

18 May 2010

NO SPRING GROWTH AS NEW CAR SALES STALL IN APRIL

- **European new car market drops 6.7% in April**
- **Italy joins Germany in post-scrappage sales drop**
- **Golf is back on top; Ford sales suffer in Germany and UK**
- **Good news for Renault as Clio sales push brand into 2nd place**

European new car sales have experienced a significant slide in April, down 6.7%, according to the latest monthly analysis from the world's leading provider of automotive intelligence, JATO Dynamics.

In a marked contrast to a buoyant March, the end of scrappage incentive schemes is starting to be felt in key markets across Europe. In particular, monthly sales in Italy have now slipped into the red, as the deadline for registrations under its scrappage scheme has now passed. The Italian market joins Germany in experiencing lower sales vs. April 2009, an indication of cooling demand for new cars in post-scrappage markets.

Against this backdrop, the Volkswagen Golf has climbed once again back to the top of the best-seller chart, with the Ford Fiesta suffering a marked drop in sales in Germany, Italy and the UK, a performance which contributed to Ford dropping to fourth overall in Europe's best-selling brands.

Commenting, David Di Girolamo, Head of JATO Consult states: "This was inevitable and is a shift in fortune for some of the big markets, now stripped of their government incentives. The effect of this on overall European new car sales is clear and we will progressively see the extent to which European

sales have been underpinned by scrappage. Looking at the bigger picture, wider economic uncertainties across the Eurozone will do nothing to stimulate consumer demand in the months ahead and we expect this combination of factors to force a continued slide in overall new car sales."

Brand Performance

April's biggest winners were Renault and Peugeot, with the French brands doing well in their still-growing home market and in Spain.

The effects of these rising sales were magnified by the relatively poor performance of key rivals, many of whom are more dependent on Germany, Italy and UK for sales.

Ford has been the greatest casualty of this shift in sales, dropping to fourth place in the brand table for April, although it remains second in year-to-date sales.

Brand Performance

Make	Apr_10	Apr_09	% Change Apr	Apr YtD_10	Apr YtD_09	% Change YtD
VOLKSWAGEN	142,037	153,223	-7.3%	546,651	525,428	+4.0%
RENAULT	100,209	85,491	+17.2%	423,752	321,582	+31.8%
PEUGEOT	89,787	81,168	+10.6%	371,364	313,361	+18.5%
FORD	89,381	110,842	-19.4%	440,262	428,271	+2.8%
OPEL/VAUXHALL	79,702	97,672	-18.4%	339,471	350,669	-3.2%
FIAT	70,952	99,350	-28.6%	334,755	348,880	-4.0%
CITROEN	70,487	74,858	-5.8%	307,272	273,079	+12.5%
AUDI	56,619	57,269	-1.1%	216,361	209,683	+3.2%
BMW	52,017	44,872	+15.9%	193,734	175,790	+10.2%
MERCEDES	49,389	47,919	+3.1%	184,012	183,720	+0.2%

Model Performance

Renault's success has been driven mostly by Clio sales, which rose particularly in France (up 63.7%), although Mégane also returned strong sales in secondary Western European markets, such as Belgium.

National rival Peugeot also performed strongly at home, augmented by strong sales in Spain, for both 308 and 207 (up 37.1% and 65.2%, respectively).

Fiesta – which benefitted from strong Italy and UK sales in March – suffered as sales in these markets dipped, allowing Golf to take back the European top spot.

Top 10 models

Make & Model	Apr_10	Apr_09	% Change Apr	Apr YtD_10	Apr YtD_09	% Change YtD
VOLKSWAGEN GOLF	49,395	50,948	-3.0%	186,202	171,930	+8.3%
FORD FIESTA	32,226	44,149	-27.0%	173,096	159,555	+8.5%
RENAULT CLIO	29,258	21,490	+36.1%	132,876	87,809	+51.3%
VOLKSWAGEN POLO	28,092	30,204	-7.0%	123,889	107,003	+15.8%
PEUGEOT 207	26,415	32,109	-17.7%	118,312	122,730	-3.6%
OPEL/VAUXHALL ASTRA	25,854	22,163	+16.7%	105,458	81,756	+29.0%
OPEL/VAUXHALL CORSA	25,628	35,366	-27.5%	112,163	115,937	-3.3%
RENAULT MÉGANE	22,094	19,415	+13.8%	93,382	67,995	+37.3%
FORD FOCUS	21,948	24,349	-9.9%	102,630	102,507	+0.1%
FIAT PANDA	20,958	29,812	-29.7%	96,325	102,062	-5.6%

National Trends

Across Europe, year-to-date sales are now only 5.9% ahead of 2009, having dropped behind 2009 by 6.7%, for the month of April. Even those major markets still growing are doing so at a slower rate since the end of key scrappage schemes.

Just one month before, in March 2010, Italy registered 258,821 sales, 62% more than in April.

Poor April sales have also had an impact on Italy's year-to-date performance vs. 2009, which is now running at 13.2%, compared to 23.3% for the year to March 2010.

Germany remains Europe's largest market, but has now declined 25.5% of sales year-to-date, vs. 2009.

Sales by Market

Country	Apr_10	Apr_09	% Change Apr	Apr YtD_10	Apr YtD_09	% Change YtD
Austria	31,723	35,898	-11.6%	107,662	100,194	+7.5%
Belgium	57,309	47,641	+20.3%	218,606	191,493	+14.2%
Cyprus*	1,106	1,402	-21.1%	4,590	5,799	-20.8%
Czech Republic	15,264	17,592	-13.2%	54,603	48,671	+12.2%
Denmark	6,845	9,054	-24.4%	38,919	34,149	+14.0%
Estonia	861	1,164	-26.0%	3,046	3,868	-21.3%
Finland	10,407	7,443	+39.8%	39,495	36,919	+7.0%
France	190,917	184,475	+3.5%	785,637	689,931	+13.9%
Germany	259,414	379,626	-31.7%	929,824	1,247,716	-25.5%
Great Britain	148,793	133,475	+11.5%	760,341	613,833	+23.9%
Greece	12,198	14,236	-14.3%	71,254	63,365	+12.5%
Hungary	3,655	6,773	-46.0%	13,963	29,555	-52.8%
Iceland	79	71	+11.3%	400	364	+9.9%
Ireland	8,544	4,373	+95.4%	51,098	36,818	+38.8%
Italy	160,578	190,181	-15.6%	830,073	733,371	+13.2%
Latvia	458	554	-17.3%	1,522	2,071	-26.5%
Lithuania	581	797	-27.1%	1,956	2,725	-28.2%
Luxembourg	5,941	5,875	+1.1%	19,364	15,886	+21.9%
Norway	10,677	7,504	+42.3%	40,954	26,745	+53.1%
Poland	25,312	28,736	-11.9%	104,716	116,702	-10.3%
Portugal*	16,944	12,191	+39.0%	70,696	43,972	+60.8%
Slovakia	4,945	10,540	-53.1%	18,222	25,441	-28.4%
Slovenia	5,441	4,840	+12.4%	21,189	19,488	+8.7%
Spain	93,974	67,204	+39.8%	380,730	265,210	+43.6%
Sweden	25,668	18,249	+40.7%	84,815	62,186	+36.4%
Switzerland*	26,477	24,892	+6.4%	91,994	83,675	+9.9%
The Netherlands	37,668	30,081	+25.2%	183,159	154,335	+18.7%
Grand Total	1,161,779	1,244,867	-6.7%	4,928,828	4,654,482	+5.9%

* denotes estimated data included for April 2010

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

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