



# The U.S. Auto Market

# U.S. New Vehicle Sales, by Year

Consumer demand by category of new vehicle had a major shift. Light duty trucks as a percentage of total sales went from 51% in 2010 to 77% in 2021.

Year	New cars	Light-duty trucks	Total light-duty vehicles	Light-duty trucks as % of total
2010	5,635,400	5,919,100	11,554,500	51.2%
2011	6,089,300	6,644,900	12,734,200	52.2%
2012	7,242,800	7,199,000	14,441,800	49.8%
2013	7,582,500	7,942,300	15,524,800	51.2%
2014	7,688,900	8,748,100	16,437,000	53.2%
2015	7,525,023	9,861,024	17,386,047	56.7%
2016	6,873,158	10,591,862	17,465,020	60.6%
2017	6,079,584	11,055,149	17,134,733	64.5%
2018	5,304,347	11,910,816	17,215,163	69.2%
2019	4,790,846	12,317,310	17,108,156	72.0%
2020	3,408,778	11,055,157	14,463,935	76.4%
2021	3,339,476	11,587,457	14,926,933	77.6%



**3,339,476**  
NEW-CAR SALES



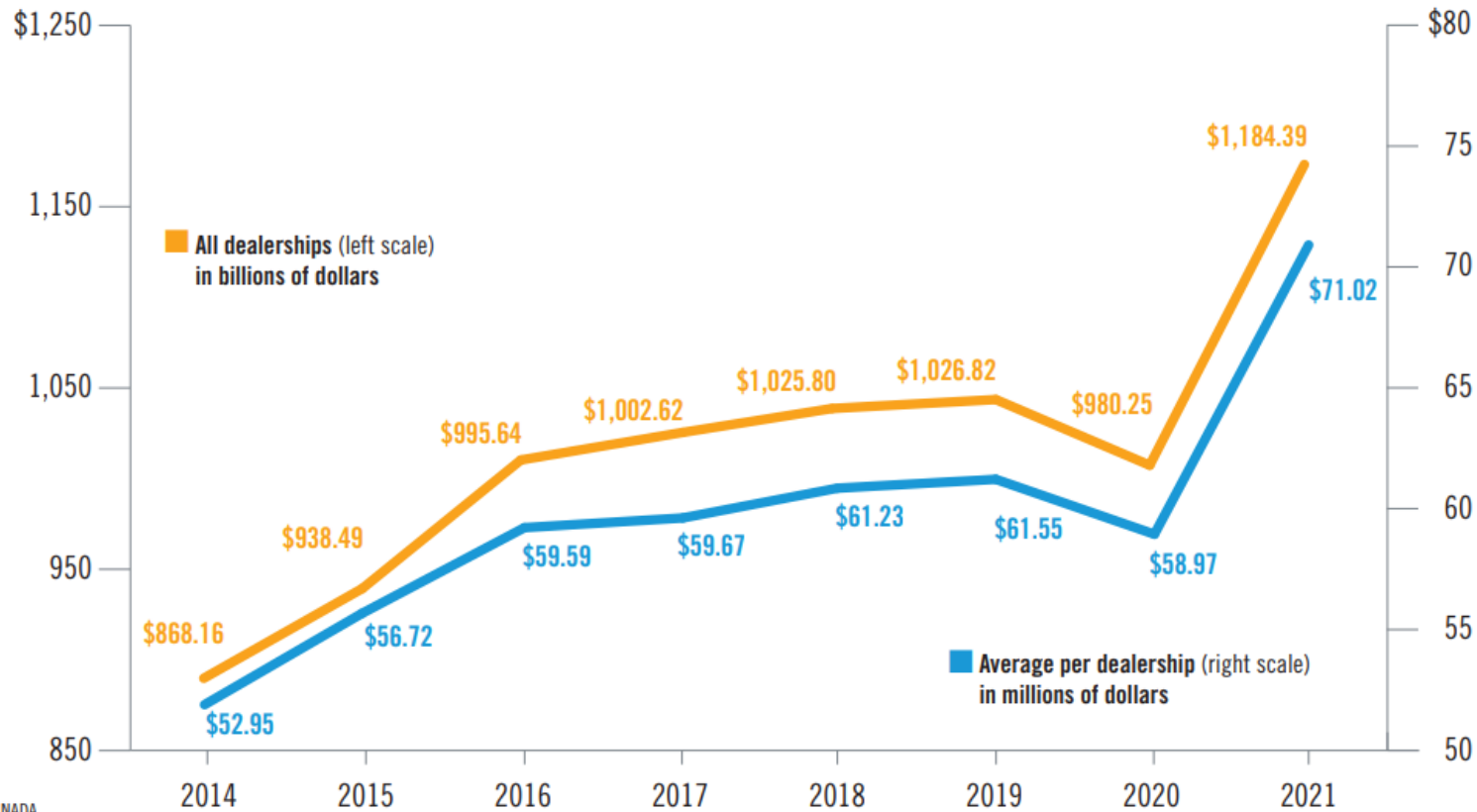
**11,587,457**  
NEW LIGHT-DUTY  
TRUCK SALES

**14,926,933**

TOTAL LIGHT-DUTY

Source: WardsAuto, Automotive News Data Center

# U.S. Total Sales of New Vehicle Dealerships, by Year

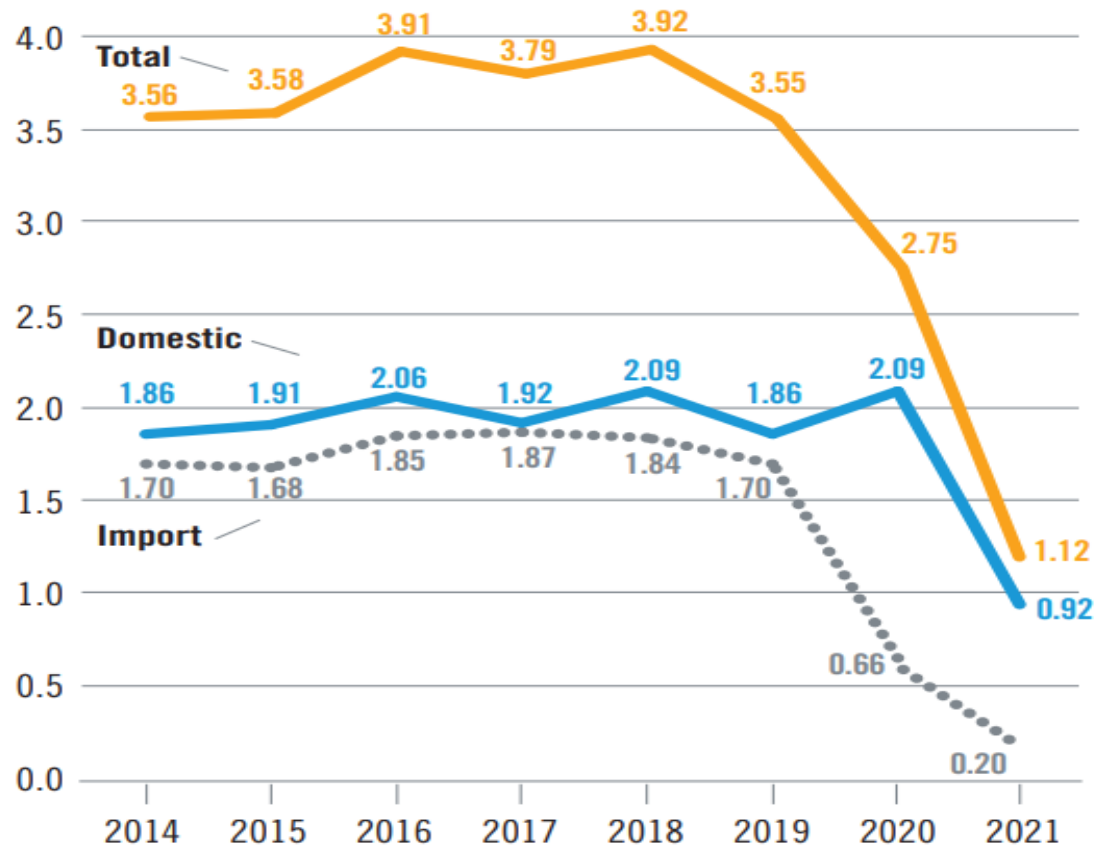


Source: NADA

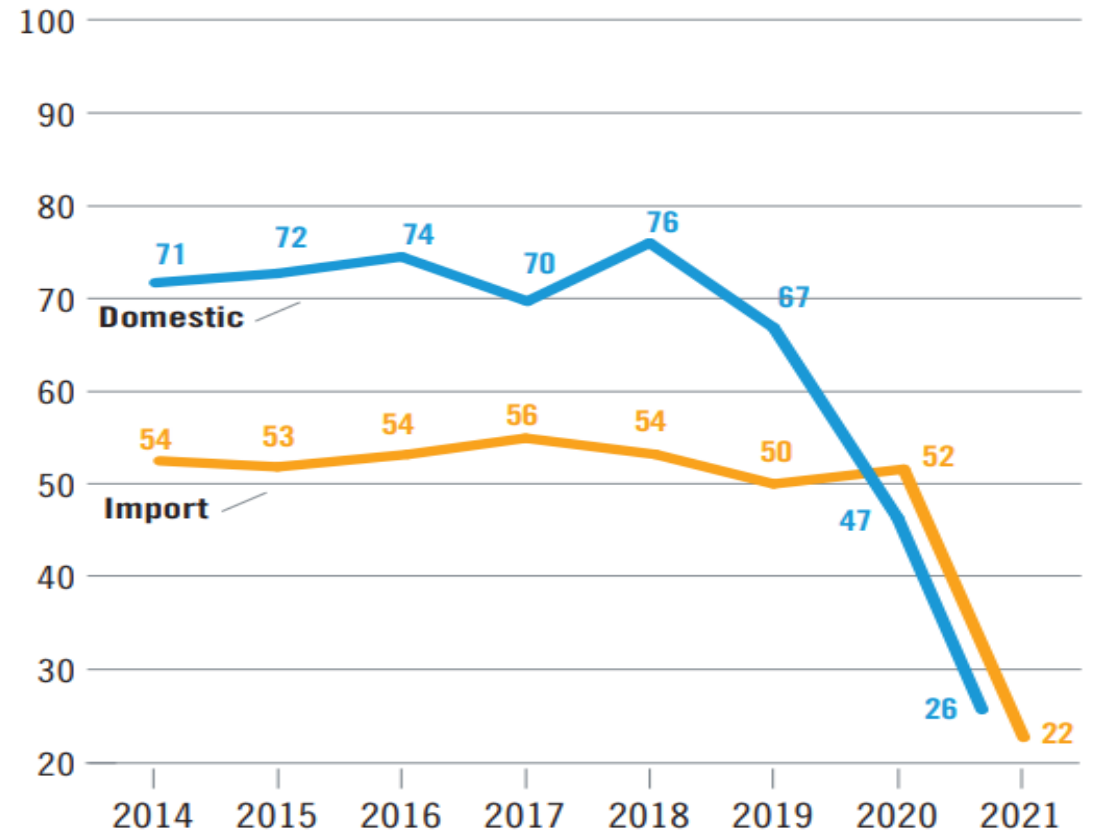
**Average per dealership sales took a huge jump in 2020, from \$59M to \$71M in 2021.**

# U.S. New Vehicle Inventories and Days' Supply, by Year

Inventory (in millions)



Days' supply



Source: WardsAuto, Automotive News Data Center

# U.S. Average Number of New Vehicles Sold Per Dealership and Selling Price, by Year

Year	New vehicles sold	Average retail selling price
2014	1,003	\$32,824
2015	1,051	\$33,456
2016	1,045	\$34,449
2017	1,020	\$34,670
2018	1,028	\$35,608
2019	1,026	\$36,824
2020	870	\$38,961
2021	895	\$42,379

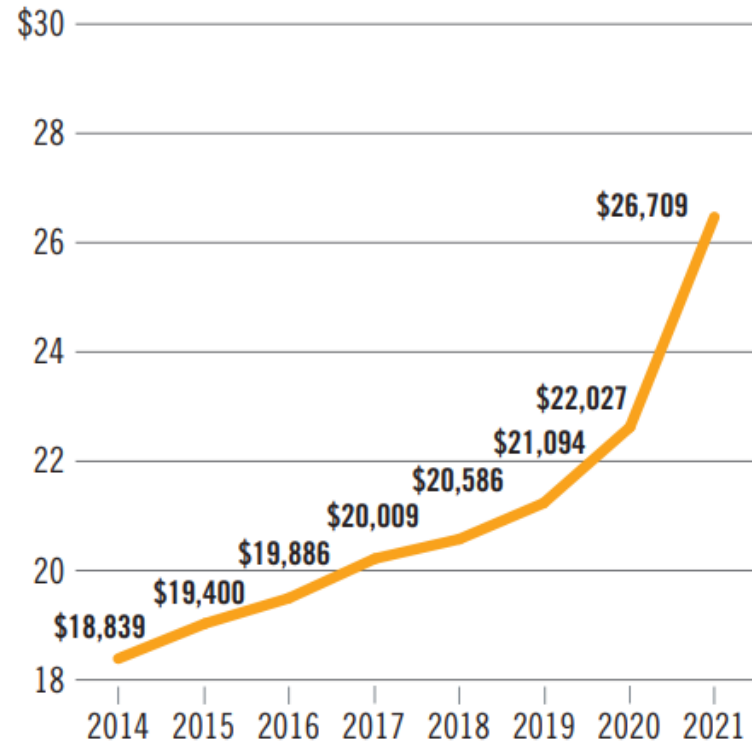
**Average new vehicles sold dropped -11% from 2014 to 2021, retail selling price is up.**

Source: WardsAuto, NADA

# U.S. Used Vehicle Department, 2021

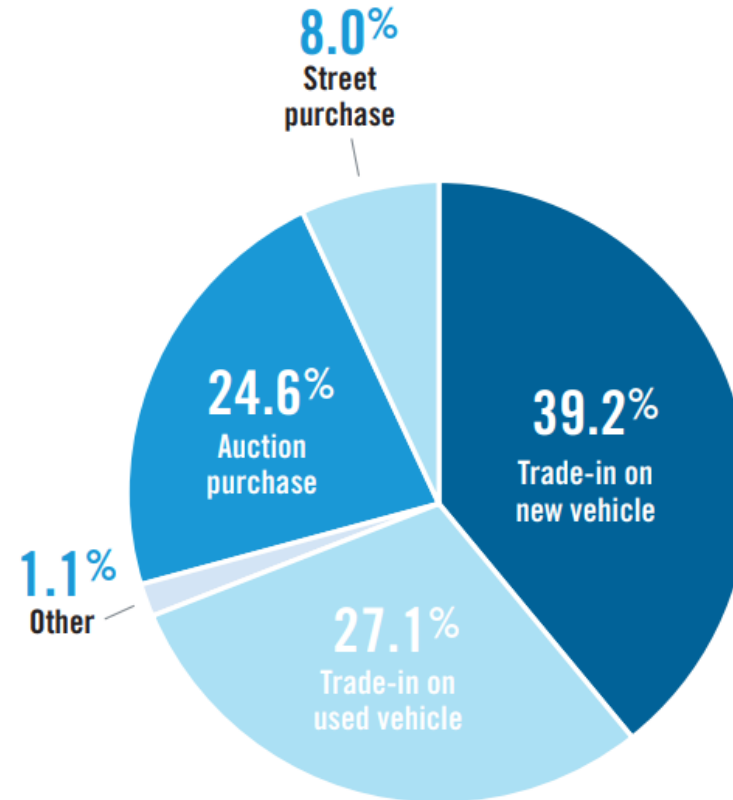
## Average Retail Selling Price of Used Vehicles Sold by New-Vehicle Dealerships, by Year

In thousands



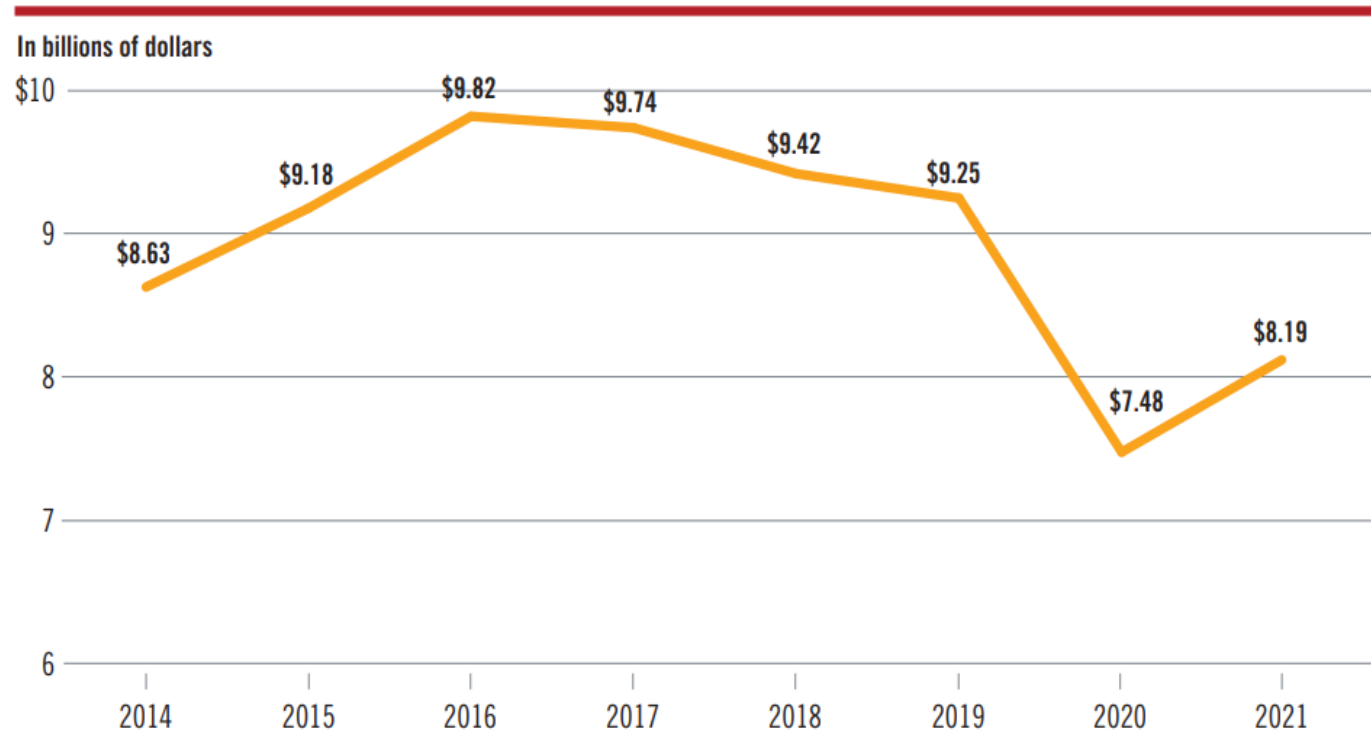
Source: NADA

## Sources of Used Vehicles Retailed by New-Vehicle Dealerships, 2021



Source: NADA

# U.S. Total Dealership Advertising Expenditures, by Year

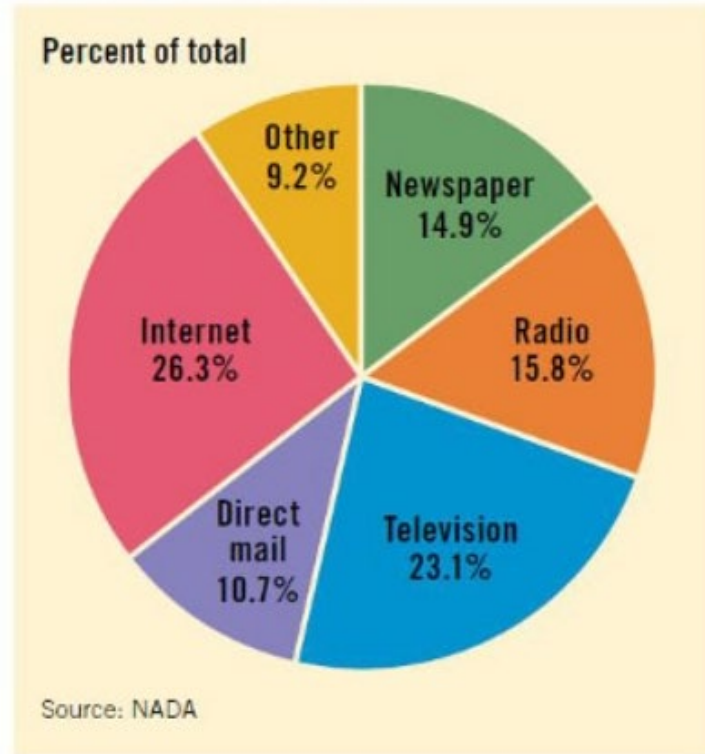


Source: NADA

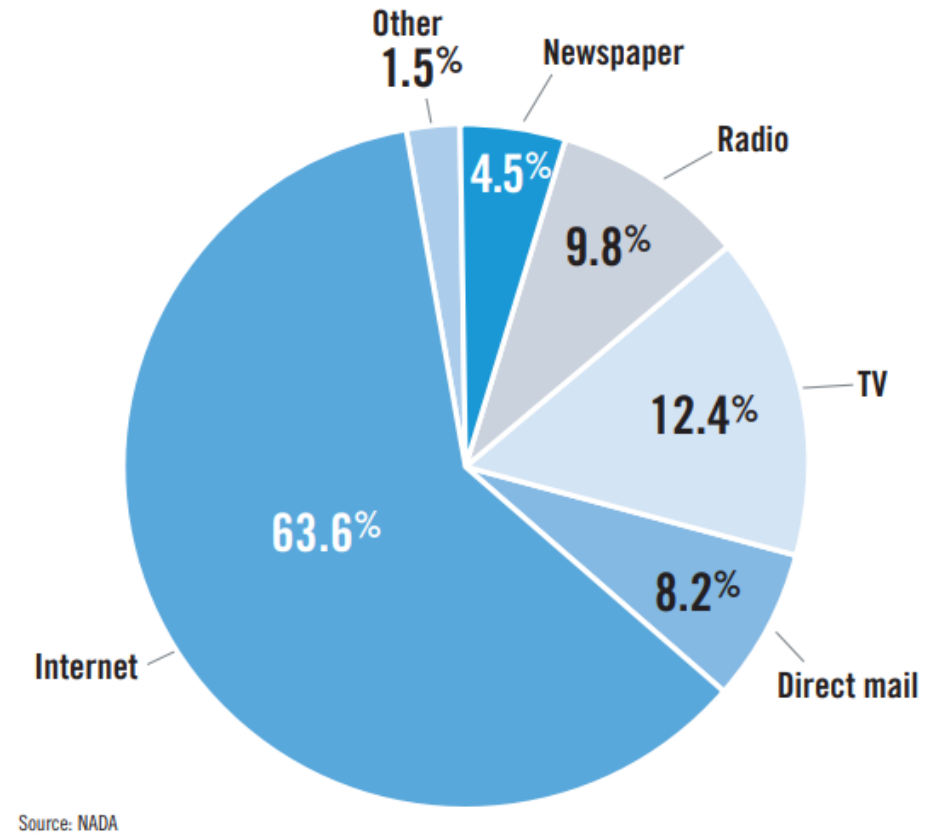
Year	U.S. Average Dealership Advertising per New Unit Sold
<b>2014</b>	\$607
<b>2015</b>	\$606
<b>2016</b>	\$633
<b>2017</b>	\$629
<b>2018</b>	\$624
<b>2019</b>	\$640
<b>2020</b>	\$582
<b>2021</b>	\$602

# U.S. Dealership Advertising, 2021

## Advertising expenditures by medium, 2014



## Estimated Advertising Expenditures by Medium, 2021

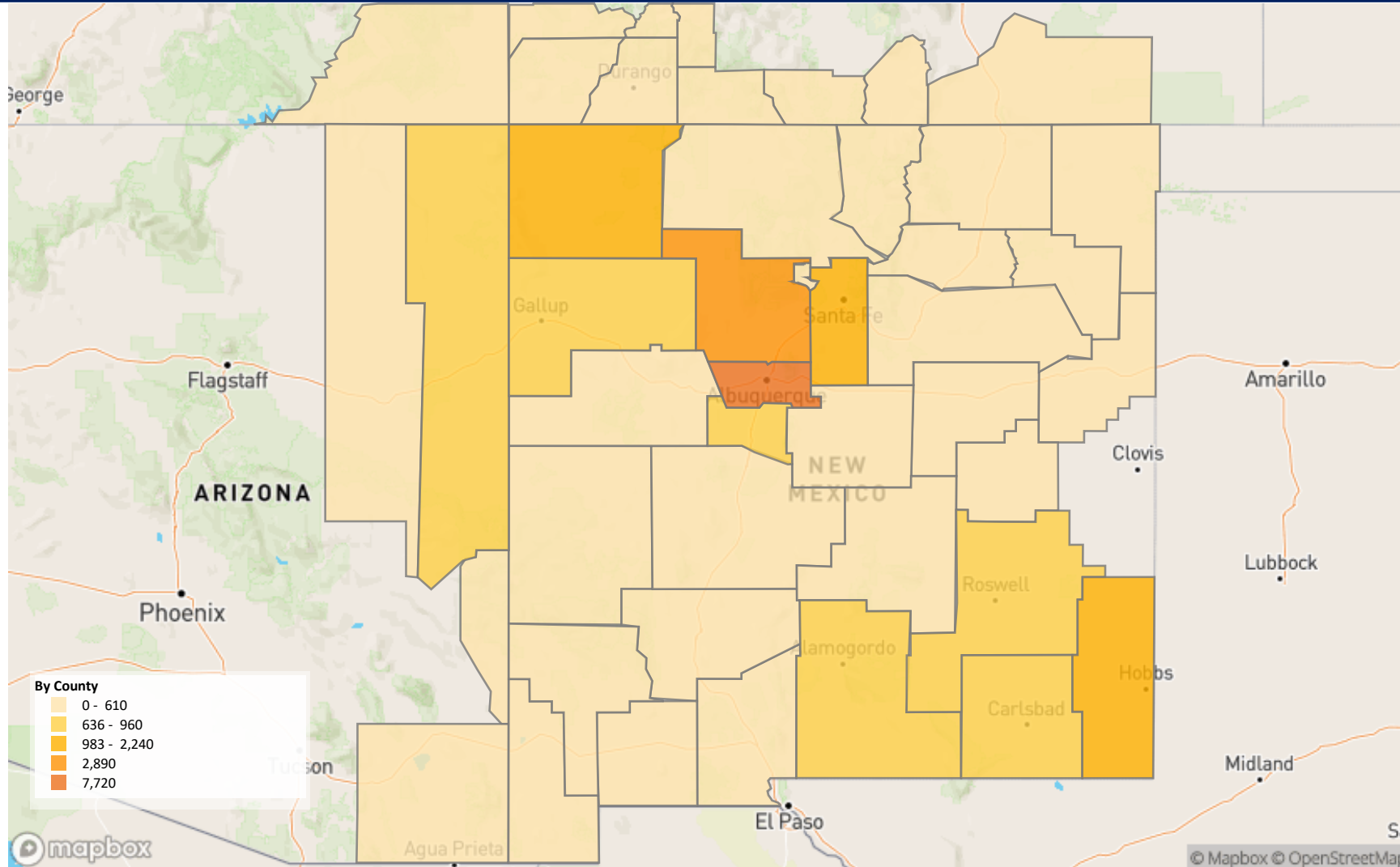






# The NM Auto Market

# NM New Vehicle Sales, by County CYTD



# NM New Vehicle Sales, by Make CYTD

Make	Jan-May 2022 New Registrations	Make	Jan-May 2022 New Registrations	Make	Jan-May 2022 New Registrations
TOYOTA	3,834	BMW	329	GENESIS	35
FORD	3,524	LEXUS	297	JAGUAR	10
CHEVROLET	2,630	MERCEDES	242	RIVIAN	6
NISSAN	1,653	BUICK	176	FIAT	5
JEEP	1,614	AUDI	155	MASERATI	5
HONDA	1,423	ACURA	149	ALFA ROMERO	5
GMC	1,260	MITSUBISHI	149	BENTLEY	5
KIA	1,122	CADILLAC	135	POLESTAR	5
RAM	1,121	LINCOLN	130	LAMBORGHINI	3
HYUNDAI	1,117	VOLVO	111	LUCID	2
SUBARU	1,109	CHRYSLER	104	GEM	2
MAZDA	479	LAND ROVER	86	ROLLS ROYCE	1
TELSA	410	PORSCHE	64	ASTON MARTIN	1
VOLKSWAGEN	407	MINI	59		
DODGE	360	INFINITI	55		

# NM New Vehicle Sales, by Dealer CYTD

Dealer Name	Jan-May 2022 New Registrations
LHM AMERICAN TOYOTA ABQ	1,121
RELIABLE NISSAN	839
LHM TOYOTA ABQ	779
RICH FORD SALES INC	665
MELLOY NISSAN	636
LHM CHRYSLER JEEP DODGE ABQ	546
POWER FORD	533
TOYOTA OF SANTA FE	488
CHALMERS FORD	470
GARCIA HONDA	452
SUBARU OF SANTA FE	438
LHM HYUNDAI ABQ	393
UNIVERSITY VOLKSWAGEN	380
PITRE KIA	362
PERFECTION HONDA	354
LHM CASA CHRYSLER JEEP	339
LITHIA CHRYSLER JEEP DODGE OF SF	337
GARCIA SUBARU NORTH	325
AMIGO CHEVROLET	314
DURANGO FORD	305
LARRY H MILLER CASA CHEVROLET	293
MELLOY DODGE RAM FIAT	277
FIESTA KIA	277
GALLES CHEVROLET COMPANY	266
FIESTA SUBARU	264

Dealer Name	Jan-May 2022 New Registrations
LARRY H MILLER SW HYUNDAI ABQ	256
ZIEMS FORD CORNERS INC	240
PERMIAN CHEVROLET BUICK GMC CADILLAC	224
PITRE BUICK GMC	220
CHEVROLET CADILLAC OF SANTA FE	213
SANDIA BMW MINI MOTORCYCLES	213
QUALITY BUICK GMC INC	205
LEXUS OF ALBUQUERQUE	198
CAPITOL FORD	194
HORACE HYUNDAI	181
TATE BRANCH DODGE CHRYSLER JEEP	172
HI COUNTRY KIA	164
ROSWELL TOYOTA	160
WEBB CHEVROLET TOYOTA	157
MELLOY HONDA	157
WEBB AUTOMOTIVE GROUP INC	144
HI COUNTRY BUICK GMC	143
MELLOY FORD	142
MERCEDES BENZ AUDI PORSCHE OF ABQ	142
AMIGO TOYOTA	140
SANTA FE KIA	140
MELLOY CHRYSLER JEEP DODGE RAM	140
MOREHART MURPHY SUBARU	137
MOREHART MURPHY REGIONAL AUTO CENTER	137
RICHLAND CHEVROLET	131

# NM New Vehicle Sales, by Dealer State YOY

**17%** of new vehicle customers purchased their vehicle thru a dealer outside of New Mexico!

Dealer State	2020 Jan-May New Registrations	2020 Jan-May %	2021 Jan-May New Registrations	2021 Jan-May %	Jan-May 2022 New Registrations	2022 Jan-May %
NM	17,994	83.0%	26,139	81.2%	19,493	79.9%
OUTSIDE OF NM	3,374	15.6%	5,580	17.3%	4,232	17.4%
UNKNOWN	300	1.4%	472	1.5%	664	2.7%
<b>Jan-May Total</b>	<b>21,668</b>	<b>100.0%</b>	<b>32,191</b>	<b>100.0%</b>	<b>24,389</b>	<b>100.0%</b>

**UNKNOWN INCLUDES NON-PARTICIPATING MAKES**

Aston Martin, BMW, Bugatti, Ferrari, Genesis, Lotus, Maserati, Mercedes-Benz, Mini, Rolls Royce, Saab, Smart



**The Road Ahead**

**The Road Ahead**

**Vintage Video**

**Kia Video**

**Audi Video**

**Hyundai Video**

# The Road Ahead...

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## Customers are looking for an adapted dealer role in a new multichannel landscape

- 'Point of sale' stores need to develop into 'point of contact' stores
- Establish closer relationships with their customers, investing in enhanced customer analytics
- Seamless customer journey that combines both the physical and digital world
- Electric Vehicles - BEVs, EVs, PHEVs, HEVs
- Used Vehicle Market



**Thank You!**