

15 December 2009

LAST DAYS OF SCRAPPAGE SUMMER

- **European November sales up 27.3%, vs. 2008; only 1.9% down YtD**
- **First signs of slowing post-scrappage sales in key European markets**
- **Fiat rides high in Italy – three of the top four sellers in November and YtD**
- **VW Golf still on top across Europe**

The latest monthly analysis by the world's leading provider of automotive data and intelligence, JATO Dynamics sees the European new car market enjoying the last days of scrappage-incentivised sales.

While Volkswagen Golf and Ford Fiesta continue as the only contenders for the 2009 European top-model crown, Fiat dominates the sales chart in Italy, with three of the top four sales positions taken by its Punto, Panda and 500.

Fiat's Punto and Panda have also benefitted from scrappage schemes across Europe, recording November sales up 45.4% and 54.0% respectively.

JATO's monthly 27-market analysis shows that November 2009 was a significantly better month for new car sales than the same period, 2008, as expected. However, the sales surge is lessening as scrappage schemes close. In Germany, October 2009 sales were up 24.1%, vs. 2008; in November, this gap has closed to 19.7%.

By contrast, Italy, France, Spain and the UK all returned buoyant sales figures for November, as their schemes are set to endure until at least the end of 2009.

"Already, we are seeing reduced new car imports into Europe and the extent of the decline in sales will be something to watch carefully over the next couple of months. You only have to look at Eastern Europe, where there are no such schemes, to see a truer picture of new the car market place – demand is much lower, year-on-year," suggests David Di Girolamo, Head of JATO Consult.

“Western Europe could find out what happens when economic reality bites if these schemes end in the New Year.”

Top 10 Models

Make & Model	Nov_09	Nov_08	% change Nov	Nov YtD_09	Nov YtD_08	% change YtD
VOLKSWAGEN GOLF	48,445	30,288	+59.9%	534,511	426,429	+25.3%
FORD FIESTA	38,953	23,653	+64.7%	437,808	303,923	+44.1%
RENAULT CLIO	33,911	20,820	+62.9%	285,697	318,670	-10.3%
PEUGEOT 207	30,093	22,219	+35.4%	339,487	382,958	-11.4%
OPEL/VAUXHALL CORSA	27,433	19,806	+38.5%	327,712	334,265	-2.0%
VOLKSWAGEN POLO	25,287	19,242	+31.4%	258,048	255,657	+0.9%
FIAT PUNTO	25,079	17,254	+45.4%	301,801	263,101	+14.7%
FIAT PANDA	24,910	16,179	+54.0%	277,328	209,060	+32.7%
RENAULT MEGANE	23,062	15,616	+47.7%	212,103	153,123	+38.5%
FORD FOCUS	22,616	22,033	+2.6%	286,755	343,911	-16.6%

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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