

19 October 2010

## EUROPEAN NEW CAR SALES STRUGGLE TO REGAIN LOST GROUND

- **All leading brand and model sales still suffering, post-scrappage**
- **European new car market down 9.1% in September 2010; YtD down 3.2%**
- **Volkswagen Polo is only exception to declining September sales**

With the tail-wind of scrappage now gone from its sales, Europe's new car market continues to decline, as shown in the latest analysis from the world's leading provider of automotive intelligence, JATO Dynamics.

Overall, the European performance is now 3.2% below 2009 levels, at this point in the year. True comparisons remain difficult, with 2009 figures inflated by scrappage-driven demand, but some of the major brands, models and markets are still in the red.

The powerhouses of European new car sales - UK, France, Germany and Italy - all posted lower figures for September 2010, than the same month in 2009, with Germany on course to sell one million fewer cars than last year.

As traditional sales territories for the industry's big names, this has consequences for the leading brands and models. The top five brands – Volkswagen, Ford, Opel/Vauxhall, Renault and Peugeot – posted September sales down by an average of 9.7%, while the top two models – VW Golf and Ford Fiesta – were down 28.9% and 22.2%, respectively.

David Di Girolamo, Head of JATO Consult, explains: "Although true year-on-year comparisons remain difficult, the level of new car sales in the 'big five' markets this year has been bad news for the global volume brands, who have traditionally relied on them and will need to look elsewhere for growth."

## Brand Performance

Although down almost one fifth in September (-19.1%), Ford has improved on its mid-year position and is back in second place, ahead of Renault, year-to-date.

Mercedes and BMW have consolidated their positions in the top ten selling brands and are ahead of Toyota in September sales.

## Top 10 Brands

Make	Sep_10	Sep_09	% Change Sep	Sep YtD_10	Sep YtD_09	% Change YtD
VOLKSWAGEN	137,628	155,983	-11.8%	1,182,476	1,243,182	-4.9%
FORD	109,764	135,684	-19.1%	883,194	982,029	-10.1%
OPEL/VAUXHALL	104,204	109,561	-4.9%	761,318	822,143	-7.4%
RENAULT	92,579	103,438	-10.5%	870,878	776,396	+12.2%
PEUGEOT	85,072	87,028	-2.2%	773,893	738,153	+4.8%
CITROEN	68,042	76,230	-10.7%	646,774	645,148	+0.3%
FIAT	67,939	88,495	-23.2%	655,694	773,314	-15.2%
MERCEDES	61,512	58,312	+5.5%	441,473	441,659	-0.0%
BMW	58,399	57,440	+1.7%	451,394	429,336	+5.1%
TOYOTA	56,393	70,801	-20.3%	455,922	538,549	-15.3%

## Model Performance

The new Volkswagen Polo continues to buck the trend in sales and has posted the only positive figure of the top ten models, in September. Even though sales comparisons are versus a previous generation model, its success is notable for gaining ground on key competitors.

Fiat's troubles are indicated by the 10<sup>th</sup> position for its Punto, while Panda has dropped from the top ten models completely. Of particular note are the low sales for these models in their home market of Italy, where they were down 32.8% and 31.0% respectively.

## Top 10 models

Make & Model	Sep_10	Sep_09	% Change Sep	Sep YtD_10	Sep YtD_09	% Change YtD
VOLKSWAGEN GOLF	40,834	57,444	-28.9%	378,900	433,341	-12.6%
FORD FIESTA	40,015	51,413	-22.2%	324,545	357,295	-9.2%
OPEL/VAUXHALL CORSA	32,899	39,049	-15.7%	247,505	270,789	-8.6%
OPEL/VAUXHALL ASTRA	29,597	32,127	-7.9%	228,902	210,612	+8.7%
VOLKSWAGEN POLO	29,006	22,328	+29.9%	271,782	206,845	+31.4%
RENAULT CLIO	26,862	31,479	-14.7%	260,094	219,251	+18.6%
PEUGEOT 207	26,464	32,405	-18.3%	238,448	277,945	-14.2%
FORD FOCUS	25,314	32,300	-21.6%	205,337	239,459	-14.2%
RENAULT MEGANE	21,195	22,541	-6.0%	200,888	163,943	+22.5%
FIAT PUNTO	20,937	30,094	-30.4%	203,248	249,577	-18.6%

## National Trends

The number of markets returning to growth across Europe is increasing, but it is the performance of the 'Big Five' on which the overall health of the region rests.

September is of particular significance in Great Britain, where it heralds a bi-annual registration change and is a key sales month in the market. The 8.9% drop in sales vs. 2009 is a reflection of the downshift in post-scrappage demand.

By contrast, most of the Eastern European and Baltic states have returned to growth, albeit against very low 2009 figures, when these markets were suffering the worst of the global recession.

Concludes David Di Girolamo: "Europe has been through the scrappage highs and lows and now looks to be edging slowly towards recovery. The question is when will more favourable conditions return to the 'Big Five'?"

## Sales by Market

Country	Sep_10	Sep_09	% Change Sep	Sep YtD_10	Sep YtD_09	% Change YtD
Austria	28,115	26,542	+5.9%	251,462	247,676	+1.5%
Belgium	36,945	35,687	+3.5%	433,997	374,883	+15.8%
Cyprus	1,415	1,166	+21.4%	10,730	11,877	-9.7%
Czech Republic	13,251	12,196	+8.7%	125,753	117,752	+6.8%
Denmark	11,033	9,791	+12.7%	107,934	81,583	+32.3%
Estonia	969	812	+19.3%	7,508	7,850	-4.4%
Finland	9,696	7,556	+28.3%	88,043	72,643	+21.2%
France	169,944	183,110	-7.2%	1,657,490	1,613,501	+2.7%
Germany	259,748	316,166	-17.8%	2,166,852	2,990,766	-27.5%
Great Britain	335,246	367,929	-8.9%	1,635,659	1,517,039	+7.8%
Greece	6,002	11,952	-49.8%	122,420	180,717	-32.3%
Hungary	3,577	3,235	+10.6%	32,686	49,471	-33.9%
Iceland	110	95	+15.8%	2,572	1,891	+36.0%
Ireland	4,330	2,250	+92.4%	83,475	55,112	+51.5%
Italy	155,578	191,361	-18.7%	1,549,340	1,620,317	-4.4%
Latvia	531	387	+37.2%	4,334	4,338	-0.1%
Lithuania	724	504	+43.7%	5,327	5,906	-9.8%
Luxembourg	3,297	3,494	-5.6%	39,946	34,783	+14.8%
Norway	11,137	9,530	+16.9%	95,027	68,638	+38.4%
Poland	27,906	25,012	+11.6%	234,046	240,826	-2.8%
Portugal	15,840	12,092	+31.0%	163,314	112,849	+44.7%
Slovakia	5,266	5,615	-6.2%	45,695	69,085	-33.9%
Slovenia	4,691	4,574	+2.6%	46,474	42,986	+8.1%
Spain	56,664	77,884	-27.2%	789,485	678,798	+16.3%
Sweden	25,912	19,244	+34.6%	206,742	152,131	+35.9%
Switzerland	23,402	21,144	+10.7%	215,893	196,504	+9.9%
The Netherlands	45,773	33,507	+36.6%	391,076	314,781	+24.2%
<b>Grand Total</b>	<b>1,257,102</b>	<b>1,382,835</b>	<b>-9.1%</b>	<b>10,513,280</b>	<b>10,864,703</b>	<b>-3.2%</b>

The above intelligence is provided by JATO Consult, the company's bespoke consulting service which offers customers access to its unique research and provides solutions and advice to meet a wide range of automotive business challenges. For more information visit [www.jato.com](http://www.jato.com), or email [consult@jato.com](mailto:consult@jato.com).

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**Editorial note: JATO Dynamics background**

JATO was founded in 1984 and provides the world's most timely, accurate and up-to-date information on vehicle specifications and pricing, sales and registrations, news and incentives. The company has representation in over 40 countries, providing unique local market expertise. The JATO client base includes all of the world's volume vehicle manufacturers, giving them the ability to react to short-term market movements, plan for long-term developments and ultimately to meet consumers' needs. JATO's intelligence has also been adapted for consumer use in motoring web portals where customers can see the advantages and disadvantages of a specified model against any other while major leasing companies use JATO's intelligence to drive the vehicle quotation process. Visit JATO at [www.jato.com](http://www.jato.com).

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