

18 July 2013

Some signs of stability despite European new car market finishing first half of 2013 down

- **Europe's new car sales declined by 6.3% in June, finishing H1 2013 down 6.7% compared to last year**
- **Great Britain was the only 'Big Five' market to have a significant increase in sales in H1 2013**
- **The Netherlands posts significant drops in both monthly and year to date new car sales figures**

According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, European new car sales continued to drop last month and ended the first half of 2013 down by 6.7% compared to 2012.

JATO's key findings:

- *The European new car market is down by 6.7% year-to-date, posting a 6.3% decrease in new car sales in June compared to June 2012*
- *Within the 'Big 5' markets, Spain saw a small rise in June figures but Great Britain was the only market to record significant sales increases for H1 2013*
- *Mercedes is the only brand in the top 10 to record increased sales volumes for both monthly and year-to-date figures*

Half way through 2013, the overall European new car market remains down 6.7% compared to same period in 2012. In the last six months, 464,204 fewer new cars were sold in Europe, bringing the total to 6,458,200 new vehicles for the half year.

Out of the countries experiencing a reduction in sales, Cyprus recorded the largest percentage drop of 45.6% year-to-date. Germany, which recorded an 8.1% decrease in new car sales and registrations recorded the largest volume drop, with 131,771 fewer cars sold in the first half of 2013 than were sold in the same period in 2012.

Both Denmark and Great Britain have reported two of the biggest increases over H1 2012, posting increases of 9.1% and 10.0% respectively; however Great Britain's increase of 105,943 additional cars sold in H1 2013 than in H1 2012 is the more significant of the two, due to overall market size.

Similarly, Great Britain also posted one of the largest changes in monthly figures, selling 25,443 more cars in June 2013, a 13.4% increase over June 2012. However, the largest overall change was a decrease experienced by The Netherlands, with 40,682 fewer new cars being sold in June 2013, a 53.4% drop over June 2012.

In Ireland, buyers are hesitating to buy ahead of the country's first mid-year registration plate change resulting in a 73.7% drop over June 2012.

Spain, however, posted a 0.6% increase for June year-on-year, suggesting the market could be stabilising, despite overall sales remaining down 4.2% year to date.

Sales by Market

Country	Jun_13	Jun_12	% Change Jun	Jun YtD_13	Jun YtD_12	% Change YtD
Austria	31,279	33,067	-5.4%	171,204	186,958	-8.4%
Belgium	43,158	47,647	-9.4%	289,873	285,116	+1.7%
Croatia	3,175	3,395	-6.5%	15,342	20,258	-24.3%
Cyprus	475	859	-44.7%	3,151	5,793	-45.6%
Czech Republic	14,482	18,140	-20.2%	80,818	94,212	-14.2%
Denmark	17,537	14,713	+19.2%	91,910	84,210	+9.1%
Estonia	1,702	1,966	-13.4%	10,348	10,331	+0.2%
Finland	8,820	7,714	+14.3%	56,460	66,863	-15.6%
France	191,355	208,909	-8.4%	931,476	1,048,993	-11.2%
Germany	282,913	296,722	-4.7%	1,502,630	1,634,401	-8.1%
Great Britain	214,957	189,514	+13.4%	1,163,623	1,057,680	+10.0%
Greece	5,641	5,526	+2.1%	30,335	32,323	-6.2%
Hungary	5,009	4,982	+0.5%	27,327	28,000	-2.4%
Iceland	1,468	1,516	-3.2%	4,804	4,854	-1.0%
Ireland	1,673	6,350	-73.7%	53,247	66,647	-20.1%
Italy	122,558	129,599	-5.4%	734,247	818,842	-10.3%
Latvia	1,027	1,050	-2.2%	5,137	5,462	-6.0%
Lithuania	1,121	1,048	+7.0%	6,014	6,194	-2.9%
Luxembourg	4,320	4,939	-12.5%	26,409	28,656	-7.8%
Norway	11,240	11,279	-0.3%	71,725	70,261	+2.1%
Poland	25,214	23,314	+8.1%	147,504	148,670	-0.8%
Portugal*	11,971	10,810	+10.7%	54,225	53,412	+1.5%
Romania	3,967	7,326	-45.9%	24,549	33,343	-26.4%
Serbia*	2,031	2,207	-8.0%	10,580	11,857	-10.8%
Slovakia	5,807	5,936	-2.2%	31,683	33,804	-6.3%
Slovenia	5,845	4,980	+17.4%	28,229	28,327	-0.3%
Spain	73,508	73,094	+0.6%	388,838	405,781	-4.2%
Sweden	22,863	25,562	-10.6%	128,894	142,633	-9.6%
Switzerland	28,339	39,967	-29.1%	154,900	177,186	-12.6%
The Netherlands	35,432	76,114	-53.4%	212,718	331,337	-35.8%
Grand Total	1,178,887	1,258,245	-6.3%	6,458,200	6,922,404	-6.7%

NOTE: * denotes estimated volumes for June 2013

Amongst the top 10 manufacturers, Mercedes is the only brand to post an increase for both year-to-date and monthly figures. The German brand posted a 2.1% increase in sales for H1 2013 and a 0.9% increase in June 2013 year-on-year.

Ford was the only other brand in the top 10 this month to post an increase in sales, achieving a 7.0% increase for June year-on-year. All other brands, even market leaders Volkswagen, reported a drop in sales for both monthly and year-to-date figures.

Outside of the top 10, Dacia recorded strong progress with a 12.7% increase for June year-on-year and an overall increase of 17.2% during the first half of 2013. Also making notable progress is SEAT, up 9.9% for June and 9.4% for H1 2013 and Jaguar, up 11.6% for June and 15.0% for H1 2013. Mazda, Honda and Land Rover all remain up overall for H1 2013.

Top 10 Brands

Make	Jun 13	Jun 12	% Change Jun	Jun YtD 13	Jun YtD 12	% Change YtD
VOLKSWAGEN	145,727	156,101	-6.6%	809,486	876,653	-7.7%
FORD	92,588	86,534	+7.0%	488,011	540,150	-9.7%
RENAULT	87,104	90,500	-3.8%	412,146	462,039	-10.8%
OPEL/VAUXHALL	83,863	90,735	-7.6%	437,112	470,246	-7.0%
PEUGEOT	72,236	80,189	-9.9%	393,041	443,648	-11.4%
AUDI	63,507	69,909	-9.2%	364,457	378,587	-3.7%
CITROEN	62,391	71,403	-12.6%	325,209	385,991	-15.7%
BMW	59,469	64,828	-8.3%	327,623	337,473	-2.9%
MERCEDES	59,307	58,752	+0.9%	322,860	316,353	+2.1%
FIAT	54,225	57,869	-6.3%	318,569	327,610	-2.8%

Three of the top 10 European models remain up on H1 2012; Renault Clio, Peugeot 208 and BMW 3 Series. These models also posted an increase in sales for June year-on-year, along with the Ford Focus (up 1.6%) and Volkswagen Golf (up 2.8%) which remains Europe's best seller.

Outside of the top 10, Audi are enjoying success with the new A3, which has posted an increase of 24.7% for June year-on-year and a 14.3% increase for H1 2013. The Dacia Sandero has also performed well from launch with an 80.2% increase for June and 45.6% increase for H1 2013. One of the biggest increases, however, has come from the Mercedes A-Class, with a 157.1% increase for June year-on-year and 96.4% for H1 2013, after a successful launch of the new model.

Commenting on the findings, Gareth Hession, Vice President of Research at JATO Dynamics said: "It is disheartening to see the overall European new car sales market down by nearly 7% on 2012. There are glimmers of hope though; Great Britain and Denmark lead the country tables for improvement, Dacia continues to show promise and Mercedes shows a strong sales performance with the new A-Class."

Top 10 Models

Make & Model	Jun_13	Jun_12	% Change Jun	Jun YtD_13	Jun YtD_12	% Change YtD
VOLKSWAGEN GOLF	40,872	39,743	+2.8%	236,865	240,055	-1.3%
RENAULT CLIO	30,370	23,063	+31.7%	153,997	130,782	+17.8%
VOLKSWAGEN POLO	26,480	28,347	-6.6%	142,800	163,787	-12.8%
OPEL/VAUXHALL CORSA	26,172	29,533	-11.4%	131,905	149,746	-11.9%
FORD FIESTA	25,904	26,530	-2.4%	153,617	171,881	-10.6%
PEUGEOT 208	22,764	18,363	+24.0%	136,860	41,698	-
FORD FOCUS	22,413	22,059	+1.6%	122,667	139,221	-11.9%
BMW 3 SERIES	20,382	20,083	+1.5%	103,538	91,440	+13.2%
OPEL/VAUXHALL ASTRA	19,984	23,252	-14.1%	105,152	127,704	-17.7%
NISSAN QASHQAI	18,230	21,550	-15.4%	113,571	114,538	-0.8%

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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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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