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PRESS RELEASE

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EUROPEAN CAR REGISTRATIONS INCREASED BY 5.4% IN AUGUST, BUT SUMMER CONTINUES TO BE A QUIET MONTH FOR THE INDUSTRY

- **European car registrations grew by 5.4% for August 2017, with a total of 899,272 registrations**
- **Despite the growth, August continues to be a quiet month for the industry - with registrations in certain countries as much as 50% lower than the typical monthly average**
- **Renault-Nissan threatens to overtake PSA Group as Europe's second biggest car group in terms of market share, as Renault-Nissan's biggest brands post double-digit growth**

The European car industry continued to grow in August 2017, with new registrations for the month totalling 899,272 units, which was an increase of 5.4% on the same period last year. This was thanks to good results for the month in France, Italy and Spain, which made up for a fall in registrations experienced in the UK.

Notably, Poland recorded an outstanding result for the month, registering a significant 21.8% increase in volume, placing it only 1,000 units behind Belgium, Europe's sixth largest market. Poland's strong economic performance is the reason behind this boost to its car market and it is clear that this growth will continue.

August is usually a quiet month for car registrations and average monthly sales for August for the last 5 years were 31% lower than the total monthly average. Italy is the market that feels the biggest effects of the summer, with its registrations for August being 50% lower than its typical monthly average. Other markets that are also significantly impacted by the summer holidays include France, where registrations for August are 40% lower than the typical monthly average, followed by Croatia (-37%), Portugal (-31%), Greece (-29%) and Spain (-26%). In contrast, Romania's registrations for August are 34% higher than its typical monthly average.

EUROPE-27 AUGUST 2017 VOLUME BY COUNTRIES

	Aug-17	Aug-16	Δ Aug 16-17	YTD-17	YTD-16	Δ YTD 16-17
Austria	26,058	23,690	+10.0%	240,350	222,341	+8.1%
Belgium	35,517	38,655	-8.1%	394,446	382,634	+3.1%
Croatia	2,405	2,295	+4.8%	38,474	31,534	+22.0%
Czech Rep.	21,192	21,251	-0.3%	185,293	172,768	+7.2%
Denmark	15,298	17,415	-12.2%	154,466	150,072	+2.9%
Estonia	2,079	1,850	+12.4%	17,854	15,867	+12.5%
Finland	9,660	9,192	+5.1%	82,909	82,938	0.0%
France	106,976	98,048	+9.1%	1,384,774	1,333,088	+3.9%
Germany	253,679	245,076	+3.5%	2,323,786	2,257,781	+2.9%
Greece	5,131	4,167	+23.1%	63,866	58,562	+9.1%
Hungary	8,914	7,192	+23.9%	73,057	61,324	+19.1%
Ireland	5,754	7,286	-21.0%	124,714	138,498	-10.0%
Italy	83,806	72,604	+15.4%	1,365,998	1,263,510	+8.1%
Latvia	1,469	1,168	+25.8%	11,495	11,123	+3.3%
Lithuania	2,084	1,552	+34.3%	16,647	13,891	+19.8%
Luxembourg	3,330	3,359	-0.9%	36,805	35,815	+2.8%
Netherlands	29,483	27,032	+9.1%	288,390	253,000	+14.0%
Norway	13,687	13,410	+2.1%	104,855	103,779	+1.0%
Poland	34,504	28,318	+21.8%	319,333	270,289	+18.1%
Portugal*	11,920	10,708	+11.3%	156,678	144,966	+8.1%
Romania	12,001	12,411	-3.3%	68,344	58,631	+16.6%
Slovakia	7,131	6,890	+3.5%	63,632	57,489	+10.7%
Slovenia	4,492	3,942	+14.0%	48,834	43,984	+11.0%
Spain	73,600	65,105	+13.0%	858,687	802,830	+7.0%
Sweden	29,915	27,316	+9.5%	248,167	239,104	+3.8%
Switzerland	22,754	21,724	+4.7%	205,534	205,028	+0.2%
UK	76,433	81,640	-6.4%	1,640,241	1,680,799	-2.4%

* Forecast by LMC

AUG-17

Europe-27	899,272
Var. Y-o-Y	+5.4%
Big 5	594,494
Var. Y-o-Y	+5.7%

YTD-17

Europe-27	10,517,629
Var. Y-o-Y	+4.2%
Big 5	7,573,486
Var. Y-o-Y	+3.2%

SAAR

Europe-27	15,836,288

"August is usually a quiet month for car registrations and our data shows that the average monthly sales for August in the last 5 years were 31% lower than the total monthly average. The summer holidays clearly have a lot to do with this. Italy is the market which is most impacted by the summer, as its economy more or less stops in the second and third weeks of August. This affects all brands who sell cars in Italy, but particularly those who rely on the market the most, such as Fiat, Alfa Romeo and Jeep, who all sold lower volumes. Other markets that are similarly hit by the summer include France, Croatia, Portugal, Greece and Spain. Not every country experiences this August lull though, in fact, both Romania and Norway have seen their average registrations grow in August by 34% and 2% respectively," commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

TOP SELLING BRANDS

		Aug-17	Δ Aug 16-17	YTD-17	Δ YTD 16-17
1	VOLKSWAGEN	101,784	-4.4%	1,136,861	-1.0%
2	MERCEDES	58,680	+9.2%	605,515	+10.7%
3	RENAULT	58,179	+11.4%	758,270	+5.6%
4	OPEL/VAUXHALL	54,183	-1.6%	650,637	-3.0%
5	FORD	53,712	-7.6%	720,312	+1.4%
6	AUDI	49,595	+5.2%	558,247	+0.4%
7	PEUGEOT	49,166	+9.6%	617,845	+5.0%
8	BMW	48,557	+4.3%	538,997	+1.7%
9	SKODA	47,535	+14.8%	468,335	+6.8%
10	TOYOTA	41,894	+14.4%	461,463	+16.3%
11	FIAT	37,306	+9.4%	545,344	+8.6%
12	DACIA	33,603	+12.6%	315,897	+9.4%
13	HYUNDAI	30,699	-0.6%	340,145	+2.6%
14	CITROEN	30,645	+5.8%	398,271	+4.6%
15	NISSAN	29,999	+17.2%	385,500	+5.6%
16	KIA	29,142	+1.6%	313,300	+5.9%
17	SEAT	24,934	+12.2%	269,758	+15.5%
18	SUZUKI	16,669	+27.5%	162,372	+22.4%
19	MAZDA	15,946	+6.9%	153,939	-3.8%
20	VOLVO	14,528	+30.6%	196,090	+7.8%
21	MINI	10,229	-3.2%	135,425	+1.9%
22	MITSUBISHI	7,946	+17.1%	78,967	0.0%
23	HONDA	7,761	-7.1%	93,274	-13.5%
24	LAND ROVER	6,589	+6.1%	111,530	+1.6%
25	JEEP	5,921	-6.3%	67,484	-2.9%
26	SMART	5,288	+9.1%	65,666	-5.9%
27	ALFA ROMEO	4,742	+42.7%	58,068	+39.7%
28	PORSCHE	3,967	-10.1%	50,679	+7.1%
29	LANCIA	2,835	+11.6%	44,459	-6.2%
30	JAGUAR	2,544	-23.0%	46,931	+15.2%
31	LEXUS	2,494	-4.2%	28,319	-0.2%
32	DS	2,382	-10.1%	31,047	-34.5%
33	SUBARU	2,346	-6.9%	23,334	-8.2%
34	TESLA	1,336	+16.7%	14,609	+70.5%
35	ABARTH	1,248	+65.3%	13,977	+46.8%
36	SSANGYONG	1,094	-19.0%	12,112	-8.1%
37	INFINITI	714	-38.4%	9,401	-3.1%
38	MASERATI	438	-26.4%	6,769	+50.1%
39	LADA	398	+27.2%	3,121	+28.2%
40	BENTLEY	254	+21.0%	2,751	+21.2%
41	CHEVROLET	182	+5.2%	1,902	+52.9%
42	MG	181	+82.8%	2,480	+7.7%
43	FERRARI	161	+5.9%	2,345	+8.2%
44	ASTON MARTIN	92	+91.7%	1,843	+92.8%
45	IVECO	70	+14.8%	677	+17.3%
46	LOTUS	67	-53.8%	582	-1.9%
47	LAMBORGHINI	61	-21.8%	660	-4.9%
48	ALPINA	58	-4.9%	339	-36.6%
49	CADILLAC	50	-42.5%	632	+29.2%
50	DODGE	50	-13.8%	394	-14.5%

TOP 10 CAR GROUPS MARKET SHARE

AUG-17

VW Group	25.37%
PSA*	15.17%
Renault-Nissan**	14.55%
Daimler	7.11%
Hyundai-Kia	6.65%
BMW Group	6.55%
Ford	5.97%
FCA	5.84%
Toyota	4.94%
Suzuki	1.85%

TOP 5 MKT SHARE WINNERS & LOSERS

MARKET SHARE % POINTS CHANGE

Renault-Nissan**	+0.97
Toyota	+0.34
Suzuki	+0.32
Geely	+0.31
FCA	+0.25
BMW Group	-0.16
PSA*	-0.25
Hyundai-Kia	-0.33
VW Group	-0.64
Ford	-0.84

*Includes Opel/Vauxhall

**Includes Mitsubishi

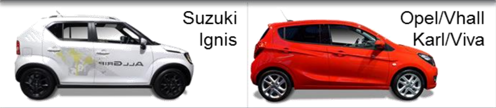
VW Group kept its lead, despite losing 0.6 percentage points of market share. Second place PSA Group is under threat from Renault-Nissan, whose big brands all posted double-digit growth.

TOP SELLING MODELS

		Aug-17	Δ Aug 16-17	YTD-17	Δ YTD 16-17
1	GOLF	30,986	+5.1%	304,943	-8.8%
2	CLIO	16,859	+31.9%	222,270	+7.8%
3	OCTAVIA	15,857	+11.6%	153,992	+1.6%
4	TIGUAN	13,936	-2.4%	157,314	+55.1%
5	SANDERO	13,828	+16.8%	136,384	+14.1%
6	POLO	12,891	-12.4%	207,688	+0.8%
7	QASHQAI	12,403	+17.1%	166,100	+7.5%
8	CORSA	12,390	-8.6%	167,404	-7.1%
9	208	12,348	-10.2%	161,944	-4.8%
10	YARIS	12,208	+17.6%	130,840	+1.3%
11	ASTRA	12,149	-15.3%	160,704	-2.4%
12	PASSAT	11,848	-1.8%	121,174	-14.0%
13	C-CLASS	11,508	+0.9%	123,720	+8.6%
14	MOKKA	11,312	+19.8%	121,749	+9.7%
15	C3	11,193	+75.8%	143,130	+63.7%
16	FABIA	10,918	-5.1%	120,797	+3.1%
17	500	10,783	+19.1%	135,331	+7.9%
18	A3	10,122	+7.7%	113,901	-10.2%
19	LEON	10,087	+10.8%	101,517	+0.2%
20	CAPTUR	10,027	-5.5%	136,877	-4.1%
21	DUSTER	9,471	+4.2%	96,026	+1.1%
22	GLC/COUPE	9,224	+121.6%	70,068	+57.3%
23	KUGA	9,139	+17.0%	99,837	+23.1%
24	MEGANE	9,041	+21.6%	112,047	+29.9%
25	FOCUS	8,829	-13.0%	144,584	-2.3%
26	3008 SUV	8,817	New	105,644	New
27	TUCSON	8,811	+2.1%	101,128	-3.0%
28	A4	8,757	-28.3%	99,119	-11.7%
29	308	8,545	-16.3%	112,530	-18.6%
30	A-CLASS	8,526	+6.7%	94,032	+2.2%
31	SERIES 5	8,223	+80.7%	68,744	+31.1%
32	2008	8,089	-10.2%	125,085	+5.9%
33	FIESTA	8,072	-44.4%	177,130	-9.5%
34	X1	7,996	+11.1%	75,853	+22.1%
35	SERIES 3	7,466	+10.0%	88,853	-4.6%
36	SERIES 1	7,337	-4.3%	87,243	+5.9%
37	IBIZA	7,319	-1.8%	81,055	-6.2%
38	SPORTAGE	7,281	-8.1%	90,156	-7.6%
39	PANDA	7,211	+4.1%	130,479	-0.5%
40	TIPO	7,066	+50.0%	93,859	+179.5%
41	C-HR	6,849	New	77,270	New
42	AURIS	6,803	-14.5%	78,077	-11.4%
43	E-CLASS	6,773	+12.3%	85,246	+34.7%
44	TOURAN	6,464	-12.0%	74,478	-5.9%
45	MINI	6,377	-10.4%	88,490	+2.2%
46	I20	6,365	-12.3%	69,934	+8.3%
47	XC60	6,020	+89.3%	66,464	+36.7%
48	SCENIC/GRAND	5,818	+30.9%	67,538	+14.9%
49	Q2	5,759	New	54,397	New
50	Q5	5,720	+14.9%	44,458	+0.3%

SEGMENT SHARE AUG-17

TOP WINNER | TOP LOSER

CITY-CARS (A-SEGMENT)

Suzuki Ignis | Opel/Vhall Karl/Viva

SUBCOMPACTS (B-SEGMENT)

Citroen C3 | Ford Fiesta

COMPACTS (C-SEGMENT)

Fiat Tipo | Opel/Vhall Astra

MIDSIZE SEDAN/SW (D-SEGMENT)

BMW 3-Series | Audi A4

EXECUTIVE (E-SEGMENT)

BMW 5-Series | Audi A6

LUXURY (F-SEGMENT)

Porsche Panamera | BMW 7-Series

MPVs

Renault Scenic | Peugeot 3008

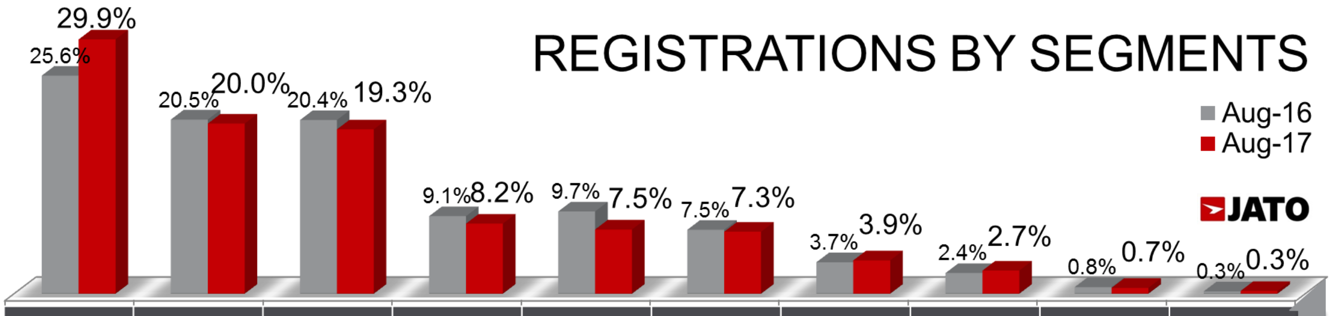
SUVs

Peugeot 3008 | VW Tiguan

SPORT CARS

Mazda MX-5 | Ford Mustang

The Golf experienced positive growth for the month. Other high performing models for August were the Clio, Sandero, Qashqai, Yaris, Mokka, C3, 500 and Leon. Good month for new Compass, XC60, 5-Series, Micra, B-Max, Tipo, X-Trail and Countryman.



	SUV	B	C	D	MPV	A	VAN	E	SPORT	F
Vol.	268,569	179,613	173,505	74,016	67,801	65,442	35,214	24,397	6,165	2,921
Δ 16-17	+22.9%	+2.9%	-0.3%	-4.7%	-17.7%	+2.2%	+11.6%	+17.9%	-5.4%	+27.1%

-Ends-

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More insights:

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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.

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