

Ford Bronco surge helps automaker's 2nd quarter sales growth



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Detroit Free Press

Ford Motor Co. sold more vehicles in the U.S. during the second quarter this year than in 2021, bucking the industry trend.

In the months of April, May and June, Ford sold 483,688 vehicles — helped by a Bronco surge — for a 1.8% overall quarterly sales increase over a year ago.

Other vehicles that contributed included the Mustang Mach-E, Edge, Explorer and Maverick:

- Bronco went from 801 to 31,269. Up 3,803.7%
- Mach-E went from 6,361 to 10,941. Up 72%
- Edge went from 17,205 to 25,041. Up 45.5%
- Explorer went from 52,997 to 60,181. Up 13.6%

- Maverick, launched in 2021, sold 19,508

Erich Merkle, Ford U.S. sales analyst, told the Free Press that customers placing orders for vehicles has helped with delivery flow. He spotlighted the major contrast between Ford's 1.8% sales growth versus the overall industry's 20.4% sales drop.

"A lot of it has to do with inventory flow. The supply constraints and chip constraints are real and the situation remains really fluid," he said Tuesday. "We're working as quickly as we can to convert those placed orders to sales and deliver vehicles to customers."

Meanwhile, sales of the Ford F-Series, which is the primary moneymaker for the company, saw just 0.3% growth year-over-year to 158,644. But a highlight hidden in this data point is that Ford is now the top electric truck maker, selling 2,296 F-150 Lightning trucks this quarter and 1,837 in June alone.



Ford F-650/750 truck sales climbed 2.1% to 3,130 and Transit Vans up 1.5% to 24,617.

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While the Lincoln Navigator dropped 11% from 4,396 to 3,902, the MKC/Corsair and Nautilus/MKX saw double-

digit percentage increases; from 6,393 to 7,094 and 6,055 to 6,766 respectively. The Aviator held strong, rising from 5,770 to 5,983.

Because of the ongoing global supply chain crisis and semiconductor chip shortage, automakers, including Ford, have had to ration supplies and focus on certain products.

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Ford sales were hit hard by a chip disruption caused by a power surge and fire at Japanese chipmaker Renesas Electronics in March 2021.

Fewer Rangers, Expeditions sold

Sales plummeted for:

- Mustang, down 16.5% to 12,258
- Bronco Sport, down 20.7% to 29,460
- Escape, down 23.7% to 33,958
- Expedition, down 48% to 13,129
- Ranger, down 52.6% to 16,201
- E-Series, down 21.1% to 5,336

- Transit Connect, down 27.6% to 6,750

EcoSport, which the company is phasing out, saw sales drop 29.3% to 9,498.

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By comparison, General Motors and Toyota Motor North America saw a decline in U.S. sales during the second quarter but still sold more vehicles than Ford. The same goes for Stellantis.

GM, Toyota, Stellantis sell more

GM's second-quarter U.S. sales were down 15.4% to 582,401 vehicles compared with the 688,236 vehicles it sold in the year-ago period, the Free Press reported Friday.

Toyota reported for the second quarter its U.S. sales dropped 22.9% to 531,105, according to data released Friday.

The U.S. sales slide continued at Stellantis with a 16% drop to 408,521 vehicles in the second quarter of 2022, compared with the same period the prior year.

It's the fourth down quarterly report in a row for Stellantis, the Free Press reported Friday.

June has been key

Michelle Krebs, executive analyst for Cox Automotive, said new vehicle sales overall were "very weak" in June, below industry forecasts.

"Asian brands were particularly constrained by low to no inventory. Detroit brands had far better inventory but sales may be suffering due to the impact of inflation and higher interest rates on consumers," she said.

While the industry is seeing a dip in sales, Ford actually outshone its competitors in the month of June. Ford spokesman Said Deep said in a news release:

- Ford sales went up 31.5% compared with an industry decline of 11%.
- Demand remains strong, with a record rate of 50% of retail sales coming from previously placed orders.
- F-Series sales were up 26.3% over a year ago in June, representing 37.9% of Ford's overall sales mix — up from 32% in May.

- Ford brand electric vehicle sales jumped 77%, making Ford the second-best-selling brand of electric vehicles behind Tesla for the month of June and the first half of the year.

Ford total pickup sales, including F-Series, Ranger and Maverick were up 26.3% over a year ago with total pickups sales of 66,663.

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Ford's total pickup share gained approximately 7 percentage points over last year — at 29% in June, Deep said in a news release. "This is the highest share of any brand in the total pickup segment."

Outperforms market

The data for the month is notable, with Ford posting a gain while competitors saw a drop in sales, Krebs said. SUV sales have been key to Ford's strategy.

"The Ford F-Series, which has seen improved inventory, held its own. Interesting that the Ford Maverick outsold the Ranger," Krebs said. "The Maverick clearly is eating into Ranger sales. With high gas prices, the Maverick's hybrid powertrain is particularly attractive."

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