

November 2008 Hybrid Market Dashboard

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

Overview

In November, car sales went from bad to worse as sales volumes fell a bruising 37 percent from a year earlier. Even sales of small, fuel efficient vehicles lagged as tight credit, recession fears, and falling gas prices eroded demand for small cars that had surged just months earlier. Hybrids, which generally have outperformed the overall car market in recent months, fell faster than conventional vehicles in November, posting a 50 percent sales decline from a year earlier.

With sales volumes at their lowest levels in decades, gas prices racing toward \$1.50 per gallon, and automotive CEOs begging for federal financial assistance, the short-term prospects for hybrids have diminished. Yet in this challenging environment, automakers are more committed to hybrids than ever. Toyota and Honda are moving forward with planned vehicle launches next spring, and have confirmed their plans for new hybrid models.

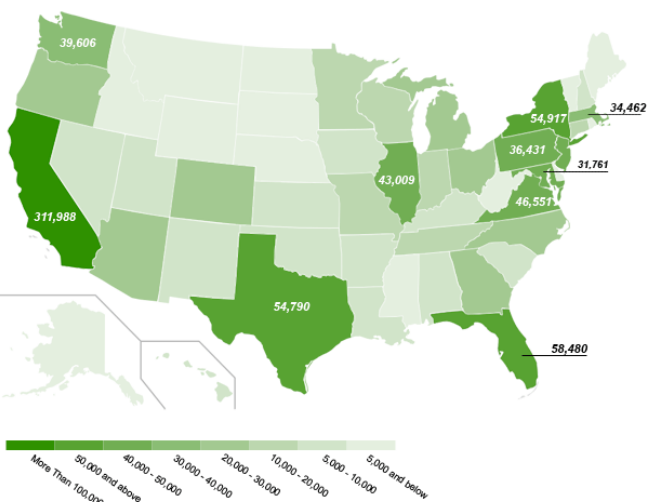
Detroit's Big Three also have announced plans to move aggressively into hybrids and electric-drive vehicles. GM promises 15 hybrids by 2012 as well as additional plug-in hybrid models like the Chevrolet Volt. Ford has committed to launching a family of electric drive vehicles by 2012 that includes hybrids, plug-in hybrids, and battery-electric vehicles (including an all-electric commercial van). And Chrysler reaffirmed its commitment to a hybrid Dodge Ram pickup and detailed plans for a freeway-capable electric vehicle produced in large volumes by 2010.

These announcements signal a shift in strategy for the Big Three, which have placed electric-drive technologies at the heart of their recovery plans. Perhaps these automakers now realize that advanced vehicles (including hybrids) can be a key way to differentiate their products and attract consumers who, in time, will return to the market.

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. The historical sales graph for top-selling hybrid models shows estimated 2008 volumes based on sales-to-date.

Total Hybrids in the United States: 1,152,206 (as of July 2008)



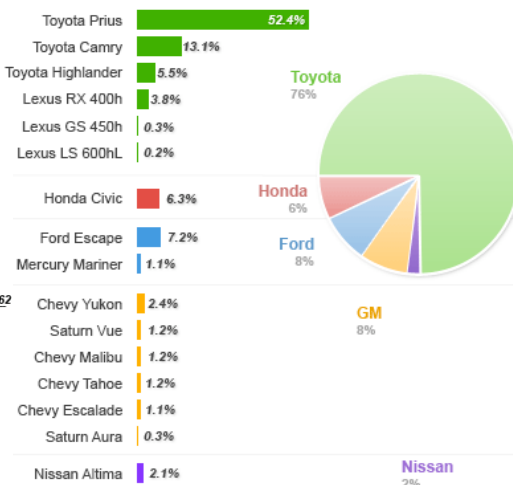
SOURCE: R. L. POLK & CO

Hybrids sold in the U.S. (November 2008): **16,536**

US Hybrid Sales for November 2008

Model	Units	vs. 10/08	vs. 11/07
Prius	8,660	-26.6%	-48.3%
Camry	2,174	-22.1%	-57.5%
Highlander	907	-11.3%	-64.8%
RX400h	624	1.5%	-62.7%
LS600hL	37	-32.7%	-78.2%
GS450h	42	90.9%	-58.0%
Civic	1,043	-35.7%	-67.8%
Escape	1,185	-33.5%	-35.8%
Mariner	176	-18.1%	-53.4%
Yukon	190	-1.6%	n/a
Malibu	195	-40.0%	n/a
Vue	328	-7.3%	1,461.9%
Tahoe	404	8.6%	n/a
Aura	45	104.5%	-26.2%
Altima	353	-36.3%	-70.4%
Escalade	173	-24.8%	n/a
All hybrids	16,536	-24.8%	-50.4%
All vehicles	747,544	-10.9%	-36.7%

U.S. Hybrid Sales for October 2008 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	63,312
2	New York	14,362
3	Florida	13,344
4	Texas	13,274
5	Illinois	10,241

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	California	1.752
2	District of Columbia	1.658
3	Oregon	1.388
4	Washington	1.362
5	Vermont	1.321
U.S. State Average		0.82

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	28,244
2	San Francisco	17,557
3	New York	17,115
4	Washington DC	9,047
5	Chicago	8,137

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	10.394
2	San Francisco	7.453
3	Santa Barbara	5.912
4	Monterrey, CA	5.874
5	San Diego	5.585
U.S. Metro Area Average		1.812

*Registrations CYTD September 2008