

# Houston Auto Market News

JULY 2023

INSIGHTS TO THE HOUSTON VEHICLE MARKET

Volume 14 Issue 3



## Sound Bites

- Q2-2023 Total Vehicle Sales up from the previous quarter & year. See chart to the right.
- YTD Truck/SUV Retail Sales up! See Page 2.

## Inside Story

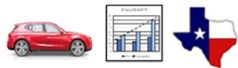
- The Fleet Sales Market Share up for Q2-2023, is the driving force behind Total Sales for the quarter. See page 4.
- Houston Total Market Share for Electric Vehicle (EV), Hybrid & Plugin Hybrid (PHEV) . See page 5.

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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 6.

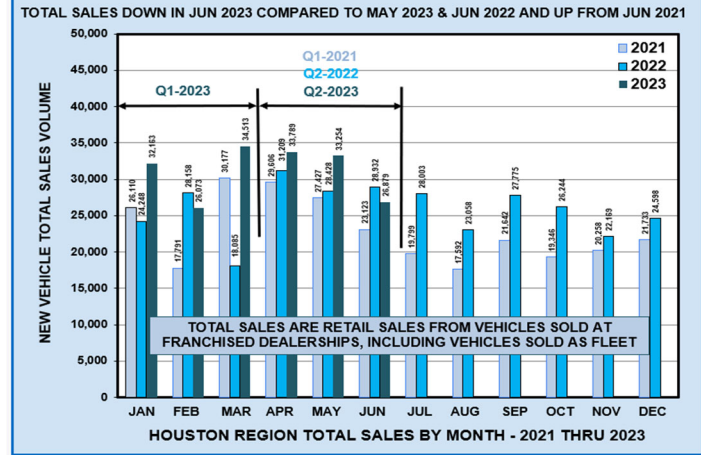
## Q2-2023 Total Sales Were Up Compared To Q1-2023 & Q2-2022

Houston Region Total Sales were up in Q2-2023 at 93,922 units compared to Q1-2023 at 92,749 units sold and up compared to Q2-2022 at 88,569 units.

The Houston Region Retail Sales for Q2-2023 were down at 80,015 units compared to Q1-2023 at 81,250 units, and down with 80,586 units sold in Q2-2022.

The Retail Auto Segment sold 17,345 units in Q2-2023 for the Houston Region, up compared to Q1-2023 with 16,970 units sold and down from 17,596 units sold in Q2-2022.

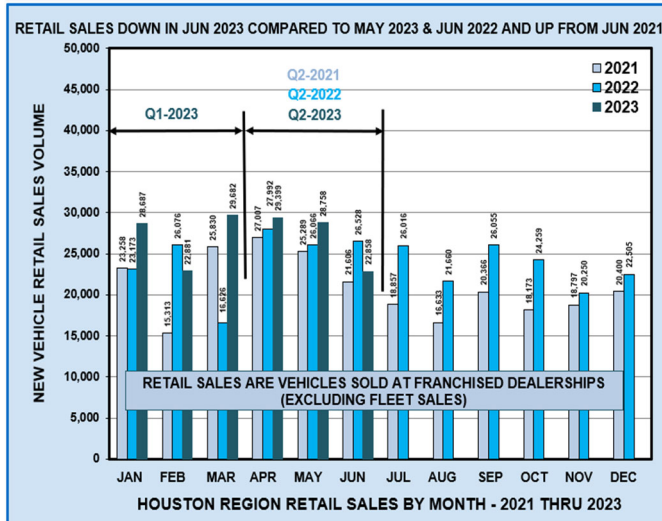
The Retail Truck/SUV Segment sold 62,670 units for Q2-2023, this was down



PRE-PANDEMIC	PANDEMIC	POST-PANDEMIC		
2019 (YTD)	2020 (YTD)	2021 (YTD)	2022 (YTD)	2023 (YTD)
147,550	121,731	154,234	159,060	186,671

2023 (YTD) Total Sales up over the past four years.

compared to Q1-2023 with 64,280 units sold and down from Q2-2022 with 62,990 units sold.



PRE-PANDEMIC	PANDEMIC	POST-PANDEMIC		
2019 (YTD)	2020 (YTD)	2021 (YTD)	2022 (YTD)	2023 (YTD)
122,061	105,574	138,303	146,461	162,265

2023 (YTD) Retail Sales up over the past four years.

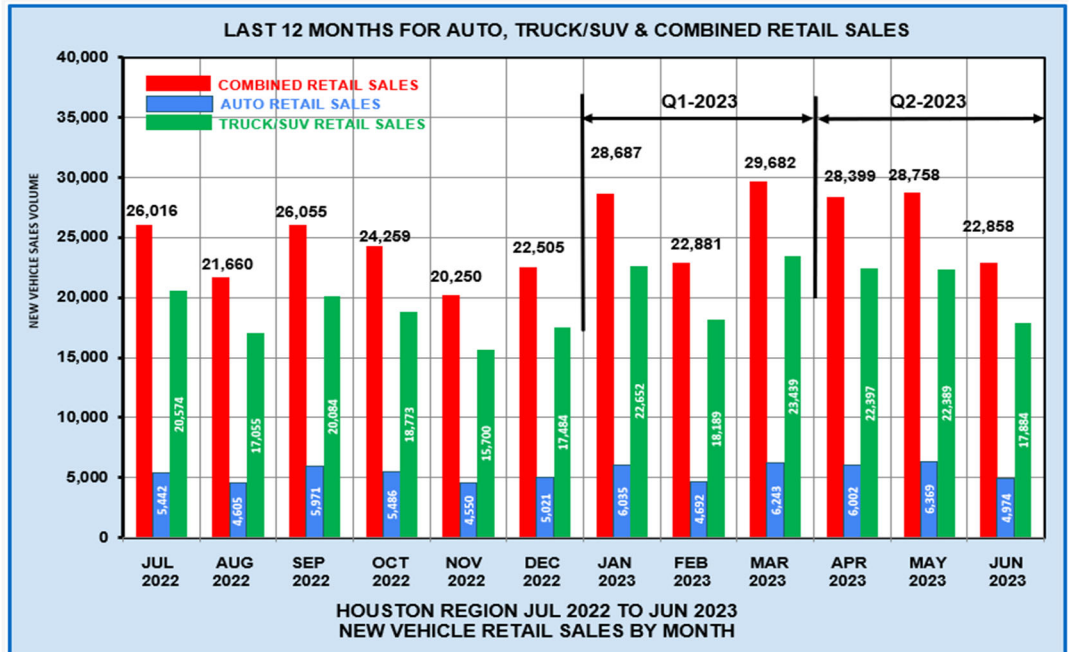
**Note:** Due to the supply chain issues, some sales figures & data in 2023 may be skewed due to the lag time from registering the automobiles at the dealership vs. titling at the Texas DMV.

## LOOKING AHEAD

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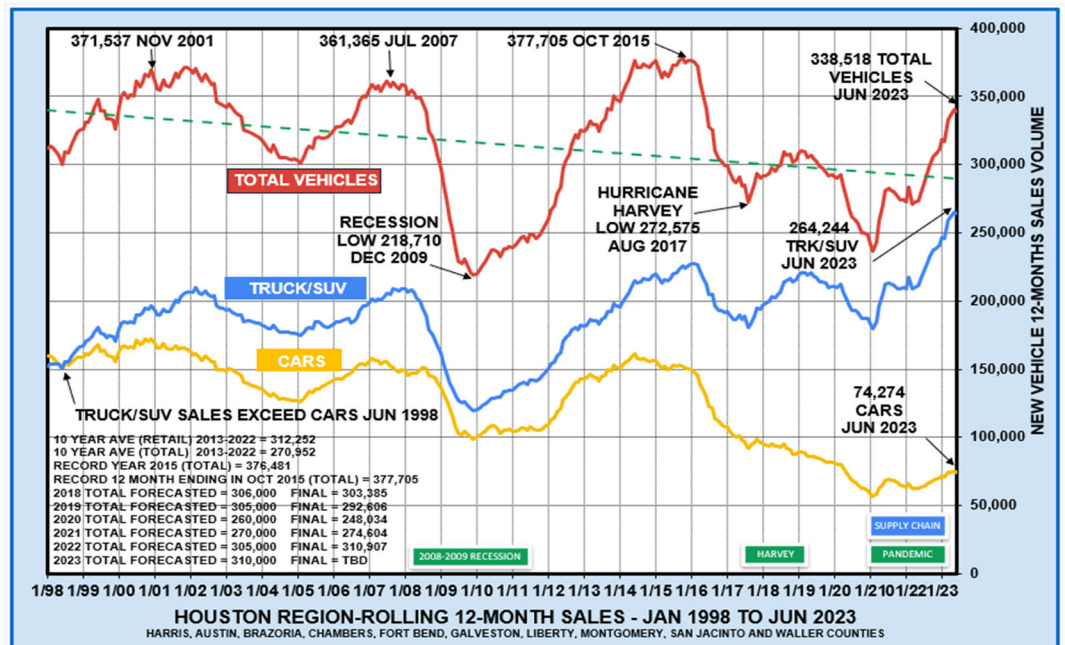
## Combined Retail Vehicle Sales for the Last 12-Months & Breakout of Cars & Trucks/SUVs

The Truck/SUV Retail Sales for 2023 (JAN-JUN) at 126,950 units (a record high) vs 2022 (JAN-JUN) at 114,719 units.



The Retail Auto Segment sold 17,345 units in Q2-2023 which was up compared to Q1-2023 with 16,970 units sold and but down from 17,596 units sold in Q2-2022. The Retail Truck/SUV Segment sold 62,670 units for Q2-2023. This was down compared to Q1-2023 with 64,280 units sold and down from Q2-2022 with 62,990 units sold.

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



The 12-Month Rolling Total Sales for Autos in the Houston Region continues to fluctuate month to month.

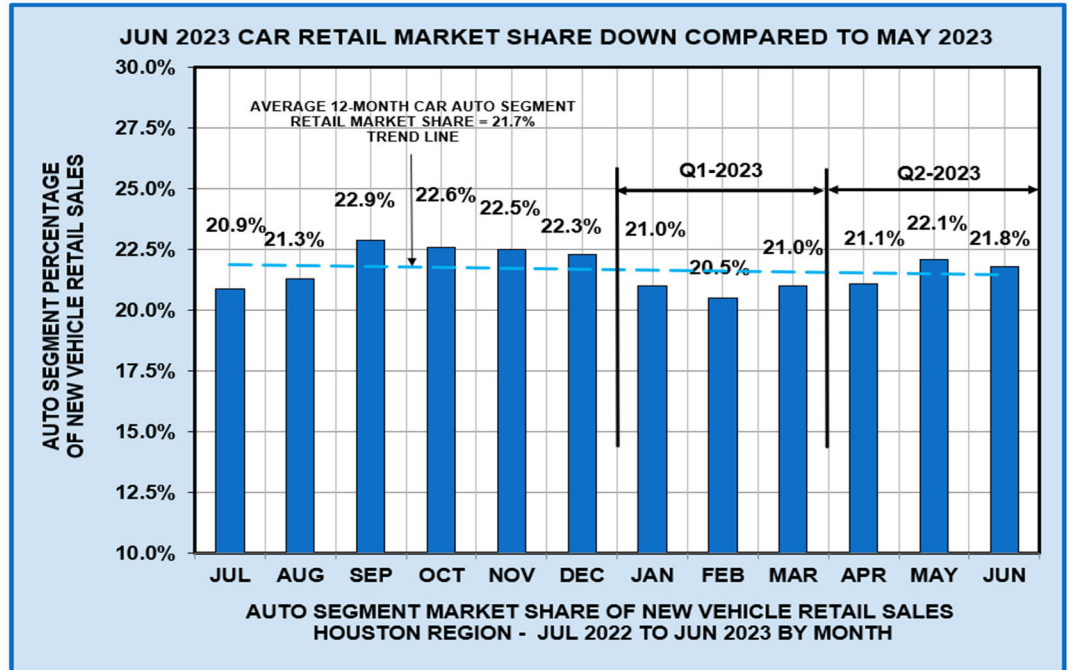
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For vehicles sold in the Houston Region, the 12-Month Rolling Total Sales at the end of Q2-2023 were 338,518 units sold. In comparison the 12-Month Rolling Total Sales at the end of Q1-2023 were 333,165 units and the 12-Month Rolling Total Sales at the end of Q2-2022 were 279,430 units.

## Q2-2023 Retail Auto Market Share Up From Q1-2023

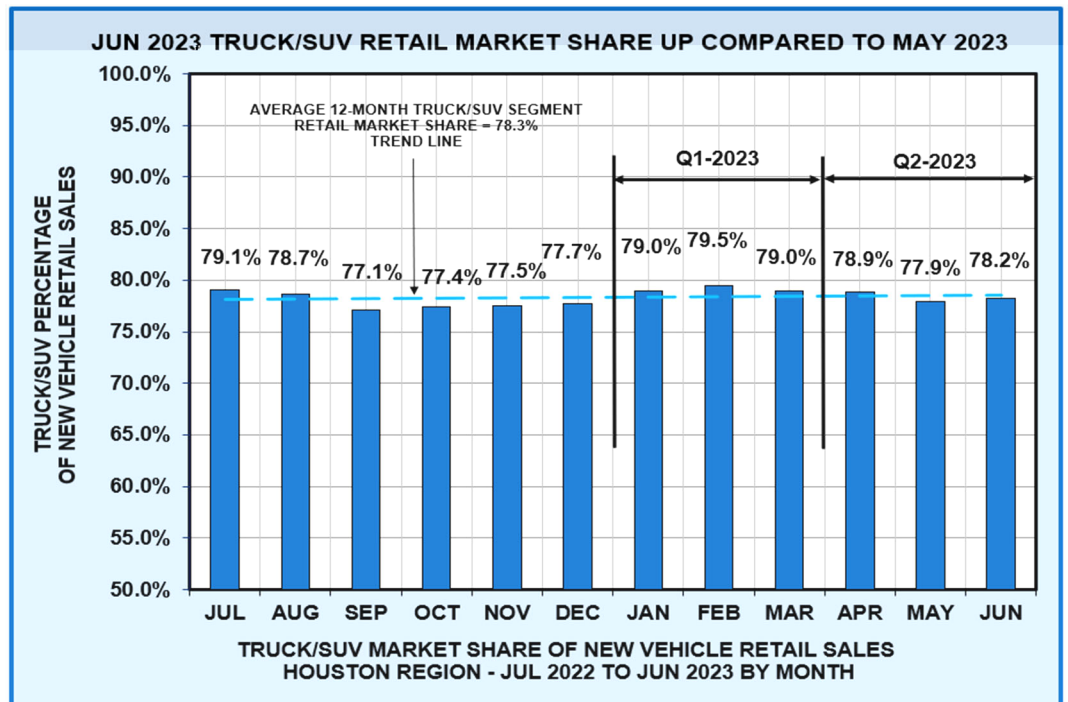
The 12 month (Jul 22 -Jun 23) average for the Auto Segment Retail Market Share was 21.7%.



The Q2-2023 Auto Segment Retail Market Share increased from 21.7% compared to Q1-2023 at 20.9%. Q2-2023 was down slightly compared to Q2-2022 at 21.8% for the Houston Region.

## Q2-2023 Retail Truck/SUV Market Share Up From Q2-2022

The 12 month (Jul 22 -Jun 23) average for the Truck/SUV Retail Market Share was high at 78.3%.



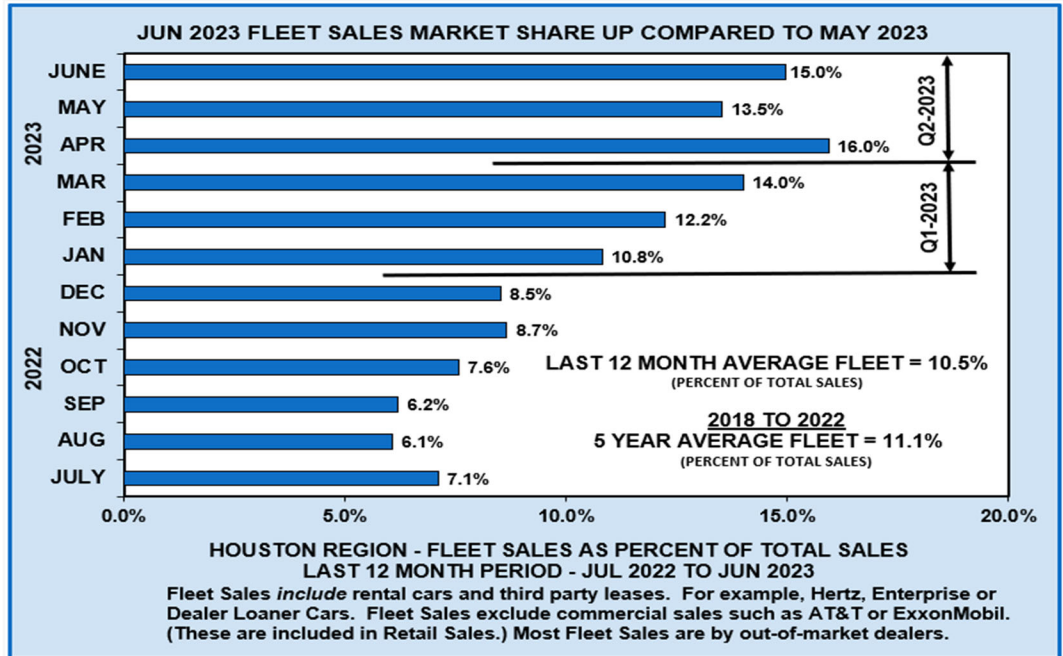
The Q2-2023 Truck/SUV Retail Market Share was down at 78.3% compared to Q1-2023 of 79.1% and slightly up from Q2-2022 at 78.2%.

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## Q2-2023 Fleet Sales Market Share Increased From the Previous Quarter & Previous Year

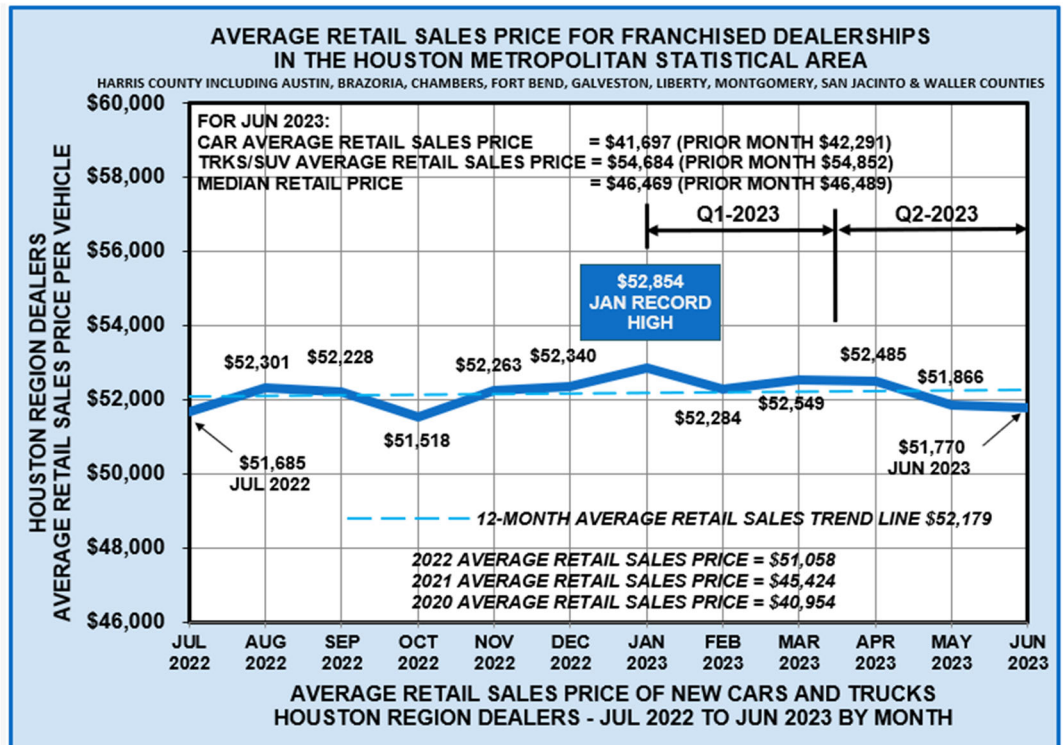
The Average (JUL 22- JUN 23) Fleet Sales Market Share for the last 12 Months was 10.5%.



Fleet Sales Market Share was up at 14.8% for Q2-2023 compared to 12.3% in Q1-2023 and up from Q2-2022 at 9.0%. 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 Q2-2023

The record breaking hot streak of the Average Retail Price cools for Q2-2023.



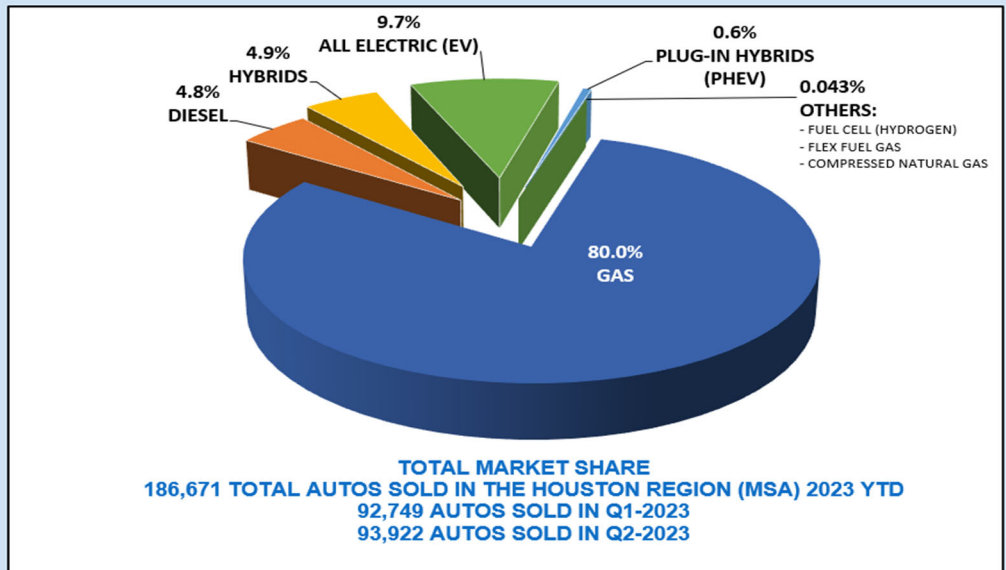
The Average Retail Sales Price for Q2-2023 was \$52,040 down compared to Q1-2023 at \$52,562 and up compared to Q2-2022 at \$49,908. Retail Sales Prices are vehicles sold at franchised dealerships.

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## 2023 YTD Houston Total Market Share for Automobiles by Engine/Fuel Type

2023 YEAR TO DATE (JAN-JUN) TOTAL MARKET SHARE BY ENGINE TYPE



In Q2-2023, Electric (EV), Hybrid & Plug-in Hybrids (PHEV) Vehicles account for 16.4% vs Q1-2023 at 14.0%.

### Electric Vehicles (EV)



### Hybrid (Gas/Battery Engine)



### Plug-in Hybrid Electric Vehicle (PHEV)



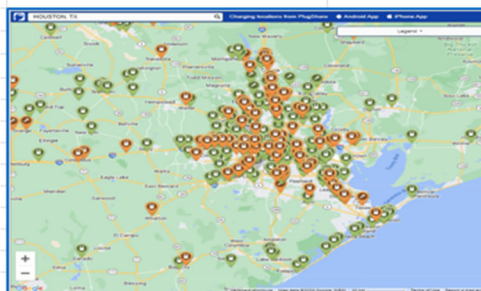
## 2023 Houston Top Performing Manufactures Electric Vehicles (EV's), Hybrids and Plugin Hybrids (PHEV)

TOP EV'S, HYBRID'S & PHEV'S MFG'S	
MAKE/BRAND	MKT SHARE
TESLA	23.0%
TOYOTA MOTOR COMPANY	16.9%
AMERICA HONDA	11.5%
MERCEDES-BENZ	9.7%
BMW GROUP	8.5%
VW GROUP	7.8%
FORD MOTOR COMPANY	5.9%
HYUNDAI GROUP	5.1%
STELLANTIS (FORMERLY FCA)	4.1%
GENERAL MOTORS	3.3%
JAGUAR/LAND ROVER	2.7%
VOLVO CARS USA	2.6%
RIVIAN	1.3%
MAZDA	0.40%
NISSAN	0.39%
LUCID	0.18%
MITSUBISHI	0.13%
SUBARU	0.11%
POLESTAR	0.10%
OTHER	0.05%

TOP 10 ELECTRIC VEHICLES (EV)		
RANK	MAKE/MODEL	MKT SHARE
1	TESLA MODEL Y	41.4%
2	TESLA MODEL 3	17.1%
3	CHEVROLET BOLT EUV	5.5%
4	TESLA MODEL X	2.6%
5	CHEVROLET BOLT EV	2.6%
6	MERCEDES-BENZ EQS SUV	2.2%
7	BMW I4	2.1%
8	RIVIAN R1S	2.1%
9	VOLKSWAGEN ID.4	1.7%
10	FORD MUSTANG MACH-E	1.6%

TOP 10 HYBRID VEHICLES		
RANK	MAKE/MODEL	MKT SHARE
1	HONDA CR-V HYBRID	11.5%
2	HONDA ACCORD SEDAN	6.7%
3	BMW X5	5.1%
4	MERCEDES-BENZ GLE	4.7%
5	AUDI Q5	4.4%
6	FORD F-150	4.4%
7	TOYOTA RAV4	4.1%
8	TOYOTA TUNDRA	3.4%
9	TOYOTA HIGHLANDER	3.2%
10	LEXUS RX	3.0%

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	JEEP WRANGLER	24.1%
2	JEEP GRAND CHEROKEE	16.5%
3	TOYOTA RAV4 PRIME	5.4%
4	VOLVO XC90	4.8%
5	AUDI Q5 E-TRON	4.6%
6	BMW X5	4.2%
7	CHRYSLER PACIFICA	4.2%
8	VOLVO XC60	4.0%
9	BMW XM	3.8%
10	KIA NIRO PLUG-IN HYBRID	3.8%

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## Summary By Manufacturer

### 2023 NEW AUTO SALES BY BRAND FOR THE HOUSTON METROPOLITAN STATISTICAL AREA

MANUFACTURER	THIS MONTH		YEAR TO DATE		2022 YTD		MARKET SHARE				% CHNG 23 VS 22		2023 6 MOS / Q2 *
	RETAIL		TOTAL		RETAIL		2023 YTD		2022 YTD		YEAR TO DATE		
	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	
AMERICAN HONDA	2243	2247	13026	13170	10007	10462	8.1%	7.1%	8.8%	6.5%	30.2%	25.9%	24.8%
BMW GROUP	692	695	5099	5241	4455	4475	3.2%	2.8%	3.0%	2.8%	14.5%	17.1%	12.5%
STELLANTIS (FORMERLY FCA) **	1900	2409	12294	16535	16296	18558	7.6%	8.9%	11.1%	11.7%	-24.6%	-10.9%	-1.3%
FORD MOTOR CO	2764	3021	20899	24693	19578	21368	13.0%	13.3%	13.4%	13.4%	6.7%	15.6%	9.9%
GENERAL MOTORS	3789	4389	27037	31322	22794	25267	16.8%	16.9%	15.6%	15.9%	18.6%	24.0%	18.5%
HYUNDAI KIA GROUP	2523	2686	17803	18924	14143	14746	11.0%	10.2%	9.7%	9.3%	25.9%	28.3%	16.7%
ISUZU	17	19	175	196	94	116	0.1%	0.1%	0.1%	0.1%	86.2%	69.0%	0.0%
JAGUAR LAND ROVER NA	158	158	1466	1467	1168	1179	0.9%	0.8%	0.8%	0.7%	25.5%	24.4%	8.9%
MAZDA	446	464	3208	4056	3048	3128	2.0%	2.2%	2.1%	2.0%	5.2%	29.7%	28.7%
MCLAREN AUTOMOTIVE	2	2	16	16	19	19	0.0%	0.0%	0.0%	0.0%	-15.8%	-15.8%	15.3%
MERCEDES-BENZ USA	633	639	4615	4656	4745	4761	2.9%	2.5%	3.2%	3.0%	-2.7%	-2.2%	-1.7%
MINI	181	181	1012	1012	1044	1217	0.6%	0.5%	0.7%	0.8%	-3.1%	-16.8%	-5.7%
NISSAN NORTH AMERICA	1070	1400	8564	12125	9197	10791	5.3%	6.5%	6.3%	6.8%	-6.9%	12.4%	25.0%
NISSAN NORTH AMERICA	484	490	3522	3557	2965	3033	2.2%	1.9%	2.0%	1.9%	18.8%	17.3%	15.3%
TESLA	856	856	6796	6796	3355	3357	4.2%	3.7%	2.3%	2.1%	102.6%	102.4%	50.0%
TOYOTA MOTOR SALES	3636	4354	25137	29269	24146	26706	15.6%	15.8%	16.5%	16.8%	4.1%	9.6%	-0.7%
VOLVO	122	149	797	941	698	756	0.5%	0.5%	0.5%	0.5%	14.2%	24.5%	18.1%
VW GROUP OF AMERICA	1104	1167	7914	8915	8010	8263	4.9%	4.8%	5.5%	5.2%	-1.2%	7.9%	11.5%
OTHER	238	317	1885	2544	699	858	1.2%	1.4%	0.5%	0.5%	169.7%	196.5%	144.6%
<b>TOTAL</b>	<b>22858</b>	<b>25643</b>	<b>161265</b>	<b>185435</b>	<b>146461</b>	<b>159060</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>10.1%</b>	<b>16.6%</b>	<b>12.9%</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. QUARTELY US SALES REPORTED BY THE MANUFACTURERS MAY DIFFER FROM NUMBERS CALCULATED BY OTHER SOURCES.

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As US National Sales rebound for Q2-2023, while the Houston Region vehicle sales showed no signs of slowing down for the quarter.

General Motors continues its hot streak and again outperformed Toyota during Q2-2023 in Market Share and Total units sold . The Houston Region Total Vehicle Sales (YTD) were up at 16.6% and also up for US National Total Vehicle Sales at 12.9%.

## SAVE THE DATE

### Luncheon

October 5, 2023

Location:

Vic & Anthony's Steakhouse

## STUDENT AUTO TECH COMPETITION

October 15, 2023

Location:

San Jacinto College

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Vic & Anthony's  
STEAKHOUSE





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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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