

19 April 2010

FIESTA OUTPACES GOLF IN RACE TO EUROPEAN SALES RECOVERY

- **Ford Fiesta takes over from VW Golf as Europe's best-selling car**
- **Buoyant sales in UK and Italy benefit Ford; German market continues to struggle**
- **March new car market closes 10% up on same period, 2009**
- **UK is Europe's largest market in March 2010**

The Ford Fiesta has become Europe's best-selling car, beating the Volkswagen Golf into second place in both March 2010 and year-to-date sales, according to latest figures from the world's leading provider of automotive data and intelligence, JATO Dynamics.

In total, 68,630 Fiestas were sold in March 2010, a 25.8% rise in sales, vs. March 2009 and 11,785 more than Volkswagen's second-placed Golf.

Year-to-date, Fiesta is also ahead, selling 140,496 to Golf's 135,048, reversing the picture from Q1 2009, but continuing a pattern where Fiesta has closed the sales gap to Golf through 2010.

Fiesta's achievement is even more impressive considering Golf sales also increased during last month and the year's first quarter. Fiesta sales simply outpaced Golf, with its move to pole position particularly due to its strong March sales in the UK (+14.7%) and Italy (+87%), where 57% of all Fiestas sold (11,251) were LPG-powered.

By contrast, Golf's traditionally strong home market, Germany, continued to struggle, losing 106,590 sales overall, vs. March 2009 (- 26.6%).

"What may appear to be a sudden change in fortunes is actually a continuing trend," explained David Di Girolamo, Head of JATO Consult. "Fiesta has been closing the gap to Golf through 2010 and there are a number of factors behind this. The buoyant sales markets so far this year are those where Fiesta is popular and are also scrappage-influenced markets, driving purchase of small

cars. In the UK, March marked a registration change and the final month of Britain's scrappage scheme, while in Italy, March was the last month of 2010 in which scrappage sales could be registered.

"The last time Fiesta was ahead of Golf in European sales was March 2009, so it remains to be seen whether it can hold top position this time round."

The encouraging news for the wider industry will be the net 9.8% uplift in March sales across Europe (+9.6% YtD), with Germany the only major market not posting a sales increase for the month.

Model Performance

Fiesta's move to the top of the table is the result of success in key markets, notably Great Britain, where it sold 34% of all March models (23,681 sales).

By contrast, Fiat has seen a drop in March sales for its Punto and Panda, largely due to significantly reduced sales in Germany (-88% and -80% respectively).

Volkswagen Golf sales have continued to grow, but the strongest markets are not those where Golf is most popular. It was the only one of Germany's top five cars to increase sales in March (+12.5%), and grew by 24.3% in the UK, but was outsold here 2:1 by Fiesta, year-to-date.

Most improved in the month's top ten was the new model Opel/ Vauxhall Astra, which saw a 42.9 overall March sales rise, aided greatly by a 75.9% uplift in the UK, where it was the third best-selling car.

Top 10 Models

Make & Model	Mar_10	Mar_09	% Change Mar	Mar YtD_10	Mar YtD_09	% Change YtD
FORD FIESTA	68,630	54,573	+25.8%	140,496	115,406	+21.7%
VOLKSWAGEN GOLF	56,845	48,189	+18.0%	135,048	122,290	+10.4%
RENAULT CLIO	43,879	31,606	+38.8%	103,576	66,319	+56.2%
OPEL/VAUXHALL CORSA	41,724	40,582	+2.8%	85,992	80,571	+6.7%
PEUGEOT 207	40,895	39,416	+3.8%	91,223	90,621	+0.7%
FORD FOCUS	39,661	34,723	+14.2%	79,677	78,158	+1.9%
OPEL/VAUXHALL ASTRA	39,121	27,370	+42.9%	79,396	59,593	+33.2%
VOLKSWAGEN POLO	36,922	38,403	-3.9%	94,859	76,799	+23.5%
FIAT PUNTO	31,646	37,465	-15.5%	86,019	73,165	+17.6%
FIAT PANDA	30,483	33,693	-9.5%	74,730	72,250	+3.4%

Brand Performance

Ford has also secured the top spot in the March brand chart, on its Fiesta success – 1,818 sales ahead of Volkswagen in March, whilst also closing the year-to-date gap to its German rival.

March was a less successful month for Fiat and Toyota, as both slipped in sales, losing 4.3% and 12.4%, respectively.

Toyota's top three European selling models, the Yaris, Auris and Aygo, all dropped sales, compared to March 2009, most likely to be a consequence of the recent media coverage regarding the brand's recall activity and regardless of its strong CO₂ performances. Toyota had also previously seen strong sales in Germany, so is affected by that market's poor performance.

Similarly, Fiat had been one of the big winners last year from the German scrappage scheme, and is now suffering much reduced sales (-21,057 units in March alone) following the conclusion of that scheme.

Top 10 Brands

Make	Mar_10	Mar_09	% Change Mar	Mar YtD_10	Mar YtD_09	% Change YtD
FORD	169,871	145,605	+16.7%	348,780	317,429	+9.9%
VOLKSWAGEN	168,053	155,941	+7.8%	401,082	372,205	+7.8%
RENAULT	130,748	103,370	+26.5%	320,855	236,091	+35.9%
OPEL/VAUXHALL	123,466	117,391	+5.2%	258,460	252,997	+2.2%
PEUGEOT	116,732	98,431	+18.6%	277,663	232,193	+19.6%
FIAT	108,458	113,312	-4.3%	262,840	249,527	+5.3%
CITROEN	95,737	80,492	+18.9%	234,120	198,221	+18.1%
AUDI	71,406	62,863	+13.6%	158,473	152,414	+4.0%
TOYOTA	69,365	79,203	-12.4%	172,084	182,390	-5.7%
BMW	66,955	59,240	+13.0%	141,084	130,918	+7.8%

National Trends

All of the major European markets, except Germany, posted sales gains for both March and year-to-date 2010, compared to 2009.

These performances have led to a net improvement for both the month and year-to-date, of almost 10%, reflecting a tentative recovery from the darker times of 2009.

Once again Spain, Great Britain, Italy and France all recorded double-digit sales growth, with Spain sales an impressive 44.8% up year-to-date and Great Britain taking the accolade of largest European market in March 2010.

"There remains the shade of scrappage in these figures, so we need to remain cautious. Germany has lost almost 200,000 sales in the first three months of the year, without the incentives that are still helping other markets," concludes Di Girolamo.

Sales by Market

Country	Mar_10	Mar_09	% Change Mar	Mar YtD_10	Mar YtD_09	% Change YtD
Austria	33,270	26,477	+25.7%	75,939	64,296	+18.1%
Belgium*	50,239	50,258	-0.0%	147,206	143,852	+2.3%
Cyprus*	1,193	1,458	-18.2%	3,479	4,397	-20.9%
Czech Republic	17,446	12,410	+40.6%	39,339	31,079	+26.6%
Denmark	9,411	9,858	-4.5%	28,682	25,095	+14.3%
Estonia	864	895	-3.5%	2,185	2,704	-19.2%
Finland	9,119	10,737	-15.1%	29,088	29,476	-1.3%
France	242,707	204,018	+19.0%	594,720	505,456	+17.7%
Germany	294,375	400,965	-26.6%	670,410	868,090	-22.8%
Great Britain	397,383	313,912	+26.6%	611,548	480,358	+27.3%
Greece	19,039	13,371	+42.4%	59,056	49,129	+20.2%
Hungary	4,431	9,401	-52.9%	10,308	22,782	-54.8%
Iceland	156	76	+105.3%	321	293	+9.6%
Ireland	13,813	7,763	+77.9%	42,678	32,445	+31.5%
Italy	258,821	216,475	+19.6%	669,495	543,190	+23.3%
Latvia	466	568	-18.0%	1,064	1,517	-29.9%
Lithuania	501	653	-23.3%	1,375	1,928	-28.7%
Luxembourg	5,806	4,768	+21.8%	13,423	10,011	+34.1%
Norway	11,486	7,601	+51.1%	30,277	19,241	+57.4%
Poland*	29,655	31,107	-4.7%	79,404	87,966	-9.7%
Portugal	16,476	12,758	+29.1%	46,392	31,781	+46.0%
Slovakia	5,679	7,239	-21.5%	13,277	14,901	-10.9%
Slovenia	5,895	5,360	+10.0%	15,748	14,648	+7.5%
Spain	124,988	76,505	+63.4%	286,755	198,003	+44.8%
Sweden	25,652	18,035	+42.2%	59,147	43,937	+34.6%
Switzerland*	23,542	23,578	-0.2%	60,749	58,783	+3.3%
The Netherlands	45,171	34,348	+31.5%	145,732	124,254	+17.3%
Grand Total	1,647,584	1,500,594	+9.8%	3,737,797	3,409,612	+9.6%

*Denotes estimated volumes for March 2010.

The above data is provided by JATO Consult, the company's bespoke consulting service which offers customers access to its unique data 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 43 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 data 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 data to drive the vehicle quotation process. Visit JATO at www.jato.com.

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