

December 2009 Hybrid Market Dashboard

read more online at <http://www.hybridcars.com/market-dashboard.html>

December 2009: A Hybrid Recovery?

The final tally of hybrid sales for 2009 comes in at 290,272 units—not bad for a year in which auto sales imploded. Hybrid sales were off by 8 percent compared to 2008, while the overall market fell by 21 percent. The total market share of hybrid gas-electric vehicles was 2.8 percent.

How did hybrids manage to maintain a decent sales performance in 2009, when they are more expensive than comparable conventional models, and gas prices were modest? The answer is new product introductions, including the Ford Fusion Hybrid, Honda Insight, and Lexus HS250h. Sales of all the existing popular hybrid models took a tumble, but the new models softened the blow to the segment.

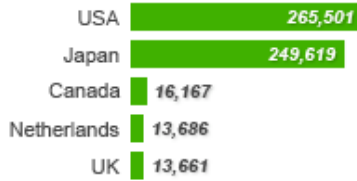
The expected growth of hybrids in 2010 will benefit from even more new models, as well as an improved market, and higher production output on popular models like the Toyota Prius. We expect the share of market to easily surpass 3 percent next year, as it climbs approximately one point a year throughout the decade. There will be casualties along the way—particularly hybrid models from General Motors, such as the Chevy Malibu Hybrid, and the Saturn Vue and Saturn Aura hybrids. These models are either dead or will soon be killed off. These cancellations will have limited impact on the market, because they never made more than a blip on the sales radar in the first place.

The arrival of plug-in hybrids and electrics makes it difficult to forecast hybrid sales for 2010. What impact will these electric-drive cars have on conventional hybrids? Will buyers waiting for a more robust electric drive hold off on a hybrid purchase in 2010, until plug-in technology arrives? Will the new models simply displace sales of conventional models? Or will plug-in cars fuel growth in all greener advanced technology vehicles? With the right economic conditions and government incentives—and compelling new models coming to market—sales of hybrid and electric cars could exceed the rosiest predictions

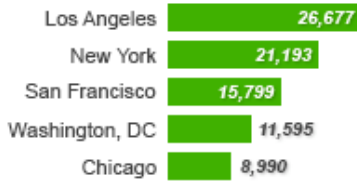
2009 global hybrid registrations



Top 5 global hybrid markets



Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

US Sales

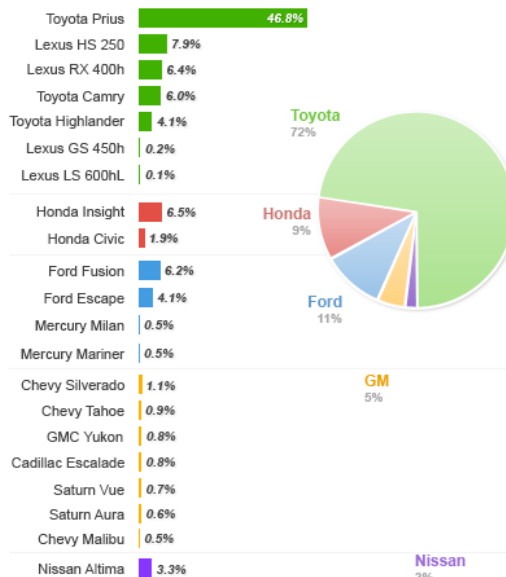
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (December 2009): **25,160**

US Hybrid Sales for December 2009

Model	Units	vs. 11/09	vs. 12/08
Prius	11,775	22.4%	49.8%
HS250h	1,980	40.7%	n/a
Insight	1,639	16.8%	n/a
RX400h	1,598	32.1%	9.2%
Fusion	1,556	19.3%	n/a
Camry	1,513	3.3%	-19.9%
Escape	1,036	18.5%	-0.7%
Highlander	1,029	42.5%	15.6%
Altima	842	67.4%	18.6%
Civic	471	93.8%	-54.5%
Silverado (est)	279	78.6%	n/a
Yukon (est)	237	78.6%	-46.3%
Escalade (est)	205	78.6%	-33.0%
Tahoe	203	-15.9%	-79.3%
Vue	186	38.7%	-45.0%
Aura	159	448.3%	367.6%
Malibu	132	-37.7%	-70.9%
Milan	130	34.0%	n/a
Mariner	121	40.7%	14.2%
GS450h	54	45.9%	5.9%
LS600hL	15	0.0%	-70.0%
All hybrids	25,160	25.8%	42.2%
All vehicles	1,029,936	37.9%	15.1%

U.S. Hybrid Sales for December 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	55,553
2	New York	15,348
3	Florida	14,949
4	Texas	14,632
5	New Jersey	11,367

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	District of Columbia	3.790
2	California	1.540
3	Washington	1.530
4	Vermont	1.420
5	Massachusetts	1.320
U.S. State Average		0.87

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	26,677
2	New York	21,193
3	San Francisco	15,799
4	Washington DC	11,595
5	Chicago	8,990

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	8.800
2	Helena	6.700
3	San Francisco	6.700
4	Washington, DC	5.100
5	Los Angeles	4.800
U.S. Metro Area Average		1.800

*Registrations CYTD November 2009

