

16 March 2012

Uncertain economy continues to disrupt Europe's new car market

- **Europe's new car sales decline by 9.5% in February, and 8.1% Year-to-Date compared to last year**
- **France and Italy continue to hold the European total down**
- **Volkswagen's Golf and Polo maintain their positions as Europe's top performing models**

According to the latest analysis from JATO Dynamics, the world's leading provider of automotive intelligence, the European new car market continues to suffer, as economic uncertainty kept customers out of showrooms in February.

JATO's key findings:

- *The European new car market declines by 9.5% in February*
- *All of the Big Five markets experience reduced sales, with France and Italy seeing the largest falls*
- *Only one of the top 10 brands records a significant increase in February sales compared to last year*
- *Two of the top 10 models record an increase in sales compared to 2011*

Within the top 10 brands by volume, Renault suffers the largest fall in sales but manages to remain in the top 3 behind Volkswagen and Ford.

Mercedes is the only top 10 brand to record an improvement, primarily benefitting from an increase in sales of its B-Class and C-Class models to achieve sales 8.6% higher than last year for February and up 8.5% YtD.

Outside the top 10, the picture is similar to January, with Lexus, Kia and Land Rover significantly increasing their sales due to the launch of new vehicles. Jeep also performs strongly (up 55.1% in February and 57.7% YtD), the brand benefitting from the new Grand Cherokee and revised Compass models.

Volkswagen's Golf and Polo models retain first and second place for best-selling cars across Europe in February, despite a reduction in sales for both during the month.

Ford's Focus continues to perform well, achieving a 20.1% increase in sales in February, and 12.8% YtD – particularly surprising as much of this sales growth comes from the declining market in France. Fiat's new Panda records a 2.6% fall in sales, but re-claims a place in the top 10 models by volume.

Commenting on the findings, Gareth Hession, Vice President, Research at JATO said: "What is clear is that maintaining investment in new models across all segments is critical despite the tough economic climate, evidenced by the success of vehicles like the Kia Rio, Range Rover Evoque and Audi A6, which are all performing well across the region."

Sales by Market

Country	Feb_12	Feb_11	% change Feb	Feb YtD_12	Feb YtD_11	% change YtD
Austria	24,005	26,412	-9.1%	50,831	51,996	-2.2%
Belgium	43,716	53,135	-17.7%	88,448	106,371	-16.8%
Croatia	3,552	3,340	+6.3%	7,049	6,657	+5.9%
Cyprus*	1,130	1,185	-4.6%	2,283	2,458	-7.1%
Czech Republic	13,544	12,847	+5.4%	26,465	24,525	+7.9%
Denmark	11,179	11,577	-3.4%	24,047	23,954	+0.4%
Estonia	1,303	936	+39.2%	2,974	2,259	+31.7%
Finland	10,611	9,298	+14.1%	24,843	23,084	+7.6%
France	163,010	204,400	-20.2%	310,067	389,921	-20.5%
Germany	224,318	224,426	-0.0%	434,513	435,482	-0.2%
Great Britain	61,868	63,424	-2.5%	190,721	192,235	-0.8%
Greece	3,816	6,991	-45.4%	12,221	16,727	-26.9%
Hungary	4,300	3,567	+20.5%	9,280	7,013	+32.3%
Iceland	323	130	+148.5%	643	327	+96.6%
Ireland	11,489	12,570	-8.6%	32,802	33,569	-2.3%
Italy	131,427	162,056	-18.9%	269,483	328,131	-17.9%
Latvia	727	765	-5.0%	1,609	1,497	+7.5%
Lithuania	863	925	-6.7%	1,871	1,771	+5.6%
Luxembourg	4,543	4,410	+3.0%	8,192	7,763	+5.5%
Norway	10,972	10,585	+3.7%	21,832	20,985	+4.0%
Poland*	23,826	21,508	+10.8%	48,024	40,465	+18.7%
Portugal	6,930	13,437	-48.4%	13,879	26,662	-47.9%
Romania*	5,182	4,233	+22.4%	8,657	8,632	+0.3%
Serbia	1,495	2,035	-26.5%	2,904	3,454	-15.9%
Slovakia	5,374	4,810	+11.7%	10,176	9,234	+10.2%
Slovenia	4,128	5,317	-22.4%	9,139	10,744	-14.9%
Spain	64,678	66,250	-2.4%	119,644	120,055	-0.3%
Sweden	20,735	20,993	-1.2%	39,421	40,237	-2.0%
Switzerland	22,816	22,449	+1.6%	46,037	43,000	+7.1%
The Netherlands	44,127	49,016	-10.0%	114,543	123,798	-7.5%
Grand Total	925,987	1,023,027	-9.5%	1,932,598	2,103,006	-8.1%

* denotes estimated or provisional data used for February 2012

Top 10 Brands

Make	Feb_12	Feb_11	% change Feb	Feb YtD_12	Feb YtD_11	% change YtD
VOLKSWAGEN	118,938	120,883	-1.6%	248,182	249,868	-0.7%
FORD	69,036	74,982	-7.9%	152,967	162,108	-5.6%
RENAULT	68,918	94,727	-27.2%	132,878	184,122	-27.8%
PEUGEOT	61,233	77,069	-20.5%	128,865	156,668	-17.7%
OPEL/VAUXHALL	58,969	73,085	-19.3%	116,796	145,981	-20.0%
CITROEN	56,995	64,941	-12.2%	114,152	130,700	-12.7%
FIAT	46,475	57,464	-19.1%	95,362	117,193	-18.6%
AUDI	45,157	46,521	-2.9%	96,572	94,584	+2.1%
MERCEDES	40,348	37,151	+8.6%	84,541	77,921	+8.5%
BMW	39,961	41,211	-3.0%	83,609	87,724	-4.7%

Top 10 Models

Make & Model	Feb_12	Feb_11	% change Feb	Feb YtD_12	Feb YtD_11	% change YtD
VOLKSWAGEN GOLF	32,724	34,154	-4.2%	69,587	71,117	-2.2%
VOLKSWAGEN POLO	24,254	25,756	-5.8%	50,295	54,935	-8.4%
FORD FOCUS	19,681	16,392	+20.1%	41,949	37,186	+12.8%
FORD FIESTA	19,588	24,245	-19.2%	43,516	51,611	-15.7%
RENAULT CLIO	19,048	27,499	-30.7%	37,550	53,445	-29.7%
OPEL/VAUXHALL CORSA	18,986	21,693	-12.5%	34,622	44,694	-22.5%
VOLKSWAGEN PASSAT	16,622	16,549	+0.4%	34,317	31,887	+7.6%
PEUGEOT 207	15,951	21,419	-25.5%	34,196	42,445	-19.4%
OPEL/VAUXHALL ASTRA	15,879	21,692	-26.8%	33,051	42,623	-22.5%
FIAT PANDA	15,785	16,209	-2.6%	30,934	32,705	-5.4%

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About JATO

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 intelligence 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.

Major leasing companies use JATO's intelligence to drive the vehicle quotation process.

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