

**18 December 2013**

## **Third consecutive month of growth for new car sales in Europe**

- **European new car market increased by 1.7% during November compared to 2012, reducing the year-to-date deficit to 2.7%**
- **Continued sales growth for the majority of markets during November results in overall monthly increase**
- **Skoda achieved increases for both the month and year-to-date**

*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 a third consecutive month, with 18 of the 30 markets included achieving growth in November.*

*JATO's headline market analysis:*

- *A third month of consecutive growth has reduced the year-to-date deficit to 2.7%, the smallest amount seen so far this year*
- *Great Britain posted the largest year-to-date increase in Europe, with registrations up 9.9% compared with 2012*
- *Monthly sales in Greece rose by 31.3% to reduce their year-to-date deficit to just 0.4%*

Following last month's trend, Spain posted the largest increase for the month out of the 'Big Five', with new car volumes up by 12.6% in November. The increase is in part the result of customers taking advantage of government incentives, but also reflects lower sales volumes during this period in 2012 which were dampened by a VAT increase.

Out of the 'Big Five', Great Britain was the only other country to post an increase for the month, up 7.0%, and the year-to-date, up 9.9%, the largest increase in Europe. Italy, Germany and France, however, were all down for both monthly and year-to-date new car volumes, with Italy the most significant; down 4.7% in November and 7.8% year-to-date.

The Netherlands had another strong month, with November sales increasing by 34.8% on last year, helping to reduce the year-to-date deficit to 21.2%, as company car drivers continue to place orders ahead of taxation changes planned for January 2014.

## Sales by Market

Country	Nov 13	Nov 12	% Change Nov	Nov YtD 13	Nov YtD 12	% Change YtD
Austria	23,350	24,377	-4.2%	298,204	317,589	-6.1%
Belgium	39,263	35,834	+9.6%	468,224	464,413	+0.8%
Croatia	1,956	1,635	+19.6%	26,125	30,010	-12.9%
Cyprus	571	699	-18.3%	5,711	9,529	-40.1%
Czech Republic	14,697	14,203	+3.5%	150,194	161,204	-6.8%
Denmark	15,891	16,329	-2.7%	167,855	159,928	+5.0%
Estonia	1,577	1,560	+1.1%	18,692	18,381	+1.7%
Finland	7,439	7,725	-3.7%	97,399	104,756	-7.0%
France	138,829	144,602	-4.0%	1,615,137	1,738,457	-7.1%
Germany	254,651	259,846	-2.0%	2,737,111	2,878,173	-4.9%
Great Britain	159,581	149,191	+7.0%	2,111,819	1,921,052	+9.9%
Greece	5,464	4,162	+31.5%	54,414	54,655	-0.4%
Hungary	4,971	4,662	+6.6%	51,380	48,388	+6.2%
Iceland	299	496	-39.7%	6,984	7,386	-5.4%
Ireland	702	883	-20.5%	74,097	79,182	-6.4%
Italy	102,758	107,877	-4.7%	1,220,274	1,322,878	-7.8%
Latvia	894	873	+2.4%	9,818	9,869	-0.5%
Lithuania	1,139	958	+18.9%	11,234	11,323	-0.8%
Luxembourg	3,544	3,782	-6.3%	44,069	47,326	-6.9%
Norway	12,109	12,001	+0.9%	132,516	129,996	+1.9%
Poland	24,092	23,147	+4.1%	263,611	251,572	+4.8%
Portugal*	9,095	7,136	+27.5%	97,625	89,004	+9.7%
Romania	7,696	6,388	+20.5%	63,094	66,832	-5.6%
Serbia*	1,663	1,613	+3.1%	18,802	20,371	-7.7%
Slovakia	5,590	5,542	+0.9%	58,677	62,875	-6.7%
Slovenia	3,926	3,714	+5.7%	48,279	46,159	+4.6%
Spain	54,539	48,430	+12.6%	664,433	648,493	+2.5%
Sweden	24,779	25,052	-1.1%	243,176	252,791	-3.8%
Switzerland	24,390	26,669	-8.5%	275,589	297,366	-7.3%
The Netherlands	40,778	30,254	+34.8%	381,565	484,208	-21.2%
<b>Grand Total</b>	<b>986,233</b>	<b>969,640</b>	<b>+1.7%</b>	<b>11,416,108</b>	<b>11,734,166</b>	<b>-2.7%</b>

NOTE: \* denotes estimated volumes for November 2013

Within the monthly top 10 brands, Skoda posted the largest monthly increase of 19.1%, as well as growth of 2.4% for the year-to-date. Both the Octavia and Rapid have performed well since their introduction and continue to increase sales volumes. Volkswagen continues to dominate the top 10 with a clear advantage over the next closest brand.

Also up in November are third place Renault, with an increase of 3.9% for the month, and fifth place Peugeot with a 2.1% monthly increase.

The other brands posting increases for the year-to-date were BMW, who finished the month in seventh with a 0.3% increase, and were closely followed by Mercedes in eighth with a 4.6% increase.

## Top 10 Brands

Make	Nov_13	Nov_12	% Change Nov	Nov YtD_13	Nov YtD_12	% Change YtD
VOLKSWAGEN	133,179	130,636	+1.9%	1,432,056	1,513,228	-5.4%
FORD	71,012	72,534	-2.1%	856,847	897,854	-4.6%
RENAULT	66,369	63,890	+3.9%	734,237	759,517	-3.3%
OPEL/VAUXHALL	63,452	65,220	-2.7%	759,901	783,807	-3.0%
PEUGEOT	58,528	57,340	+2.1%	687,053	745,076	-7.8%
AUDI	55,058	56,368	-2.3%	648,646	665,851	-2.6%
BMW	50,965	54,736	-6.9%	589,476	587,813	+0.3%
MERCEDES	49,453	50,567	-2.2%	578,929	553,417	+4.6%
CITROEN	46,497	48,264	-3.7%	558,946	633,455	-11.8%
SKODA	45,448	38,152	+19.1%	469,884	458,714	+2.4%

With a clear lead over the market, the Volkswagen Golf retains the title of best-selling car in Europe, with a 65.6% advantage over the next best-selling model, the Ford Fiesta. That said, the top 10 models table continues to be dominated by the high volume selling B-segment models, with half of the top 10 belonging to the B-segment.

Out of the five, the Ford Fiesta ranked highest in second place with 25,807 units sold or registered in November, a 2.2% increase year-on-year. It was followed closely by the Volkswagen Polo in third and the Renault Clio in fourth.

Outside of the top 10, both the Renault Captur and Peugeot 2008 have made impressive progress since coming to market in 2013, selling 73,196 units and 50,832 units year-to-date respectively.

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "With only one month left in 2013, sales remain strong, with the European new car market increasing monthly volumes for the third consecutive month. Skoda have capitalised on this, posting an increase of 19.1% for the month, driven by the successful introduction of the Rapid and Octavia."

## Top 10 Models

Make & Model	Nov_13	Nov_12	% Change Nov	Nov YtD_13	Nov YtD_12	% Change YtD
VOLKSWAGEN GOLF	42,740	35,833	+19.3%	433,452	409,131	+5.9%
FORD FIESTA	25,807	25,252	+2.2%	271,912	289,881	-6.2%
VOLKSWAGEN POLO	22,436	21,576	+4.0%	245,730	269,458	-8.8%
RENAULT CLIO	22,416	22,192	+1.0%	263,943	225,700	+16.9%
SKODA OCTAVIA	17,869	12,269	+45.6%	153,619	166,389	-7.7%
OPEL/VAUXHALL CORSA	16,975	20,046	-15.3%	222,164	249,804	-11.1%
PEUGEOT 208	16,003	18,553	-13.7%	223,762	140,704	+59.0%
BMW 3 SERIES	15,266	15,834	-3.6%	186,933	160,141	+16.7%
AUDI A3/S3/RS3	14,979	10,840	+38.2%	155,765	124,378	+25.2%
FORD FOCUS	14,750	18,752	-21.3%	208,826	226,680	-7.9%

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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.

Major leasing companies use JATO's intelligence to drive the vehicle quotation process.

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