

18 October 2012

## European car sales continue to fall during third quarter

- **Europe's new car sales declined by 11.2% in September and 9.4% in Q3, compared to the same period last year**
- **Looking at Europe's big five only Great Britain ended the quarter up on 2011**
- **Volkswagen's Golf continues as Europe's top model during Q3, the Fiesta is second**

*According to the latest analysis from JATO Dynamics, the world's leading provider of automotive intelligence, the overall European new car market continues to decline.*

*JATO's key findings:*

- *The European new car market declined by 11.2% in September, its biggest drop in sales this YtD, and 9.4% in Q3 2012 compared to the same period last year*
- *Great Britain is the only market out of the big five to see growth at the end of Q3 2012, Italy and Spain experienced the greatest reduction in sales during the same period*
- *Among the top ten brands, Audi and BMW recorded a sales increase in September compared to last year, but only Audi saw an overall increase for the quarter*
- *Volkswagen's Golf remains the top European model, despite a 17.2% decrease in sales in Q3 2012 compared to 2011*

The difficult economic conditions across Europe continued to affect new car sales during the third quarter as only Great Britain ended September and Q3 on a high note, with an increase of 8.2% in September and 7.5% for the quarter, compared to 2011. The considerable sales decreases last month in Germany, France, Italy and Spain (down 10.9%, 17.9%, 25.5% and 40.9% respectively on last year) has brought the overall European total for September to its lowest figure this year, ending the month down 11.2% compared to the same time last year.

## Sales by Market

Country	Sep_12	Sep_11	% Change Sep	Sep YtD_12	Sep YtD_11	% Change YtD
Austria	27,094	30,755	-11.9%	266,891	273,539	-2.4%
Belgium	33,660	41,427	-18.7%	392,553	440,546	-10.9%
Croatia	1,694	3,170	-46.6%	26,376	32,826	-19.6%
Cyprus	692	970	-28.7%	8,055	9,994	-19.4%
Czech Republic	12,435	12,978	-4.2%	130,870	127,485	+2.7%
Denmark	13,915	13,834	+0.6%	128,377	127,098	+1.0%
Estonia	1,548	1,541	+0.5%	15,191	12,722	+19.4%
Finland	7,990	10,100	-20.9%	88,841	100,019	-11.2%
France	137,536	167,526	-17.9%	1,431,520	1,661,271	-13.8%
Germany	250,082	280,689	-10.9%	2,358,798	2,401,736	-1.8%
Great Britain	359,612	332,476	+8.2%	1,620,609	1,553,094	+4.3%
Greece	3,454	6,712	-48.5%	45,392	79,094	-42.6%
Hungary	3,539	3,538	+0.0%	39,599	34,057	+16.3%
Iceland	470	283	+66.1%	6,371	4,082	+56.1%
Ireland	2,487	2,770	-10.2%	76,645	87,179	-12.1%
Italy	110,350	148,062	-25.5%	1,092,260	1,377,919	-20.7%
Latvia	744	926	-19.7%	7,995	7,777	+2.8%
Lithuania	980	1,197	-18.1%	9,177	9,967	-7.9%
Luxembourg*	3,630	3,466	+4.7%	39,550	39,609	-0.1%
Norway	11,212	11,794	-4.9%	105,538	104,146	+1.3%
Poland	18,854	21,040	-10.4%	206,329	200,231	+3.0%
Portugal*	8,385	9,208	-8.9%	78,028	123,525	-36.8%
Romania	4,736	6,875	-31.1%	49,128	55,879	-12.1%
Serbia*	1,797	2,077	-13.5%	17,297	23,054	-25.0%
Slovakia	5,276	4,998	+5.6%	51,817	50,003	+3.6%
Slovenia	3,203	4,523	-29.2%	38,707	46,378	-16.5%
Spain	32,847	55,601	-40.9%	542,393	624,260	-13.1%
Sweden	21,937	26,605	-17.5%	203,711	227,636	-10.5%
Switzerland	20,661	26,399	-21.7%	243,447	231,834	+5.0%
The Netherlands	32,088	44,382	-27.7%	427,635	453,851	-5.8%
<b>Grand Total</b>	<b>1,132,908</b>	<b>1,275,922</b>	<b>-11.2%</b>	<b>9,749,100</b>	<b>10,520,811</b>	<b>-7.3%</b>

\* denotes estimated data used for September 2012

## Brand Performance

Although the German market has been hostile during the last quarter, German brands continue to perform relatively well. BMW and Audi were the only brands in the top ten to record a sales increase in September, up 9.0% and 0.2% respectively compared to last year, whilst Audi was the only brand to end Q3 2012 with a sales increase on last year up 6%. Audi can attribute its positive performance last month to the popularity of its new Q3, A6 and A1 models, whilst BMW can credit its new offerings (1-Series and 3-Series) with its success last month. Volkswagen remains the top European brand despite a decrease of 7.6% in Q3 2012 compared to 2011.

Toyota is just outside the top ten with its 2.7% increase in Q3 sales bolstered by the new Yaris. Hyundai, Kia, Honda, Land Rover and Subaru also recorded strong sales increases in last quarter following the launch of new and revamped models from these brands.

## Top 10 Brands

Make	Sep_12	Sep_11	% Change Sep	Sep YtD_12	Sep YtD_11	% Change YtD
VOLKSWAGEN	135,017	157,268	-14.1%	1,249,292	1,292,622	-3.4%
FORD	93,397	110,081	-15.2%	747,718	855,137	-12.6%
OPEL/VAUXHALL	83,219	99,030	-16.0%	659,573	778,999	-15.3%
PEUGEOT	68,160	73,072	-6.7%	620,692	718,925	-13.7%
BMW	64,950	59,566	+9.0%	480,986	486,516	-1.1%
AUDI	64,647	64,529	+0.2%	550,340	522,967	+5.2%
RENAULT	62,085	91,719	-32.3%	629,673	796,767	-21.0%
MERCEDES	55,594	60,104	-7.5%	454,254	451,044	+0.7%
CITROEN	53,754	60,564	-11.2%	528,726	601,196	-12.1%
FIAT	50,678	59,669	-15.1%	452,100	545,072	-17.1%

Make	Q3_12	Q3_11	% Change Q3	Sep YtD_12	Sep YtD_11	% Change YtD
VOLKSWAGEN	373,320	404,037	-7.6%	1,249,292	1,292,622	-3.4%
FORD	208,071	254,729	-18.3%	747,718	855,137	-12.6%
OPEL/VAUXHALL	189,720	226,357	-16.2%	659,573	778,999	-15.3%
PEUGEOT	177,353	196,675	-9.8%	620,692	718,925	-13.7%
AUDI	172,055	162,360	+6.0%	550,340	522,967	+5.2%
RENAULT	167,978	224,830	-25.3%	629,673	796,767	-21.0%
BMW	143,961	148,794	-3.2%	480,986	486,516	-1.1%
CITROEN	143,350	162,450	-11.8%	528,726	601,196	-12.1%
MERCEDES	138,282	148,678	-7.0%	454,254	451,044	+0.7%
FIAT	124,905	146,058	-14.5%	452,100	545,072	-17.1%

## Model Performance

The Volkswagen Golf still leads the European market, despite sales for the quarter falling by 17.2% compared to 2011. Considering the current model is at the end of its lifecycle, with the new model Golf due within weeks, this is an impressive performance. The Ford Fiesta came in second with the Opel/Vauxhall Corsa third.

Toyota's new Yaris rounds off the top ten European models in September with an impressive 68.6% increase in sales last month, compared to September 2011.

Outside the top ten new or revamped models, such as the Hyundai i20, Kia's Rio and new Cee'd, Honda's new Civic, Land Rover's Evoque and Subaru's new XV, all saw improved sales compared to September 2011.

Commenting on the findings, Gareth Hession, Vice President, Research at JATO said: "The European new car market has shown little sign of improvement in the last quarter and September has been the most challenging month so far this year. Strong sales in Great Britain, driven by the new registration plate change, did little to lift overall European performance as the unfavourable economic conditions continue to take their toll in most countries."

## Top 10 Models

Make & Model	Sep_12	Sep_11	% Change Sep	Sep YtD_12	Sep YtD_11	% Change YtD
VOLKSWAGEN GOLF	38,669	49,172	-21.4%	340,448	376,912	-9.7%
FORD FIESTA	31,468	36,386	-13.5%	238,345	275,419	-13.5%
OPEL/VAUXHALL CORSA	30,581	34,820	-12.2%	211,088	245,559	-14.0%
FORD FOCUS	24,061	31,868	-24.5%	190,418	225,439	-15.5%
PEUGEOT 208	23,225	1	-	97,228	1	-
OPEL/VAUXHALL ASTRA	22,092	27,277	-19.0%	183,028	230,938	-20.7%
VOLKSWAGEN POLO	20,571	31,778	-35.3%	225,044	274,623	-18.1%
RENAULT CLIO	19,988	28,286	-29.3%	180,130	228,829	-21.3%
NISSAN QASHQAI	18,828	20,086	-6.3%	160,968	162,671	-1.0%
TOYOTA YARIS	17,933	10,638	+68.6%	134,066	103,938	+29.0%

Make & Model	Q3_12	Q3_11	% Change Q3	Sep YtD_12	Sep YtD_11	% Change YtD
VOLKSWAGEN GOLF	100,546	121,438	-17.2%	340,448	376,912	-9.7%
FORD FIESTA	66,603	78,847	-15.5%	238,345	275,419	-13.5%
OPEL/VAUXHALL CORSA	61,467	73,362	-16.2%	211,088	245,559	-14.0%
VOLKSWAGEN POLO	61,407	84,258	-27.1%	225,044	274,623	-18.1%
PEUGEOT 208	55,538	1	-	97,228	1	-
OPEL/VAUXHALL ASTRA	53,076	66,892	-20.7%	183,028	230,938	-20.7%
FORD FOCUS	51,320	74,558	-31.2%	190,418	225,439	-15.5%
RENAULT CLIO	49,428	65,184	-24.2%	180,130	228,829	-21.3%
NISSAN QASHQAI	46,556	49,368	-5.7%	160,968	162,671	-1.0%
RENAULT MEGANE	43,949	53,914	-18.5%	154,913	184,197	-15.9%

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### About JATO

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.

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