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EUROPEAN MARKET FALTERS AS RENAULT SALES PICK-UP PACE

- European new car market down by 8.6% in May
- Volkswagen still top, but Renault closes gap in monthly sales
- Golf and Fiesta drop in May; Polo, Clio and Mégane gain
- UK and Spain increase May sales, Germany still falling

As the overall European new car market continues to slide, Renault is proving the big winner, according to the latest monthly analysis from the world's leading provider of automotive intelligence, JATO Dynamics.

European sales were down 8.6% overall in May, as a result of continuing poor sales in Germany, with the YtD improvement now just 2.9% vs. 2009, a decline compared to previous months. A traditionally strong sales base for Volkswagen Golf, Opel Astra and Ford Fiesta, Germany's changing competitive landscape is benefitting other brands in the top 10 sellers.

David Di Girolamo, Head of JATO Consult commented: "The economic waves that are buffeting the European countries are now starting to effect sales of brands that traditionally enjoyed loyalty in their "home" markets, allowing other brands to benefit and establish a stronger foothold."

Brand Performance

Both Ford and Volkswagen are suffering heavily from the German market downturn, which was a 35.1% decline in May. Renault's contrasting good fortune has helped the brand retain its second place above Ford in third and YtD have closed the gap to 13,684 units in sales.

Ford's third place has been regained from Peugeot, who were unable to sustain its April gains.

Brand Performance

Make	May_10	May_09	% Change May	May YtD_10	May YtD_09	% Change YtD
VOLKSWAGEN	133,939	151,783	-11.8%	680,626	677,227	+0.5%
RENAULT	95,286	86,334	+10.4%	518,931	407,916	+27.2%
FORD	92,258	111,250	-17.1%	532,615	539,521	-1.3%
PEUGEOT	85,739	88,908	-3.6%	458,002	402,270	+13.9%
OPEL/VAUXHALL	79,319	98,044	-19.1%	419,018	448,713	-6.6%
CITROEN	73,453	75,857	-3.2%	381,158	348,936	+9.2%
FIAT	72,318	93,254	-22.5%	407,648	442,135	-7.8%
AUDI	55,320	54,003	+2.4%	271,860	263,686	+3.1%
MERCEDES	54,207	53,374	+1.6%	238,218	237,094	+0.5%
BMW	52,815	53,242	-0.8%	246,548	229,032	+7.6%

Model Performance

The biggest net winner is Renault and its success has been driven largely by Clio sales, particular notable performances in Italy (+83.8%), the UK (108%) and its home market France (37.5%) contributing to its overall 43.3% rise YtD.

This success contrasts with the current performance of key segment rivals, with the Ford Fiesta and Peugeot 207 both down over 22% in May when compared with the same month last year.

Building on the Clio's performance the French brand adds Mégane to the 3 models in the top 10 recording an increase in the month.

Top 10 models

Make & Model	May_10	May_09	% Change May	May YtD_10	May YtD_09	% Change YtD
VOLKSWAGEN GOLF	42,061	54,754	-23.2%	228,418	226,680	+0.8%
FORD FIESTA	31,432	40,412	-22.2%	204,535	199,967	+2.3%
VOLKSWAGEN POLO	30,477	26,099	+16.8%	154,684	133,102	+16.2%
RENAULT CLIO	28,111	24,398	+15.2%	160,795	112,207	+43.3%
OPEL/VAUXHALL CORSA	26,747	31,301	-14.5%	139,135	147,238	-5.5%
PEUGEOT 207	26,127	33,680	-22.4%	144,412	156,410	-7.7%
OPEL/VAUXHALL ASTRA	25,289	27,179	-7.0%	130,752	108,935	+20.0%
FORD FOCUS	22,836	26,449	-13.7%	125,504	128,956	-2.7%
RENAULT MEGANE	21,662	18,579	+16.6%	115,204	86,574	+33.1%
FIAT PANDA	21,205	27,551	-23.0%	117,716	129,614	-9.2%

National Trends

As Europe slips to be only 2.9% ahead of the regions 2009 YtD performance, Germany and Greece feature amongst the largest contributors to the decline in May, reflecting the wider economic issues that have tied these two countries together.

Italy and France have also experienced a dip joining some Central and Eastern European countries in a lack of consumer confidence pervading the Euro-zone.

Concludes David Di Girolamo: "The current situation is significant, in not being one of the industry's own making as it had hoped that the economy would have recovered by now. Without the assistance of scrappage, national markets and brands can only hope to ride out the storm and wait for more favourable and stable economic conditions."

Sales by Market

Country	May_10	May_09	% Change May	May YtD_10	May YtD_09	% Change YtD
Austria	29,057	29,732	-2.3%	136,719	129,926	+5.2%
Belgium	47,725	37,976	+25.7%	266,331	229,469	+16.1%
Cyprus	1,141	1,313	-13.1%	5,930	7,112	-16.6%
Czech Republic	15,885	14,277	+11.3%	70,488	62,948	+12.0%
Denmark	10,815	9,342	+15.8%	54,946	43,491	+26.3%
Estonia	911	875	+4.1%	3,957	4,743	-16.6%
Finland	10,704	7,245	+47.7%	50,199	44,164	+13.7%
France	186,268	206,247	-9.7%	971,905	896,178	+8.4%
Germany	249,708	384,578	-35.1%	1,179,532	1,632,294	-27.7%
Great Britain	153,095	134,858	+13.5%	913,436	748,691	+22.0%
Greece	11,887	25,976	-54.2%	83,141	89,341	-6.9%
Hungary	3,428	4,556	-24.8%	17,391	34,111	-49.0%
Iceland	390	186	+109.7%	790	550	+43.6%
Ireland	8,677	5,084	+70.7%	59,583	41,902	+42.2%
Italy	164,474	190,801	-13.8%	995,727	924,190	+7.7%
Latvia	481	447	+7.6%	2,003	2,518	-20.5%
Lithuania	658	698	-5.7%	2,614	3,423	-23.6%
Luxembourg	5,158	4,479	+15.2%	24,522	20,365	+20.4%
Norway	9,896	7,421	+33.4%	50,850	34,166	+48.8%
Poland	25,639	25,326	+1.2%	130,355	142,028	-8.2%
Portugal	17,356	13,112	+32.4%	87,331	57,084	+53.0%
Slovakia	5,014	9,184	-45.4%	23,236	34,625	-32.9%
Slovenia	5,551	4,778	+16.2%	26,740	24,266	+10.2%
Spain	103,033	71,086	+44.9%	483,763	336,296	+43.9%
Sweden	24,994	18,215	+37.2%	109,809	80,401	+36.6%
Switzerland	24,499	22,941	+6.8%	115,634	106,616	+8.5%
The Netherlands	37,042	30,684	+20.7%	219,784	185,019	+18.8%
Grand Total	1,153,486	1,261,417	-8.6%	6,086,716	5,915,917	+2.9%

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, or email 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.

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