

January 2009 Hybrid Market Dashboard

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

Overview

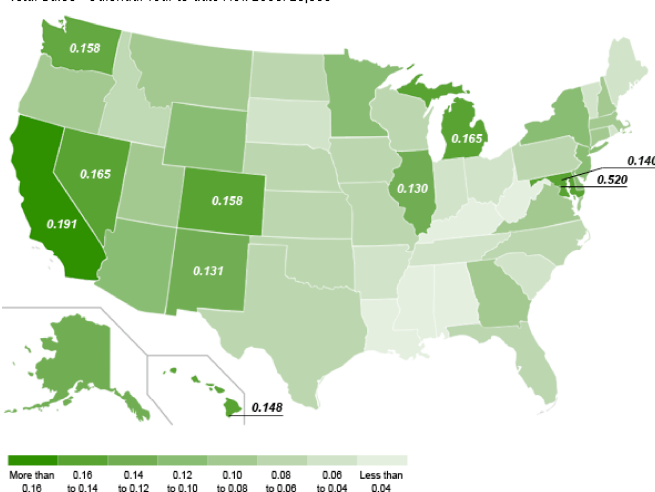
The beginning of 2009 was much like the end of 2008 for auto markets: showrooms stayed quiet, credit remained tight, and sales continued to slide. Overall, auto sales were down 38 percent compared with last January; brands like General Motors and Chrysler saw more severe declines as their volumes were cut in half. Although hybrids outperformed the market slightly, sales of hybrid models were still far below typical levels.

January hybrid sales fell an average of 31 percent from the previous year. Sales of the segment-leading Prius slid 29 percent, and models like the Escape Hybrid and Camry Hybrid plummeted, falling 42 percent and 70 percent, respectively. Remarkably, sales of the Lexus RX hybrid held up reasonably well: sales of the luxury crossover SUV were up 29 percent in January, making the RX the second highest selling model this month behind the Prius.

If there was good news in January, it was that hybrid powertrains finally penetrated the pickup segment: GM shipped seven Silverado Two-Mode Hybrids to its dealers this month. While a hulking full-sized pickup with a hybrid powertrain may be anathema to many of today's hybrid owners, vehicles like the Two-Mode Silverado have the potential to attract new buyers to the hybrid market. In particular, drivers who need the hauling or towing capabilities of a big pickup but are concerned about fuel economy seem like good candidates for the gas-electric Silverado.

We're not really sure how many pickup buyers fit this bill, or whether the Two-Mode Silverado's \$38,000 starting price will scare them off. But the fact remains that the Silverado expands the reach of hybrids beyond midsized sedans and crossovers into a new vehicle segment. Sales of large trucks may have slowed somewhat over the past year, but the top two selling vehicles in January were both pickups. That means a very large new pool of potential hybrid buyers for the future.

Sales of Domestic Hybrids (produced by General Motors, Ford and Chrysler)
Based on Hybrids per 1,000 Households
Total Sales - Calendar Year-to-date Nov. 2008: 29,690

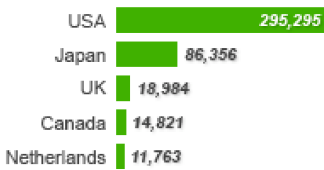


SOURCE: R. L. POLK & CO.

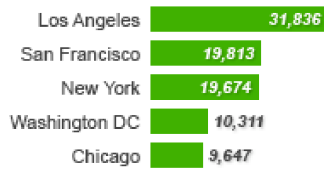
2008 global hybrid registrations



Top 5 global hybrid markets



Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

US Sales

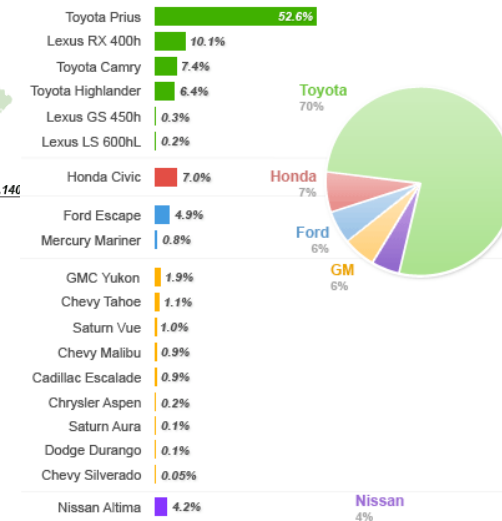
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (January 2009): **15441**

US Hybrid Sales for January 2009

Model	Units	vs. 12/08	vs. 01/08
Prius	8,121	3.3%	-28.6%
Camry	1,141	-39.6%	-69.6%
Highlander	984	10.6%	-54.1%
RX400h	1,556	6.4%	28.5%
LS600hL	33	-34.0%	-68.6%
GS450h	41	-19.6%	-35.9%
Civic	1,076	3.9%	-38.3%
Escape	753	-27.8%	-41.9%
Mariner	127	19.8%	-28.7%
Yukon	168	-62.0%	n/a
Malibu	145	-68.1%	n/a
Vue	153	-54.7%	1,430.0%
Tahoe	299	-69.5%	n/a
Aura	19	-44.1%	111.0%
Altima	644	-9.3%	36.2%
Escalade	132	-56.9%	n/a
Aspen	33	-28.3%	n/a
Durango	9	n/a	n/a
Silverado	7	n/a	n/a
All hybrids	15,441	-12.7%	-31.1%
All vehicles	656,881	-26.6%	-38.0%

U.S. Hybrid Sales for January 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	71,205
2	New York	16,294
3	Texas	15,281
4	Florida	15,212
5	Illinois	12,064

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	California	1.970
2	District of Columbia	1.910
3	Oregon	1.560
4	Washington	1.530
5	Vermont	1.470
U.S. State Average		0.94

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	31,836
2	San Francisco	19,813
3	New York	19,674
4	Washington DC	10,311
5	Chicago	9,647

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	11.620
2	San Francisco	8.410
3	Monterrey, CA	6.850
4	Santa Barbara, CA	6.600
5	San Diego	6.220
U.S. Metro Area Average		2.070

*Registrations CYTD November 2008