

# April 2009 Hybrid Market Dashboard

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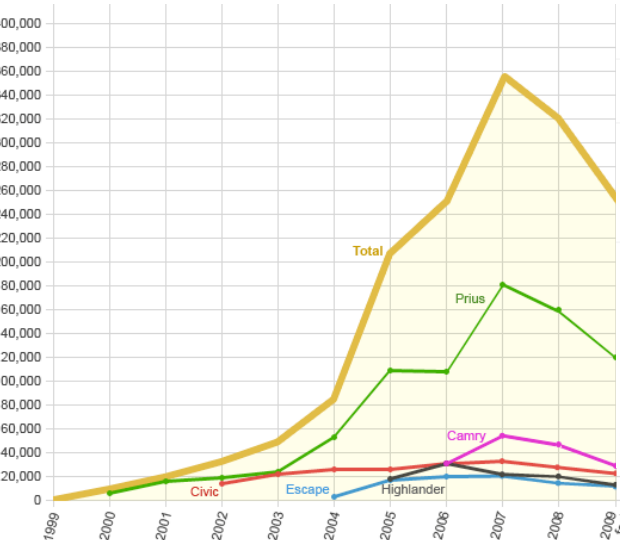
## Honda on the Move

April's hybrid sales totaled 21,735 units, up slightly from the previous month but almost 50 percent below last year's levels. To put things in perspective, Prius alone sold 21,757 units in April 2008. Today, the combined sales of all 20 hybrid models on the market barely reach that same mark.

Of course, it's not just hybrid sales that are suffering. Sales of all vehicles are off 34 percent from last year as consumers remain wary of making major purchases in an unsteady economy.

Clearly, the crisis in the automotive industry continues. But is there opportunity in this crisis? At least one automaker thinks so. After launching its redesigned Insight sedan in March, Honda has been ramping up sales volumes of both of its hybrid models. The company's market share in the April 2008 US hybrid market reached 25 percent—the highest level since 2004. Although sales expectations for the Insight have been scaled back, Honda still expects to sell at least 60,000 Insights to American car buyers this year. The Insight has become a runaway success in Japan, where it was the number one top selling car last month—the first hybrid to ever occupy that spot. While consumer tastes and fuel prices in Japan differ substantially from those in the US (and Toyota is likely to be a fierce competitor for hybrid sales in Japan and elsewhere), Honda's Insight volumes in the Japanese market suggest that the company is serious about being a major player in hybrid vehicles.

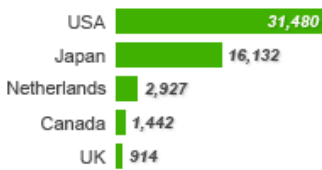
Like all automakers, Honda is suffering. The company announced a \$1.1 billion loss last quarter, its first quarter in the red since the mid-1990s. But Honda's US sales chief suggests that, although fewer people are shopping for vehicles, those who are may be more likely to visit Honda showrooms in this recessionary environment. This is due to Honda's reputation for quality and reliability, which leads many car buyers to view the brand as a "safe harbor" during difficult times. And Honda's Japanese CEO, Takeo Fukui, has stated publicly that he believes US sales have reached bottom and are due to begin rising again soon. If he is correct, Honda will be well positioned with new hybrid models, ambitious sales targets, and additional production capabilities (including a joint venture with battery manufacturer GS Yuasa to produce lithium ion batteries for future models).



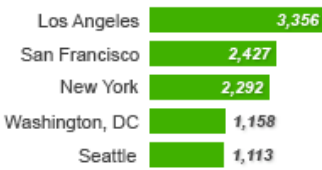
## 2009 global hybrid registrations



### Top 5 global hybrid markets



### Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

## US Sales

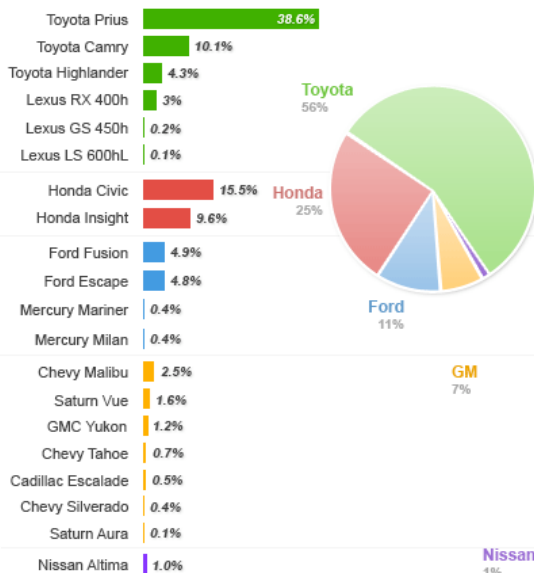
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (April 2009): **21,735**

### US Hybrid Sales for April 2009

Model	Units	vs. 02/09	vs. 03/08
Prius	8,385	-6.0%	-61.5%
Camry	2,198	-13.9%	-67.1%
Highlander	933	-10.0%	-63.8%
RX400h	655	-43.8%	-59.7%
LS600hL	19	-24.0%	-84.4%
GS450h	33	-21.4%	-59.8%
Civic	3,361	17.1%	-22.3%
Escape	1,049	-13.4%	-37.6%
Mariner	85	-39.3%	-62.2%
Yukon	147	-14.1%	199.4%
Malibu	547	0.0%	n/a
Vue	338	-6.6%	745.0%
Tahoe	261	-14.1%	278.4%
Aura	31	19.2%	675.0%
Altima	222	-73.4%	-72.3%
Escalade	115	-14.1%	n/a
Silverado	95	39.7%	n/a
Fusion	1,073	166.9%	n/a
Milan	92	87.8%	n/a
Insight	2,096	268.4%	n/a
All hybrids	21,735	1.4%	-45.7%
All vehicles	819,817	-4.4%	-34.3%

### U.S. Hybrid Sales for April 2009 by Manufacturer and Model



## Regional Data

Curious where hybrid buyers live? We present the data in two ways. First, we list the 15 cities and states that boast the largest numbers of new hybrids on their roads within the past year. For example, residents in the New York City area put over 8,000 new hybrids on the road in 2007. Second, we adjust for population and look at hybrids per person (in states) or per household (in metro areas). This lets us include cities like Portland, OR: a city that has fewer overall vehicles (and thus fewer hybrids) but has more hybrids per capita than anywhere else.

### States with the Most Hybrid Sales

Rank	State	New Hybrids*
1	California	7,385
2	Florida	1,832
3	Texas	1,817
4	New York	1,679
5	Illinois	1,360

### Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	Washington	0.290
2	District of Columbia	0.210
3	California	0.200
4	Colorado	0.160
5	Minnesota	0.160
U.S. State Average		0.1

### Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	3,356
2	San Francisco	2,427
3	New York	2,292
4	Washington DC	1,158
5	Seattle	1,113

### Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	1.090
2	San Francisco	1.030
3	Seattle	0.650
4	San Diego	0.610
5	Los Angeles	0.590
U.S. Metro Area Average		0.200

\*Registrations CYTD February 2009