

## PRESS RELEASE

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### **European new car market on track for full calendar year of growth**

- **European new car sales grew 1.3% in November compared to the same month last year**
- **Italy, Spain and Great Britain helped to mitigate for dips in Germany and France**
- **Peugeot 308 enters the top 10 highest selling models with 70.7% year-on-year sales growth**

*Europe's new car sales market continued to grow in November with sales up by 1.3% compared to the same month last year, according to the latest analysis from JATO Dynamics, the world's leading provider of automotive intelligence. The growth rate was lower than in previous months, due in part to sales dips in France (-2.7%) and Germany (-1.8%) when compared to November of last year.*

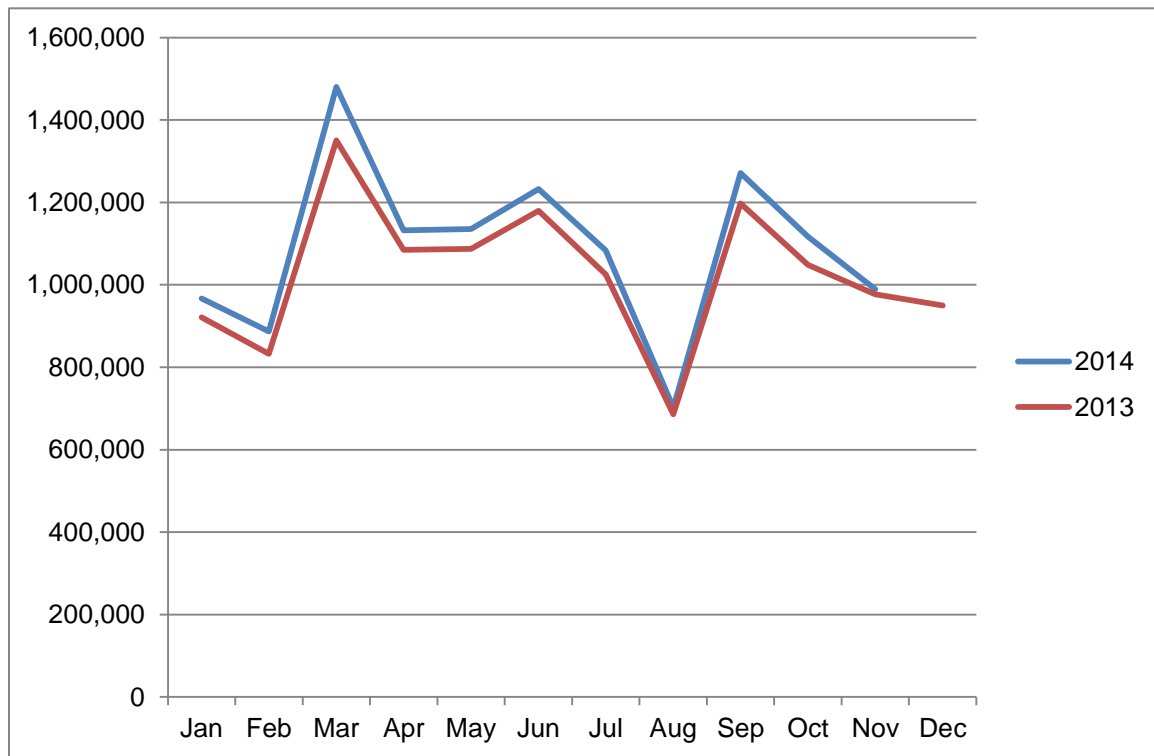
*JATO's headline market analysis:*

- *New car sales in the Netherlands were down by 20.0% year-on-year, the first double-digit drop for any market since July*
- *Volkswagen's Golf and Polo remain the highest selling models in Europe*
- *Volkswagen, Ford and Renault remain top-selling brands for a third consecutive month*

Europe's new car sales continued to grow in November, led by Spain's impressive 22.0% growth compared to the same month last year. This continued an excellent year in which Spain's new car market has grown by 19.7% compared to the same period in 2013. There was also strong year-on-year growth in Italy (+5.4%) and Great Britain (+8.0%) as all of the 'Big 5' markets continued to see positive year-to-date growth.

It was another month of mixed fortunes for the medium-sized markets: year-on-year sales rose in the Czech Republic (+11.3%) and Sweden (+4.6%), while there were dips in Norway (-4.9%), Switzerland (-6.8%), Belgium (-7.1%), Austria (-7.4%) and the Netherlands (-20.0%). There was a better picture in year-to-date sales, with double-digit sales increases in 12 of the 29 countries; only five markets have seen sales fall this year.

### European Monthly Sales Volumes Year-on-Year Comparison



*(Image file of graph also attached)*

The top 10 high-volume brands continued their successful year; all 10 have posted year-to-date growth. Eight of these also saw sales grow compared to November last year. Volkswagen remained the clear leader with almost double the units sold in November compared to second placed Ford, and a year-on-year increase of 1.2%. Ford was second, with Renault behind by less than a 1,000 units. Ford has stayed ahead of Renault, but the French manufacturer's year-to-date increase of 9.2% compared to Ford's 4.3% means that the French brand has closed the gap significantly during the last 12 months.

Skoda kept its place in the top 10 with the highest year-to-date increase among the top 10 brands (+14.2%), despite sales slipping (-1.4%) in November. It was a good month for BMW and Mercedes, as new models saw both manufacturers increase their year-on-year sales by 8.2% and 7.3%, respectively, the highest increases among the top 10 brands.

Outside of the top 10, Jeep more than doubled its sales compared to November 2013 on the back of an excellent month for its Renegade and Cherokee models. The new Lexus NX crossover model helped the brand to drive sales up by 68.2% year-on-year, while Mitsubishi increased sales by 32.1% year-to-date thanks to the continued success of its Outlander, ASX and Space Star / Mirage models.

### Top 10 Brands

Make	Nov_14	Nov_13	% change Nov	Nov YtD_14	Nov YtD_13	% change YtD
VOLKSWAGEN	133,075	131,515	+1.2%	1,486,479	1,428,220	+4.1%
FORD	66,054	70,714	-6.6%	893,374	856,169	+4.3%
RENAULT	65,851	65,220	+1.0%	799,819	732,168	+9.2%
OPEL/VAUXHALL	63,726	63,177	+0.9%	817,809	759,845	+7.6%
PEUGEOT	58,075	57,915	+0.3%	725,121	685,457	+5.8%
AUDI	56,529	54,567	+3.6%	676,826	647,790	+4.5%
BMW	54,567	50,418	+8.2%	616,619	589,153	+4.7%
MERCEDES	52,704	49,105	+7.3%	606,249	578,616	+4.8%
SKODA	44,956	45,574	-1.4%	535,576	469,000	+14.2%
CITROEN	43,159	46,084	-6.3%	566,736	557,982	+1.6%

For the second month in a row it was a Volkswagen 1-2 at the top of the best-selling European models table, following continued year-on-year gains for its flagship Golf (+3.2%) and Polo (+12.4%) models. Renault's Clio was in third place despite a dip (-2.5%) and Ford's Fiesta was a close fourth with sales down (-19.0%) compared to November last year. While Opel/Vauxhall's Corsa increased sales in November (+5.6%) to place it in fifth.

The Peugeot 308 shot into the top 10 models table with a year-on-year sales increase of 70.7%, which has contributed to a 60.2% year-to-date surge in sales, both the highest growth figures in the top 10. This was achieved without taking significant market share from its stablemate the Peugeot 208, which remained in the top 10 despite sales falling (-6.1%) compared to November 2013.

Skoda's flagship Octavia remained in the top 10 despite a drop in year-on-year sales (-9.9%) as the model continued its successful run with an increase of 23.4% year-to-date. Nissan's Qashqai increased year-on-year sales by 18.8%, the second highest in the top 10 after the 308. The Mercedes C-Class narrowly missed out on the top ten following a 60.6% year-on-year increase in sales for November.

Among the mid-volume models, the MINI increased year-on-year sales by 44.2% following the release of a new generation three-door hatch and an additional five-door hatch added to the range. The Seat Leon also benefitted from its new generation, and three-door and estate versions released last year, with year-to-date sales up 43.1%.

### Top 10 Models

Make & Model	Nov_14	Nov_13	% change Nov	Nov YtD_14	Nov YtD_13	% change YtD
VOLKSWAGEN GOLF	43,733	42,361	+3.2%	487,252	431,881	+12.8%
VOLKSWAGEN POLO	24,832	22,095	+12.4%	259,406	244,995	+5.9%
RENAULT CLIO	21,248	21,799	-2.5%	275,166	262,611	+4.8%
FORD FIESTA	20,808	25,676	-19.0%	289,396	271,594	+6.6%
OPEL/VAUXHALL CORSA	17,634	16,706	+5.6%	232,928	221,862	+5.0%
SKODA OCTAVIA	16,250	18,041	-9.9%	189,042	153,187	+23.4%
NISSAN QASHQAI	15,281	12,858	+18.8%	189,055	189,537	-0.3%
AUDI A3/S3/RS3	15,030	14,879	+1.0%	187,375	155,624	+20.4%
PEUGEOT 308	14,996	8,787	+70.7%	146,724	91,584	+60.2%
PEUGEOT 208	14,753	15,704	-6.1%	200,513	222,503	-9.9%

Brian Walters, Vice President of Data at JATO Dynamics, commented: "We are just one month away from what would be a fantastic full calendar year of sales growth for the European new car market. Although some of the larger markets saw a slow-down in November, overall performance for the year so far is positive in the vast majority of countries analysed."

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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.

Visit JATO at [www.jato.com](http://www.jato.com) for more information.

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## Notes to editors

### Sales by Market

Country	Nov_14	Nov_13	% change Nov	Nov YtD_14	Nov YtD_13	% change YtD
Austria	21,619	23,350	-7.4%	285,927	298,204	-4.1%
Belgium	29,739	32,023	-7.1%	455,949	460,984	-1.1%
Croatia	1,902	1,961	-3.0%	31,724	26,129	+21.4%
Cyprus	665	571	+16.5%	7,256	5,711	+27.1%
Czech Republic	16,365	14,697	+11.3%	175,626	150,194	+16.9%
Denmark	15,151	15,891	-4.7%	173,511	167,858	+3.4%
Estonia	1,981	1,577	+25.6%	20,146	18,692	+7.8%
Finland	7,229	7,439	-2.8%	99,091	97,399	+1.7%
France	135,067	138,829	-2.7%	1,632,531	1,615,137	+1.1%
Germany	250,082	254,651	-1.8%	2,807,073	2,737,111	+2.6%
Great Britain	172,327	159,581	+8.0%	2,310,237	2,111,819	+9.4%
Greece	4,975	5,464	-8.9%	64,464	54,414	+18.5%
Hungary	5,916	4,977	+18.9%	61,837	51,425	+20.2%
Ireland	782	702	+11.4%	95,989	74,090	+29.6%
Italy	109,111	103,477	+5.4%	1,276,852	1,221,312	+4.5%
Latvia	1,006	894	+12.5%	11,452	9,818	+16.6%
Lithuania	1,159	1,139	+1.8%	13,438	11,234	+19.6%
Luxembourg	3,488	3,544	-1.6%	46,157	44,069	+4.7%
Norway	11,521	12,109	-4.9%	133,280	132,516	+0.6%
Poland	24,319	24,092	+0.9%	275,218	263,611	+4.4%
Portugal*	10,677	8,817	+21.1%	129,914	97,347	+33.5%
Romania	5,669	5,474	+3.6%	64,577	52,141	+23.9%
Serbia*	1,583	1,603	-1.2%	16,944	18,742	-9.6%
Slovakia	5,471	5,590	-2.1%	64,353	58,677	+9.7%
Slovenia	4,220	3,926	+7.5%	49,923	48,279	+3.4%
Spain	66,012	54,088	+22.0%	793,262	662,508	+19.7%
Sweden	25,916	24,779	+4.6%	276,804	243,176	+13.8%
Switzerland	23,082	24,767	-6.8%	266,953	276,382	-3.4%
The Netherlands	32,633	40,781	-20.0%	356,999	381,577	-6.4%
<b>Grand Total</b>	<b>989,667</b>	<b>976,793</b>	<b>+1.3%</b>	<b>11,997,487</b>	<b>11,390,556</b>	<b>+5.3%</b>

NOTE: \* denotes estimated data included for Nov\_14