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European new car market favours premium brands despite decreases in both August & year-to-date sales figures

- **The European new car market decreased by 5.3% in August compared to 2012 and remains down 5.2% year-to-date**
- **Four of the 'Big Five' markets were down for both the month and year-to-date sales figures**
- **Premium brands performed well, with Audi, Mercedes and BMW holding strong positions in the monthly top 10**

According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, the European new car market decreased by 5.3% in August compared to August 2012, contributing to the 5.2% deficit year-to-date.

JATO's headline market analysis:

- *Over two thirds of the 30 markets analysed reported a decrease in year-to-date sales compared to 2012, with 19 markets posting decreases in August*
- *BMW achieved an increase of 9.3% in August compared to 2012, with the 3-Series finishing fourth in the top 10, outselling the Ford Fiesta and Peugeot 208*
- *Volkswagen continued to lead both the manufacturer and model top 10 tables for the month and year-to-date*

Four of the 'Big Five' markets have all experienced a decrease in sales for both the month and year-to-date. Of the five, Spain posted the largest decrease for the month of August, down 23.0% on 2012, and France for year-to-date, down 9.8% on the same period in 2012.

Great Britain, however, posted increases for both August and year-to-date, increasing sales by 10.9% and 10.4% respectively compared to 2012.

Sales by Market

Country	Aug_13	Aug_12	% Change Aug	Aug YtD_13	Aug YtD_12	% Change YtD
Austria	23,063	24,570	-6.1%	222,810	239,796	-7.1%
Belgium	29,829	31,256	-4.6%	354,581	353,073	+0.4%
Croatia	1,522	1,743	-12.7%	20,102	24,683	-18.6%
Cyprus	426	691	-38.4%	4,145	7,363	-43.7%
Czech Republic	11,595	13,193	-12.1%	106,943	118,563	-9.8%
Denmark	14,295	13,557	+5.4%	120,518	114,476	+5.3%
Estonia	1,589	1,518	+4.7%	13,748	13,643	+0.8%
Finland	7,725	7,545	+2.4%	72,637	80,851	-10.2%
France	85,953	96,067	-10.5%	1,167,647	1,293,984	-9.8%
Germany	214,044	226,455	-5.5%	1,969,820	2,108,716	-6.6%
Great Britain	65,937	59,433	+10.9%	1,391,788	1,260,997	+10.4%
Greece	3,371	3,872	-12.9%	40,165	41,938	-4.2%
Hungary	4,199	3,585	+17.1%	36,580	36,106	+1.3%
Iceland	429	473	-9.3%	5,868	5,901	-0.6%
Ireland	3,698	3,092	+19.6%	68,564	74,161	-7.5%
Italy	53,313	57,119	-6.7%	896,851	986,037	-9.0%
Latvia	752	894	-15.9%	6,823	7,251	-5.9%
Lithuania	828	952	-13.0%	7,913	8,197	-3.5%
Luxembourg	2,554	2,899	-11.9%	32,868	35,750	-8.1%
Norway	11,805	11,932	-1.1%	95,163	94,326	+0.9%
Poland	19,067	17,985	+6.0%	191,491	187,475	+2.1%
Portugal*	7,555	5,442	+38.8%	73,458	68,119	+7.8%
Romania	5,424	5,270	+2.9%	41,491	46,821	-11.4%
Serbia	1,488	1,764	-15.6%	13,930	15,500	-10.1%
Slovakia	4,244	5,578	-23.9%	41,627	45,359	-8.2%
Slovenia	3,373	3,072	+9.8%	35,831	35,504	+0.9%
Spain	37,607	48,818	-23.0%	502,507	519,782	-3.3%
Sweden	21,616	21,065	+2.6%	168,677	181,774	-7.2%
Switzerland	20,630	21,940	-6.0%	202,094	223,277	-9.5%
The Netherlands	28,595	32,991	-13.3%	272,176	395,245	-31.1%
Grand Total	**686,526**	**724,771**	**-5.3%**	**8,178,816**	**8,624,668**	**-5.2%**

*NOTE: * denotes estimated volumes for August 2013*

Of the top 10 manufacturers, only three brands posted an increase for August; Renault were up 0.8%, Mercedes 5.9% and BMW 9.3% compared to 2012; only one however, Mercedes, posted an increase for the year-to-date, up 3.9% over the same period in 2012.

Nine of the top 10 manufacturers have posted a decrease in sales for the year-to-date; even market leaders Volkswagen weren't exempt from the overall downturn. BMW, however, saw only a nominal decrease in year-to-date figures; selling only 502 fewer cars, this equated to a mere 0.1% decrease on the same period in 2012.

Also performing well in August was Audi; even with decreases for the month and year-to-date (down 6.7% and 3.6% respectively), the premium brand finished in second place in the monthly top 10. The last time Audi reached this position was August 2012.

Top 10 Brands

Make	Aug_13	Aug_12	% Change Aug	Aug YtD_13	Aug YtD_12	% Change YtD
VOLKSWAGEN	86,206	103,789	-16.9%	1,027,039	1,114,442	-7.8%
AUDI	44,198	47,391	-6.7%	467,949	485,423	-3.6%
FORD	44,004	44,360	-0.8%	610,547	655,056	-6.8%
RENAULT	43,941	43,612	+0.8%	520,594	568,006	-8.3%
OPEL/VAUXHALL	42,143	43,690	-3.5%	546,067	576,236	-5.2%
MERCEDES	39,286	37,110	+5.9%	414,624	399,036	+3.9%
BMW	39,077	35,762	+9.3%	416,001	416,503	-0.1%
PEUGEOT	37,718	46,284	-18.5%	494,810	553,460	-10.6%
TOYOTA	31,125	31,853	-2.3%	338,036	353,676	-4.4%
SKODA	30,093	31,698	-5.1%	324,946	337,863	-3.8%

With an increase of 47.0% over 2012, the BMW 3-Series reached fourth place in the monthly European models table, selling more units than popular models like the Ford Fiesta and Peugeot 208 in August. So far in 2013, BMW has sold 19.6% more 3-Series' than in same period in 2012.

This increase in sales can be attributed to new Touring (estate) and GT (hatchback) versions of the 3-Series which have sold well (especially in Germany), taking market share from competitors.

Also enjoying success for both the month and the year-to-date is the Audi A3 (including S3 and RS3 variants), which finished the monthly European sales table in sixth with an increase of 42.1%. The Renault Clio finished second in both monthly and year-to-date tables, with increases of 13.1% for the month and 19.0% year-to-date compared to the same periods in 2012.

Remaining dominant however is the Volkswagen Golf; sales of the model dipped slightly in August resulting a 6.5% decrease for the month, but remain strong overall, up by 0.1% year-to-date.

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "August's results demonstrate the popularity of premium brands, with Audi finishing the month in second position, while Mercedes was the only manufacturer to post increases for both the month and year-to-date. BMW are enjoying success too; new variants of the 3-Series have elevated the model to fourth place with an increase of almost fifty per cent over 2012, outselling popular models like the Ford Fiesta and Peugeot 208. Although the overall market continues to decline, it is clear consumers are still prepared to pay for premium brands."

Top 10 Models

Make/Model	Aug_13	Aug_12	% Change Aug	Aug YtD_13	Aug YtD_12	% Change YtD
VOLKSWAGEN GOLF	27,004	28,870	-6.5%	302,156	301,706	+0.1%
RENAULT CLIO	14,770	13,055	+13.1%	190,725	160,317	+19.0%
VOLKSWAGEN POLO	14,137	16,956	-16.6%	180,357	204,506	-11.8%
BMW 3-SERIES	12,874	8,760	+47.0%	133,235	111,442	+19.6%
FORD FIESTA	12,369	12,986	-4.8%	188,671	206,995	-8.9%
AUDI A3/S3/RS3	12,089	8,509	+42.1%	107,011	89,494	+19.6%
PEUGEOT 208	11,613	14,813	-21.6%	167,196	74,885	-
OPEL/VAUXHALL CORSA	11,587	13,178	-12.1%	160,436	180,596	-11.2%
NISSAN QASHQAI	10,501	10,883	-3.5%	142,081	142,638	-0.4%
SKODA OCTAVIA	10,169	11,025	-7.8%	98,510	125,761	-21.7%

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

For more information visit www.jato.com, or email jatoteam@firstlightpr.com

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For media enquiries:

Aimen Chouchane

+44 (0) 203 617 7239

jatoteam@firstlightpr.com

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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