

May 2009 Hybrid Market Dashboard

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

Overview

In almost every way, hybrid sales boomed in May. Sure, sales of gas-electric vehicles were down compared to a year ago, when gas prices soared and US buyers went into a frenzied and radical (albeit temporary) shift toward fuel efficiency. But those times are receding in the rear view mirror, and a new pattern of growth in the hybrid market is emerging.

Sales of the Toyota Prius, which continues to dominate, broke the 10,000 mark for the first time since October 2008. Sales of Ford hybrids—the Fusion Hybrid and Escape Hybrid—jumped by 75 percent and 62 percent respectively compared to the previous month.

The list of hybrids continues to break between solid and steady players—including the Honda Insight, Honda Civic Hybrid, Toyota Camry Hybrid, and Toyota Highlander Hybrid—and a field of expensive larger vehicles with relatively low fuel efficiency improvements compared to conventional models.

GM's announcement that it will discontinue the Chevy Malibu Hybrid and Saturn Hybrids, indicates that low-selling hybrid models can quickly disappear during this period of economic turmoil in the auto industry. The fact that Honda discontinued two hybrid models in recent years—the original Honda Insight and the Honda Accord Hybrid—only to re-launch the Insight as one of the top-selling hybrid models—shows how automakers can successfully take a trial-and-error approach to find a winning combination of price, features and fuel efficiency.

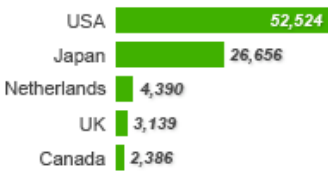
Dealers sold 25,693 hybrids last month, up from 21,735 in April. That's an 18.2 percent rise from April to May, outpacing the 12.9 percent increase in the overall car market.

The biggest news in hybrid sales continues to come from Japan. In cumulative 2009 sales through March, Japanese car buyers bought 26,656 hybrids—a little more than half the number of hybrids bought by US consumers. The 2-to-1 ratio is a significant jump from 2007—when the ration of US to Japan sales was more than 5-to-1. High gas taxes and generous incentives in Japan—two factors almost completely missing in the US—will mean the gap between the two markets will continue to close. (American legislators hoping to stir sales of green cars in the US should take note of the Japanese model.)

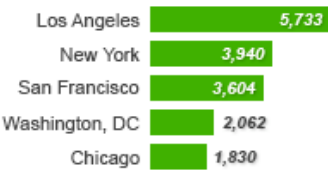
2009 global hybrid registrations



Top 5 global hybrid markets



Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

US Sales

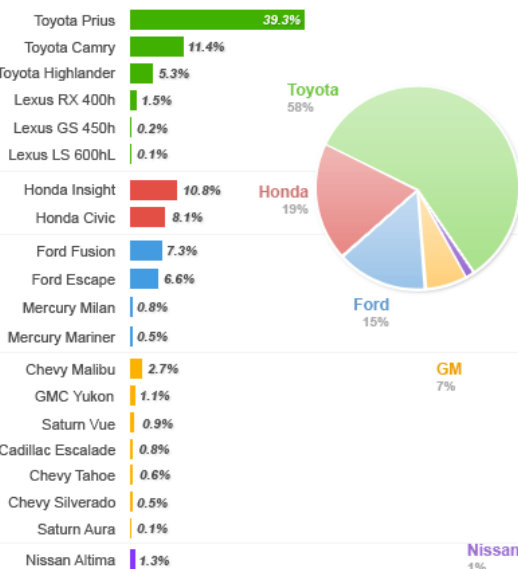
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (May 2009): **25,693**

US Hybrid Sales for May 2009

Model	Units	vs. 03/09	vs. 04/08
Prius	10,091	20.3%	-32.8%
Camry	2,941	33.8%	-51.0%
Highlander	1,351	44.8%	-48.9%
RX400h	393	-40.0%	-81.8%
LS600hL	27	42.1%	-75.9%
GS450h	43	30.3%	-56.1%
Civic	2,077	-38.2%	-55.6%
Escape	1,702	62.2%	-20.4%
Mariner	125	47.1%	-47.7%
Yukon	157	7.0%	-35.8%
Malibu	706	29.1%	n/a
Vue	227	-32.8%	-33.2%
Tahoe	277	6.1%	-19.6%
Aura	35	12.9%	-2.8%
Altima	345	55.4%	-78.5%
Escalade	207	79.6%	n/a
Silverado	130	36.8%	n/a
Fusion	1,877	74.9%	n/a
Milan	202	119.6%	n/a
Insight	2,780	32.6%	n/a
All hybrids	25,693	18.2%	-28.0%
All vehicles	925,824	12.9%	-33.7%

U.S. Hybrid Sales for May 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	11,879
2	Texas	2,939
3	New York	2,922
4	Florida	2,902
5	Illinois	2,258

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	District of Columbia	0.445
2	Washington	0.338
3	California	0.329
4	Vermont	0.281
5	Maryland	0.272
U.S. State Average		0.163

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	5,733
2	New York	3,940
3	San Francisco	3,604
4	Washington DC	2,062
5	Chicago	1,830

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	1.732
2	San Francisco	1.530
3	Seattle	1.046
4	Los Angeles	1.036
5	Lafayette, IN	1.011
U.S. Metro Area Average		0.330

*Registrations CYTD March 2009

