

18th March 2013

February sees no respite from decreasing European car sales

- **February European new car sales were down 10.3% compared to February 2012**
- **Volkswagen's Golf is Europe's best-selling car in February**
- **Great Britain is the sole 'Big Five' European market to have increased sales**

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 0.3% in February sales, and a 9.1% fall in year-to-date sales, compared to 2012. Four B-segment cars, the Renault Clio, Volkswagen Polo, Peugeot 208 and Ford Fiesta, complete the Top Five.

JATO's key analysis of the market:

- *The European new car market continues to contract, with sales 10.3% less in February and 9.5% less year-to-date than a year earlier*
- *Great Britain is the only 'Big Five' market to have experienced growth in 2013 with sales increasing 7.9% in February (versus 2012) and 10.3% year-to-date*
- *B-Segment models take five out of the Top 10 places*
- *None of the Top 10 brands recorded increased sales in February*
- *BMW is the only brand to have achieved a year-to-date increase in sales (4.7%)*

Out of the 'Big Five' European markets, only Great Britain saw any growth in February. There has been a noticeable increase in the number of private sales and additionally new top selling models such as the facelift Ford Fiesta are now in full flow of availability.

Sales by market

Country	Feb_13	Feb_12	% Change Feb	Feb YtD_13	Feb YtD_12	% Change YtD
Austria	21,196	24,005	-11.7%	48,957	50,831	-3.7%
Belgium	45,400	43,716	+3.9%	96,084	88,448	+8.6%
Croatia	1,782	3,565	-50.0%	3,583	7,063	-49.3%
Cyprus*	899	1,106	-18.7%	1,753	2,086	-16.0%
Czech Republic	10,562	13,544	-22.0%	22,633	26,444	-14.4%
Denmark	12,242	14,196	-13.8%	26,986	27,066	-0.3%
Estonia	1,364	1,303	+4.7%	3,077	2,974	+3.5%
Finland	7,865	10,611	-25.9%	18,111	24,843	-27.1%
France	143,255	163,010	-12.1%	268,053	310,067	-13.5%
Germany	200,683	224,318	-10.5%	392,773	434,513	-9.6%
Great Britain	66,749	61,868	+7.9%	210,392	190,721	+10.3%
Greece	4,118	3,816	+7.9%	9,645	12,221	-21.1%
Hungary	3,862	4,297	-10.1%	7,547	9,277	-18.6%
Iceland	380	323	+17.6%	840	643	+30.6%
Ireland	10,617	11,487	-7.6%	27,909	32,789	-14.9%
Italy	109,305	132,025	-17.2%	223,632	270,753	-17.4%
Latvia	773	727	+6.3%	1,549	1,609	-3.7%
Lithuania	782	863	-9.4%	1,783	1,871	-4.7%
Luxembourg	4,090	4,543	-10.0%	7,465	8,192	-8.9%
Norway	11,369	10,972	+3.6%	23,044	21,832	+5.6%
Poland	24,109	23,897	+0.9%	50,354	48,095	+4.7%
Portugal*	7,644	6,905	+10.7%	14,660	13,865	+5.7%
Romania	3,473	4,126	-15.8%	7,909	9,063	-12.7%
Serbia*	1,563	1,499	+4.3%	2,610	2,908	-10.2%
Slovakia	4,395	5,326	-17.5%	8,703	9,984	-12.8%
Slovenia	3,807	4,128	-7.8%	8,190	9,139	-10.4%
Spain	58,605	64,679	-9.4%	108,538	119,646	-9.3%
Sweden	17,860	20,735	-13.9%	33,581	39,421	-14.8%
Switzerland	21,795	23,279	-6.4%	42,651	46,924	-9.1%
The Netherlands	32,454	43,945	-26.1%	81,303	114,114	-28.8%
Grand Total	832,998	928,814	-10.3%	1,754,315	1,937,402	-9.5%

NOTE: * denotes estimated volumes for February 2013

BMW is the only brand in the Top 10 to have recorded an increase in year-to-date sales (4.7% higher than the same period in 2012). None of the Top 10 brands recorded increased year-on-year sales for the month of February.

Outside the Top 10 the story is similar to January, with Dacia and Mazda being the brands achieving the greatest increases in sales. Honda has seen some success, thanks to the new CR-V model and strong British sales of the Civic, and Jaguar also recorded increased sales in February.

Commenting on the findings, Gareth Hession, Vice President, Research at JATO said: "The European new car market remains a tough place to do business. The market in Great Britain remains strong, but the rest of the 'Big Five' markets are depressed and show no signs of improvement."

Top 10 Brands

Make	Feb_13	Feb_12	% Change Feb	Feb YtD_13	Feb YtD_12	% Change YtD
VOLKSWAGEN	107,739	119,480	-9.8%	221,835	248,990	-10.9%
RENAULT	58,725	68,940	-14.8%	116,047	132,995	-12.7%
PEUGEOT	56,083	61,486	-8.8%	112,587	129,119	-12.8%
FORD	54,044	68,887	-21.5%	116,598	152,944	-23.8%
OPEL/VAUXHALL	49,440	58,904	-16.1%	109,428	116,829	-6.3%
CITROEN	46,986	57,424	-18.2%	95,105	114,563	-17.0%
FIAT	43,740	46,815	-6.6%	90,601	95,734	-5.4%
AUDI	43,359	45,188	-4.0%	93,450	96,590	-3.3%
BMW	39,628	40,024	-1.0%	87,761	83,811	+4.7%
MERCEDES	39,249	40,445	-3.0%	84,667	84,730	-0.1%

The Volkswagen Golf continues to be Europe's best-selling car, despite sales falling 0.3% compared to February 2012, and 9.1% Year-to-Date.

The Renault Clio takes second place with sales up 17.5% on a year ago thanks to a strong sales start for the latest model. The Volkswagen Polo achieves third place, the Peugeot 208 fourth place and the Nissan Qashqai takes fifth place to complete the Top Five. The Opel/Vauxhall Corsa's ninth place in the chart means B-segment models account for half of the Top 10 in February.

Hession commented: "While the Golf has reinforced its lead over its key C-Segment competitors, the competition at the top of the B-Segment is much closer. Meanwhile the Nissan Qashqai's performance demonstrates that the crossover is no longer a niche product, but a key part of the European automotive landscape."

Top 10 Models

Make & Model	Feb_13	Feb_12	% Change Feb	Feb YtD_13	Feb YtD_12	% Change YtD
VOLKSWAGEN GOLF	32,663	32,746	-0.3%	63,318	69,658	-9.1%
RENAULT CLIO	22,318	18,999	+17.5%	43,798	37,491	+16.8%
VOLKSWAGEN POLO	19,538	24,425	-20.0%	40,482	50,429	-19.7%
PEUGEOT 208	18,867	202	-	38,621	615	-
NISSAN QASHQAI	15,813	15,266	+3.6%	32,755	32,489	+0.8%
FORD FIESTA	15,571	19,423	-19.8%	36,325	43,317	-16.1%
FORD FOCUS	14,632	19,684	-25.7%	32,319	42,056	-23.2%
FIAT PANDA	14,024	15,883	-11.7%	28,326	31,029	-8.7%
OPEL/VAUXHALL CORSA	13,686	18,933	-27.7%	29,822	34,597	-13.8%
OPEL/VAUXHALL ASTRA	13,093	15,400	-15.0%	29,780	32,184	-7.5%

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