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18 May 2009

***IMPORTANT CORRECTION* TO ESTIMATED DATA IN THIS STORY:**

GOLF BACK IN TOP SPOT AS EUROPEAN 'SCRAPPAGE SCHEMES' BITE

- **Golf is back as Europe's most popular model**
- **Scrappage schemes affect certain markets**
- **VW still Europe's best-selling brand**
- **European new car market down 15.5% YTD**

JATO Dynamics, the world's leading provider of automotive data and intelligence, has released its monthly European new car market analysis for April 2009, showing the Volkswagen Golf has re-claimed its crown as Europe's best-selling car, while Volkswagen remains the best-selling brand.

Ford has kept up the pressure on its German rival however, with the new Fiesta continuing to increase its sales across Europe, up 26.7% year-to-date and 59.2% for the month of April. Fiesta has sold especially well in the 'big 5' European new car markets (Germany, UK, France, Italy and Spain), all of which have now also announced scrappage schemes, incentivising consumers towards new, smaller cars.

Beyond the Ford Fiesta, small cars dominate the top ten and have managed to increase sales year-to-date over the same period in 2008 in an otherwise difficult market. Volkswagen Polo and Fiat Panda are up an impressive 17.3% and 56.8% respectively, in the month of April.

This small car success is in marked contrast to the overall European new car market, which dropped by 12.5% (175,548 units) in April 2009 versus April 2008, to a monthly total of 1,233,710 units. This translates to a year-to-date fall of 15.5% (or 853,772 units) versus the same period last year, with total sales of 4,647,468.

"National government scrappage schemes are really starting to have an impact, both in the sales volumes in different markets and in the type of cars being sold", says David Di Girolamo, Head of JATO Consult. "The bigger picture shows the size of the drop in new car sales across Europe and we'll continue to monitor this closely for signs of a wider improvement."

In a further sign of the impact of changing consumer tastes and targeted incentives, all of the top ten best-selling models in Europe are now B or C segment cars, accounting for 1,158,651 sales year-to-date between them, or 24.9% of the total European market.

Top 10 Models

Make & Model	Apr_09	Apr_08	% Change Apr	Apr YtD_09	Apr YtD_08	% Change YtD
VOLKSWAGEN GOLF	49,488	44,612	+10.9%	170,456	169,089	+0.8%
FORD FIESTA	43,253	27,170	+59.2%	158,693	125,285	+26.7%
OPEL/VAUXHALL CORSA	35,754	34,465	+3.7%	116,273	140,578	-17.3%
FIAT PUNTO	34,340	30,643	+12.1%	107,624	120,751	-10.9%
PEUGEOT 207	32,310	43,045	-24.9%	122,958	165,915	-25.9%
VOLKSWAGEN POLO	30,156	25,708	+17.3%	106,925	99,960	+7.0%
FIAT PANDA	29,536	18,831	+56.8%	101,733	80,955	+25.7%
FORD FOCUS	25,158	34,605	-27.3%	103,428	140,861	-26.6%
OPEL/VAUXHALL ASTRA	22,731	32,466	-30.0%	82,328	132,075	-37.7%
RENAULT CLIO	21,900	34,771	-37.0%	88,233	132,480	-33.4%

Brand Performance

Volkswagen was once again Europe's top-selling car brand in April, but with sales down 1.2%, versus 2008. Ford maintains a close second, while Fiat has moved up to take third place, posting a 6% rise in total sales for April, the only brand to do so this month. It remains fourth year-to-date, behind Opel/Vauxhall.

Top 10 Brands

Make	Apr_09	Apr_08	% Change Apr	Apr YtD_09	Apr YtD_08	% Change YtD
VOLKSWAGEN	150,558	152,435	-1.2%	522,979	552,135	-5.3%
FORD	110,130	110,231	-0.1%	427,797	461,225	-7.2%
FIAT	98,666	93,454	+6%	348,264	371,137	-6.2%
OPEL/VAUXHALL	98,342	111,292	-11.6%	351,255	444,069	-20.9%
RENAULT	85,399	111,072	-23.1%	321,727	416,900	-22.8%
PEUGEOT	80,669	99,444	-18.9%	313,044	391,239	-20.0%
CITROEN	74,839	82,483	-9.3%	273,212	322,799	-15.4%
TOYOTA	56,438	72,717	-22.4%	238,878	297,982	-19.8%
AUDI	56,434	63,041	-10.5%	209,159	223,662	-6.5%
MERCEDES	47,413	70,707	-32.9%	183,314	257,036	-28.7%

National Trends

Behind the downward European sales trend, the picture of national new car sales shows the varying effect of scrappage schemes around Europe.

Germany's new car market continues to benefit, just as the German government has announced plans to extend its scrappage scheme until the end of 2009, with sales up 19.4% in April and 18.4% year-to-date. All other major European new car markets are still suffering the effects of the global recession and while many now have national incentive schemes in place to encourage purchase of new cars, the effect of these is yet to be felt in the UK and Spain.

Sales by Market

Country	Apr_09	Apr_08	% Change Apr	Apr YtD_09	Apr YtD_08	% Change YtD
Austria	35,898	31,813	+12.8%	100,194	105,591	-5.1%
Belgium	47,641	61,703	-22.8%	191,493	231,567	-17.3%
Cyprus*	1,474	1,809	-18.5%	5,871	7,707	-23.8%
Czech Republic*	15,809	18,832	-16.1%	52,629	61,573	-14.5%
Denmark	7,885	16,117	-51.1%	32,444	55,467	-41.5%
Estonia	1,164	2,801	-58.4%	3,868	10,236	-62.2%
Finland	7,433	15,494	-52.0%	36,844	61,724	-40.3%
France	184,475	198,558	-7.1%	689,931	724,679	-4.8%
Germany	379,626	317,960	+19.4%	1,247,716	1,053,874	+18.4%
Great Britain	133,475	175,668	-24.0%	613,833	859,017	-28.5%
Greece*	16,377	28,033	-41.6%	65,506	107,104	-38.8%
Hungary	6,707	14,576	-54.0%	29,087	54,197	-46.3%
Iceland	71	622	-88.6%	364	3,944	-90.8%
Ireland	4,448	13,261	-66.5%	37,037	105,974	-65.1%
Italy	189,029	204,710	-7.7%	730,876	874,950	-16.5%
Latvia	546	2,250	-75.7%	2,061	8,240	-75.0%
Lithuania	797	2,535	-68.6%	2,725	9,372	-70.9%
Luxembourg	5,875	6,419	-8.5%	15,886	19,909	-20.2%
Norway	7,504	11,704	-35.9%	26,745	41,678	-35.8%
Poland*	27,705	28,057	-1.3%	115,672	114,981	+0.6%
Portugal*	13,566	18,447	-26.5%	45,347	73,660	-38.4%
Slovakia*	8,701	8,612	+1.0%	23,612	28,354	-16.7%
Slovenia	4,840	7,730	-37.4%	19,488	26,529	-26.5%
Spain	63,565	123,482	-48.5%	261,583	471,091	-44.5%
Sweden	18,249	27,478	-33.6%	62,186	89,301	-30.4%
Switzerland*	20,567	28,582	-28.0%	79,341	95,124	-16.6%
The Netherlands	30,283	42,005	-27.9%	155,129	205,397	-24.5%
Grand Total	**1,233,710**	**1,409,258**	**-12.5%**	**4,647,468**	**5,501,240**	**-15.5%**

* denotes estimated volumes for April 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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