

June 2009 Hybrid Market Dashboard

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June 2009: A Hybrid Recovery?

The worst seems to be over in the retail auto market, although sales remain well below normal levels. Auto sales totaled 859,847 units in May, down 28 percent from last year. One bright spot, however, is hybrids: 26,205 hybrids sold last month, a 5 percent increase from May 2008.

Could the recent rise in gas prices and the introduction of new hybrid sedans from Toyota and Honda be leading a hybrid recovery? To be fair, using last summer's hybrid sales numbers as a benchmark may not be the best approach. Gas prices shot up last spring, so manufacturers were caught off guard by swelling hybrid demand. By May, waiting lists for models such as the Prius had reappeared, and sales numbers reflected the supply constraints.

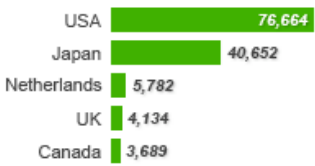
But hybrids are showing signs of life nonetheless, and are leading the recovery for some manufacturers. Ford, which experienced the lowest sales decline of any major automaker in May, attributed its sales success in part to its growing family of hybrid models, including the new Fusion sedan. More than 10 percent of Ford Fusions sold in June were hybrid versions, lifting Fusion sales to just 35 units below those of the Camry Hybrid. Another bright spot last month was Prius sales, which rose 10 percent from last year's levels as dealers cleared remaining 2009 models from their lots and initiated sales of the redesigned 2010 version. So far, demand for the new Prius is strong, with less than a 10-day supply of the new hybrid available on dealer lots.

Not all hybrid models were rolling out of showrooms. Most General Motors hybrid models fell, dragging down the company's share of the hybrid market to its lowest level this year. However, there are signs that GM—and its new owner, the US government—view hybrids as a central component of the automotive market's recovery. While GM's future hybrid plans have not been fully disclosed, last month Hitachi announced plans to dramatically expand its lithium ion battery production capacity, spurred on by future orders for at least 100,000 hybrid battery packs from General Motors.

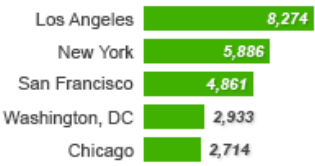
2009 global hybrid registrations



Top 5 global hybrid markets



Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

"Top 5 global hybrid markets" based on vehicle registrations CYTD April 2009.

and "Top 5 US hybrid markets" based on vehicle registrations CYTD April 2009.

US Sales

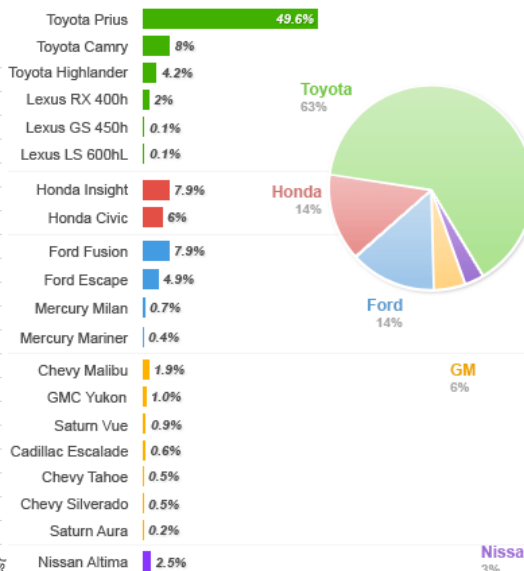
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (June 2009): **26,205**

US Hybrid Sales for June 2009

Model	Units	vs. 05/09	vs. 06/08
Prius	12,998	28.8%	10.5%
Insight	2,079	-25.2%	n/a
Camry	2,093	-28.8%	-31.5%
Fusion	2,058	9.6%	n/a
Civic	1,583	-23.8%	-41.6%
Escape	1,295	-23.9%	-24.7%
Highlander	1,098	-18.7%	-27.3%
Altima	666	93.0%	-50.0%
RX400h	527	34.1%	-60.4%
Malibu	489	-30.7%	65.8%
Tahoe	253	-8.7%	-20.9%
Vue	239	5.3%	-13.7%
Milan	186	-7.9%	n/a
Escalade	155	-25.1%	n/a
Yukon	139	-11.5%	-38.8%
Silverado	123	-5.4%	n/a
Mariner	110	-12.0%	-42.8%
Aura	56	60.0%	86.7%
GS450h	27	-37.2%	-63.0%
LS600hL	31	14.8%	-57.5%
All hybrids	26,205	2.0%	5.2%
All vehicles	859,847	-7.1%	-27.7%

U.S. Hybrid Sales for June 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	16,874
2	New York	4,534
3	Texas	4,389
4	Florida	4,220
5	Illinois	3,332

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	District of Columbia	0.600
2	Washington	0.480
3	California	0.470
4	Vermont	0.430
5	Massachusetts	0.400
U.S. State Average		0.24

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	8,274
2	New York	5,886
3	San Francisco	4,861
4	Washington DC	2,933
5	Chicago	2,714

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	2.450
2	San Francisco	2.060
3	Los Angeles	1.490
4	Seattle	1.490
5	San Diego	1.370
U.S. Metro Area Average		0.490

*Registrations CYTD April 2009

