

September 2009 Hybrid Market Dashboard

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September 2009: End of Clunkers Hurts Hybrids

The hybrid market disproportionately benefited from the Cash For Clunkers program in July and August, and therefore disproportionately fell in September. The overall vehicle market dropped by about 41 percent, and hybrids plunged by about 48 percent.

That's when looking at the numbers compared to last month. It's not nearly as dismal when comparing the numbers to September 2008—hybrids fell by 4 percent compared to one year ago, when the auto market was in full slide. Comparing cumulative year-to-date sales to this point last year, hybrid sales fell by 14.5 percent while conventional car sales fell by 22.5 percent. The Seasonally Adjusted Sales Rate (SAAR) in September dropped back down to 9.22 million units, from 14.09 million units in August.

The Toyota Prius fell precipitously from nearly 20,000 units in August to about 11,000 units in September. But there was a silver-ish lining in the dark clouds: the Prius was the 9th most popular vehicle in the United States last month, showing that a hybrid car with the right traits can be popular despite a bad economy and low gas prices. We're not saying that Prius, or any other hybrid model or any hybrid brand, escaped the misery—but the Prius's numbers underline how the end of Cash for Clunkers pulled the rug out from the entire automotive market.

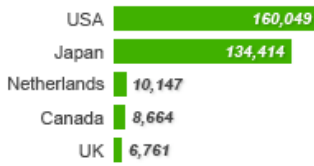
Several vehicles suffered terribly in September. Nissan Altima Hybrid sales crashed by nearly 90 percent; the Honda Civic Hybrid fell by nearly 79 percent, with Honda sadly managing to sell merely 152 Civic Hybrids. The Civic Hybrid's poor showing, along with mediocre sales of the Honda Insight—which has failed to capture the magic and mystique of the Prius—allowed Ford to edge past Honda to become the No. 2 seller of gas-electric vehicles in September.

The relative strength of the Prius, combined with the company's stronger stable of seven Toyota and Lexus hybrids, further etched Toyota Motor Co. as the leader in the hybrid market selling more than 7 out of every 10 hybrids in September.

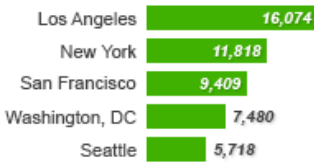
2009 global hybrid registrations



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 July 2009.

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

US Sales

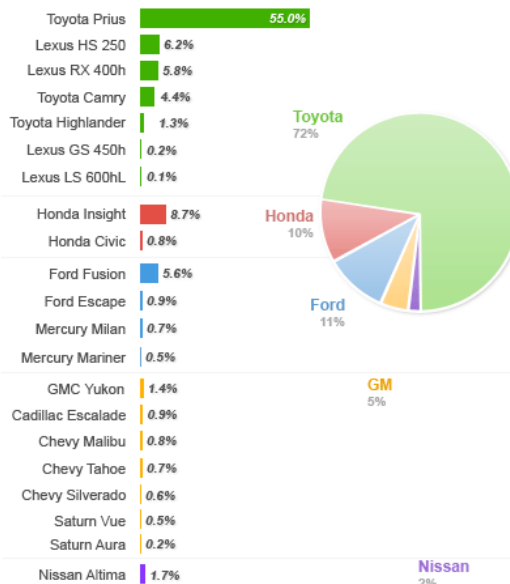
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer.

Hybrids sold in the U.S. (September 2009): **19,977**

US Hybrid Sales for September 2009

Model	Units	vs. 08/09	vs. 09/08
Prius	10,984	-41.8%	1.0%
Insight	1,746	-58.7%	n/a
HS250	1,242	-128.7%	n/a
RX400h	1,168	-33.4%	57.0%
Fusion	1,116	-52.6%	n/a
Camry	872	-58.8%	-68.7%
Escape	787	-54.0%	-11.5%
Altima	345	-89.1%	-26.6%
Tahoe	280	26.1%	-56.0%
Highlander	269	-67.8%	-70.8%
Escalade	189	-11.7%	107.7%
Malibu	156	-64.6%	-59.2%
Civic	152	-78.8%	-92.5%
Yukon	146	15.9%	-61.0%
Milan	144	-40.0%	n/a
Silverado	120	-46.9%	n/a
Mariner	91	-76.7%	-9.9%
Vue	90	-78.3%	-79.7%
GS450h	38	-20.8%	31.0%
Aura	30	-53.8%	-3.2%
LS600hL	12	20.0%	-74.5%
All hybrids	19,977	-48.4%	-4.1%
All vehicles	745,516	-40.9%	-22.8%

U.S. Hybrid Sales for September 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	33,241
2	New York	9,203
3	Texas	9,075
4	Florida	8,789
5	Washington	6,941

Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	District of Columbia	3.020
2	Washington	1.100
3	California	0.920
4	Vermont	0.900
5	Massachusetts	0.820
U.S. State Average		0.54

Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	16,074
2	New York	11,818
3	San Francisco	9,409
4	Washington DC	7,480
5	Seattle	5,718

Most Popular Cities for Hybrid

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	4.950
2	San Francisco	3.990
3	Helena, MT	3.600
4	Seattle	3.360
5	Washington, DC	3.320
U.S. Metro Area Average		1.070

*Registrations CYTD July 2009

