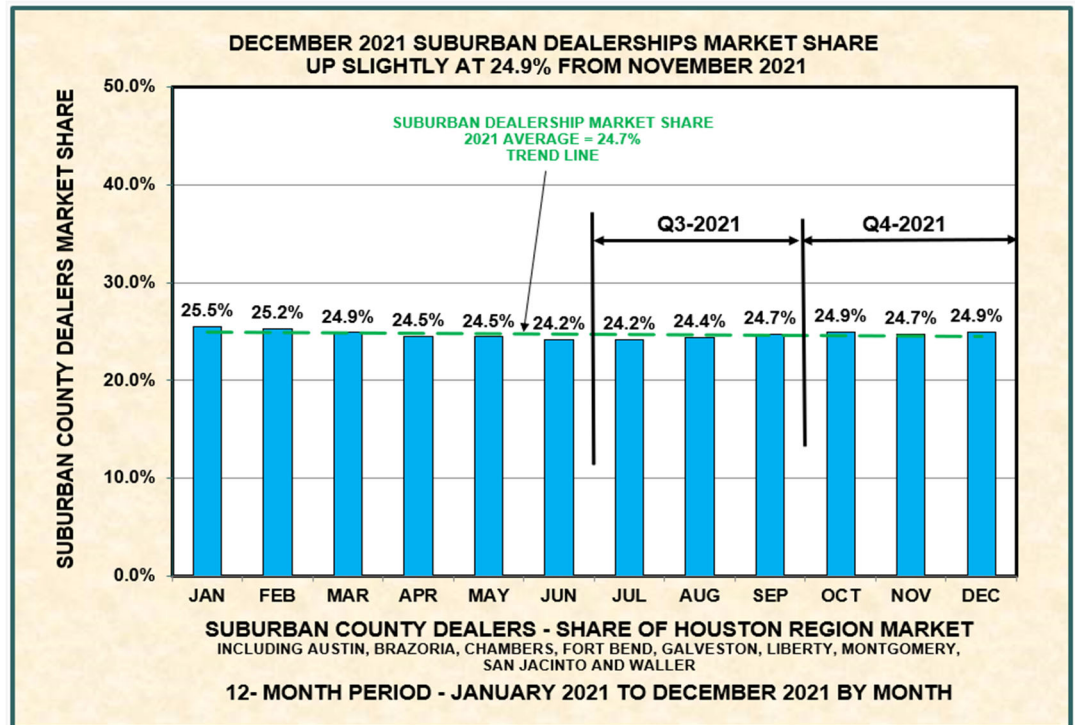
The Average Retail Sales Price for Q4-2021 was \$49,055 up compared to Q3-2021 at \$46,427 and up compared to Q4-2020 at \$42,220. Retail Sales Prices are vehicles sold at franchised dealerships only.

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Suburban Market Share Holding Steady

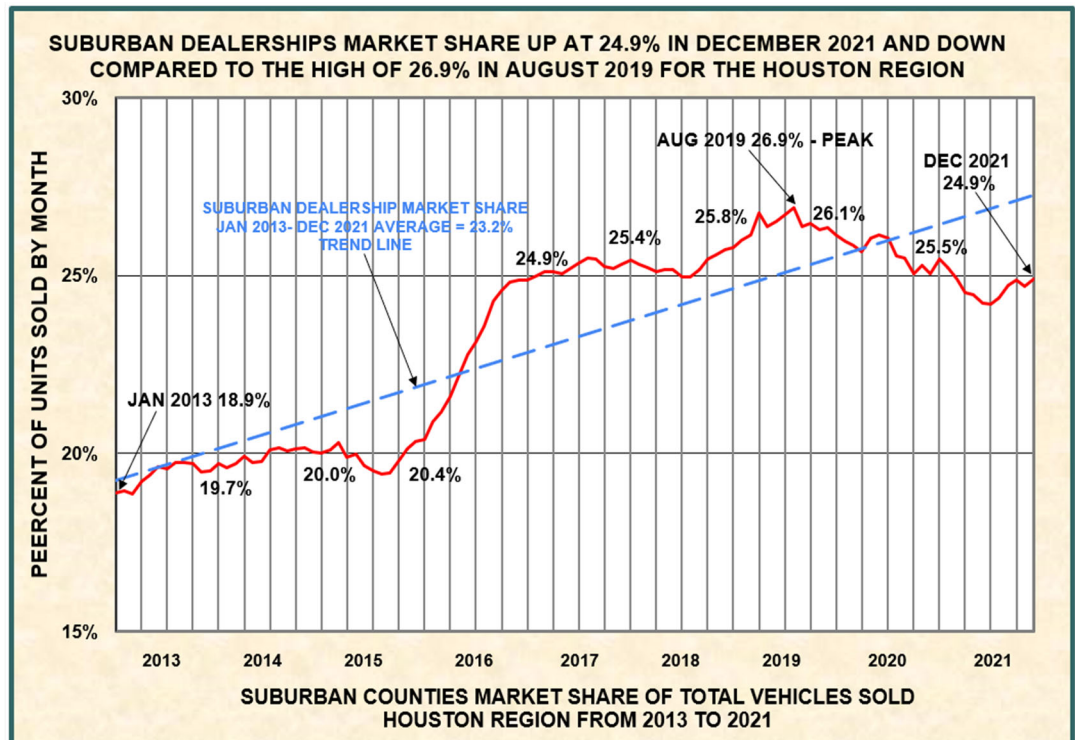
The Suburban Dealer Market Share for the last 12 months was 24.7%.



The Q4-2021 Suburban Dealer Market Share was up at 24.8% compared to Q3-2021 at 24.4% and down compared to Q4-2020 at 25.1%.

History of the Suburban Dealer Market Share

The Suburban Dealer Market Share has grown 6.0% from January 2013-December 2021.



The Suburban Dealer Market Share Year-To-Date for 2021 was at 24.7% compared to the year of 2020 which was 25.7% and compared to the year of 2019 which was 26.4%.

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Domestic Vs. Import Auto Manufacturers

North American Assembly includes US, Canadian and Mexican locations.

TEXAUTO FACTS												
RECAPITULATION OF NEW CARS AND TRUCKS REGISTERED IN HOUSTON REGION, 10 COUNTIES (MSA)												
DECEMBER 2021												
TOTAL VEHICLES	THIS MONTH		YEAR TO DATE		2020 YTD		MARKET SHARE				% CHNG 21 VS 20	
	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	2021 YTD		2020 YTD		YEAR TO DATE	
							RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL
TOTAL DOMESTIC AUTOS	922	926	10314	11561	10794	13638	4.1%	4.2%	4.9%	5.5%	-4.4%	-15.2%
TOTAL IMPORT AUTOS	3282	3829	45717	53055	40440	47099	18.2%	19.3%	18.3%	19.0%	13.0%	12.6%
TOTAL DOMESTIC TRUCKS	8043	8523	99015	107197	89972	101733	39.4%	39.0%	40.8%	41.0%	10.1%	5.4%
TOTAL IMPORT TRUCKS	8153	8455	96483	102791	79428	85564	38.4%	37.4%	36.0%	34.5%	21.5%	20.1%
GRAND TOTAL UNITS	20400	21733	251529	274604	220634	248034	100%	100%	100%	100%	14.0%	10.7%

Domestic Brands Retail Market Share sold in the Houston Region for Q4-2021 (End of Year) was 43.5%, up compared to Q3-2021 (YTD) at 43.2% and down from Q4-2020 (End of Year) at 45.7%.

Import Brands Retail Market Share sold in the Houston Region for Q4-2021 (End of Year) was at 56.5%, down compared to 56.8% in Q3-2021 (YTD) and up compared to Q4-2020 (End of Year) at 54.3%.

Summary by Location of Assembly

TEXAUTO FACTS												
SUMMARY BY LOCATION OF ASSEMBLY												
NEW CARS AND TRUCKS REGISTERED DURING THE MONTH OF DECEMBER 2021												
TOTAL VEHICLES	THIS MONTH		YEAR TO DATE		2020 YTD		MARKET SHARE				% CHNG 21 VS 20	
	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	2021 YTD		2020 YTD		YEAR TO DATE	
							RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL
AUTOS NORTH AMERICA	3310	3768	39807	46755	38691	47099	15.8%	17.0%	17.5%	19.0%	2.9%	-0.7%
IMPORT AUTOS	894	987	16305	17942	12543	13638	6.5%	6.5%	5.7%	5.5%	30.0%	31.6%
TRUCKS NORTH AMERICA	13132	13804	156026	167641	135163	149884	62.0%	61.0%	61.3%	60.4%	15.4%	11.8%
IMPORT TRUCKS	3064	3174	39391	42266	34237	37413	15.7%	15.4%	15.5%	15.1%	15.1%	13.0%
GRAND TOTAL UNITS	20400	21733	251529	274604	220634	248034	100%	100%	100%	100%	14.0%	10.7%

Retail Sales Market Share of vehicles assembled in North America and sold in the Houston Region was up at 77.9% for Q4-2021 (YTD) compared to Q3-2021 (YTD) at 77.2% and was down compared to Q4-2020 at 78.8%.

Summary By Manufacturer

TEXAUTO FACTS													
SUMMARY BY MANUFACTURER													
NEW CARS AND TRUCKS REGISTERED IN HOUSTON REGION													
DECEMBER 2021													
MANUFACTURER	THIS MONTH		YEAR TO DATE		2020 YTD		MARKET SHARE				% CHNG 21 VS 20		12 MOS/Q4*
	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	2021 YTD		2020 YTD		YEAR TO DATE		
							RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	TOT US
AMERICAN HONDA	1617	1621	21187	21317	18866	18985	8.4%	7.8%	8.6%	7.7%	12.3%	12.3%	8.9%
BMW GROUP	596	604	5206	5489	3659	3909	2.1%	2.0%	1.7%	1.6%	42.3%	40.4%	19.5%
STELLANTIS (FORMERLY FCA) **	2339	2535	29905	33438	26305	31364	11.9%	12.2%	11.9%	12.6%	13.7%	6.8%	-2.3%
FORD MOTOR CO	3287	3453	34898	38010	33249	37878	13.9%	13.8%	15.1%	15.3%	5.0%	0.3%	-7.0%
GENERAL MOTORS	2636	2725	39546	42061	38321	42854	15.7%	15.3%	17.4%	17.3%	3.2%	-1.9%	-13.1%
HYUNDAI KIA GROUP	1864	2053	19400	20919	14906	16694	7.7%	7.6%	6.8%	6.7%	30.1%	25.3%	21.6%
ISUZU	16	16	221	253	193	222	0.1%	0.1%	0.1%	0.1%	14.5%	14.0%	6.1%
JAGUAR LAND ROVER NA	148	152	2069	2096	2034	2076	0.8%	0.8%	0.9%	0.8%	1.7%	1.0%	19.2%
MAZDA	287	299	4752	5192	3669	4078	1.9%	1.9%	1.7%	1.6%	29.5%	27.3%	3.6%
MCLAREN AUTOMOTIVE	1	1	29	29	22	22	0.0%	0.0%	0.0%	0.0%	31.8%	31.8%	1.1%
MERCEDES-BENZ USA	694	697	6806	6825	6201	6261	2.7%	2.5%	2.8%	2.5%	9.8%	9.0%	16.8%
MITSUBISHI	75	138	1202	1803	813	1344	0.5%	0.7%	0.4%	0.5%	47.8%	34.2%	8.7%
NISSAN NORTH AMERICA	1218	1459	16396	19455	14683	17584	6.5%	7.1%	6.7%	7.1%	11.7%	10.6%	9.4%
SUBARU	290	292	5504	5593	4966	5074	2.2%	2.0%	2.3%	2.0%	10.8%	10.2%	-4.6%
TESLA	650	650	4521	4528	1940	1941	1.8%	1.6%	0.9%	0.8%	133.0%	133.3%	65.5%
TOYOTA MOTOR SALES	3505	3777	45008	51296	38552	43816	17.9%	18.7%	17.5%	17.7%	16.7%	17.1%	10.4%
VOLVO	132	153	1243	1389	969	1054	0.5%	0.5%	0.4%	0.4%	28.3%	31.8%	12.6%
VW GROUP OF AMERICA	945	967	12354	13346	9686	10856	4.9%	4.9%	4.4%	4.4%	27.5%	22.9%	10.9%
OTHER	101	141	1282	1565	1600	2022	0.5%	0.6%	0.7%	0.8%	-19.9%	-22.6%	40.6%
TOTAL	20400	21733	251529	274604	220634	248034	100%	100%	100%	100%	14.0%	10.7%	3.3%

NOTE:
 BMW GROUP INCLUDES BMW, MINI-COOPER AND ROLLS ROYCE
 ** STELLANTIS FORMED JANUARY 2021 (FORMERLY FIAT CHRYSLER AUTOMOBILES), US BRANDS INCLUDE CHRYSLER, DODGE, JEEP, RAM, FIAT, ALFA ROMEO AND MASERATI.

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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* Total US Sales for 2021 was up at 15,060,287 compared to 2020 at 14,575,255 units sold.

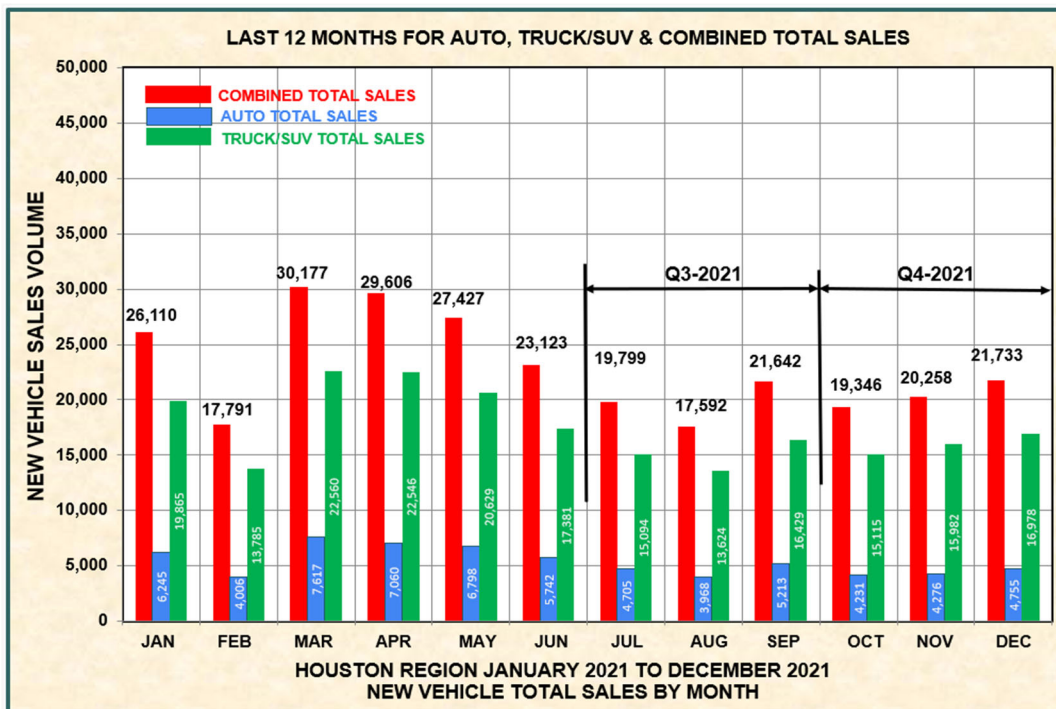
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Toyota was the front runner for Retail & Total Market Share (End of Year). In 2nd place was General Motors and followed by Ford Motor Company. The Houston Region Total Vehicle Sales (End of Year) were up at 10.7% and performed better than the US National Total Vehicle Sales at 3.3%.

Combined Total Vehicle Sales for the Last 12-Months and breakout of Cars & Trucks/SUVs

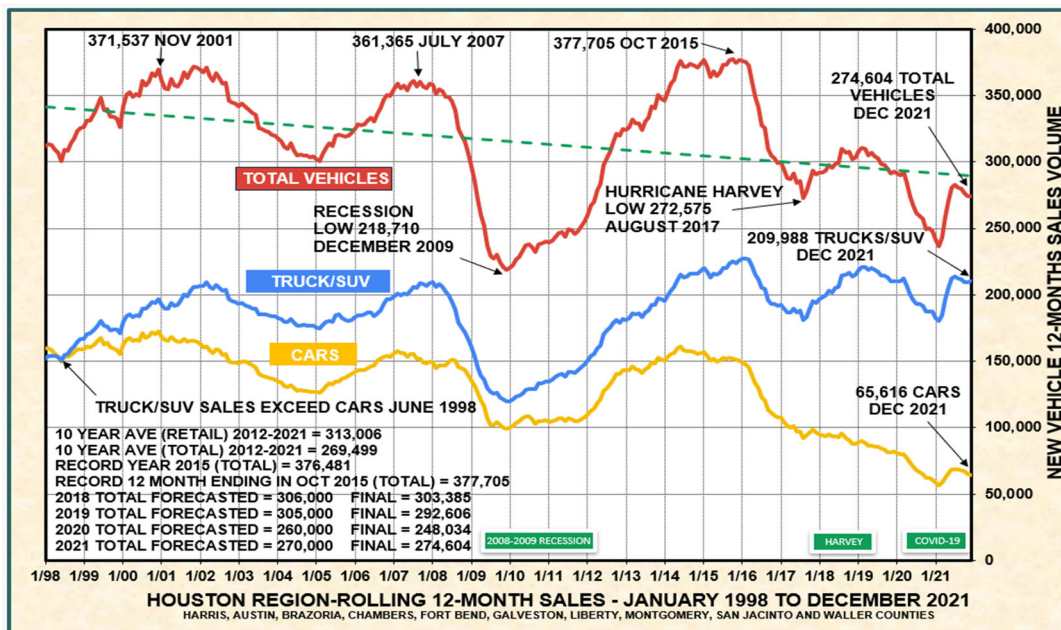
Total Vehicle Sales for 2021 were 274,604 in the Houston Region.



The Total Auto Segment sold 13,262 units in Q4-2021 was down compared to Q3-2021 with 13,868 units sold and down from 16,738 units sold in Q4-2020. The Total Truck/SUV Segment sold 48,075 units for Q4-2021, this was up compared to Q3-2021 with 45,147 units sold and down from 49,948 units sold.

The last 12-Month Rolling Period for Total Sales of 274,604 exceeded the last 10 year average of 269,499.

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



The 12-Month Rolling Total Sales ending for the year of 2021 at 274,604 exceeded the forecasted units sold of 270,000 in the Houston Region.

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HADA UPCOMING EVENTS

SAVE THE DATE!

HADA Spring Luncheon

Tuesday, April 19, 2022

Location: To be determined

Keynote Speaker: Troy Finner - Houston's Chief of Police



**RIVERBEND
COUNTRY CLUB**

Golf Tournament Hosted by HADA

Monday, May 2, 2022

Locations:

Riverbend Country Club
Sugar Creek Country Club



**SUGAR CREEK
COUNTRY CLUB**

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Featured Member Service

DEALER ALERTS

HADA informs its members about the theft of vehicles, fraud, and other important matters when the need arises through its association with the Houston Police Department's Auto Theft Division. In 2021, \$1,949,858.03 of fraud was prevented during Fraud-in-Progress calls.

To be added to this Dealer Alert distribution list email: RoShelle Salinas at rsalinas@houstoncardealers.com.

Additional Member Services

- GOVERNMENT RELATIONS
- HADA NEWSLETTERS
- DEALER ALERTS
- LUNCHEON MEETINGS
- TADA / NADA LIASON
- SATURDAY / SUNDAY CLOSING LAW
- TOOLBOX SET REIMBURSEMENT PROGRAM
- MEDIA RELATIONS
- PUBLIC RELATIONS
- SOCIAL EVENTS
- SURVEYS

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