

19 June 2013

European car sales decline in May but year-to-date figures show signs of improvement

- **European new car sales for the month were down 5.8% compared to May 2012**
- **Mercedes is the only brand in the top 10 to report an increase in sales for both month and year-to-date figures**
- **Great Britain performs well despite current market trends, reporting an 11% increase in new car sales last month compared to May 2012, and remains up by 9.3% year-to-date.**

According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, European new car sales slipped back into decline during May. Following a small 2.0% increase for the month of April 2013 (versus April 2012), May ended with a 5.8% reduction in new car sales/registrations for the month compared to May 2012. However, despite year-to-date figures also showing a decline of 6.8% compared to 2012, the downward trend appears to be slowing, as year-to-date decline rates have become smaller each month since March this year.

JATO headline market analysis:

- *The European new car market decreased by 5.8% in May compared to May 2012 and year-to-date sales remain down by 6.8% year-on-year*
- *Within the 'Big 5' markets, Great Britain was the only market to record an improvement in year-on-year sales volumes for both the month and year-to-date figures whereas France, Germany, Italy and Spain all suffered decreased volumes for both month and year-to-date figures*
- *B-segment models took four out of the top five places for European sales volumes while the VW Golf remains at the top of the leader board*
- *Mercedes is the only brand in the top 10 to record increased sales volumes for both the month and year-to-date versus 2012*

Although Finland posted the largest year-on-year increase for the month of May at 39.6%, this dramatic increase year-on-year is largely due to a change in car tax in April 2012 that resulted in an artificially high sales volume in

March 2012 and thereafter artificially lower sales in the subsequent months. Year-to-date figures, which remain down by 19.5%, are more representative of the overall picture in Finland.

In contrast to current market trends, Great Britain posted an 11.0% increase in year-on-year figures for May, remaining up by 9.3% year-to-date.

Sales by Market

Country	May_13	May_12	% change May	May YtD_13	May YtD_12	% change YtD
Austria	29,094	32,399	-10.2%	139,925	153,891	-9.1%
Belgium	44,519	40,780	+9.2%	246,715	237,469	+3.9%
Croatia	3,328	3,377	-1.5%	12,155	16,863	-27.9%
Cyprus	479	1,069	-55.2%	2,676	4,934	-45.8%
Czech Republic	14,822	15,975	-7.2%	66,336	76,072	-12.8%
Denmark	16,611	16,670	-0.4%	74,373	69,497	+7.0%
Estonia	2,003	1,942	+3.1%	8,646	8,365	+3.4%
Finland	10,228	7,326	+39.6%	47,640	59,149	-19.5%
France	148,490	165,691	-10.4%	740,121	840,084	-11.9%
Germany	261,316	289,977	-9.9%	1,219,717	1,337,679	-8.8%
Great Britain	180,111	162,288	+11.0%	948,666	868,166	+9.3%
Greece	5,238	5,271	-0.6%	24,694	26,797	-7.8%
Hungary	5,034	4,614	+9.1%	22,318	23,018	-3.0%
Iceland*	890	1,536	-42.1%	2,802	3,338	-16.1%
Ireland	5,963	7,697	-22.5%	51,544	60,297	-14.5%
Italy	136,711	148,203	-7.8%	611,075	689,246	-11.3%
Latvia	960	1,040	-7.7%	4,110	4,412	-6.8%
Lithuania	1,109	1,213	-8.6%	4,893	5,146	-4.9%
Luxembourg	4,614	4,833	-4.5%	22,089	23,717	-6.9%
Norway	12,280	12,897	-4.8%	60,485	58,982	+2.5%
Poland	22,550	23,929	-5.8%	122,285	125,356	-2.4%
Portugal*	11,016	10,674	+3.2%	43,208	42,602	+1.4%
Romania	4,107	7,745	-47.0%	20,582	26,017	-20.9%
Serbia	2,212	2,189	+1.1%	8,549	9,650	-11.4%
Slovakia	5,917	5,957	-0.7%	25,876	27,868	-7.1%
Slovenia	4,914	4,660	+5.5%	22,384	23,347	-4.1%
Spain	70,957	72,409	-2.0%	315,330	332,687	-5.2%
Sweden	25,782	25,759	+0.1%	106,031	117,071	-9.4%
Switzerland	26,678	29,165	-8.5%	124,952	137,219	-8.9%
The Netherlands	30,262	47,757	-36.6%	177,290	255,223	-30.5%
Grand Total	1,088,195	1,155,042	-5.8%	5,277,467	5,664,162	-6.8%

NOTE: * denotes estimated volumes for May 2013

Out of the top 10 manufacturers, Mercedes was the only brand to record an increase in either year-on-year monthly or year-to-date figures, with sales up 1.8% and 2.3% respectively. This is largely thanks to the successful launch of the new shape A-Class and the introduction of the new CLA-Class four-door coupé.

All other brands in the top 10, including market leader Volkswagen, reported a decline for both monthly and year-to-date volumes.

Outside the top 10, Dacia, currently 17th, made significant progress over 2012, reporting an 18.2% increase in both monthly year-on-year and year-to-date volumes. Other brands that are making strong progress include: Mazda, up 30.9% for the month and 7.2% year-to-date; Seat, up 12.8% for the month and 9.4% year-to-date; Land Rover, up 10.8% for the month and 10.1% year-to-date; and Jaguar up 16.2% for the month and 15.6% year-to-date.

Top 10 Brands

Make	May_13	May_12	% change May	May YtD_13	May YtD_12	% change YtD
VOLKSWAGEN	138,271	148,528	-6.9%	663,631	720,552	-7.9%
FORD	87,002	87,711	-0.8%	395,250	453,616	-12.9%
OPEL/VAUXHALL	75,800	83,652	-9.4%	353,280	379,511	-6.9%
PEUGEOT	65,553	74,205	-11.7%	320,544	363,459	-11.8%
AUDI	63,749	66,625	-4.3%	300,816	308,678	-2.5%
RENAULT	61,744	75,118	-17.8%	325,098	371,539	-12.5%
FIAT	57,434	60,543	-5.1%	264,307	269,742	-2.0%
BMW	55,303	59,113	-6.4%	268,322	272,645	-1.6%
MERCEDES	55,135	54,154	+1.8%	263,500	257,601	+2.3%
CITROEN	52,427	62,090	-15.6%	262,592	314,588	-16.5%

The Volkswagen Golf continued to be Europe's best-selling car, despite a slight drop in sales (0.7% for the month and 2.1% year-to-date). New model Peugeot 208 and facelift Renault Clio continued to sell well, recording increased sales in May 2013, compared to May 2012.

Out of the top five, four were B-segment models: Ford Fiesta; Peugeot 208; Opel/Vauxhall Corsa; Renault Clio. However, both the Ford Fiesta and Opel/Vauxhall Corsa experienced a drop in sales for the month compared to May 2012 and also remain down year-to-date.

Commenting on the findings, Gareth Hession, Vice President of Research at JATO Dynamics said: "Although the latest year-to-date figures continue to show an overall decline, it's important to note that they suggest the decline is beginning to slow. Alongside a few of the premium names, brands like Dacia, Kia, Subaru and Seat are helping to reverse the trend of decline."

Top 10 Models

Make/Model	May_13	May_12	% change May	May YtD_13	May YtD_12	% change YtD
VOLKSWAGEN GOLF	40,695	40,964	-0.7%	196,097	200,312	-2.1%
FORD FIESTA	26,530	28,201	-5.9%	127,675	145,351	-12.2%
PEUGEOT 208	23,020	10,920	-	113,982	23,335	-
OPEL/VAUXHALL CORSA	22,518	26,566	-15.2%	105,800	120,213	-12.0%
RENAULT CLIO	22,093	20,874	+5.8%	123,565	107,719	+14.7%
VOLKSWAGEN POLO	22,075	23,972	-7.9%	116,415	135,440	-14.0%
FORD FOCUS	20,367	22,361	-8.9%	100,226	117,162	-14.5%
BMW SERIES 3	17,837	17,359	+2.8%	83,205	71,357	+16.6%
NISSAN QASHQAI	17,393	15,691	+10.8%	95,300	92,988	+2.5%
OPEL/VAUXHALL ASTRA	17,328	22,337	-22.4%	85,275	104,452	-18.4%

NOTE: Percentage changes for the Peugeot 208 are not representative due to the new model's introduction in 2012 and have therefore been removed from the table

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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.

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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