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NORTH AMERICAN VEHICLE SALES CUT BY A FIFTH IN 2009

- **North American markets down by 20.6% in 2009**
- **Canada least affected (-10.8%); Mexico fares worst (-28.8%)**
- **Imported brands fare better than domestic vehicles**
- **Upper segment cars and small commercial vehicles hit hardest in sales decline**

The new car market across North America suffered the full force of recession in 2009, with some worrying trends revealed in the latest figures supplied by world's leading provider of automotive data and intelligence, JATO Dynamics.

Behind the headlines of US government intervention and "cash for clunkers" schemes, lies a shift in consumer demand that has hit upper segment cars and domestic US brands hardest.

Overall, 3,271,321 fewer new cars were bought in North America in 2009, than in 2008, with 12.6 million total sales.

Across the region, those brands weathering the storm best were lower volume imported marques, with Hyundai (+11.6 %) and Kia (+11.3%) increasing sales volumes. Other winners were Subaru (+15%) and Audi, which achieved 5.4% growth in H2, albeit with smaller volumes.

By contrast, the three biggest brands, Ford, Toyota and Chevrolet, ended the year 13.8%, 18.2% and 25.8% down respectively.

David Di Girolamo, Head of JATO Consult, said: “The recession of demand and simultaneous, sudden shift to smaller, more economical vehicles has been felt keenly across North America. This has created even more of an opportunity for those lower-volume, importing manufacturers who already offer such vehicles and puts even more pressure on the big, domestic auto makers.”

United States

With 2009 sales down by 2.8 million (21.2%), the top five models in the United States new car league were held by import brands, Toyota, Honda and Nissan, with the year’s best-selling car the Toyota Camry.

Domestic US brands still feature, but some have been hit hard by the recession – for example, the seventh-placed car, the Chevrolet Impala large sedan, whose sales dropped by 37.7%, vs. 2008.

Overall, US car and truck sales were down 20.5% and 22% respectively, with small and lower medium cars seeing smaller drops in demand, evidence of downsizing amongst those US customers buying new cars.

Top 5 Models

Vehicle Type	Make/Model	FY2009	FY2008	% Change	Diff 2009 vs. 2008
Cars	TOYOTA CAMRY	356,824	438,555	-18.6%	-81,731
	HONDA ACCORD	290,056	372,789	-22.2%	-82,733
	TOYOTA COROLLA	270,785	302,440	-10.5%	-31,655
	HONDA CIVIC	259,722	339,289	-23.5%	-79,567
	NISSAN ALTIMA	203,568	269,668	-24.5%	-66,100
Trucks	CHEVROLET SILVERADO	316,544	465,065	-31.9%	-148,521
	FORD F-150	307,859	349,908	-12.0%	-42,049
	HONDA CR-V	191,214	197,279	-3.1%	-6,065
	DODGE RAM	177,268	245,840	-27.9%	-68,572
	FORD ESCAPE	173,044	156,544	+10.5%	+16,500

Canada

The Canadian market (2009 total sales: 1.5 million) fared better, dropping only 10.8%, with truck sales actually rising 3.6% in the second half of the year.

This was perhaps helped by the fact Canadian customers seem to prefer smaller cars, with the Honda Civic, Toyota Corolla and Mazda3 heading the sales list.

More significantly however, truck sales in Canada grew through the second half of the year, with the Ford F150 topping the list, with total sales of 67,538, (+20.2%).

Top 5 Models

Vehicle Type	Make/Model	FY2009	FY2008	% Change	Diff 2009 vs. 2008
Cars	HONDA CIVIC	62,654	72,463	-13.5%	-9,809
	TOYOTA COROLLA	53,933	57,736	-6.6%	-3,803
	MAZDA3	46,943	50,317	-6.7%	-3,374
	HYUNDAI ELANTRA	30,675	11,814	+159.6%	+18,861
	HYUNDAI ACCENT	25,220	29,751	-15.2%	-4,531
Trucks	FORD F-150	67,538	56,209	+20.2%	+11,329
	DODGE GRAND CARAVAN	40,283	39,780	+1.3%	+503
	GMC SIERRA	37,316	34,555	+8.0%	+2,761
	FORD ESCAPE	36,980	32,898	+12.4%	+4,082
	CHEVROLET SILVERADO	36,428	34,685	+5.0%	+1,743

Mexico

The Mexican market fell below one million sales this year, having suffered the greatest percentage fall of 28.8%.

Overall, both truck and car sales fell, with even market-specific models such as Nissan Tsuru, experiencing a downturn. Some car models did buck this trend, with Seat Ibiza doing the best business, up 28.3%, with total 2009 sales of 10,419.

Volkswagen's South American entry-level model, the Gol, has been an immensely popular addition to the Mexican market in 2009, selling 23,776 and could prove a future market leader.

Truck sales fared less well, headed by the Nissan Pickup. In further evidence of the sudden unpopularity of large SUVs, sales of the Ford Expedition more than halved, down 52.2%.

Top 5 Models

Vehicle Type	Make/Model	FY2009	FY2008	% Change	Diff 2009 vs. 2008
Cars	NISSAN TSURU	57,749	68,902	-16.2%	-11,153
	VOLKSWAGEN JETTA	34,922	40,963	-14.7%	-6,041
	CHEVROLET CHEVY	33,134	56,294	-41.1%	-23,160
	VOLKSWAGEN GOL	23,776	4,780	+397.4%	+18,996
	NISSAN TIIDA	23,188	23,899	-3.0%	-711
Trucks	NISSAN PICKUP	32,660	42,478	-23.1%	-9,818
	CHEVROLET SILVERADO	16,865	26,931	-37.4%	-10,066
	DODGE RAM	15,824	20,036	-21.0%	-4,212
	FORD RANGER	13,449	16,183	-16.9%	-2,734
	DODGE JOURNEY	13,036	12,831	+1.6%	+205

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 43 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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