**18 August 2009**

# GOLF IMPERIOUS AS SMALL CARS LEAD SALES RECOVERY

- **Golf is Europe's most popular model for fifth consecutive month**
- **VW stays as Europe's best-selling brand**
- **Small cars leading new car sales recovery**
- **European new car market performance improves - 3.3% rise in July**

JATO Dynamics, the world's leading provider of automotive data and intelligence, has released its monthly European new car market analysis for July 2009, showing the Volkswagen Golf remains untouchable as Europe's best-selling car, despite strong sales performances in a resurgent small-car segment.

Golf's fifth consecutive month at the top of the charts is yet another where it outperformed its own previous year sales, being up 15.5% YtD and 26.9% in July, although the gap to its rivals is smaller than 2008.

Ford's new Fiesta has continued to increase its sales across Europe, up 37.1% YtD and a massive 55.9% for the month of July. Boosted by its popularity with German, Italian and British scrappage-incentivised customers it becomes the only non French branded car in the YtD Top 10 in France. Other small car rivals are following its lead, headed by Fiat – Panda posted sales rises of 32.6% YtD and 47% in July, while Punto buoyed the Italian carmaker with sales up 2.5% YtD and 38% for the month.

Small cars are continuing to lead the recovery and are the reason behind a 3.3% rise in the European new car market in July, while the deficit in new cars sales YtD has improved to be only 8.5% behind 2008. In a marked contrast to previous years, the top ten best-selling cars are now all B- or C-segment vehicles.

Other Government-backed incentives are also influencing the market, with sales of LPG and CNG-fuelled cars more than double the figure for the same period last year. Italy leads the way for ECO fuels, followed by France for LPG, Sweden and

Germany for CNG. Meanwhile due to the reduced demand for larger cars diesel's share of the market has fallen below 50% for the first time since May 2007.

"The much talked about 'green shoots' of recovery can be seen in the small car market, which is the greatest benefactor of scrappage incentives and European customers' desire to move to more affordable cars. Whether this performance is sustainable remains to be seen," says David Di Girolamo, Head of JATO Consult.

### Top 10 Models

| Make & Model | Jul_09 | Jul_08 | % Change Jul | Jul YtD_09 | Jul YtD_08 | % Change YtD |
|---|---|---|---|---|---|---|
| VOLKSWAGEN GOLF | 50,329 | 39,647 | +26.9% | 339,045 | 293,669 | +15.5% |
| FORD FIESTA | 40,161 | 25,761 | +55.9% | 283,940 | 207,046 | +37.1% |
| PEUGEOT 207 | 33,424 | 36,012 | -7.2% | 226,953 | 280,090 | -19.0% |
| FIAT PUNTO | 30,952 | 22,434 | +38.0% | 201,882 | 197,048 | +2.5% |
| OPEL/VAUXHALL CORSA | 30,700 | 28,204 | +8.8% | 212,376 | 239,782 | -11.4% |
| FORD FOCUS | 29,113 | 32,467 | -10.3% | 189,960 | 244,613 | -22.3% |
| OPEL/VAUXHALL ASTRA | 27,210 | 27,168 | +0.2% | 164,699 | 220,834 | -25.4% |
| FIAT PANDA | 26,954 | 18,333 | +47.0% | 186,817 | 140,898 | +32.6% |
| RENAULT CLIO | 25,129 | 25,855 | -2.8% | 170,146 | 226,624 | -24.9% |
| PEUGEOT 308 | 21,500 | 22,231 | -3.3% | 140,310 | 146,283 | -4.1% |

### Brand Performance

Volkswagen remains Europe's top-selling car brand, posting a modest 0.9% increase in overall brand sales, versus 2008. Ford maintains a close second, with Opel/Vauxhall third for the month of July. Fiat's continuing strong brand performance and its ability to capitalise on the incentives has brought it up to fourth overall YtD.

### Top 10 Brands

| Make | Jul_09 | Jul_08 | % Change Jul | Jul YtD_09 | Jul YtD_08 | % Change YtD |
|---|---|---|---|---|---|---|
| VOLKSWAGEN | 137,985 | 135,944 | +1.5% | 981,749 | 972,865 | +0.9% |
| FORD | 113,358 | 101,443 | +11.7% | 781,204 | 793,146 | -1.5% |
| OPEL/VAUXHALL | 98,634 | 90,400 | +9.1% | 655,962 | 760,550 | -13.8% |
| FIAT | 92,287 | 81,919 | +12.7% | 634,584 | 632,007 | +0.4% |
| RENAULT | 93,882 | 88,666 | +5.9% | 615,563 | 726,513 | -15.3% |
| PEUGEOT | 93,584 | 85,353 | +9.6% | 596,251 | 668,462 | -10.8% |
| CITROEN | 80,132 | 77,136 | +3.9% | 519,964 | 563,127 | -7.7% |
| TOYOTA | 61,427 | 66,066 | -7.0% | 423,096 | 492,718 | -14.1% |
| AUDI | 56,810 | 58,824 | -3.4% | 383,920 | 400,591 | -4.2% |
| MERCEDES | 50,998 | 59,391 | -14.1% | 352,990 | 436,152 | -19.1% |

### National Trends

Behind the downward European sales trend, the picture of national new car sales shows the varying effect of scrappage schemes around Europe. Of the big 5 European markets only Germany and France have made their way into the black, the former by 26.6% YtD. Encouraging signs of recovery can be seen in Austria, Italy, Great Britain, Poland and Slovakia when considering July registration increases over the same period last year, and this will need to be sustained in these markets to bring them back on track.

## Sales by Market

| Country | Jul_09 | Jul_08 | % Change Jul | Jul YtD_09 | Jul YtD_08 | % Change YtD |
|---|---|---|---|---|---|---|
| Austria | 32,694 | 22,695 | +44.1% | 198,711 | 191,363 | +3.8% |
| Belgium | 35,906 | 39,242 | -8.5% | 309,111 | 369,939 | -16.4% |
| Cyprus | 1,493 | 2,214 | -32.6% | 9,971 | 14,015 | -28.9% |
| Czech Republic* | 14,762 | 16,290 | -9.4% | 100,370 | 110,055 | -8.8% |
| Denmark | 6,974 | 13,017 | -46.4% | 60,464 | 98,486 | -38.6% |
| Estonia | 714 | 2,337 | -69.4% | 6,439 | 17,543 | -63.3% |
| Finland | 6,736 | 11,177 | -39.7% | 58,679 | 99,261 | -40.9% |
| France | 188,534 | 182,954 | +3.0% | 1,319,849 | 1,311,850 | +0.6% |
| Germany | 339,981 | 262,534 | +29.5% | 2,399,386 | 1,895,703 | +26.6% |
| Great Britain | 157,149 | 153,420 | +2.4% | 1,082,104 | 1,400,899 | -22.8% |
| Greece | 32,261 | 29,039 | +11.1% | 145,922 | 187,356 | -22.1% |
| Hungary | 3,806 | 13,944 | -72.7% | 43,419 | 95,947 | -54.7% |
| Iceland | 385 | 578 | -33.4% | 1,660 | 7,719 | -78.5% |
| Ireland | 3,759 | 16,343 | -77.0% | 50,552 | 140,334 | -64.0% |
| Italy | 206,014 | 193,970 | +6.2% | 1,339,629 | 1,464,124 | -8.5% |
| Latvia | 454 | 1,850 | -75.5% | 3,564 | 13,697 | -74.0% |
| Lithuania | 560 | 2,070 | -72.9% | 4,872 | 15,486 | -68.5% |
| Luxembourg | 4,317 | 4,811 | -10.3% | 28,710 | 34,715 | -17.3% |
| Norway | 9,394 | 9,605 | -2.2% | 51,141 | 71,170 | -28.1% |
| Poland* | 24,644 | 23,460 | +5.0% | 193,532 | 192,105 | +0.7% |
| Portugal* | 16,164 | 21,568 | -25.1% | 89,257 | 135,961 | -34.4% |
| Slovakia | 10,718 | 8,718 | +22.9% | 56,446 | 52,836 | +6.8% |
| Slovenia | 5,083 | 6,490 | -21.7% | 34,529 | 45,560 | -24.2% |
| Spain | 108,979 | 121,518 | -10.3% | 541,967 | 823,757 | -34.2% |
| Sweden | 14,551 | 16,902 | -13.9% | 117,345 | 154,786 | -24.2% |
| Switzerland* | 24,411 | 26,034 | -6.2% | 157,804 | 176,947 | -10.8% |
| The Netherlands | 33,289 | 39,784 | -16.3% | 253,938 | 338,663 | -25.0% |
| **Grand Total** | **1,283,732** | **1,242,564** | **+3.3%** | **8,659,371** | **9,460,277** | **-8.5%** |

* denotes estimated data for July 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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