

**19 November 2013**

## **European new car market begins the final quarter of 2013 on a high**

- **Strong sales volumes in October help to decrease the year-to-date deficit to the lowest amount seen in 2013**
- **European new car market increased by 4.7% during October compared to 2012**
- **Eight of the top 10 brands increased new car sales during October**

*According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, sales of new cars in Europe have increased for the second month running, by 4.7% in October, reducing the year-to-date sales deficit by over 2% in two months.*

*JATO's headline market analysis:*

- *The European new car market was just 3.1% behind 2012 performance year-to-date, the smallest deficit seen so far in 2013*
- *Three of the top 10 models reported increases in sales for both the month and year-to-date*
- *Four of the 'Big Five' markets recorded an increase in sales in October compared with 2012 figures*

Out of the four, Spain posted the largest increase for the month and also increased year-to-date sales volumes for the first time in 2013, by 1.6% year-to-date. In both September and October, sales in Spain were considerably higher than over the same period in 2012, when a VAT increase came into effect resulting in a reduction in sales. That said, sales in Spain were above average in September and October this year as customers take advantage of economical car incentives from the Spanish Government.

The Netherlands have also had a strong month, with sales increasing by 38.0% over October 2012, helping to reduce a year-to-date deficit of 24.9%, as company car drivers place orders ahead of taxation changes.

## Sales by Market

| Country            | Oct_13           | Oct_12           | % Change Oct | Oct YtD_13        | Oct YtD_12        | % Change YtD |
|--------------------|------------------|------------------|--------------|-------------------|-------------------|--------------|
| Austria            | 26,743           | 26,322           | +1.6%        | 274,854           | 293,212           | -6.3%        |
| Belgium            | 39,490           | 41,846           | -5.6%        | 428,961           | 428,579           | +0.1%        |
| Croatia            | 2,224            | 1,994            | +11.5%       | 24,149            | 28,375            | -14.9%       |
| Cyprus             | 498              | 775              | -35.7%       | 5,140             | 8,830             | -41.8%       |
| Czech Republic     | 15,346           | 15,963           | -3.9%        | 135,497           | 147,001           | -7.8%        |
| Denmark            | 16,867           | 15,209           | +10.9%       | 151,963           | 143,599           | +5.8%        |
| Estonia            | 1,798            | 1,630            | +10.3%       | 17,115            | 16,821            | +1.7%        |
| Finland            | 9,097            | 8,190            | +11.1%       | 89,960            | 97,031            | -7.3%        |
| France             | 166,495          | 162,335          | +2.6%        | 1,476,308         | 1,593,855         | -7.4%        |
| Germany            | 265,441          | 259,529          | +2.3%        | 2,482,460         | 2,618,327         | -5.2%        |
| Great Britain      | 157,314          | 151,252          | +4.0%        | 1,952,238         | 1,771,861         | +10.2%       |
| Greece             | 4,969            | 5,101            | -2.6%        | 48,950            | 50,493            | -3.1%        |
| Hungary            | 5,149            | 4,076            | +26.3%       | 46,409            | 43,726            | +6.1%        |
| Iceland            | 467              | 519              | -10.0%       | 6,685             | 6,890             | -3.0%        |
| Ireland            | 1,696            | 1,657            | +2.4%        | 73,413            | 78,299            | -6.2%        |
| Italy              | 111,744          | 118,350          | -5.6%        | 1,116,948         | 1,214,993         | -8.1%        |
| Latvia             | 1,161            | 1,001            | +16.0%       | 8,924             | 8,996             | -0.8%        |
| Lithuania          | 1,196            | 1,188            | +0.7%        | 10,095            | 10,365            | -2.6%        |
| Luxembourg         | 4,499            | 4,454            | +1.0%        | 40,525            | 43,544            | -6.9%        |
| Norway             | 12,969           | 12,457           | +4.1%        | 120,407           | 117,995           | +2.0%        |
| Poland             | 26,372           | 22,108           | +19.3%       | 239,491           | 228,425           | +4.8%        |
| Portugal*          | 8,760            | 7,390            | +18.5%       | 88,177            | 81,868            | +7.7%        |
| Romania            | 7,076            | 6,864            | +3.1%        | 55,398            | 60,444            | -8.3%        |
| Serbia             | 1,632            | 1,653            | -1.3%        | 17,139            | 18,758            | -8.6%        |
| Slovakia           | 6,525            | 4,773            | +36.7%       | 53,087            | 57,333            | -7.4%        |
| Slovenia           | 4,600            | 3,738            | +23.1%       | 44,353            | 42,445            | +4.5%        |
| Spain              | 61,153           | 45,142           | +35.5%       | 609,894           | 600,063           | +1.6%        |
| Sweden             | 25,332           | 24,028           | +5.4%        | 218,397           | 227,739           | -4.1%        |
| Switzerland        | 26,040           | 26,357           | -1.2%        | 250,829           | 270,697           | -7.3%        |
| The Netherlands    | 36,943           | 26,764           | +38.0%       | 340,779           | 453,954           | -24.9%       |
| <b>Grand Total</b> | <b>1,049,596</b> | <b>1,002,665</b> | <b>+4.7%</b> | <b>10,428,545</b> | <b>10,764,518</b> | <b>-3.1%</b> |

NOTE: \* denotes estimated volumes for October 2013

Out of the top 10 brands, eight posted an increase in sales during October, which has contributed towards improving the negative year-to-date figures experienced throughout 2013.

Despite finishing in eighth, ninth and tenth respectively, BMW, Mercedes and Skoda were the only manufacturers in the top 10 to post an increase for the year-to-date.

Sales for both Audi and Citroen were down for the month, contributing to their respective 2.6% and 12.4% year-to-date deficits. That said, sales in 2013 have left the brands in sixth and seventh positions overall for the month and in sixth and ninth for the year-to-date.

## Top 10 Brands

| Make          | Oct_13  | Oct_12  | % Change Oct | Oct YtD_13 | Oct YtD_12 | % Change YtD |
|---------------|---------|---------|--------------|------------|------------|--------------|
| VOLKSWAGEN    | 134,858 | 133,058 | +1.4%        | 1,298,682  | 1,382,594  | -6.1%        |
| FORD          | 76,886  | 76,745  | +0.2%        | 785,718    | 825,320    | -4.8%        |
| RENAULT       | 73,831  | 65,308  | +13.1%       | 667,594    | 695,627    | -4.0%        |
| PEUGEOT       | 66,925  | 65,997  | +1.4%        | 628,421    | 687,736    | -8.6%        |
| OPEL/VAUXHALL | 63,017  | 59,263  | +6.3%        | 696,523    | 718,587    | -3.1%        |
| AUDI          | 58,919  | 59,201  | -0.5%        | 593,524    | 609,481    | -2.6%        |
| CITROEN       | 53,579  | 55,504  | -3.5%        | 512,397    | 585,190    | -12.4%       |
| BMW           | 51,775  | 51,086  | +1.3%        | 538,479    | 533,077    | +1.0%        |
| MERCEDES      | 51,371  | 47,894  | +7.3%        | 529,417    | 502,850    | +5.3%        |
| SKODA         | 48,644  | 39,214  | +24.0%       | 424,396    | 420,562    | +0.9%        |

The Volkswagen Golf continues to be Europe's bestselling car and is one of only three models in the top 10 to post increases for both the month and year-to-date. Increasing sales by 30.8% in October and 4.7% year-to-date, Volkswagen have sold 17,390 more Golfs so far in 2013 compared to the same period in 2012.

Also with increases for both the month and year-to-date are the Renault Clio and BMW 3 Series which ended October second and tenth respectively. The Clio increased sales for the month by 6.0% and the 3 Series by 8.2%. Year-to-date, both the Clio and 3 Series are performing impressively, with increases of 18.7% and 18.9% respectively.

The only other increases in the top 10 for either the month or year-to-date were the Skoda Octavia, up 46.1% for the month, and Peugeot 208, up 70.1% year-to-date, following the successful introduction of their new models.

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "The European new car market is the closest it's been to the performance seen in 2012. Out of the 30 markets analysed, 22 have reported increases for the month, and out of the top 10 brands, eight increased sales during October. Even with contributing factors such as incentives aiding the recovery in some markets, it is positive to see an overall increase in sales for the second month running and the yearly deficit falling to the lowest amount seen in 2013."

## Top 10 Models

| Make & Model        | Oct_13 | Oct_12 | % Change Oct | Oct YtD_13 | Oct YtD_12 | % Change YtD |
|---------------------|--------|--------|--------------|------------|------------|--------------|
| VOLKSWAGEN GOLF     | 43,281 | 33,086 | +30.8%       | 390,688    | 373,298    | +4.7%        |
| RENAULT CLIO        | 24,500 | 23,117 | +6.0%        | 241,516    | 203,508    | +18.7%       |
| FORD FIESTA         | 23,959 | 26,189 | -8.5%        | 246,098    | 264,629    | -7.0%        |
| VOLKSWAGEN POLO     | 21,416 | 22,763 | -5.9%        | 223,216    | 247,882    | -10.0%       |
| SKODA OCTAVIA       | 19,240 | 13,173 | +46.1%       | 135,714    | 154,120    | -11.9%       |
| PEUGEOT 208         | 18,214 | 23,842 | -23.6%       | 207,836    | 122,151    | +70.1%       |
| FORD FOCUS          | 17,553 | 17,578 | -0.1%        | 194,020    | 207,928    | -6.7%        |
| OPEL/VAUXHALL CORSA | 16,641 | 18,555 | -10.3%       | 205,247    | 229,758    | -10.7%       |
| NISSAN QASHQAI      | 16,322 | 16,823 | -3.0%        | 177,392    | 178,522    | -0.6%        |
| BMW 3 SERIES        | 16,221 | 14,990 | +8.2%        | 171,620    | 144,307    | +18.9%       |

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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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