

16 October 2009

GOLF AND FIESTA STORM AHEAD IN RACE FOR SALES RECOVERY

- **Key models behind 7.5% market recovery in September**
- **Golf, Fiesta, Punto and Mégane sales up over 50%, vs. September '08**
- **VW Golf stays Europe's most popular model; VW best-selling brand**

A handful of key models remain the driving force behind a fragile European new car market recovery, according to the latest monthly analysis from JATO Dynamics, the world's leading provider of automotive data and intelligence.

Boosted by their popularity in national scrappage schemes, the market-leading Volkswagen Golf, Ford Fiesta, Fiat Punto, Fiat Panda and Renault Mégane are the only best-sellers to increase their sales, YtD.

This is maintaining a tentative recovery, with the European new car market up 7.5% in September, and the YtD deficit reduced to 5.7%.

The Golf sold 59,552 new vehicles in September which represents a 56% increase over the same period last year, providing good news for the German carmaker, whose Polo and Passat models fared less well in the month and are down YtD by 3.3% and 15.8% respectively.

Ford is keeping up the pressure, selling 51,291 new Fiestas in September, 63.9% more than a year ago and over 12,000 more new registrations than the third-placed Opel/ Vauxhall Corsa.

Fiat enjoyed another buoyant sales period, with both its Punto and Panda featuring in the top ten models with the Punto recording a 66.2% rise in sales for the month. Renault's new Mégane gives the French manufacturer the accolade of the highest percentage sales increase in this month's top 10 with a rise of 90.4%.

However, David Di Girolamo, Head of JATO Consult, remains unconvinced that these performances are sustainable: "We are still seeing the market recovery driven by small cars and new models – in other words, the popular choices in national scrappage schemes. This has clearly distorted the natural performance of some markets and models. Now the end is in sight for these incentives, we will be watching the market closely, to see if this recovery is sustainable," he says.

Top 10 Models

Make & Model	Sep_09	Sep_08	% Change Sep	Sep YtD_09	Sep YtD_08	% Change YtD
VOLKSWAGEN GOLF	59,552	38,174	+56.0%	435,423	358,842	+21.3%
FORD FIESTA	51,291	31,293	+63.9%	357,203	254,692	+40.2%
OPEL/VAUXHALL CORSA	38,947	33,260	+17.1%	270,634	290,287	-6.8%
FORD FOCUS	32,329	32,768	-1.3%	239,485	295,107	-18.8%
PEUGEOT 207	32,223	33,635	-4.2%	277,720	332,262	-16.4%
OPEL/VAUXHALL ASTRA	32,154	30,917	+4.0%	210,463	265,854	-20.8%
RENAULT CLIO	31,513	28,091	+12.2%	219,250	271,903	-19.4%
FIAT PUNTO	29,726	17,884	+66.2%	249,107	226,319	+10.1%
FIAT PANDA	24,783	21,664	+14.4%	226,140	173,114	+30.6%
RENAULT MEGANE	22,050	11,582	+90.4%	163,373	126,632	+29.0%

Brand Performance

Volkswagen remains Europe's top-selling car brand. Its seemingly healthy 3.7% YtD sales rise almost solely thanks to the performance of Golf, especially in its home market of Germany, where sales increased considerably for September. The remaining brands reveal the true extent of the downturn, with many still unable to match their 2008 YtD figures.

Top 10 Brands

Make	Sep_09	Sep_08	% Change Sep	Sep YtD_09	Sep YtD_08	% Change YtD
VOLKSWAGEN	155,770	133,946	+16.3%	1,241,755	1,197,843	+3.7%
FORD	135,142	114,520	+18.0%	981,446	968,398	+1.3%
OPEL/VAUXHALL	109,531	103,205	+6.1%	821,872	918,659	-10.5%
RENAULT	102,876	85,064	+20.9%	775,757	867,584	-10.6%
FIAT	87,869	77,402	+13.5%	772,366	753,310	+2.5%
PEUGEOT	86,953	83,986	+3.5%	737,881	799,480	-7.7%
CITROEN	76,022	68,121	+11.6%	644,710	674,929	-4.5%
TOYOTA	71,416	70,074	+1.9%	539,069	605,535	-11.0%
MERCEDES	57,946	65,273	-11.2%	441,099	541,952	-18.6%
BMW	57,541	59,216	-2.8%	429,639	529,718	-18.9%

National Trends

The parlous state of most of the European automotive markets continued in September, with the majority still posting sales losses. Markets across Eastern Europe in particular are suffering with significant contractions in new car sales, the consequence of stricter loan policies introduced by financial institutions, recent VAT increases and a lack of Western-European-style scrappage schemes.

In contrast, the effect of Germany's comprehensive scrappage incentive can be seen in its YtD performance, while the extension of the British scheme is expected to support UK national sales into 2010.

Sales by Market

Country	Sep_09	Sep_08	% Change Sep	Sep YtD_09	Sep YtD_08	% Change YtD
Austria	26,542	22,510	+17.9%	247,676	232,158	+6.7%
Belgium	35,687	37,838	-5.7%	374,883	440,731	-14.9%
Cyprus*	1,358	2,285	-40.6%	12,069	17,722	-31.9%
Czech Republic	12,196	15,282	-20.2%	117,752	138,418	-14.9%
Denmark	8,951	12,047	-25.7%	79,928	121,894	-34.4%
Estonia	812	1,681	-51.7%	7,850	20,820	-62.3%
Finland	7,177	9,843	-27.1%	71,772	118,550	-39.5%
France	183,110	160,565	+14.0%	1,613,501	1,575,765	+2.4%
Germany	316,166	261,384	+21.0%	2,990,766	2,371,473	+26.1%
Great Britain	367,929	330,294	+11.4%	1,517,039	1,794,418	-15.5%
Greece	11,952	18,814	-36.5%	180,717	225,929	-20.0%
Hungary	3,365	13,248	-74.6%	49,302	120,327	-59.0%
Iceland	95	584	-83.7%	1,891	8,732	-78.3%
Ireland	2,259	3,454	-34.6%	55,167	149,028	-63.0%
Italy	190,424	178,416	+6.7%	1,618,030	1,720,997	-6.0%
Latvia	387	1,294	-70.1%	4,338	16,546	-73.8%
Lithuania	504	1,525	-67.0%	5,906	18,417	-67.9%
Luxembourg	3,494	4,053	-13.8%	34,783	40,230	-13.5%
Norway	9,530	8,453	+12.7%	68,638	87,456	-21.5%
Poland*	23,789	23,109	+2.9%	238,418	235,622	+1.2%
Portugal*	11,637	13,822	-15.8%	112,398	162,132	-30.7%
Slovakia	5,615	6,401	-12.3%	69,085	65,723	+5.1%
Slovenia	4,574	5,321	-14.0%	42,986	55,255	-22.2%
Spain	77,883	65,691	+18.6%	678,791	947,965	-28.4%
Sweden	19,244	22,777	-15.5%	152,131	195,284	-22.1%
Switzerland*	21,038	21,748	-3.3%	196,399	217,182	-9.6%
The Netherlands	33,892	41,098	-17.5%	315,389	419,136	-24.8%
Grand Total	1,379,610	1,283,537	+7.5%	10,857,605	11,517,910	-5.7%

*Denotes Estimated data for September 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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