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The European new car market shows no signs of recovery at the beginning of 2013

- **The European new car market starts the year down 9.6% compared to 2012**
- **Volkswagen's Golf is Europe's best-selling car in January**
- **All the 'Big Five' European markets, apart from Great Britain, continue to contract**

According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, the Volkswagen Golf continues to be Europe's best-selling car, despite a fall of 17.8% in January sales compared to 2012. Four B-segment cars, the Ford Fiesta, Volkswagen Polo, Renault Clio and Peugeot 208 complete the top 5.

JATO's key analysis of the market:

- *The European new car market shows no sign of recovery, with January sales 9.6% less than a year earlier*
- *Great Britain was the only 'Big Five' market to experience growth in January with sales increasing 11.5%*
- *The battle among the leading B-segment cars for second place in the market is very close, only a few hundred units separating the Fiesta, Polo and Clio, with the 208 not far behind*
- *Opel/Vauxhall, BMW and Mercedes were the only brands in the Top 10 to record increased sales compared to January 2012, up 2.2%, 5.5% and 1.9% respectively*

Sales in the Netherlands fell significantly in January, down 30.4% on a year earlier. This is primarily the result of an overall decline in consumer confidence due to the impact of rising taxes, declining pensions and a stagnant housing market. In addition, January 2013 saw the tightening of emission boundaries that drive company car taxation.

Out of the 'Big Five' European markets, only Great Britain saw any growth in January. Germany, France, Italy and Spain all experienced continued falls in vehicle registrations.

Sales by market

Country	Jan_13	Jan_12	% Change Jan	Jan YtD_13	Jan YtD_12	% Change YtD
Austria	27,761	26,826	+3.5%	27,761	26,826	+3.5%
Belgium*	40,606	44,732	-9.2%	40,606	44,732	-9.2%
Croatia	1,853	3,498	-47.0%	1,853	3,498	-47.0%
Cyprus*	854	980	-12.9%	854	980	-12.9%
Czech Republic	12,071	12,900	-6.4%	12,071	12,900	-6.4%
Denmark	14,744	12,870	+14.6%	14,744	12,870	+14.6%
Estonia	1,713	1,671	+2.5%	1,713	1,671	+2.5%
Finland	10,246	14,232	-28.0%	10,246	14,232	-28.0%
France	124,798	147,057	-15.1%	124,798	147,057	-15.1%
Germany	192,090	210,195	-8.6%	192,090	210,195	-8.6%
Great Britain	143,643	128,853	+11.5%	143,643	128,853	+11.5%
Greece	5,527	8,405	-34.2%	5,527	8,405	-34.2%
Hungary	3,685	4,980	-26.0%	3,685	4,980	-26.0%
Iceland	460	320	+43.8%	460	320	+43.8%
Ireland	17,292	21,302	-18.8%	17,292	21,302	-18.8%
Italy	114,327	138,726	-17.6%	114,327	138,726	-17.6%
Latvia	776	882	-12.0%	776	882	-12.0%
Lithuania	1,001	1,008	-0.7%	1,001	1,008	-0.7%
Luxembourg	3,375	3,649	-7.5%	3,375	3,649	-7.5%
Norway	11,675	10,860	+7.5%	11,675	10,860	+7.5%
Poland	26,246	24,198	+8.5%	26,246	24,198	+8.5%
Portugal*	7,380	6,960	+6.0%	7,380	6,960	+6.0%
Romania	4,436	4,937	-10.1%	4,436	4,937	-10.1%
Serbia*	1,250	1,409	-11.3%	1,250	1,409	-11.3%
Slovakia	4,308	4,658	-7.5%	4,308	4,658	-7.5%
Slovenia	4,383	5,011	-12.5%	4,383	5,011	-12.5%
Spain	49,933	54,967	-9.2%	49,933	54,967	-9.2%
Sweden	15,721	18,686	-15.9%	15,721	18,686	-15.9%
Switzerland	20,856	23,645	-11.8%	20,856	23,645	-11.8%
The Netherlands	48,849	70,169	-30.4%	48,849	70,169	-30.4%
Grand Total	911,859	1,008,586	-9.6%	911,859	1,008,586	-9.6%

NOTE: * denotes estimated volumes for January 2013

Opel/Vauxhall has recorded a 2.2% increase in January sales compared with 2012. The new Mokka model has been particularly well received by the market, recording almost 5,500 units sold in January, while the high-volume Corsa and Astra models also increased sales. BMW and Mercedes-Benz were the only other brands in the Top 10 to record increased sales.

Outside the Top 10, Mazda, with sales up 25.0% thanks to the CX-5 crossover SUV, and Dacia, with sales up by 6.0% thanks to the introduction of the second generation Sandero hatchback and the new Lodgy MPV, are the rising stars of the market in January.

Commenting on the findings, Gareth Hession, Vice President, Research at JATO said: "The New Year has not seen any renewed demand for new cars in much of Europe. The market remains challenging and highly competitive."

Top 10 Brands

Make	Jan_13	Jan_12	% Change Jan	Jan YtD_13	Jan YtD_12	% Change YtD
VOLKSWAGEN	114,026	129,510	-12.0%	114,026	129,510	-12.0%
FORD	62,345	84,057	-25.8%	62,345	84,057	-25.8%
OPEL/VAUXHALL	59,212	57,925	+2.2%	59,212	57,925	+2.2%
RENAULT	56,093	64,055	-12.4%	56,093	64,055	-12.4%
PEUGEOT	55,967	67,631	-17.2%	55,967	67,631	-17.2%
AUDI	50,091	51,401	-2.5%	50,091	51,401	-2.5%
CITROEN	47,426	57,139	-17.0%	47,426	57,139	-17.0%
FIAT	46,199	48,918	-5.6%	46,199	48,918	-5.6%
BMW	46,184	43,787	+5.5%	46,184	43,787	+5.5%
MERCEDES	45,148	44,285	+1.9%	45,148	44,285	+1.9%

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B-segment cars take the next four places in the models chart. The Ford Fiesta takes second place, but the third placed Volkswagen Polo and fourth placed Renault Clio are within a few hundred units of the Fiesta's sales volume. The introduction of the fourth generation Clio has improved the model's market performance, with sales 11.3% higher than in January 2012. Peugeot's 208 completes the Top Five.

Hession commented: "The B-segment is one of the most competitive in the European market. Recent product actions such as facelift Fiesta and the introduction of the Clio 4 and the 208 have added to the strength of this segment. With the Fiesta, Polo, Clio and 208 all selling such similar volumes, we anticipate the lead of this segment will change regularly during 2013."

Top 10 Models

Make & Model	Jan_13	Jan_12	% Change Jan	Jan YtD_13	Jan YtD_12	% Change YtD
VOLKSWAGEN GOLF	30,338	36,913	-17.8%	30,338	36,913	-17.8%
FORD FIESTA	20,909	23,894	-12.5%	20,909	23,894	-12.5%
VOLKSWAGEN POLO	20,628	26,004	-20.7%	20,628	26,004	-20.7%
RENAULT CLIO	20,580	18,492	+11.3%	20,580	18,492	+11.3%
PEUGEOT 208	19,260	413	-	19,260	413	-
FORD FOCUS	17,596	22,372	-21.3%	17,596	22,372	-21.3%
NISSAN QASHQAI	17,047	17,224	-1.0%	17,047	17,224	-1.0%
OPEL/VAUXHALL ASTRA	16,898	16,784	+0.7%	16,898	16,784	+0.7%
OPEL/VAUXHALL CORSA	15,923	15,664	+1.7%	15,923	15,664	+1.7%
FIAT PANDA	14,307	15,145	-5.5%	14,307	15,145	-5.5%

For more information visit www.jato.com, or email jatoteam@firstlightpr.com

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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.

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