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SMALL CARS DRIVING DOWN EUROPEAN CO₂ EMISSIONS

- **Over 50% of the European new car market is 140g/km or less**
- **Low-CO₂ cars (101-120 g/km) increased market share by 8.9% in 2009**
- **Fiat tops the 2009 volume-weighted CO₂ chart**
- **Toyota holds lowest CO₂ models**
- **Data extracted from forthcoming JATO CO₂ White Paper**

As another batch of environmentally-friendly new models are unveiled at this year's Geneva Motor Show, the world's leading provider of automotive data and intelligence, JATO Dynamics, reveals how the growth of small, low-CO₂ cars is driving down the average CO₂ emissions across Europe.

Volume-weighted average CO₂ emissions across all models and segments fell by 7.9g/km last year, with over half of all cars sold in Europe now emitting less than 140g/km. This reduction has accelerated, compared with 2008, which saw CO₂ emissions reduce by 5.4g/km.

The majority of this decrease is being driven by shifts in buying habits towards smaller, low-CO₂ cars, with the three lowest CO₂ bands increasing market share, at the expense of bands above 140g/km. In particular, the 101-120g/km band experienced a market share gain of 8.9%, from 16.7% to 25.6%.

Shifting consumer behaviour has also been guided by the popularity of small, low-CO₂ emitting cars in national scrappage schemes, which heavily influenced European new car sales in 2009.

"The marked reduction in average CO₂ emissions is a consequence of changing buying habits and in particular, the downsizing to smaller, more economical cars, driven by scrappage incentives and recessionary uncertainties," commented David Di Girolamo, Head of JATO Consult.

“This is accelerating the decreases made through the introduction of new, ever-more efficient models and technologies. The achievement here should not be under-estimated: car makers are offering models that are safer and more feature-rich, whilst still improving their environmental credentials.”

Brand Performance

The most improved brands overall are often low-volume exotic and supercar marques and indeed Ferrari leads the way, reducing volume-weighted CO₂ emissions in the past year by 53.6g/km.

However, the second highest improver is Porsche, which has reduced its volume-weighted CO₂ emissions by 27.5g/km, on 2009 sales of 32,960, a significant achievement against such a sales volume that is due in part to the introduction of the brand’s diesel engine, available in the Cayenne 4x4.

The best overall brand reduction was achieved by Alfa Romeo, who lowered emissions by 18.3g/km over the year, on sales of 109,542. Fiat remains the lowest overall volume brand for CO₂, with an average of 127.8g/km, although Toyota has moved to a close second from fifth in 2008, largely due to the European market penetration of its Yaris models, displacing Citroen and Peugeot from their positions, respectively.

Whilst most of the top 10 brands, by volume, have simply shuffled position, Audi is a new entry, replacing BMW in 9th position. This is due to continued strong sales of the A3 model, reducing sales of the brand’s larger, less efficient models and working to reduce CO₂ emissions across the range, particularly on the high-volume A4 2.0-litre TDi.

Some brands are already ahead of future EU targets – smart, Fiat and MINI are under the average 130g/km mark, not required for all makes until 2015, while Toyota is only 0.1g/km adrift.

Volume-weighted average CO₂ emissions of the top 10 brands by volume

Make	2009 Volumes	Average CO ₂ (g/km) 2009	Position in 2008
FIAT	1,009,106	127.8	1 st
TOYOTA	702,048	130.1	5 th
PEUGEOT	986,584	133.6	2 nd
RENAULT	1,081,289	137.5	4 th
CITROEN	863,243	137.9	3 rd
FORD	1,284,316	140.0	6 th
OPEL/VAUXHALL	1,055,652	148.9	7 th
VOLKSWAGEN	1,631,560	150.4	8 th
AUDI	605,771	160.9	11 th
MERCEDES	582,299	176.4	10 th

Model Performance

It is Toyota that also claims the best individual model performance during 2009, with the Toyota Prius being the lowest CO₂ model in Europe, with an average 2009 CO₂ output of only 95.6g/km. However, the best volume model is its sister car, the Yaris, with an average CO₂ of 119.0g/km, down 12.4g/km compared with 2008.

Beyond the top 20 models, by volume, the Ford Ka was notable for its 25.5 g/km reduction, although this is mainly due to the all-new model being launched, which has introduced a diesel option for the first time.

Volume-weighted average CO₂ emissions of the top 20 models by volume

Make	2009 Volumes	Average CO ₂ (g/km) 2009
TOYOTA YARIS	209,635	119.0
FIAT 500	186,404	119.9
FIAT PANDA	299,139	122.4
FORD FIESTA	470,647	125.6
FIAT PUNTO	323,990	127.9
RENAULT CLIO	311,844	129.4
PEUGEOT 207	366,546	132.0
VOLKSWAGEN POLO	282,603	132.7
RENAULT MEGANE	228,587	134.9
PEUGEOT 308	219,740	136.5
OPEL/VAUXHALL CORSA	351,844	137.0
AUDI A3/S3	184,514	140.0
VOLKSWAGEN GOLF	568,838	140.7
SKODA FABIA	217,088	142.5
FORD FOCUS	308,633	144.8
OPEL/VAUXHALL ASTRA	275,385	147.5
BMW SERIES 3	199,451	148.4
VOLKSWAGEN PASSAT	210,041	151.9
AUDI A4/S4/RS4	192,991	153.7
NISSAN QASHQAI	180,970	162.1

Vehicle Manufacturer Group Performance

With over half of Europe's new car volume now under the 2008 EU threshold of 140g/km, it is no surprise that the four out of the five lowest-CO₂ manufacturer groups are all comfortably beating this target. Fiat Group remains at the top of the chart for low-CO₂ motoring, but the gap to Toyota Group has dramatically reduced, with PSA and Renault close behind. All of these groups are now within sight of the EU target of 130g/km, which must be met by 2015.

Make Group	CO ₂ 2009
FIAT	131.0
TOYOTA	132.2
PSA	135.6
RENAULT	139.6
HYUNDAI	141.6

"The efforts made by the car industry to reduce emissions are clear to see in these figures, not only in reducing absolute emissions levels, but also in making their smaller cars attractive and appealing against larger vehicles. This has helped drive a major shift in buying habits over the past year which is accelerating CO₂ reduction." concluded Di Girolamo.

This analysis is extracted from a forthcoming JATO CO₂ White Paper that studies 21 European countries which will be released in March 2010. The full JATO report will provide a detailed picture of volume-weighted CO₂ emissions by country, segment and brand, plus an in-depth analysis of the effects of CO₂-friendly vehicle technology and CO₂-based taxation regimes in individual markets.

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 45 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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