

**28 February 2014**

## **A strong start to 2014 for European new car sales**

- **European new car sales for January up 4.9% on the same period last year**
- **Sales growth continues into the new year for a fifth consecutive month of year-on-year growth**
- **Strong starts to 2014 for the Volkswagen Golf and the Skoda Octavia**

*According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, there was a much healthier start to 2014 for the European new car market compared to one year ago, with January sales up 4.9% on last year. Building on a strong finish to 2013, 44,823 more units were sold in January 2014 compared to the same period last year, confirming a fifth consecutive month of year-on-year growth in sales volumes.*

*JATO's headline market analysis:*

- *23 out of 30 European countries analysed showed sales growth in January*
- *Volkswagen continued to perform strongly, with a 7.8% increase in January volumes, with the Golf and Polo models taking first and second in the top 10 models table respectively*
- *Eight of the top 10 brands increased sales in January*

Sales growth was reported in the vast majority of European markets, including all of the 'Big Five' - France, Italy, Spain, Germany and Great Britain. The latter two continue to perform well, with year-on-year growth of 7.2% and 7.6% respectively. While unable to replicate December's double-digit growth, Spanish volumes still increased by 8.9%. Just seven of the 30 countries analysed showed negative growth for January culminating in a very positive start for the sector.

## Sales by market

Country	Jan_14	Jan_13	% change Jan	Jan YtD_14	Jan YtD_13	% change YtD
Austria	23,990	27,761	-13.6%	23,990	27,761	-13.6%
Belgium	49,584	50,684	-2.2%	49,584	50,684	-2.2%
Croatia	2,210	1,801	+22.7%	2,210	1,801	+22.7%
Cyprus*	608	772	-21.2%	608	772	-21.2%
Czech Republic	13,638	12,071	+13.0%	13,638	12,071	+13.0%
Denmark	16,259	14,746	+10.3%	16,259	14,746	+10.3%
Estonia	1,622	1,713	-5.3%	1,622	1,713	-5.3%
Finland	12,689	10,246	+23.8%	12,689	10,246	+23.8%
France	125,454	124,798	+0.5%	125,454	124,798	+0.5%
Germany	205,996	192,090	+7.2%	205,996	192,090	+7.2%
Great Britain	154,562	143,643	+7.6%	154,562	143,643	+7.6%
Greece	6,169	5,527	+11.6%	6,169	5,527	+11.6%
Hungary	4,408	3,703	+19.0%	4,408	3,703	+19.0%
Iceland*	492	459	+7.2%	492	459	+7.2%
Ireland	22,913	17,242	+32.9%	22,913	17,242	+32.9%
Italy	118,725	114,779	+3.4%	118,725	114,779	+3.4%
Latvia	968	776	+24.7%	968	776	+24.7%
Lithuania	1,176	1,001	+17.5%	1,176	1,001	+17.5%
Luxembourg	3,415	3,375	+1.2%	3,415	3,375	+1.2%
Norway	11,421	11,675	-2.2%	11,421	11,675	-2.2%
Poland	27,172	26,245	+3.5%	27,172	26,245	+3.5%
Portugal	9,267	7,023	+32.0%	9,267	7,023	+32.0%
Romania	3,855	3,334	+15.6%	3,855	3,334	+15.6%
Serbia*	1,250	1,047	+19.4%	1,250	1,047	+19.4%
Slovakia	4,718	4,374	+7.9%	4,718	4,374	+7.9%
Slovenia	4,646	4,383	+6.0%	4,646	4,383	+6.0%
Spain	54,430	49,967	+8.9%	54,430	49,967	+8.9%
Sweden	18,673	15,721	+18.8%	18,673	15,721	+18.8%
Switzerland	20,090	21,262	-5.5%	20,090	21,262	-5.5%
The Netherlands	45,006	48,365	-6.9%	45,006	48,365	-6.9%
<b>Grand Total</b>	<b>965,406</b>	<b>920,583</b>	<b>+4.9%</b>	<b>965,406</b>	<b>920,583</b>	<b>+4.9%</b>

NOTE: \* denotes estimated volumes for January 2014

Volkswagen expanded its market share to remain the number one brand in Europe thanks to a 7.8% increase in volumes in January. Opel/Vauxhall, however, had a slower start to the year with sales down 8.0% on 2013 mainly due to lower sales of the Astra in Great Britain and Germany.

Peugeot (9.4%) and Renault (3.7%) both took advantage of this to move up to third and fourth places respectively in the top 10 brands table. It was also a good month for second-placed Ford (8.5%) and sixth-placed Audi (7.7%).

Outside the top 10, Dacia, Mazda, Skoda and Toyota also recorded significantly increased sales in January.

## Top 10 Brands

Make	Jan_14	Jan_13	% change Jan	Jan YtD_14	Jan YtD_13	% change YtD
VOLKSWAGEN	122,801	113,863	+7.8%	122,801	113,863	+7.8%
FORD	67,869	62,576	+8.5%	67,869	62,576	+8.5%
PEUGEOT	61,874	56,541	+9.4%	61,874	56,541	+9.4%
RENAULT	59,315	57,173	+3.7%	59,315	57,173	+3.7%
OPEL/VAUXHALL	55,048	59,820	-8.0%	55,048	59,820	-8.0%
AUDI	54,195	50,307	+7.7%	54,195	50,307	+7.7%
CITROEN	50,213	48,082	+4.4%	50,213	48,082	+4.4%
BMW	48,635	48,049	+1.2%	48,635	48,049	+1.2%
FIAT	45,866	47,005	-2.4%	45,866	47,005	-2.4%
MERCEDES	45,765	45,451	+0.7%	45,765	45,451	+0.7%

Increases of 28.4% for the Golf and 9.0% for the Polo, the top two models by sales, were key to Volkswagen's strong performance during January. The Ford Fiesta dropped from second to third place as a result, despite an 8.4% increase in volumes.

The new Skoda Octavia climbed to sixth place following a strong start to the year with year-on-year sales up by 32.7%. The Audi A3 was the only top 10 model to better this, recording a significant increase of 83.7% for its recently expanded model range.

A number of new models were amongst the top performers, including Peugeot's new 308 (50.2%) Citroën's new C4 Picasso / Grand C4 Picasso range (77.5%) and the new Seat Leon (59.3%). It was also a good January for Dacia's Sandero (58.0%) and Duster (35.9%) ranges.

At the premium end of the market, Tesla and Maserati both recorded high growth. Tesla's Model S electric car performed particularly well in low-emission friendly markets such as Norway. It has also been a successful debut for Maserati's new Ghibli executive saloon, which accounted for over 75% of the brand's sales across Europe in January.

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "This is an encouraging start to 2014 for the European new car market, with volumes up almost five per cent on this time last year. The industry has been hoping to avoid the slow start we witnessed at the start of 2013, so a fifth successive month of growth and the fact that the five biggest individual markets all grew during January should be grounds for optimism."

## Top 10 Models

Make & Model	Jan_14	Jan_13	% change Jan	Jan YtD_14	Jan YtD_13	% change YtD
VOLKSWAGEN GOLF	39,305	30,601	+28.4%	39,305	30,601	+28.4%
VOLKSWAGEN POLO	22,783	20,893	+9.0%	22,783	20,893	+9.0%
FORD FIESTA	22,389	20,651	+8.4%	22,389	20,651	+8.4%
RENAULT CLIO	21,011	21,483	-2.2%	21,011	21,483	-2.2%
PEUGEOT 208	18,492	19,743	-6.3%	18,492	19,743	-6.3%
SKODA OCTAVIA	16,967	12,787	+32.7%	16,967	12,787	+32.7%
FORD FOCUS	16,154	17,682	-8.6%	16,154	17,682	-8.6%
AUDI A3/S3/RS3	15,600	8,490	+83.7%	15,600	8,490	+83.7%
OPEL/VAUXHALL CORSA	14,187	16,122	-12.0%	14,187	16,122	-12.0%
BMW SERIES 3	13,967	14,734	-5.2%	13,967	14,734	-5.2%

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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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