

**17 October 2013**

## **September proves to be best month yet in 2013 for European new car market**

- **September's overall monthly increase reduced the year-to-date sales deficit on 2012 to the lowest amount so far this year**
- **21 markets reported a rise in sales in September resulting in the largest single monthly improvement in 2013**
- **Two of the top 10 manufacturers – BMW and Mercedes - recorded increases for year-to-date sales**

*According to the latest new car sales analysis from JATO Dynamics, the world's leading provider of automotive intelligence, the European new car market made impressive progress in September with an overall increase in registrations of new cars of 5.6% for the month compared with September 2012 - the largest single monthly increase seen so far in 2013.*

*JATO's headline market analysis:*

- *The European new car market was just 3.9% behind 2012 performance in September, the smallest deficit seen so far in 2013*
- *Three of the 'Big Five' markets recorded an increase in sales in September compared with 2012 figures*
- *Great Britain posted the largest volume increases in both monthly and year-to-date registrations in Europe*

In September, Great Britain posted increases in registrations of new vehicles of 43,524 (up 12.1%) for the month and 174,315 (up 10.8%) year-to-date, the largest volume increase in Europe.

Also making significant progress out of the 'Big Five' was Spain, where monthly sales increased by 30.7% from September last year. Compared with the same period in 2012, Spain now has just a 1.1% deficit in year-to-date sales.

Overall, the European new car market is now just 3.9% behind figures from this stage in 2012. France, Germany and the Netherlands all have some of the largest decreases in sales volumes in Europe, however all have either

reduced the rate of reduction or, in the case of France, increased monthly sales performance during September.

## Sales by Market

Country	Sept_13	Sept_12	% Change Sept	Sept YtD_13	Sept YtD_12	% Change YtD
Austria	25,301	27,094	-6.6%	248,111	266,890	-7.0%
Belgium	34,890	33,660	+3.7%	389,471	386,733	+0.7%
Croatia	1,805	1,698	+6.3%	21,920	26,381	-16.9%
Cyprus	497	692	-28.2%	4,642	8,055	-42.4%
Czech Republic	13,208	12,475	+5.9%	120,151	131,038	-8.3%
Denmark	14,578	13,914	+4.8%	135,096	128,390	+5.2%
Estonia	1,569	1,548	+1.4%	15,317	15,191	+0.8%
Finland	8,226	7,990	+3.0%	80,863	88,841	-9.0%
France	142,166	137,536	+3.4%	1,309,813	1,431,520	-8.5%
Germany	247,199	250,082	-1.2%	2,217,019	2,358,798	-6.0%
Great Britain	403,136	359,612	+12.1%	1,794,924	1,620,609	+10.8%
Greece	3,816	3,454	+10.5%	43,981	45,392	-3.1%
Hungary	4,680	3,544	+32.1%	41,260	39,650	+4.1%
Iceland	350	470	-25.5%	6,218	6,371	-2.4%
Ireland	3,175	2,481	+28.0%	71,719	76,642	-6.4%
Italy	107,186	110,601	-3.1%	1,004,711	1,096,639	-8.4%
Latvia	940	744	+26.3%	7,763	7,995	-2.9%
Lithuania	986	980	+0.6%	8,899	9,177	-3.0%
Luxembourg	3,158	3,340	-5.4%	36,026	39,090	-7.8%
Norway	12,275	11,212	+9.5%	107,438	105,538	+1.8%
Poland	21,628	18,842	+14.8%	213,120	206,317	+3.3%
Portugal*	8,235	6,359	+29.5%	80,283	74,478	+7.8%
Romania*	7,418	6,759	+9.7%	48,909	53,580	-8.7%
Serbia	1,574	1,605	-1.9%	15,507	17,105	-9.3%
Slovakia	4,935	7,201	-31.5%	46,562	52,560	-11.4%
Slovenia	3,990	3,203	+24.6%	39,821	38,707	+2.9%
Spain	45,918	35,139	+30.7%	548,783	554,921	-1.1%
Sweden	24,388	21,937	+11.2%	193,065	203,711	-5.2%
Switzerland	22,176	21,063	+5.3%	224,493	244,340	-8.1%
The Netherlands	31,627	31,945	-1.0%	303,824	427,190	-28.9%
<b>Grand Total</b>	<b>1,204,102</b>	<b>1,137,180</b>	<b>+5.6%</b>	<b>9,379,709</b>	<b>9,761,849</b>	<b>-3.9%</b>

NOTE: \* denotes estimated volumes for September 2013

Manufacturers had a good month with Peugeot and Citroen the only two of Europe's top 10 who did not increase sales in September, year-on-year. Also within the monthly top 10, only Mercedes and BMW have seen an increase in sales year-to-date, compared with the same period in 2012.

Renault, who finished fourth in both the monthly and year-to-date top 10, recorded the largest increase in volume, up by 10,444 (16.8%) for the month. The successful launch of the new Captur crossover and strong sales of the Clio have contributed to this result.

Market leaders Volkswagen continued to dominate European sales figures, increasing monthly performance by 1.6% on September 2012. So far this year, the manufacturer has sold 1,164,131 vehicles, down 6.8% on the same period in 2012, but still selling 64.2% more volume than the next closest brand.

## Top 10 Brands

Make	Sept_13	Sept_12	% Change Sept	Sept YtD_13	Sept YtD_12	% Change YtD
VOLKSWAGEN	137,202	135,091	+1.6%	1,164,131	1,249,533	-6.8%
FORD	98,497	93,518	+5.3%	708,932	748,575	-5.3%
OPEL/VAUXHALL	88,088	83,453	+5.6%	633,769	659,324	-3.9%
RENAULT	72,757	62,313	+16.8%	593,467	630,319	-5.8%
BMW	70,604	65,488	+7.8%	486,682	481,991	+1.0%
PEUGEOT	66,855	68,279	-2.1%	561,581	621,739	-9.7%
AUDI	66,623	64,857	+2.7%	534,605	550,280	-2.8%
MERCEDES	63,387	55,920	+13.4%	478,008	454,956	+5.1%
TOYOTA	52,530	49,645	+5.8%	390,587	403,321	-3.2%
CITROEN	51,715	53,959	-4.2%	458,892	529,686	-13.4%

The Volkswagen Golf also continues to lead the monthly top 10 models table, with increases of 17.4% for the month and 2.1% year-to-date compared with 2012, securing the model's strong lead.

Behind the Golf are three B-segment models, including the Renault Clio, finishing third year-to-date and fourth in monthly top 10. The Clio recorded the largest percentage increase\* in the top 10 for both these periods.

It was also a strong September for the BMW 3 Series. Finishing the month in seventh for the month and ninth for year-to-date, it was the only model outside the volume B- and C-segments to appear in the top 10.

Gareth Hession, Vice President of Research at JATO Dynamics, commented: "September's results should be something for the European car market to celebrate. The fact that the deficit in year-to-date figures is the smallest we've seen this year is encouraging. Similarly, September saw the largest single monthly increase of 2013 so far. Although it is still too early to tell whether this signals the start of long-term improvement for the industry, our latest analysis shows there are certainly grounds for optimism."

## Top 10 Models

Make & Model	Sept_13	Sept_12	% Change Sept	Sept YtD_13	Sept YtD_12	% Change YtD
VOLKSWAGEN GOLF	45,212	38,506	+17.4%	347,405	340,212	+2.1%
FORD FIESTA	33,561	31,445	+6.7%	222,184	238,440	-6.8%
OPEL/VAUXHALL CORSA	28,347	30,607	-7.4%	188,705	211,203	-10.7%
RENAULT CLIO	25,851	20,074	+28.8%	216,761	180,391	+20.2%
FORD FOCUS	24,872	24,127	+3.1%	176,507	190,350	-7.3%
PEUGEOT 208	22,398	23,424	-4.4%	189,654	98,309	-*
BMW 3 SERIES	22,054	17,875	+23.4%	155,335	129,317	+20.1%
VOLKSWAGEN POLO	21,625	20,613	+4.9%	201,929	225,119	-10.3%
OPEL/VAUXHALL ASTRA	21,055	21,996	-4.3%	153,281	179,660	-14.7%
NISSAN QASHQAI	18,993	19,061	-0.4%	161,054	161,699	-0.4%

NOTES: \*Year-to-date 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 and excluded from the narrative.

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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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