

23 April 2012

Europe's new car market ends the first quarter down on 2011

- **Europe's new car sales decline by 7.1% in March, and 7.5% Year-to-Date compared to 2011**
- **Reduced sales in France and Italy counter the growth seen in British and German markets**
- **Volkswagen's Golf remains Europe's most popular model but the Ford Fiesta takes second**

The latest analysis from JATO Dynamics, the world's leading provider of automotive intelligence, finds that despite some sales growth in Great Britain and Germany, the European new car market is down with poor sales in France and Italy in March.

JATO's key findings:

- *The European new car market declines by 7.1% in March and 7.5% in Q1 2012*
- *Great Britain and Germany the only big five markets to see any growth last month and in Q1*
- *Of the big five markets France and Italy experience the greatest reduction in sales during the same period*
- *The majority of top ten brands experienced a decrease in sales with only German brands showing improvements on March and Q1 2011 sales*
- *Three of the top ten models record an increase in sales compared to 2011, including a newcomer, Toyota's new Yaris*

The first quarter of 2012 proved to be challenging across Europe as three of the big five markets continue to find it tough under the current economic conditions. The poor market conditions in Italy were further exacerbated by a car transporter drivers strike which slowed deliveries of new vehicles to dealers last month.

Sales by Market

Country	Mar_12	Mar_11	% change Mar	Q1_12	Q1_11	% Change Q1
Austria	37,933	35,869	+5.8%	88,764	87,865	+1.0%
Belgium	59,915	63,533	-5.7%	148,363	169,904	-12.7%
Croatia	3,762	3,844	-2.1%	10,822	10,501	+3.1%
Cyprus*	1,187	1,238	-4.1%	3,482	3,696	-5.8%
Czech Republic	17,064	17,501	-2.5%	43,529	42,026	+3.6%
Denmark	9,442	16,788	-43.8%	36,488	40,742	-10.4%
Estonia	1,684	1,486	+13.3%	4,658	3,745	+24.4%
Finland	22,919	12,565	+82.4%	47,762	35,649	+34.0%
France	197,774	257,533	-23.2%	507,841	647,454	-21.6%
Germany	339,123	327,921	+3.4%	773,636	763,403	+1.3%
Great Britain	372,835	366,101	+1.8%	563,556	558,336	+0.9%
Greece	4,898	8,517	-42.5%	17,119	25,244	-32.2%
Hungary	4,805	4,486	+7.1%	14,085	11,499	+22.5%
Iceland	433	208	+108.2%	1,076	535	+101.1%
Ireland	13,100	14,390	-9.0%	45,842	47,959	-4.4%
Italy	138,752	189,260	-26.7%	408,235	517,391	-21.1%
Latvia	879	873	+0.7%	2,488	2,370	+5.0%
Lithuania	1,001	1,096	-8.7%	2,872	2,867	+0.2%
Luxembourg	5,319	5,660	-6.0%	13,511	13,423	+0.7%
Norway	13,225	13,014	+1.6%	35,057	33,999	+3.1%
Poland	29,481	27,040	+9.0%	77,576	67,505	+14.9%
Portugal	9,643	18,935	-49.1%	23,532	45,597	-48.4%
Romania	4,902	3,793	+29.2%	13,965	9,677	+44.3%
Serbia	2,329	3,168	-26.5%	5,233	6,622	-21.0%
Slovakia	6,429	6,489	-0.9%	16,605	15,723	+5.6%
Slovenia	5,186	5,909	-12.2%	14,325	16,653	-14.0%
Spain	80,862	88,426	-8.6%	200,507	208,481	-3.8%
Sweden	28,555	29,527	-3.3%	67,976	69,764	-2.6%
Switzerland	31,879	30,284	+5.3%	78,195	73,284	+6.7%
The Netherlands	52,539	56,596	-7.2%	166,857	180,394	-7.5%
Grand Total	1,497,855	1,612,050	-7.1%	3,433,957	3,712,308	-7.5%

* denotes estimated or provisional data used for March 2012

Brand Performance

The German brands demonstrated a strong performance within the European new car market during the first quarter of 2012. Volkswagen, Audi, BMW and Mercedes-Benz all ending March on a positive note up 3.2%, 6.9%, 4.8% and 8.1% respectively. These brands, with the exception of BMW, also ended Q1 up (1.2%, 4.3% and 8.4% respectively) on last year but BMW was only slightly down 0.4%.

Outside the top ten, there was some positive news as a number of the value brands such as Hyundai, Kia and Skoda along with some specialist premium

brands like Land Rover, Jaguar, Jeep, Porsche and Ferrari recording improved sales.

Commenting on the findings, Gareth Hession, Vice President, Research at JATO said: "Mainstream brands have been hit hardest by the continued economic uncertainty with French and Italian brands - Renault, Peugeot, Citroën and Fiat - particularly affected as their home markets saw a reduction in sales year-to-date with a combined loss of over 200,000 units."

Top Ten Brands

Make	Mar_12	Mar_11	% change Mar	Q1_12	Q1_11	% Change Q1
VOLKSWAGEN	184,172	178,415	+3.2%	432,944	427,891	+1.2%
FORD	132,471	143,869	-7.9%	285,418	305,902	-6.7%
OPEL/VAUXHALL	110,668	125,667	-11.9%	227,445	271,471	-16.2%
RENAULT	92,803	115,749	-19.8%	225,759	299,709	-24.7%
PEUGEOT	88,520	109,921	-19.5%	217,609	266,447	-18.3%
AUDI	83,563	78,146	+6.9%	180,111	172,630	+4.3%
CITROEN	75,383	95,026	-20.7%	189,886	225,683	-15.9%
BMW	73,542	70,156	+4.8%	157,307	157,875	-0.4%
TOYOTA	67,930	69,286	-2.0%	149,583	163,345	-8.4%
MERCEDES	67,637	62,543	+8.1%	152,299	140,433	+8.4%

Top Ten Models

Volkswagen's Golf, Nissan's Qashqai and the new Toyota Yaris are the only models in the top ten to record improved sales in March. The Qashqai and new Yaris performed particularly well last month, with sales up 21.5% and 18.1% respectively. They are also the only models, along with the Ford Focus, to end the quarter positively.

Ford's Fiesta moved into second place despite reductions of 4.8% in March and 10.4% YtD and Volkswagen's Polo dropped to fourth place behind Opel/Vauxhall's Corsa.

Although the Volkswagen Passat ends the quarter with increased sales, it was edged out of the top ten for March due to the new registration plate change in Great Britain which made the market larger than Germany for the month. As a result those models that are popular with consumers in the UK moved up the table.

Hession concluded: "It's important to recognise the appeal of new products, premium brands and crossover vehicles even in a difficult European car market. The Mercedes C-Class, new BMW 1-Series, and Nissan Juke have also all recorded increased sales over the last quarter."

Top Ten Models

Make & Model	Mar_12	Mar_11	% change Mar	Q1_12	Q1_11	% Change Q1
VOLKSWAGEN GOLF	52,933	52,584	+0.7%	122,569	123,590	-0.8%
FORD FIESTA	47,888	50,282	-4.8%	91,229	101,861	-10.4%
OPEL/VAUXHALL CORSA	38,809	39,749	-2.4%	73,388	84,356	-13.0%
VOLKSWAGEN POLO	36,948	39,225	-5.8%	87,369	94,053	-7.1%
FORD FOCUS	32,829	34,486	-4.8%	74,878	71,671	+4.5%
OPEL/VAUXHALL ASTRA	31,091	37,277	-16.6%	64,062	79,911	-19.8%
NISSAN QASHQAI	30,237	24,890	+21.5%	62,791	57,720	+8.8%
RENAULT CLIO	28,686	35,626	-19.5%	66,165	89,023	-25.7%
PEUGEOT 207	23,582	31,234	-24.5%	57,775	73,642	-21.5%
TOYOTA YARIS	22,856	19,351	+18.1%	48,789	43,217	+12.9%

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

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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.

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