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FIESTA STEALS EUROPE'S TOP SPOT AS GOLF'S CROWN SLIPS

- **Fiesta topples Golf as Europe's most popular model**
- **Scrapping incentives continue to bolster certain markets**
- **Small cars becoming increasingly popular**
- **VW still Europe's best selling brand**
- **First quarter European new car market down by 16.9%**

JATO Dynamics' monthly analysis of the European new car market is showing, for the first time in a year, the hugely popular Volkswagen Golf has lost its strangle hold as Europe's most popular model, handing the accolade to Ford's well received new Fiesta. The Fiesta's success is set against an overall European new car market which fell 9.0% (or 147,965 units) in March 2009 compared to March 2008, to a total of 1,488,386 units. Year-to-Date the market fell 16.9% (or 691,350 units) compared to the same period last year, to a total of 3,401,473 units.

Crucial to the success of the new Fiesta has been its increased sales in Germany and Italy, and a sustained performance in the otherwise depressed UK market. The Fiesta recorded a 15.5% increase in volumes in March with 52,805 vehicles sold. "It's interesting to see the continued affect that the government scrapping incentives have had in certain markets. Germany and Italy are big markets for new cars, and we're really seeing the commercial benefits brought about by the new incentives", says David Di Girolamo, Head of JATO Consult. "We will track the markets with interest as it will be important to understand if this is a short term reaction by consumers or if it will have a prolonged effect on the market."

Several small models have also risen to greater prominence in the top ten, including the VW Polo and Fiat Punto. Much of this can be attributed to Italy where the inclusion of CNG and LPG vehicles in the incentive scheme has provided a boost. Particularly worthy of note is the performance of Fiat's evergreen Panda, which posted significant sales growth in March, up 62% on last year, over 25% from the additional fuel types in Italy alone. Punto sales in Italy for CNG/LPG versions were more than the total growth for this model.

“The Panda is a perfect example of a car that can benefit from today’s market conditions”, continues Di Girolamo. “It’s a very affordable car to buy new and has become more fashionable recently, cheap to run with low CO₂ emissions, and available with diesel, CNG and LPG variants. It’s an easy step-up into the new car market for those who have been encouraged to scrap their old cars.”

Behind the Fiesta, the top ten places were rounded off by the VW Golf, Opel/Vauxhall Corsa, Peugeot 207, VW Polo, Fiat Punto, Ford Focus, Fiat Panda, Renault Clio and Opel/Vauxhall Astra.

Overall in the first quarter of the year, the total market fell by 16.9%. The Golf still leads Year-to-Date, from the Fiesta, 207, Corsa, Focus, Polo, Punto, Panda, Clio and Astra.

Top 10 Models

Make & Model	Mar_09	Mar_08	% Change Mar	Mar YtD_09	Mar YtD_08	% Change YtD
FORD FIESTA	52,805	45,725	+15.5%	113,576	98,124	+15.7%
VOLKSWAGEN GOLF	46,415	46,461	-0.1%	119,651	124,539	-3.9%
OPEL/VAUXHALL CORSA	40,346	45,199	-10.7%	80,361	106,136	-24.3%
PEUGEOT 207	39,499	46,674	-15.4%	90,735	122,877	-26.2%
VOLKSWAGEN POLO	38,316	29,407	+30.3%	76,666	74,288	+3.2%
FIAT PUNTO	37,337	33,270	+12.2%	73,113	90,147	-18.9%
FORD FOCUS	35,398	45,805	-22.7%	79,008	106,268	-25.7%
FIAT PANDA	33,593	20,705	+62.2%	72,178	62,167	+16.1%
RENAULT CLIO	31,938	39,490	-19.1%	66,666	97,716	-31.8%
OPEL/VAUXHALL ASTRA	27,236	43,831	-37.9%	59,519	99,617	-40.3%

Brand Performance

Volkswagen was once again Europe’s top-selling car brand in March (up 1.9%), ahead of Ford, Opel/Vauxhall, Fiat (up 12.8%) and Renault. The order of the top five brands remains the same Year-to-Date.

Top 10 Brands

Make	Mar_09	Mar_08	% Change Mar	Mar YtD_09	Mar YtD_08	% Change YtD
VOLKSWAGEN	155,648	152,723	+1.9%	372,077	399,835	-6.9%
FORD	143,480	152,812	-6.1%	315,484	351,030	-10.1%
OPEL/VAUXHALL	116,206	144,129	-19.4%	251,910	332,826	-24.3%
FIAT	112,709	99,885	+12.8%	249,002	277,843	-10.4%
RENAULT	102,066	121,921	-16.3%	235,006	305,850	-23.2%
PEUGEOT	98,319	109,383	-10.1%	232,239	291,811	-20.4%
TOYOTA	80,152	87,600	-8.5%	183,469	225,299	-18.6%
CITROEN	79,184	86,774	-8.7%	197,095	240,367	-18.0%
AUDI	63,087	65,301	-3.4%	152,817	160,634	-4.9%
MERCEDES	59,913	74,267	-19.3%	136,360	186,375	-26.8%

Significantly, March proved to be a more promising month for many brands following a poor start to the year. Skoda, Hyundai, Suzuki, Dacia and Alfa-Romeo all posted significant increases in new car sales.

National Trends

As expected given the global economic conditions, most markets across Europe recorded significantly lower new car sales in March 2009 than in March 2008. The key exceptions were France and Germany, where the government scrapping incentives boosted the markets. Year-to-Date, only Germany and Poland have recorded increased sales.

Country	Mar_09	Mar_08	% Change Mar	Mar YtD_09	Mar YtD_08	% Change YtD
Austria	26,477	29,907	-11.5%	64,296	73,778	-12.9%
Belgium*	41,981	57,077	-26.4%	135,575	169,864	-20.2%
Cyprus*	1,590	1,894	-16.1%	4,852	5,898	-17.7%
Czech Republic*	14,354	15,491	-7.3%	37,416	42,741	-12.5%
Denmark	9,006	11,989	-24.9%	24,166	39,350	-38.6%
Estonia	895	2,531	-64.6%	2,704	7,435	-63.6%
Finland	10,716	12,625	-15.1%	29,411	46,230	-36.4%
France	204,018	188,879	+8.0%	505,456	526,121	-3.9%
Germany	400,865	286,549	+39.9%	867,990	735,914	+17.9%
Great Britain	313,912	451,642	-30.5%	480,358	683,349	-29.7%
Greece	13,371	22,393	-40.3%	49,129	79,071	-37.9%
Hungary	9,249	13,895	-33.4%	22,380	39,621	-43.5%
Iceland	76	855	-91.1%	293	3,322	-91.2%
Ireland	7,811	21,451	-63.6%	32,646	92,713	-64.8%
Italy	215,350	215,695	-0.2%	540,859	671,081	-19.4%
Latvia	567	1,893	-70.0%	1,515	5,990	-74.7%
Lithuania	653	2,209	-70.4%	1,928	6,837	-71.8%
Luxembourg	4,768	5,356	-11.0%	10,011	13,490	-25.8%
Norway	7,601	9,506	-20.0%	19,241	29,974	-35.8%
Poland*	31,147	30,387	+2.5%	88,170	86,924	+1.4%
Portugal*	15,718	22,043	-28.7%	34,725	55,213	-37.1%
Slovakia*	4,996	6,828	-26.8%	12,683	19,742	-35.8%
Slovenia	5,360	6,643	-19.3%	14,648	18,799	-22.1%
Spain	76,512	124,624	-38.6%	198,018	347,609	-43.0%
Sweden	18,035	23,540	-23.4%	43,937	61,823	-28.9%
Switzerland*	18,478	23,472	-21.3%	53,678	66,542	-19.3%
The Netherlands	34,880	46,977	-25.8%	125,388	163,392	-23.3%
Grand Total	1,488,386	1,636,351	-9.0%	3,401,473	4,092,823	-16.9%

* denotes estimated volumes for March 2009

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 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 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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