

19th April 2011

New car sales fall in Europe during Q1

- **Sales for region down 1.8% compared to same period last year**
- **Despite breaking into positive territory in February, March sales down 4.6%**
- **Baltic states perform well while poor sales in Greece and Portugal reflect economic troubles**
- **Volkswagen consolidates its position as Europe's favourite brand**

The latest new car sales information for Q1 2011 shows that, despite what was looking like an improving market; sales across Europe were slightly down on last year. Although there was an uplift in sales during February, average sales in March 2011 fell by 4.6%.

JATO's key findings:

- *The European market dropped by 1.8% (68,726 units) during Q1 2011 compared to the same period last year and by 4.6% in March*
- *Markets in the Baltic region performed strongly during Q1, with Estonia, Latvia and Lithuania up 71.4%, 122.9% and 108.5% respectively*
- *This is in sharp contrast to markets that have faced economic instability during the start of the year: Greece and Spain were down 57.3% and 27.3% respectively while Portugal was down 6.2%*
- *Volkswagen retains and consolidates its position as the leading brand, selling 425,863 units during Q1 2011*

Commenting on the findings, Gareth Hession, Vice President, Research said:

"While there had been some positive signals from the industry during the first three months of this year, economic instability in some of the more mature automotive markets have hit overall sales. Despite this, it is encouraging to see growth in Central and Eastern Europe, where manufacturers will no doubt be looking to expand further. Investment in vehicles tailored for this region will be crucial to their success there."

National Trends

Only two of the 'big five' markets showed positive growth during Q1 2011: France and Germany were up 8.9% and 13.9% respectively while Great Britain, Italy and Spain were down 8.7%, 23.3% and 27.3%. Out of these markets, Germany experienced the greatest unit growth in Q1, up 92,993 units, while Italy saw the biggest decline, down 156,269 units.

While sales in Central and Eastern Europe have performed consistently well during 2011 as automotive markets expand in the region, the well publicised economic troubles in countries such as Greece and Portugal have been clearly reflected in poor sales for the quarter.

Sales by market

Country	Mar_11	Mar_10	% Change Mar	Q1_11	Q1_10	% Change Q1
Austria	35,869	33,270	+7.8%	87,865	75,939	+15.7%
Belgium	63,533	64,330	-1.2%	169,904	161,297	+5.3%
Cyprus	1,238	1,243	-0.4%	3,696	3,621	+2.1%
Czech Republic	17,501	17,446	+0.3%	42,026	39,339	+6.8%
Denmark	12,918	13,964	-7.5%	36,828	33,235	+10.8%
Estonia	1,486	864	+72.0%	3,745	2,185	+71.4%
Finland	12,565	9,119	+37.8%	35,649	29,088	+22.6%
France	257,533	242,707	+6.1%	647,454	594,720	+8.9%
Germany	327,921	294,375	+11.4%	763,403	670,410	+13.9%
Great Britain	366,101	397,383	-7.9%	558,336	611,548	-8.7%
Greece	8,517	19,039	-55.3%	25,244	59,056	-57.3%
Hungary	4,479	4,430	+1.1%	11,546	10,308	+12.0%
Iceland	208	156	+33.3%	535	321	+66.7%
Ireland	14,426	13,641	+5.8%	48,032	42,102	+14.1%
Italy*	188,182	260,456	-27.7%	515,336	671,632	-23.3%
Latvia	873	466	+87.3%	2,372	1,064	+122.9%
Lithuania	1,096	501	+118.8%	2,867	1,375	+108.5%
Luxembourg	5,660	5,806	-2.5%	13,423	13,423	+0.0%
Norway	12,901	11,486	+12.3%	33,816	30,277	+11.7%
Poland*	21,583	22,586	-4.4%	62,048	56,568	+9.7%
Portugal*	23,734	23,835	-0.4%	50,397	53,750	-6.2%
Slovakia	6,489	5,679	+14.3%	15,723	13,277	+18.4%
Slovenia	5,909	5,895	+0.2%	16,653	15,748	+5.7%
Spain	88,427	124,869	-29.2%	208,483	286,649	-27.3%
Sweden	29,527	25,652	+15.1%	69,764	59,147	+18.0%
Switzerland	29,682	28,310	+4.8%	71,853	65,517	+9.7%
The Netherlands	56,757	44,746	+26.8%	180,928	145,056	+24.7%
Grand Total	1,595,115	1,672,254	-4.6%	3,677,926	3,746,652	-1.8%

* Denotes estimated data used for March_11

Brand Performance

Volkswagen maintains its leading position in Europe for the quarter, extending its lead over rivals, with sales increasing 5.7%. In contrast, Fiat saw the biggest decline out of the regions' top ten brands, down 25.3%, largely reflecting the poor performance of its home market, Italy.

Outside the top ten brands a number of premium brands have experienced strong sales for the quarter, including Alfa-Romeo and Porsche, up 49.6% and 26.5% respectively, largely due to strong sales of the new Giulietta and latest Cayenne models. This not only demonstrates the importance of investing in new products but also shows the appetite for premium brands, despite continued tough economic conditions.

Top Ten Brands

Make	Mar_11	Mar_10	% Change Mar	Q1_11	Q1_10	% Change Q1
VOLKSWAGEN	177,956	171,244	+3.9%	425,863	402,789	+5.7%
FORD	145,372	171,484	-15.2%	306,549	348,670	-12.1%
OPEL/VAUXHALL	124,672	124,510	+0.1%	269,150	258,885	+4.0%
RENAULT	115,711	133,191	-13.1%	298,346	322,405	-7.5%
PEUGEOT	109,026	120,522	-9.5%	264,793	280,513	-5.6%
CITROEN	94,396	98,221	-3.9%	224,441	235,759	-4.8%
FIAT	80,405	109,214	-26.4%	196,580	263,009	-25.3%
AUDI	76,519	72,632	+5.4%	170,628	159,578	+6.9%
BMW	69,154	67,254	+2.8%	156,478	140,884	+11.1%
TOYOTA	68,681	69,345	-1.0%	162,089	170,865	-5.1%

Top Ten Models

All of the regions' top ten models experienced a decline or no growth in sales during Q1 2011. Volkswagen's Golf maintains its leading position, while second place Ford Fiesta saw the biggest decline in sales, down 27.7%.

During March, Volkswagen Polo was the only model to increase sales, up 4.2%, while Ford's Fiesta saw the biggest decline, down 26.9%.

Top Ten Models

Make & Model	Mar_11	Mar_10	% Change		Q1_11	Q1_10	% Change Q1
			Mar	Q1_10			
VOLKSWAGEN GOLF	53,055	59,267	-10.5%	123,480	135,745	-9.0%	
FORD FIESTA	50,534	69,085	-26.9%	101,859	140,932	-27.7%	
VOLKSWAGEN POLO	39,311	37,726	+4.2%	93,740	95,154	-1.5%	
OPEL/VAUXHALL CORSA	39,189	42,244	-7.2%	83,383	86,421	-3.5%	
OPEL/VAUXHALL ASTRA	37,125	39,313	-5.6%	79,404	79,390	+0.0%	
FORD FOCUS	36,339	40,332	-9.9%	73,222	79,758	-8.2%	
RENAULT CLIO	36,048	43,830	-17.8%	89,157	103,359	-13.7%	
PEUGEOT 207	31,021	41,540	-25.3%	73,280	91,808	-20.2%	
RENAULT MEGANE	26,534	29,848	-11.1%	65,092	70,942	-8.2%	
CITROEN C3	26,021	29,653	-12.2%	56,737	64,606	-12.2%	

For more information visit www.jato.com, or email jatoteam@firstlightpr.com

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For media enquiries:

Justin Bates

+44 7878 357463

jatoteam@firstlightpr.com

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