

Houston Auto Market News

MAY 2023

INSIGHTS TO THE HOUSTON VEHICLE MARKET

Volume 14 Issue 2



Sound Bites

- Q1-2023 Total & Retail Vehicle Sales up from the previous quarter & year. See charts to the right.
- Houston Region 2022 vs 2021 Top 25 Models. See Page 2.

Inside Story

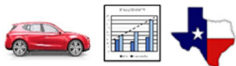
- The Average Retail Sales Price for Q1-2023 hits an all-time high yet again for Q1-2023. See page 5.
- NEW!** Q1-2023 Houston Total Market Share for Electric Vehicle (EV), Hybrid and Plugin Hybrid (PHEV). See page 6.

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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.

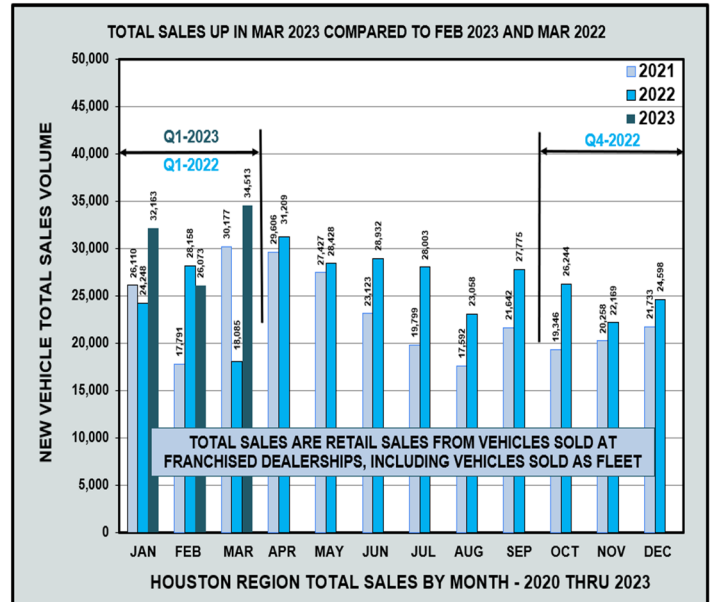
Q1-2023 Total & Retail Sales Were Up Compared To Q4-2022 & Q1-2022

Houston Region Total Sales were up in Q1-2023 at 92,749 units compared to Q4-2022 at 73,011 units sold and up compared to Q1-2022 at 70,491 units.

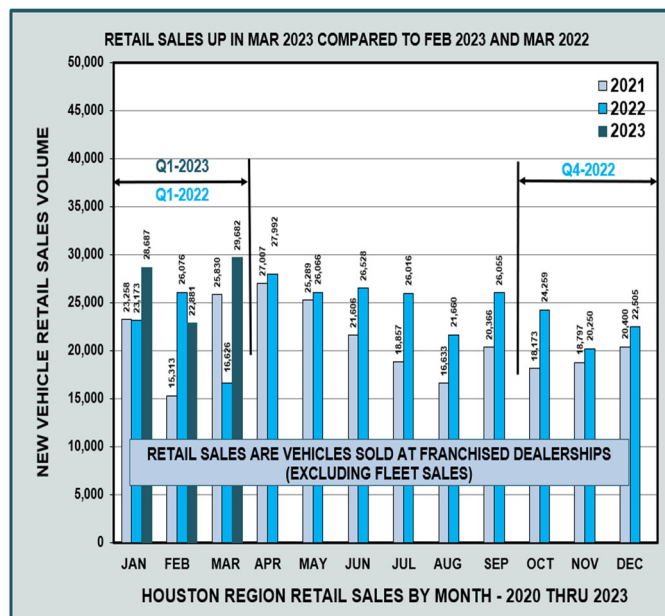
The Houston Region Retail Sales for Q1-2023 were up at 81,250 units compared to Q4-2022 at 67,014 units, and up with 65,875 units sold in Q1-2022.

The Retail Auto Segment sold 16,970 units in Q1-2023 for the Houston Region, up compared to Q4-2022 with 15,057 units sold and up from 14,146 units sold in Q1-2022.

The Retail Truck/SUV Segment sold 64,280 units for Q1-2023, this was up com-



pared to Q4-2022 with 51,957 units sold and up from Q1-2022 with 51,729 units sold.



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

Have the roaring 20's arrived? If Q1-2023 with 92,749 Total Sales is any indication...it has! Not since Q3-2015 have Total Vehicle sales for the Houston Region been this strong. The last time sales outpaced Q1-2023 was Q3-2015 at 105,258 units sold. It has taken some time since the pandemic, microchip shortage and the supply chain issue, perhaps the beginning of 2023 is the turning point for the Auto Industry. The Houston Region has out-sold National sales during the last 3 years and finally National sales are on an upswing as well. The first quarter sales for Houston are up 31.6% vs National sales at 8.4%. Good news to "roar" about.

The Top 25 Model List for 2022 vs 2021

For 2022, 2021, 2020, & 2019 the top 3 models were Pickup Trucks in their current positions.

The Hyundai Tucson, Chevrolet Silverado 2500 & Nissan Altima replaced the Honda Civic, Ford Expedition & Nissan Sentra on the 2022 Top 25.

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SALES - TOP 25 MODELS HOUSTON REGION - 2022

MODEL	VOLUME	MARKET SHARE	2022 RANK	2021 RANK
FORD F-150 PICK UP	11,990	3.9%	1	1
CHEVROLET SILVERADO 1500 PICK UP	9,233	3.0%	2	2
RAM 1500 PICK UP	8,665	2.8%	3	3
TOYOTA CAMARY	7,597	2.4%	4	5
TOYOTA RAV4 SUV	7,449	2.4%	5	4
TOYOTA COROLLA	4,879	2.4%	6	9
TOYOTA HIGHLANDER SUV	4,790	1.5%	7	8
NISSAN ROGUE SUV	4,615	1.5%	8	6
LEXUS RX SUV	4,609	1.5%	9	12
TOYOTA TUNDRA PICK UP	4,356	1.4%	10	21
GMC SIERRA 1500 PICK UP	4,305	1.4%	11	7
FORD EXPLORER SUV	4,013	1.3%	12	16
JEEP GRAND CHEROKEE SUV	3,984	1.3%	13	17
HONDA ACCORD	3,776	1.2%	14	13
CHEVROLET TAHOE SUV	3,754	1.2%	15	22
HYUNDAI TUCSON SUV	3,695	1.2%	16	NEW
JEEP WRANGLER SUV	3,674	1.2%	17	15
HONDA CR-V SUV	3,547	1.1%	18	11
FORD F-250 PICK UP	3,351	1.1%	19	10
CHEVROLET SILVERADO 2500 PICK UP	3,338	1.1%	20	NEW
TOYOTA TACAOMA PICK UP	3,324	1.1%	21	18
MAZDA CX-5 SUV	3,275	1.1%	22	23
TOYOTA 4RUNNER SUV	3,243	1.0%	23	20
RAM 2500 PICK UP	3,186	1.0%	24	14
NISSAN ALTIMA	3,034	0.98%	25	NEW

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The F-150 Pickup has been the leader on the Top 25 Model List since before 2013 for the Houston Region. The Nissan Altima is back on this list after being knock off in 2021. The 2022 Top 25 Model listing includes 9 Pickups, 12 SUVs & 4 Cars, vs 8 Pickups, 12 SUVs & 5 Cars for 2021.

NOTABLE CHANGES TO THE TOP 25 MODEL LIST

- * THE TOP 3 MODELS REMAIN IN CURRENT POSITIONS, 4 YEARS IN A ROW.
- * HYUNDAI TUCSON SUV IS NEW TO THE TOP 25 AT 16TH PLACE.
- * CHEVROLET SILVERADO 2500 PICK UP IS NEW TO THE TOP 25 AT 20TH PLACE.
- * NISSAN ALTIMA BACK ON THE LIST FROM 2020 AT 25TH PLACE.
- * HONDA CIVIC, FORD EXPEDITION AND NISSAN SENTRA FELL OF THE TOP 25.
- * LEXUS RX SUV HAS MOVED UP TO 9TH FROM 12TH PLACE & IN 2021 FROM 16TH PLACE.
- * TOYOTA TUNDRA PICKUP MOVED UP TO 10TH FROM 21ST PLACE.
- * RAM 2500 PICK UP MOVED DOWN TO 24TH FROM 14TH PLACE.
- * GMC SIERRA PICKUP MOVED DOWN TO 11TH FROM 7TH PLACE.
- * TESLA MODEL 3 (ALL ELECTRIC) ALMOST MADE THE TOP 25 MODEL LIST AT 26TH PLACE.

Brand Comparison for the Manufacturers on the Top 25 Model List for the Houston Region

For 2022, General Motors & Hyundai makes gains in Volume & Market Share compared to 2021.

MANUFACTURERS VOLUME & MARKET SHARE HOUSTON REGION - 2022

BRAND	VOLUME	MARKET SHARE
TOYOTA MOTOR CORP	40,247	12.9%
GENERAL MOTORS	20,630	6.6%
STELLANTIS (FORMERLY FCA) *	19,509	6.3%
FORD MOTOR CORP	19,354	6.2%
NISSAN / MITS GROUP	7,649	2.5%
AMERICAN HONDA	7,323	2.4%
HYUNDAI GROUP	3,695	1.2%
MAZDA MOTOR CORP	3,275	1.1%
2022 TOP 25 SUB-TOTAL	121,682	39.1%
ALL OTHERS	189,225	60.9%
2022 TOTAL	310,907	100.0%

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This is a list of the manufacturers that made up 39.1% for the Market Share of the Top 25 List in the Houston Region in 2022 compared to 45.5% in sold in 2021. In 2022, General Motors moved back to the number #2 by Volume & Market Share. The Hyundai Group has made significant gains by moving onto the list and passing The Mazda Motor Group.

The Toyota Market Share in the Houston Region for manufacturers remains the top brand for the last 4 years.

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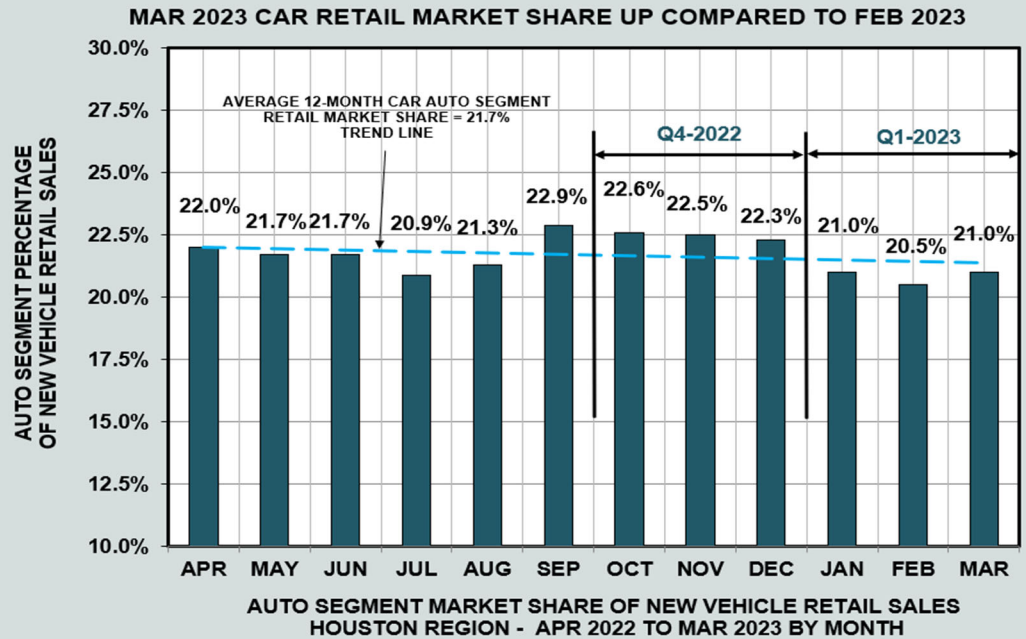
MANUFACTURERS VOLUME & MARKET SHARE HOUSTON REGION - 2021

BRAND	VOLUME	MARKET SHARE
TOYOTA MOTOR CORP	38,208	13.9%
FORD MOTOR CORP	21,749	7.9%
STELLANTIS (FORMERLY FCA) *	18,497	6.7%
GENERAL MOTORS	17,414	6.3%
AMERICAN HONDA	11,660	4.2%
NISSAN / MITS GROUP	7,706	2.8%
MAZDA MOTOR CORP	2,553	0.9%
2021 TOP 25 SUB-TOTAL	117,787	42.9%
ALL OTHERS	156,817	57.1%
2021 TOTAL	274,604	100.0%

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Q1-2023 Retail Auto Market Share Down From Q4-2022 & Q3-2022

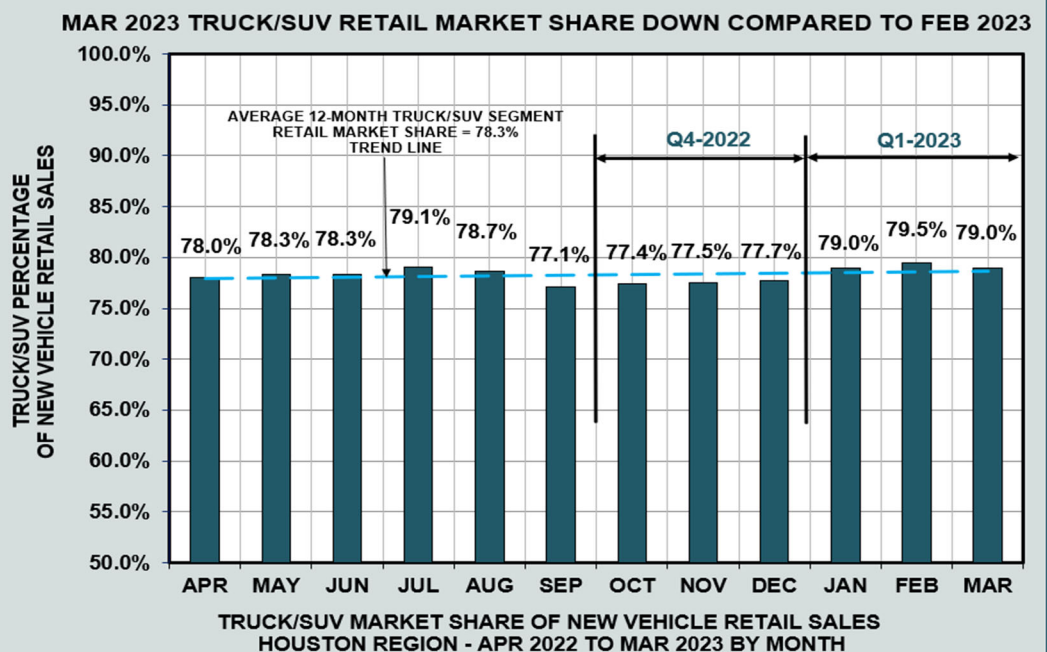
The 12 month average for the Auto Segment Retail Market Share was 21.7%.



The Q1-2023 Auto Segment Retail Market Share decreased from 20.9% compared to Q4-2022 at 22.5%. Q1-2023 was down compared to Q1-2022 at 21.5% for the Houston Region.

Q1-2023 Retail Truck/SUV Market Share Up From Q4-2022 & Q3-2022

The 12 month average for the Truck/SUV Retail Market Share was high at 78.3%.



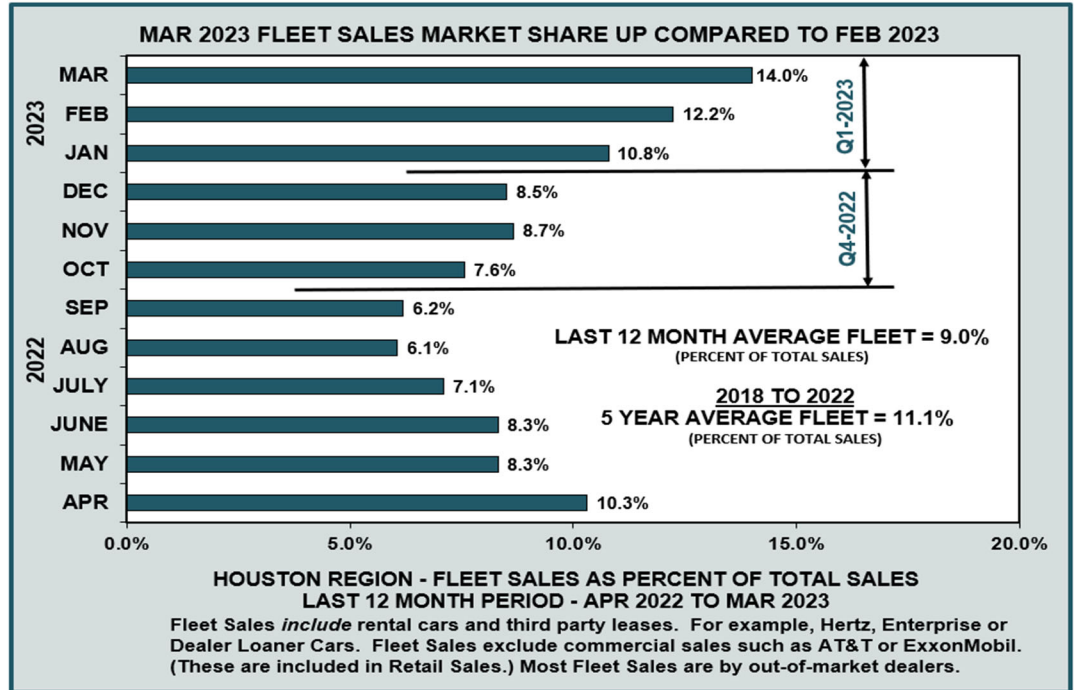
The Q1-2023 Truck/SUV Retail Market Share was up at 79.1% compared to Q4-2022 of 77.5% and up from Q1-2022 at 78.5%.

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Q1-2023 Fleet Sales Market Share Increased From Q4-2022 & Q1-2022

The Average Fleet Sales Market Share for the last 12 Months was 9.0%.

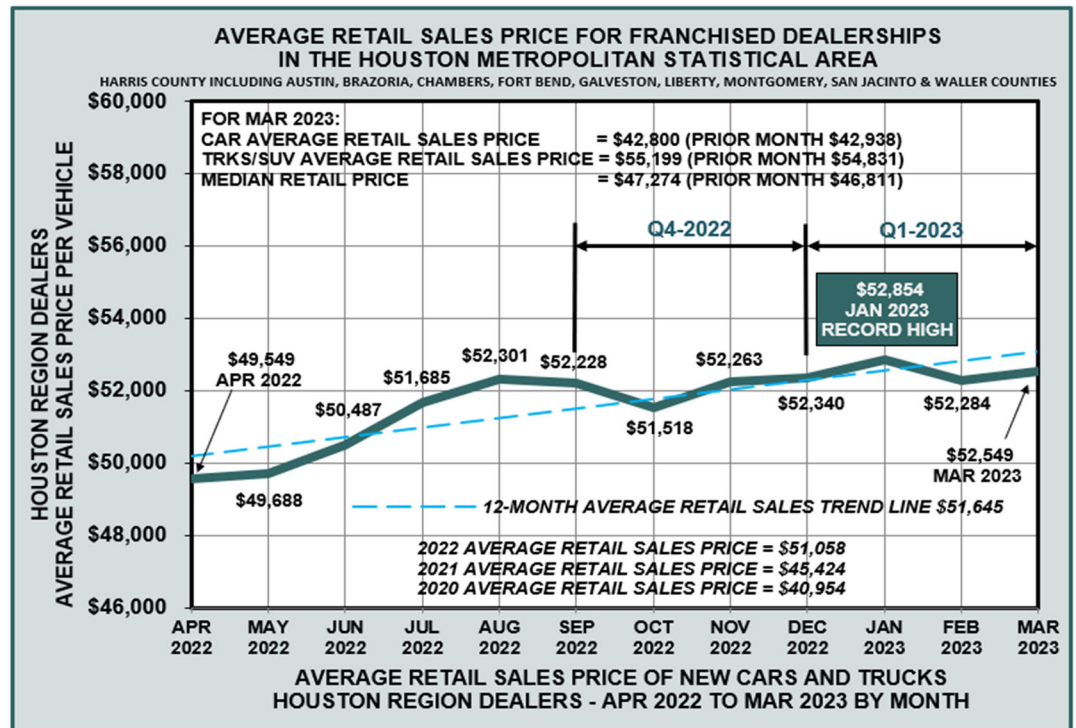


Fleet Sales Market Share was up at 12.3% for Q1-2023 compared to 8.2% in Q4-2022 and up from Q1-2022 at 6.6%. Fleet Sales can be an indicator of general business conditions and confidence. Fleet Sales include rental vehicles and third party leases.

Q1-2023 Average Retail Sales Price Increased vs Q4-2022

The Average Retail Price breaks yet another record for Q1-2023.

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The Average Retail Sales Price for Q1-2023 was \$52,562 up compared to Q4-2022 at \$52,040 and up compared to Q1-2022 at \$50,214. Retail Sales Prices are vehicles sold at franchised dealerships only.

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Q1-2023 Houston Total Market Share for Electric Vehicle (EV), Hybrid and Plug-in Hybrid (PHEV)

In Q1-2023, Electric (EV), Hybrid & Plug-in Hybrids (PHEV) Vehicles account for 14.0% of the Houston Total Market Share.

Electric Vehicles (EV)



Hybrid (Gas/Battery Engine)



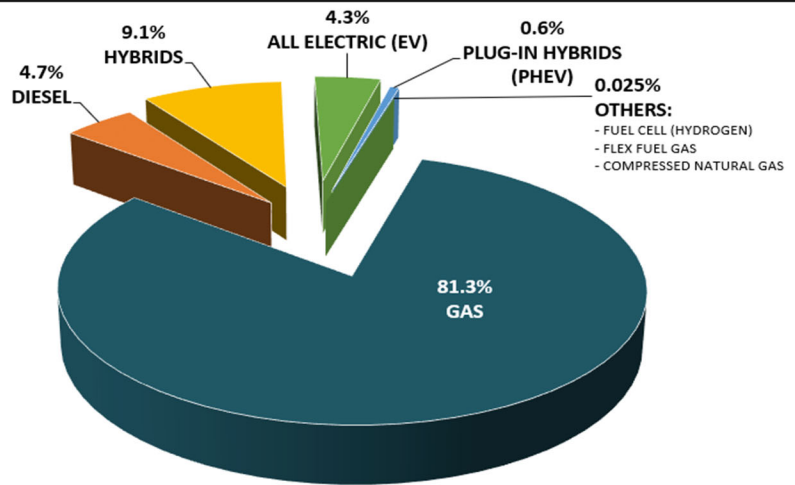
Plug-in Hybrid Electric Vehicle (PHEV)



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Q1-2023 TOTAL MARKET SHARE BY ENGINE TYPE



TOTAL MARKET SHARE
92,749 AUTOS SOLD IN THE HOUSTON REGION (MSA) 2023 YTD

MANUFACTURERS OF EV, HYBRID & PHEV'S

MAKE/BRAND	MKT SHARE
TESLA	20.7%
TOYOTA MOTOR COMPANY	16.6%
FORD MOTOR COMPANY	15.2%
BMW GROUP	9.0%
VW GROUP OF AMERICA	8.0%
MERCEDES-BENZ	6.6%
HYUNDAI GROUP	5.0%
AMERICAN HONDA	4.8%
STELLANTIS (FORMERLY FCA)	4.5%
JAGUAR LAND ROVER NA	3.3%
VOLVO CARS USA	2.6%
RIVIAN	2.3%
GENERAL MOTORS	1.5%
NISSAN NORTH AMERICA	0.5%
SUBARU OF NA	0.2%
MITSUBISHI	0.1%
LUCID	0.1%
POLESTAR	0.1%
MAZDA	0.04%

TOP 10 ELECTRIC VEHICLES (EV)

RANK	MAKE/MODEL	MKT SHARE
1	TESLA MODEL Y	46.9%
2	TESLA MODEL 3	11.1%
3	FORD F-150 LIGHTNING	4.8%
4	RIVIAN R1T	4.1%
5	FORD MUSTANG MACH-E	3.7%
6	VOLKSWAGEN ID.4	3.4%
7	TESLA MODEL X	3.4%
8	RIVIAN R1S	3.1%
9	CHEVROLET BOLT	2.3%
10	AUDI Q4 E-TRON	1.7%

TOP 10 HYBRID VEHICLES

RANK	MAKE/MODEL	MKT SHARE
1	FORD F-150	8.2%
2	HONDA CR-V	6.1%
3	BMW X5	5.6%
4	AUDI Q5	5.4%
5	MERCEDES-BENZ GLE	4.5%
6	TOTOTA TUNDRA	4.4%
7	TOYOTA HIGHLANDER	3.9%
8	BMW X7	3.5%
9	TOYOTA PRIUS	2.8%
10	KIA TUSCON	2.6%

TOP 10 PLUG-IN HYBRID VEHICLES (PHEV)

RANK	MAKE/MODEL	MKT SHARE
1	JEEP WRANGLER	22.9%
2	JEEP GRAND CHEROKEE	21.2%
3	BMW X5	14.5%
4	VOVLO XC90	6.5%
5	AUDI Q5 E-TRON	4.8%
6	CHRYSLER PACIFICA	4.6%
7	TOYOTA RAV4 PRIME	4.1%
8	VOVLO XC60	3.4%
9	KIA NIRO PLUG-IN HYBRID	3.4%
10	MIT OUTLANDER PHEV	3.1%

Summary By Manufacturer

During the month of Q1-2023, the Houston Region's Sales out paced US National Sales by more than triple.

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

TEVAUTO FACTS												
SUMMARY BY MANUFACTURER												
NEW CARS AND TRUCKS REGISTERED IN HOUSTON REGION												
MARCH 2023												
MANUFACTURER	THIS MONTH		YEAR TO DATE		2022 YTD		2023 YTD		2022 YTD		2023 YTD	
	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL	RETAIL	TOTAL
AMERICAN HONDA	2057	2096	5982	6059	4471	4525	7.4%	6.5%	6.8%	6.4%	33.8%	33.9%
BMW GROUP	939	980	2839	2911	2210	2225	3.5%	3.1%	3.4%	3.2%	28.5%	30.8%
STELLANTIS (FORMERLY FCA) **	2092	2959	5747	7764	7486	8334	7.1%	8.4%	11.4%	11.8%	-23.2%	-6.8%
FORD MOTOR CO	4082	4850	11270	13622	9420	10165	13.9%	14.7%	14.3%	14.4%	19.6%	34.0%
GENERAL MOTORS	4888	5527	13810	15256	10004	10873	17.0%	16.4%	15.2%	15.4%	38.0%	40.3%
HYUNDAI KIA GROUP	3262	3379	8764	9276	5467	5716	10.8%	10.0%	8.3%	8.1%	60.3%	62.3%
ISUZU	36	44	97	107	57	70	0.1%	0.1%	0.1%	0.1%	70.2%	52.9%
JAGUAR LAND ROVER NA	292	292	833	833	543	554	1.0%	0.9%	0.8%	0.8%	53.4%	50.4%
MAZDA	523	815	1482	1896	1339	1405	1.8%	2.0%	2.0%	2.0%	10.7%	34.9%
McLAREN AUTOMOTIVE	0	0	9	9	11	11	0.0%	0.0%	0.0%	0.0%	-18.2%	-0.3%
MERCEDES-BENZ USA	843	845	2331	2337	2069	2076	2.9%	2.5%	3.1%	2.9%	12.7%	12.6%
MINI	193	193	517	517	446	577	0.6%	0.6%	0.7%	0.8%	15.9%	-10.4%
NISSAN NORTH AMERICA	1651	2687	4285	5915	4196	4728	5.3%	6.4%	6.4%	6.7%	2.1%	25.1%
SUBARU	564	572	1836	1847	1255	1275	2.3%	2.0%	1.9%	1.8%	46.3%	44.9%
TESLA	1488	1488	3329	3329	1555	1557	4.1%	3.6%	2.4%	2.2%	114.1%	113.8%
TOYOTA MOTOR SALES	4735	5458	12669	14798	11117	12011	15.6%	16.0%	16.9%	17.0%	14.0%	23.2%
VOLVO	146	155	426	456	342	369	0.5%	0.5%	0.5%	0.5%	24.6%	23.6%
VW GROUP OF AMERICA	1378	1603	3931	4569	3551	3632	4.8%	4.9%	5.4%	5.2%	10.7%	25.8%
OTHER	513	570	1093	1248	336	388	1.3%	1.3%	0.5%	0.6%	225.3%	221.6%
TOTAL	29682	34513	81250	92749	65875	70491	100%	100%	100%	100%	23.3%	31.6%

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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For the first time in years, General Motors has out performed Toyota during March 2023 in Market Share and Total units sold . The Houston Region Total Vehicle Sales (YTD) were up at 31.6% and also up for US National Total Vehicle Sales at 8.4%.

SAVE THE DATE

STUDENT AUTO TECH COMPETITION

October 15, 2023

Location:

San Jacinto College



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