

# November 2007 Hybrid Market Dashboard

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

## Overview

Hybrid sales in November repeated the common theme for 2007: The hybrid market is growing while the overall vehicle market remains stagnant. Comparing November of this year to the same time in 2006, the hybrid market expanded by 80 percent, while the overall car market receded by 2 percent. Total monthly hybrid sales for November defied the usual fall slump, coming in at 33,313 or 2.8 percent of the market.

The jump in hybrid sales was spurred by unseasonably higher gas prices. The average national gas price was up nearly 25 cents per gallon from the beginning of November to the month's end. With these higher gas prices, and incentives offered by Toyota in certain regions, sales of the Toyota Prius and the Toyota Camry Hybrid returned to summer levels. The Prius and Camry—leaders of the hybrid pack—reported unit sales of 16,737 and 5,118 respectively.

Some journalists and market analysts had looked at low sales numbers posted for the Toyota Highlander Hybrid in October, and misread that all hybrid SUVs had taken a nosedive—rather than attributing the dip to the 2008 Highlander model year transition that reduced available inventory. With the new Highlander in production and shipping to dealers, the Highlander Hybrid has regained its position as the most popular hybrid SUV—with 2,577 units sold in November.

As we approach the end of the year, it looks as if hybrid sales should hit 350,000 units this year, nearly a 100,000-unit increase from 2006.

## Looking Ahead

With little sign of a new hybrid that will significantly alter the market in the next year, the recent hybrid buzz is all about plug-in hybrids. Despite the fact that so-called clean diesels will soon begin shipping, and reporting actual sales, the desire for that next big breakthrough has put plug-in hybrids in the headlines. Plug-in hybrids (PHEVs) also dominate the program of industry conferences like the recent EVS23 international electric vehicle symposium in Anaheim, California.

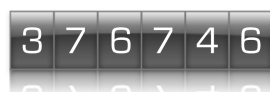
It's anybody's guess as to when a major carmaker might offer up a plug-in hybrid at local neighborhood dealership. For all appearances, General Motors is moving full speed ahead on its Chevy Volt, which was targeted for production of tens of thousands of units by 2010 or 2011. GM has a lot of work ahead of them to bring the Volt to market, so this date may gradually migrate into the future.

The Ford Motor Company presented an Escape plug-in hybrid SUV to the utility company, Southern California Edison, at EVS23. The delivery was the first of 20 such vehicles that mark a partnership between the two companies to "advance the commercialization of PHEVs." Ford's Sue Cischke, senior vice president, sustainability, environment and safety engineering, said "Cost, durability and reliability issues all need to be addressed before these vehicles can make a significant impact on the global issues of climate change and energy security."

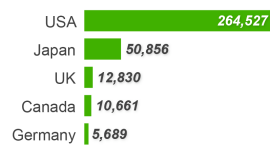
Plug-in hybrid demonstration projects from Ford and others, and GM's promotion of the Volt, have put pressure on Toyota to talk more about its own plans to produce a plug-in version of the Toyota Prius. The next generation Prius, planned for release early in 2009, almost certainly will not offer plug-in capability, but the company allowed journalists at EVS23 to test drive a plug-in prototype equipped with extra nickel-metal hydride batteries granting 7-mile all-electric range.

Plug-in hybrids may eventually produce revolutionary changes to the automotive market—but not in this decade. For those concerned with short-term numbers, the growth of the U.S. hybrid market from approximately 350,000 in 2007 to a half-million or more in the next few years will be evolutionary—and built on hybrids sans plug like full-size SUV hybrids from Detroit, the 2009 Toyota Prius and Honda's new dedicated global hybrid also expected in 2009.

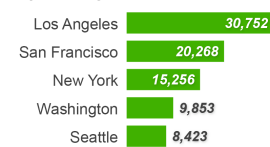
2007 global hybrid registrations



Top 5 global hybrid markets



Top 5 US hybrid markets



SOURCE: R. L. POLK & CO.

"Top 5 global hybrid markets" based on vehicle registrations January - September 2007.

and "Top 5 US hybrid markets" based on vehicle registrations January - September 2007.

## US Sales

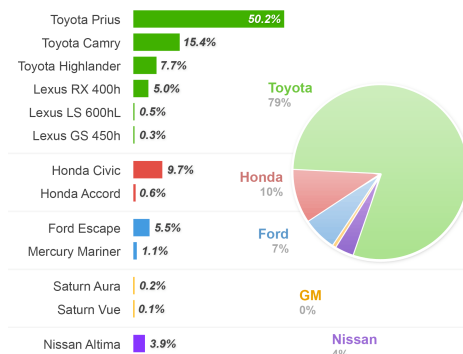
Our information is based on hybrid sales as reported by the manufacturers. For each model, this month's sales are shown compared to sales in the previous month and at the same time last year. We also examine hybrid market share by model and manufacturer. The historical sales graph for top-selling hybrid models shows estimated 2007 volumes based on sales-to-date.

Hybrids sold in the U.S. (November 2007): **33,315**

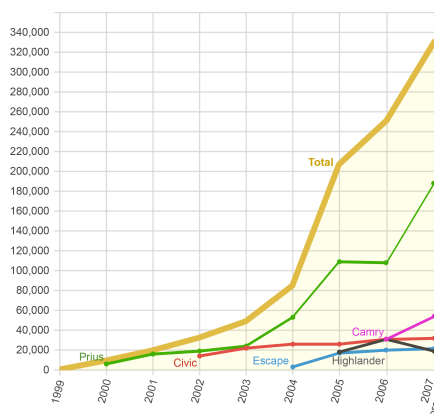
### US Hybrid Sales for November 2007

Model	Units	vs. 9/07	vs. 10/06
Altima	1,191	28.5%	n/a
Prius	16,737	27.2%	109.0%
Civic	3,238	41.6%	46.6%
Accord	204	-16.0%	-34.4%
Camry	5,118	45.8%	65.1%
Highlander	2,577	332.4%	54.6%
RX400h	1,674	20.3%	26.1%
GS450h	100	40.8%	-43.2%
LS600hL	170	-2.9%	n/a
Escape	1,846	1.6%	39.5%
Mariner	378	41.6%	134.8%
Vue	21	110.0%	n/a
Aura	61	35.6%	n/a
<b>All hybrids</b>	<b>33,315</b>	<b>36.0%</b>	<b>77.9%</b>
<b>All vehicles</b>	<b>1,180,269</b>	<b>-4.2%</b>	<b>-1.6%</b>

### U.S. Hybrid Sales for November 2007 by Manufacturer and Model



### U.S. Hybrid Market Historical Sales (1999 - 2006) with 2007 Forecast



## Regional Data

We present the data in two ways. First, we list the cities and states that boast the largest numbers of new hybrids on their roads within the past year. 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	68,887
2	Florida	13,857
3	New York	13,119
4	Texas	12,981
5	Washington	9,967

### Most Popular States for Hybrids

Rank	State	New Hybrids per 1000 residents*
1	California	1.907
2	Oregon	1.811
3	Washington	1.585
4	Vermont	1.560
5	Washington DC	1.504

**U.S. State Average** 0.818

### Cities with the Most Hybrid Sales

Rank	Metropolitan Area	New Hybrids*
1	Los Angeles	30,752
2	San Francisco	20,268
3	New York	15,256
4	Washington DC	9,853
5	Seattle	8,423

### Most Popular Cities for Hybrids

Rank	Metropolitan Area	New Hybrids per 1000 residents*
1	Portland, OR	13.364
2	San Francisco	8.604
3	Monterey, CA	7.085
4	Santa Barbara	5.939
5	Los Angeles	5.554

**U.S. Metro Area Average** 1.793

\*Registrations CYTD September 2007