

PRESS RELEASE

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Eight straight months of growth for European new car market

- **April 2014 sales were up 4.2% on the same month last year**
- **Year-to-date volumes are up 6.6% compared with 2013**
- **25 out of 30 markets have recorded year-to-date increases in sales, with 14 countries seeing double-digit growth**

According to the latest analysis from JATO Dynamics, the world's leading provider of automotive intelligence, demand for new cars continues to grow in Europe, with year-on-year sales increasing for an eighth consecutive month. At the end of April volumes were up 4.2% on 2013, and year-to-date volumes were 6.6% higher than the same period last year.

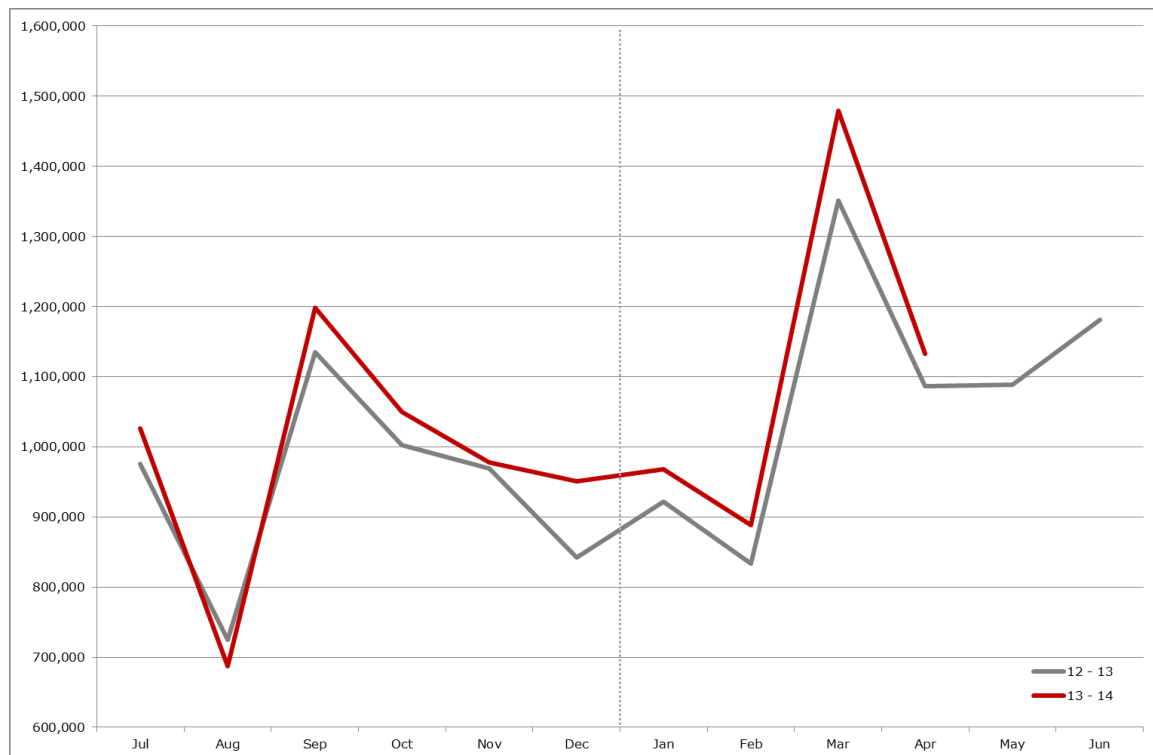
JATO's headline market analysis:

- *Nine of the top 10 brands record year-on-year sales increases for April*
- *Renault has mounted a strong recovery in 2014 with year-to-date sales 10.6% higher than last year*
- *There is strong demand for the two best-selling cars in Europe this year – the Volkswagen Golf and the Ford Fiesta, resulting in double-digit year-to-date growth for both models*

Of the 30 European countries analysed 21 recorded a year-on-year increase in new car sales for April. In over half these countries (11 in total) growth was in excess of 10%. Amongst the 'Big 5' markets, performance was particularly strong in Spain (+29.4%) and Great Britain (+8.2%). At first glance the 3.6% decrease seen in Germany seems surprising; however a contributing factor could be the fewer sales days available during April (due to a number of bank holidays) rather than any underlying fall in demand. Germany was the only 'Big 5' market that failed to record sales growth for April as volumes grew in both France (+5.8%) and Italy (+2.1%).

Year-to-date performance across Europe was even more impressive, with 25 out of 30 markets growing over the first four months of 2014 compared to the same period last year. Of these countries, 14 have seen double-digit growth in sales so far this year. With close to flat growth recorded in Austria and Belgium, only three countries have seen a significant reduction in year-to-date sales compared to 2013. One of those countries, the Netherlands, has been affected by a tax change at the start of the year that shifted sales to late 2013. With this taken into account, Serbia and Switzerland are the only markets where underlying demand has fallen so far this year.

European Monthly Sales Volumes Year-on-Year Comparison



(Image files of graph also attached)

Volkswagen retains its position as the top European brand despite a 0.6% fall in year-on-year sales for April. Meanwhile, the other brands in the top 10 increased their year-on-year sales for the month. Second-placed Ford and third-placed Renault both posted impressive sales increases of 7.6% and 9.0% respectively, with Opel/Vauxhall (+6.8%) dropping to fourth place as a result. Strong sales of the Renault Captur have helped Renault's sales recover in 2014, with year-to-date sales growth of 10.6% across its range. Volumes for all the top 10 brands have seen year-to-date growth for the first four months of 2014.

Outside of the top 10 brands, Dacia (+32.2%) and Skoda (+22.0%) continued their strong performance with impressive year-on-year growth. Nissan and Mazda also saw strong growth with year-on-year increases of 21.1% and 20.4% respectively.

Top 10 Brands

Make	Apr_14	Apr_13	% change Apr	YtD_14	YtD_13	% change YtD
VOLKSWAGEN	146,099	146,942	-0.6%	539,217	525,715	+2.6%
FORD	86,058	79,972	+7.6%	339,210	308,517	+9.9%
RENAULT	75,479	69,249	+9.0%	291,273	263,471	+10.6%
OPEL/VAUXHALL	72,841	68,200	+6.8%	298,421	277,031	+7.7%
PEUGEOT	69,880	65,660	+6.4%	277,846	255,539	+8.7%
AUDI	67,564	67,036	+0.8%	252,436	237,204	+6.4%
MERCEDES	57,646	56,796	+1.5%	215,677	208,518	+3.4%
BMW	56,241	54,430	+3.3%	225,260	213,196	+5.7%
CITROEN	55,820	53,669	+4.0%	219,202	210,238	+4.3%
FIAT	54,125	52,805	+2.5%	211,639	206,870	+2.3%

The Volkswagen Golf maintained its sizeable lead as the best selling car in Europe thanks to year-on-year growth of 15.3% for April. The Ford Fiesta posted an even bigger increase of 21.2%, helping it hold on to second place, while the Renault Clio, Volkswagen Polo and Opel/Vauxhall Corsa complete the top 5. The Skoda Octavia recorded a large year-on-year increase of 45.1% to claim tenth spot in the top 10, replacing the Fiat 500.

Overall, six of the top 10 models have recorded positive growth for April and year-to-date. Year-to-date performance has been particularly strong for the Skoda Octavia (+39.7%) and the Audi A3/S3/RS3 series (+37.8%).

Peugeot's new 2008 was one of the top performers outside the top 10. Having only recently been introduced, consumers appear to be choosing it over the 208, which would explain the 18.8% fall in sales for this model compared to April 2013. The Citroen C3, Seat Leon and Fiat 500L were amongst the other models that recorded strong growth for the month.

Top 10 Models

Make & Model	Apr_14	Apr_13	% change Apr	YtD_14	YtD_13	% change YtD
VOLKSWAGEN GOLF	49,653	43,049	+15.3%	179,428	155,472	+15.4%
FORD FIESTA	28,421	23,456	+21.2%	114,027	101,219	+12.7%
RENAULT CLIO	26,231	26,063	+0.6%	100,688	101,412	-0.7%
VOLKSWAGEN POLO	23,442	25,500	-8.1%	96,888	94,387	+2.6%
OPEL/VAUXHALL CORSA	20,326	19,752	+2.9%	85,214	83,306	+2.3%
FORD FOCUS	20,179	18,660	+8.1%	81,311	79,924	+1.7%
NISSAN QASHQAI	19,535	16,052	+21.7%	73,406	77,938	-5.8%
PEUGEOT 208	19,485	24,011	-18.8%	81,968	90,959	-9.9%
AUDI A3/S3/RS3	18,880	16,859	+12.0%	68,895	49,999	+37.8%
SKODA OCTAVIA	17,693	12,192	+45.1%	69,328	49,612	+39.7%

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "April was another strong month for the European car market, building on the great start made in the first quarter. Four months into the year and almost half of the 30 countries we analyse are showing double-digit growth for the year. With the German market expected to bounce back after its Easter lull, we think this positive performance will continue for the rest of the second quarter."

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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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Notes to editors

Sales by Market

Country	Apr_14	Apr_13	% change Apr	YtD_14	YtD_13	% change YtD
Austria	29,240	30,807	-5.1%	110,521	110,831	-0.3%
Belgium	53,319	53,036	+0.5%	201,851	202,196	-0.2%
Croatia	4,159	2,807	+48.2%	10,942	8,827	+24.0%
Cyprus	601	474	+26.8%	2,606	2,197	+18.6%
Czech Republic	17,498	15,061	+16.2%	60,491	51,514	+17.4%
Denmark	16,497	15,824	+4.3%	64,316	57,765	+11.3%
Estonia	2,043	1,936	+5.5%	6,788	6,643	+2.2%
Finland	9,311	9,811	-5.1%	39,782	37,412	+6.3%
France	166,959	157,749	+5.8%	613,568	591,631	+3.7%
Germany	274,097	284,444	-3.6%	985,850	958,401	+2.9%
Great Britain	176,820	163,357	+8.2%	864,942	768,555	+12.5%
Greece	5,442	5,323	+2.2%	21,835	19,456	+12.2%
Hungary	5,568	4,651	+19.7%	21,201	17,303	+22.5%
Iceland*	557	579	-3.8%	2,056	1,911	+7.6%
Ireland	7,877	6,144	+28.2%	57,827	45,610	+26.8%
Italy	119,887	117,398	+2.1%	499,115	475,475	+5.0%
Latvia	1,067	796	+34.0%	3,917	3,150	+24.3%
Lithuania	1,417	1,045	+35.6%	4,773	3,784	+26.1%
Luxembourg	5,220	5,160	+1.2%	17,531	17,475	+0.3%
Norway	12,401	14,242	-12.9%	49,153	48,205	+2.0%
Poland	27,701	24,015	+15.3%	103,230	99,735	+3.5%
Portugal	12,317	8,048	+53.0%	46,287	32,223	+43.6%
Romania	4,932	5,242	-5.9%	18,277	16,475	+10.9%
Serbia	1,931	2,260	-14.6%	5,913	6,336	-6.7%
Slovakia	5,889	5,740	+2.6%	21,680	19,959	+8.6%
Slovenia	4,876	4,702	+3.7%	18,675	17,470	+6.9%
Spain	81,245	62,762	+29.4%	286,803	244,500	+17.3%
Sweden	27,543	24,175	+13.9%	95,342	80,249	+18.8%
Switzerland	27,195	28,043	-3.0%	95,158	100,131	-5.0%
The Netherlands	28,622	30,600	-6.5%	136,960	147,028	-6.8%
Grand Total	1,132,231	1,086,231	+4.2%	4,467,390	4,192,447	+6.6%

NOTE: *denotes estimated data included for April '14