PRESS RELEASE

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BREXIT BEGINS TO IMPACT EUROPE AS REGISTRATIONS FOR THE REGION DECREASE BY 2.2% IN SEPTEMBER

- **European car registrations fell by 2.2% for September 2017, with a total of 1,461,683 registrations**
- **Registrations partly fell as a consequence of the UK's declining demand, following increased uncertainty around Brexit negotiations**
- **The updated Nissan Qashqai became Europe's second most popular car - outselling both the Renault Clio and the Volkswagen Polo**

The European car industry saw a significant decline in registrations in September 2017, with new registrations for the month totalling 1,461,683 units, which was a decrease of 2.2% when compared to the same month last year. This was due to decreases in 11 of the 27 markets analysed, including in Germany where the diesel crisis hit overall results, which offset double-digit growth in 6 other markets and strong performances from Italy and Spain.

This decline for September points to a slowdown in European registrations, following a long period of strong results. Whilst this isn’t an unusual trend, the recent performance of the UK car market - one of the big five markets in Europe - is having a significant impact on the rest of the region’s growth. This can be attributed to the increasing uncertainty around Brexit negotiations and the UK's future in the European Union.

The Nissan Qashqai - with its all-new facelift - became the second most popular car in Europe for the first time ever, outselling other popular models such as the Renault Clio and the Volkswagen Polo. The compact SUV, which came top in Finland, Spain and the UK, could not beat the updated Volkswagen Golf, which posted double-digit growth for the first time in 2017, posting particularly strong results in the UK, France and Italy. The strong month for the Golf comes ahead of the launch of the new Volkswagen T-Roc, which may have a negative impact on the model’s registrations in the future as it will sit in the SUV segment and will be similarly priced to the Golf.

EUROPE-27 SEPTEMBER 2017 VOLUME BY COUNTRIES

	Sep-17	Sep-16	Δ Sep 16-17	YTD-17	YTD-16	Δ YTD 16-17
Austria	29,528	29,836	-1.0%	269,878	252,177	+7.0%
Belgium	40,895	41,748	-2.0%	435,340	424,381	+2.6%
Croatia	2,694	2,486	+8.4%	41,168	34,020	+21.0%
Czech Rep.	20,219	19,946	+1.4%	205,592	192,713	+6.7%
Denmark	14,372	18,488	-22.3%	168,838	168,560	+0.2%
Estonia	1,976	1,959	+0.9%	19,830	17,826	+11.2%
Finland	9,090	9,636	-5.7%	91,999	92,574	-0.6%
France	170,241	168,027	+1.3%	1,555,015	1,501,115	+3.6%
Germany	288,035	298,002	-3.3%	2,611,820	2,555,783	+2.2%
Greece	5,937	4,593	+29.3%	69,801	63,160	+10.5%
Hungary	9,609	8,235	+16.7%	82,668	69,559	+18.8%
Ireland	3,916	4,688	-16.5%	128,629	143,186	-10.2%
Italy	167,096	156,036	+7.1%	1,533,092	1,419,546	+8.0%
Latvia	1,210	1,530	-20.9%	12,705	12,653	+0.4%
Lithuania	2,488	1,703	+46.1%	19,135	15,594	+22.7%
Luxembourg	3,968	3,568	+11.2%	40,872	39,383	+3.8%
Netherlands	35,879	33,534	+7.0%	324,268	286,534	+13.2%
Norway	13,624	13,984	-2.6%	118,480	117,763	+0.6%
Poland	37,108	32,652	+13.6%	356,441	302,941	+17.7%
Portugal*	14,294	13,960	+2.4%	170,989	158,926	+7.6%
Romania	10,425	9,361	+11.4%	78,769	67,992	+15.9%
Slovakia	7,142	7,068	+1.0%	70,871	64,557	+9.8%
Slovenia	5,281	5,036	+4.9%	54,115	49,020	+10.4%
Spain	84,496	80,701	+4.7%	943,181	883,531	+6.8%
Sweden	31,672	32,292	-1.9%	279,839	271,396	+3.1%
Switzerland	24,318	25,990	-6.4%	229,852	231,018	-0.5%
UK	426,170	469,696	-9.3%	2,066,411	2,150,495	-3.9%

* Forecast by LMC

SEP-17

Europe-27	1,461,683
Var. Y-o-Y	-2.2%
Big 5	1,136,038
Var. Y-o-Y	-3.1%

YTD-17

Europe-27	11,979,598
Var. Y-o-Y	+3.4%
Big 5	8,709,519
Var. Y-o-Y	+2.3%

SAAR

Europe-27	15,683,224

"As anticipated, European registrations are starting to slow down following their unprecedented run of strong results. Whilst a drop after such high levels of growth is not unusual, it is clear that the recent performance of the UK car market - one of Europe's most significant - is having a substantial impact on the European car market as a whole. And until there is more certainty around Brexit negotiations, and the UK's future in Europe as whole, this is set to continue. However, opportunities for growth are still there for manufacturers in the SUV segment, which continues to grow. The segment reached a record market share of 31.6% in September, with 462,000 SUVs registered for the month - an impressive growth of 14.1%. This has taken the year-to-date volume of SUVs to 3.47 million units - 553,000 units more than in the same period last year," commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

TOP SELLING BRANDS

		Sep-17	Δ Sep 16-17	YTD-17	Δ YTD 16-17
1	VOLKSWAGEN	157,029	-2.7%	1,293,730	-1.2%
2	RENAULT	95,160	-1.7%	853,137	+4.7%
3	FORD	94,297	-14.3%	814,605	-0.7%
4	OPEL/VAUXHALL	92,630	-9.8%	743,258	-3.9%
5	MERCEDES	92,372	+0.6%	698,024	+9.3%
6	BMW	86,744	-0.9%	625,737	+1.4%
7	AUDI	78,899	-3.7%	637,051	-0.1%
8	PEUGEOT	75,912	-2.1%	694,107	+4.2%
9	SKODA	65,156	+3.8%	533,361	+6.4%
10	NISSAN	64,117	+3.8%	449,592	+5.4%
11	TOYOTA	63,415	+4.0%	524,919	+14.7%
12	FIAT	62,874	-3.9%	608,102	+7.2%
13	HYUNDAI	52,068	+1.7%	392,270	+2.5%
14	CITROEN	45,422	+0.6%	443,753	+4.2%
15	KIA	44,492	-0.2%	357,908	+5.2%
16	DACIA	34,914	+8.3%	351,107	+9.4%
17	SEAT	32,354	+9.7%	302,094	+14.8%
18	VOLVO	27,163	-0.6%	223,179	+6.7%
19	MAZDA	25,339	-7.1%	179,347	-4.3%
20	SUZUKI	25,144	+18.8%	187,534	+22.0%
21	MINI	25,066	-5.0%	160,458	+0.7%
22	LAND ROVER	20,833	-2.0%	132,429	+1.1%
23	HONDA	16,242	-17.7%	109,510	-14.1%
24	JEEP	10,566	+1.9%	78,042	-2.3%
25	MITSUBISHI	9,790	-5.9%	88,751	-0.7%
26	SMART	8,867	-8.9%	74,592	-6.2%
27	ALFA ROMEO	8,145	+17.2%	66,153	+36.3%
28	JAGUAR	8,120	-16.1%	55,064	+9.2%
29	PORSCHE	6,124	-9.7%	56,814	+5.1%
30	LEXUS	5,903	-2.6%	34,240	-0.5%
31	DS	4,685	-27.9%	35,747	-33.7%
32	TESLA	4,683	+45.9%	19,292	+63.8%
33	LANCIA	4,658	-13.7%	49,116	-6.9%
34	SUBARU	3,714	-6.4%	27,048	-7.9%
35	ABARTH	2,269	+27.5%	16,245	+43.7%
36	SSANGYONG	1,365	-37.0%	13,477	-12.2%
37	INFINITI	983	-4.1%	10,384	-3.2%
38	MG	842	-16.2%	3,322	+0.5%
39	MASERATI	673	-27.3%	7,446	+37.0%
40	LADA	402	+31.4%	3,523	+28.5%
41	BENTLEY	366	-19.6%	3,117	+14.4%
42	ASTON MARTIN	206	+32.9%	2,050	+84.5%
43	FERRARI	198	-10.8%	2,543	+6.4%
44	CHEVROLET	164	+41.4%	2,066	+51.9%
45	MCLAREN	141	+261.5%	675	+125.0%
46	LAMBORGHINI	98	+8.9%	758	-3.3%
47	ROLLS-ROYCE	66	-33.3%	555	-6.7%
48	LOTUS	57	-39.4%	639	-7.0%
49	DODGE	56	-1.8%	450	-13.1%
50	CADILLAC	49	-35.5%	681	+20.5%

TOP 10 CAR GROUPS MARKET SHARE

SEP-17

VW Group	23.26%
PSA**	14.96%
Renault-Nissan*	14.05%
BMW Group	7.66%
Daimler	6.93%
Hyundai-Kia	6.61%
Ford	6.45%
FCA	6.11%
Toyota	4.74%
Tata Group	1.98%

TOP 5 MKT SHARE WINNERS & LOSERS

MARKET SHARE % POINTS CHANGE

Renault-Nissan*	+0.50
VW Group	+0.33
Suzuki	+0.30
Toyota	+0.26
Hyundai-Kia	+0.20
Tata Group	-0.09
Mazda	-0.09
Honda	-0.21
PSA**	-0.55
Ford	-0.91

*Includes Mitsubishi

**Includes Opel/Vauxhall

Renault-Nissan and Hyundai-Kia had strong months due to their small cars. Toyota also had a good month thanks to its SUV registrations. Volkswagen Group maintained its lead, but fell 0.8% because of declines in its B and E segments.

TOP SELLING MODELS

		Sep-17	Δ Sep 16-17	YTD-17	Δ YTD 16-17
1	GOLF	51,500	+10.8%	356,562	-6.4%
2	QASHQAI	28,987	+13.6%	195,060	+8.3%
3	CLIO	26,902	+3.0%	249,059	+7.2%
4	CORSA	23,575	-21.9%	191,015	-9.2%
5	TIGUAN	22,540	+1.7%	179,874	+45.5%
6	FOCUS	20,939	+3.2%	165,515	-1.6%
7	POLO	20,446	-35.2%	227,878	-4.1%
8	OCTAVIA	20,399	-1.6%	174,362	+1.2%
9	208	20,145	-14.1%	182,140	-5.9%
10	YARIS	19,178	+1.8%	150,024	+1.4%
11	FIESTA	18,917	-46.0%	195,979	-15.1%
12	CAPTUR	18,858	-8.6%	155,673	-4.7%
13	500	18,837	-5.9%	154,156	+6.0%
14	C-CLASS	17,771	-15.7%	141,523	+4.8%
15	MOKKA	16,911	+3.3%	138,645	+8.9%
16	FABIA	16,640	-2.3%	137,371	+2.4%
17	A3	16,639	-17.7%	130,600	-11.2%
18	PASSAT	16,469	-4.4%	137,619	-13.0%
19	A-CLASS	16,449	+1.3%	110,542	+2.1%
20	C3	16,118	+50.9%	159,312	+62.3%
21	ASTRA	16,093	-36.2%	176,762	-6.9%
22	PANDA	15,804	+1.8%	146,270	-0.3%
23	MINI	15,435	-9.9%	103,927	+0.2%
24	SANDERO	15,217	+8.4%	151,805	+13.6%
25	SERIES 1	14,985	-0.7%	102,149	+4.8%
26	TUCSON	14,696	-5.4%	115,829	-0.5%
27	KUGA	14,646	+0.7%	114,506	+19.7%
28	2008	14,163	-15.9%	139,282	+3.2%
29	3008 SUV	14,033	+505.7%	120,190	+2433.0%
30	SERIES 5	13,529	+54.2%	82,341	+34.5%
31	MEGANE	13,417	-9.7%	125,221	+23.9%
32	A4	13,234	-22.5%	112,327	-13.1%
33	E-CLASS	13,104	+20.1%	98,363	+32.6%
34	JUKE	12,700	+14.0%	73,599	-3.2%
35	GLC-CLASS/COUPE	12,578	+61.8%	82,713	+58.1%
36	SPORTAGE	12,574	-5.5%	102,767	-7.3%
37	X1	12,163	+55.3%	88,022	+25.8%
38	SERIES 3	12,068	-23.7%	100,933	-7.4%
39	308	11,263	-32.0%	123,774	-20.0%
40	DUSTER	10,865	+3.2%	106,906	+1.3%
41	XC60	10,625	+12.0%	77,089	+32.6%
42	UP	10,560	+29.9%	76,176	+0.9%
43	AURIS	10,401	-13.8%	88,482	-11.7%
44	TIPO	10,225	+56.1%	104,091	+159.4%
45	IBIZA	10,213	+13.3%	91,305	-4.3%
46	LEON	10,104	-13.3%	111,608	-1.2%
47	INSIGNIA	9,845	+32.1%	49,987	-15.7%
48	MICRA	9,689	+34.0%	67,927	+46.5%
49	C-HR	9,640	New	86,957	New
50	I20	9,609	-7.6%	79,547	+6.1%

SEGMENT SHARE SEP-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)

VW Golf | Opel/Vhall Astra

MIDSIZE SEDAN/SW (D-SEGMENT)

Opel/Vhall Insignia | BMW 3-Series

EXECUTIVE (E-SEGMENT)

BMW 5-Series | Audi A6

LUXURY (F-SEGMENT)

Porsche Panamera | BMW 7-Series

MPVs

Renault Scenic | Nissan Note

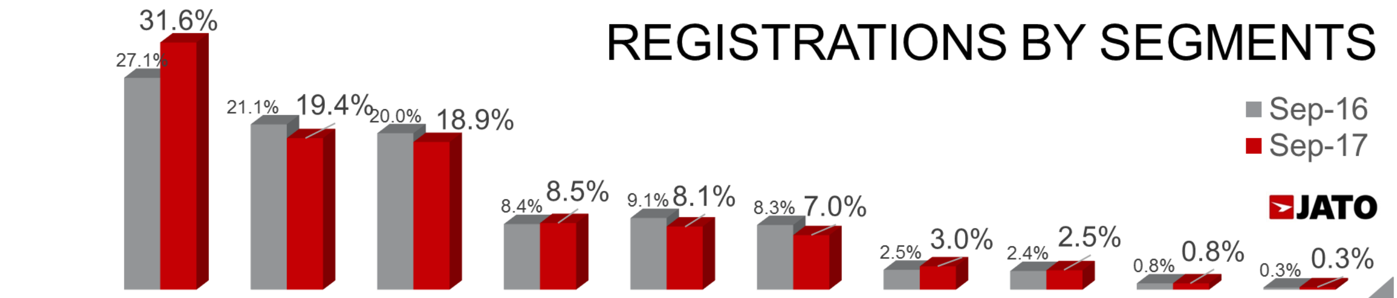
SUVs

Peugeot 3008 | Peugeot 2008

SPORT CARS

Mazda MX-5 | Ford Mustang

Among the latest launches, it is important to mention the 51% increase posted by the new Citroen C3, as well as increases by the Peugeot 3008 SUV, BMW 5-series, Mercedes GLC, BMW X1 and Fiat Tipo.



	SUV	B	C	A	D	MPV	E	VAN	SPORT	F
Vol.	461,571	282,887	275,724	124,342	118,008	101,856	43,534	36,250	11,759	4,500
Δ 16-17	+14.1%	-10.4%	-7.7%	-0.7%	-13.7%	-17.5%	+14.6%	+1.8%	-1.3%	+14.0%

-Ends-

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More insights:

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