

20 August 2013

European new car sales show signs of recovery in July but remain down year-to-date

- **Total European new car sales for July were up 4.9% on July 2012, with over 48,000 more new cars sold**
- **Spain recorded a 16.5% increase in new car sales on July 2012, increasing by 10,763 units for the month**
- **Two thirds of the 30 European markets reported have recorded an increase in new car sales for July 2013**

According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, Europe's new car market experienced a 4.9% increase in sales in July, with 48,202 more new cars sold in July 2013 compared to July 2012. Overall, the market remains behind 2012 performance, down by 5.2% year-to-date.

JATO's headline market analysis:

- *Four of the 'Big Five' markets were up in July (Italy posted a 1.8% decrease) but only Great Britain remains up year-to-date*
- *Six of the top ten manufacturers recorded an increase last month and three of those six experienced more than a 10% rise in sales compared to July last year*
- *Volkswagen remains Europe's best-selling brand in July and also takes first and second spot in Europe's top ten models for the month with Golf and Polo respectively*

Out of the 'Big Five' markets, Italy was the only country to experience a decrease in sales in July, with a drop of 1.8%. While the other 'Big Five' markets were up for the month, Great Britain was the only market to post an increase for year-to-date figures; 124,287 more new cars have been sold in Great Britain than during the same period in 2012, representing a 10.3% increase.

France, Germany and Italy, however, all remain down by a considerable amount on 2012. Year-to-date, France is down 9.7%, Germany 6.7% and

Italy 9.3% on the same period in 2012. Combined, these three countries have sold 328,818 fewer cars than in 2012 (the European year-to-date total is down by 412,335 units).

Making a significant improvement in July was Spain, which registered 10,763 more new cars in July 2013 than in July 2012. The 16.5% increase is welcome news and Spain is now just 1.3% down year-to-date 2013 compared to 2012.

Following last month, Ireland's first ever mid-year number plate change has had the expected result, with sales increasing 163.2% over July 2012.

Sales by Market

Country	Jul_13	Jul_12	% Change Jul	Jul Ytd_13	Jul Ytd_12	% Change Ytd
Austria	28,543	28,268	+1.0%	199,747	215,226	-7.2%
Belgium	34,879	36,701	-5.0%	324,752	321,817	+0.9%
Croatia	3,180	2,682	+18.6%	18,563	22,940	-19.1%
Cyprus*	570	879	-35.2%	3,721	6,672	-44.2%
Czech Republic*	10,999	11,158	-1.4%	91,814	105,370	-12.9%
Denmark	14,306	16,709	-14.4%	106,216	100,919	+5.2%
Estonia	1,811	1,794	+0.9%	12,159	12,125	+0.3%
Finland	8,452	6,443	+31.2%	64,912	73,306	-11.5%
France	150,218	148,924	+0.9%	1,081,694	1,197,917	-9.7%
Germany	253,146	247,860	+2.1%	1,755,776	1,882,261	-6.7%
Great Britain	162,228	143,884	+12.7%	1,325,851	1,201,564	+10.3%
Greece	6,459	5,743	+12.5%	36,794	38,066	-3.3%
Hungary	5,054	4,521	+11.8%	32,381	32,521	-0.4%
Iceland*	675	574	+17.6%	5,479	5,428	+0.9%
Ireland	11,640	4,422	+163.2%	64,870	71,069	-8.7%
Italy	108,068	110,072	-1.8%	842,807	928,917	-9.3%
Latvia	934	895	+4.4%	6,071	6,357	-4.5%
Lithuania	1,071	1,051	+1.9%	7,085	7,245	-2.2%
Luxembourg	3,905	4,195	-6.9%	30,314	32,851	-7.7%
Norway	11,633	12,133	-4.1%	83,358	82,394	+1.2%
Poland	24,836	20,820	+19.3%	172,419	169,490	+1.7%
Portugal*	11,060	9,265	+19.4%	66,026	62,677	+5.3%
Romania	7,105	5,603	+26.8%	36,067	41,551	-13.2%
Serbia*	1,711	1,879	-8.9%	12,303	13,736	-10.4%
Slovakia	5,700	5,977	-4.6%	37,383	39,781	-6.0%
Slovenia	4,229	4,105	+3.0%	32,458	32,432	+0.1%
Spain	75,946	65,183	+16.5%	464,900	470,964	-1.3%
Sweden	18,161	18,076	+0.5%	147,055	160,709	-8.5%
Switzerland	25,715	24,151	+6.5%	181,004	201,337	-10.1%
The Netherlands	30,852	30,917	-0.2%	243,582	362,254	-32.8%
Grand Total	1,023,086	974,884	+4.9%	7,487,561	7,899,896	-5.2%

NOTE: * denotes estimated volumes for July 2013

Volkswagen led the top 10 manufacturers table this month, despite recording the largest fall in sales in the top 10 for 2013 year-to-date. Volkswagen sales are down 6.9% (69,872 units) so far this year compared to the same period in 2012.

The largest year-to-date percentage decrease however was reported by Citroen, down by 14.1% (62,219 units) compared to the same period in 2012 and by 2.7% (1,445 units) versus July 2012.

Of the top 10 manufacturers, BMW, Ford and Mercedes all posted increases of over 10% in monthly sales compared to 2012. Ford were up 10.4%, BMW 13.2%, and Mercedes 15.0%. Within the top 10, only Mercedes posted increases for both monthly and year-to-date figures; up by 3.7% (13,341 units) year-to-date.

Top 10 Brands

Make	Jul_13	Jul_12	% Change Jul	Jul YtD_13	Jul YtD_12	% Change YtD
VOLKSWAGEN	130,554	133,745	-2.4%	940,781	1,010,653	-6.9%
FORD	78,126	70,759	+10.4%	566,450	610,696	-7.2%
OPEL/VAUXHALL	66,990	62,380	+7.4%	504,004	532,546	-5.4%
RENAULT	64,358	62,211	+3.5%	476,929	524,394	-9.1%
PEUGEOT	62,957	63,210	-0.4%	456,665	507,176	-10.0%
AUDI	59,011	59,288	-0.5%	423,574	438,032	-3.3%
CITROEN	52,676	54,121	-2.7%	378,022	440,241	-14.1%
MERCEDES	52,398	45,570	+15.0%	375,267	361,926	+3.7%
BMW	49,118	43,400	+13.2%	376,819	380,741	-1.0%
FIAT	47,476	46,389	+2.3%	366,332	374,126	-2.1%

Volkswagen led the top 10 European models for July with the Golf and Polo taking first and second place. That said, the Polo has seen a fall in sales this year, reporting an 11.3% drop over the same period last year. So far this year 21,115 fewer Volkswagen Polo's have been sold compared to 2012.

However, the largest decrease in the top 10 was experienced by the Opel/Vauxhall Astra, selling 22,791 fewer units (15.7% decrease) in 2013 compared to the same period in 2012. The Opel/Vauxhall Corsa also saw a drop in sales, with 18,510 fewer units sold (11.1% decrease) over the same period, leaving it in ninth position this month.

BMW are enjoying success with the latest generation 3-Series, selling 48.0% more units in July 2013 compared to July 2012. The boost in July sales helped year-to-date figures record a 17.1% increase over 2012.

Vice President of Research at JATO Dynamics, Gareth Hession, commented: "This month has shown a real mix of fortunes. Volkswagen led both manufacturer and model tables this month but has seen an overall fall in sales. Four of the 'Big Five' countries have increased sales figures for July but only Great Britain has increased year-to-date. The positive signs are

promising to see, but many markets and manufacturers remain down year-to-date as a whole.”

Top 10 Models

Make & Model	Jul_13	Jul_12	% Change Jul	Jul YtD_13	Jul YtD_12	% Change YtD
VOLKSWAGEN GOLF	37,661	32,762	+15.0%	274,984	272,836	+0.8%
VOLKSWAGEN POLO	23,704	23,594	+0.5%	166,435	187,550	-11.3%
FORD FIESTA	22,580	22,153	+1.9%	176,364	194,009	-9.1%
RENAULT CLIO	21,272	16,432	+29.5%	176,168	147,262	+19.6%
FORD FOCUS	19,106	16,939	+12.8%	141,794	156,081	-9.2%
PEUGEOT 208	18,583	18,296	+1.6%	155,724	60,072	-
OPEL/VAUXHALL ASTRA	17,594	17,747	-0.9%	122,425	145,216	-15.7%
NISSAN QASHQAI	17,454	17,136	+1.9%	131,414	131,755	-0.3%
OPEL/VAUXHALL CORSA	17,133	17,698	-3.2%	148,908	167,418	-11.1%
BMW 3-SERIES	16,652	11,251	+48.0%	120,267	102,682	+17.1%

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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