

# PRESS RELEASE

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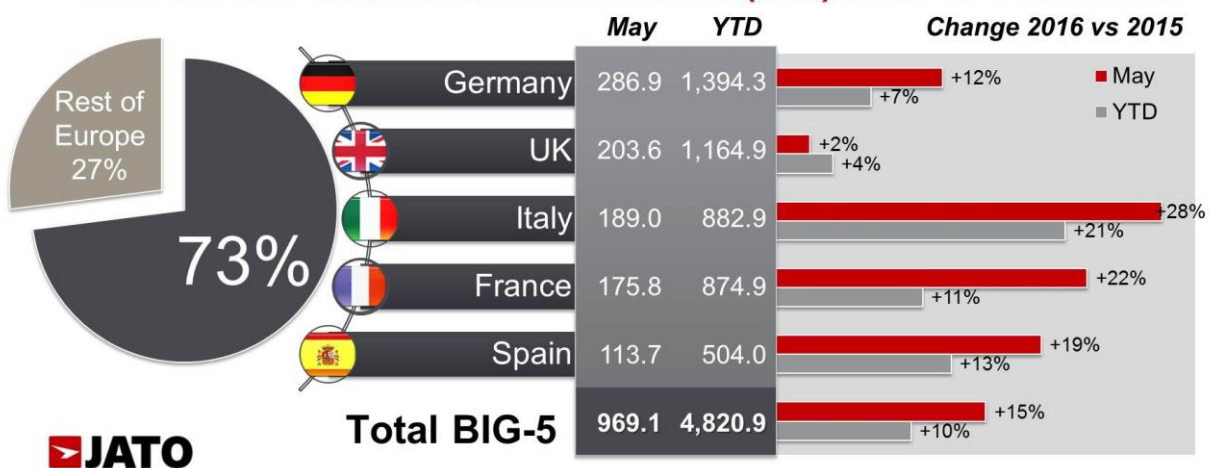
London, UK

## HIGHEST MAY VOLUME FOR EUROPE'S BIG 5 MARKETS AS NEW CAR SALES RISE 15%

- Double-digit growth in Germany, Italy, France and Spain
- May's increase was the second highest seen so far in 2016 and the highest May volume since 2009
- SUVs drove growth with a 30% increase meaning the segment accounts for almost 25% of the overall market
- The Volkswagen Golf was ahead but volume dropped by 1%

Europe's 'Big 5' markets posted double digit growth in May thanks to strong increases in four of the five markets analysed, continuing the positive trend seen over the last 15 months. Registrations for the month totalled 969,100 units, 15% up on the volume recorded in May 2015, the second highest percentage growth rate of the year so far. The total YTD volume grew by 9.7% to 4.82 million cars, the highest percentage increase in 10 years. The SAAR came in at 11 million units in May, the second lowest for the year.

### BIG-5 NEW CAR REGISTRATIONS (000) MAY & YTD 2016



Source: JATO Dynamics Limited

Germany posted its highest May sales since 2012, with total registrations growing by 12% to 287,000 units. The UK was the second largest market, but political and economic uncertainty cooled the demand,

resulting in an increase of just 2%. Italy posted outstanding growth of 28% at 189,000 units, its highest May total since 2009. This strong showing meant Italy outperformed France to become the third largest market in Europe for the year to date, despite the 22% rise posted by France in May. The 175,800 units registered in France represent its highest May sales since 2014. Spain continued to grow, reporting a 19% increase in May, its second highest monthly increase this year.

The brand ranking showed very different results for the biggest players. Volkswagen, Europe's largest car brand, posted a 1% gain and Renault outsold Ford as the second best-selling brand thanks to a dramatic 38% increase to 77,000 units. This was only 30,000 units behind Volkswagen, a significant move when compared to the 40,800 units that separated Volkswagen and Ford in May 2015. As a result, Volkswagen's market share fell from 12.5% in May 2015 to 10.9% last month. Conversely, Renault's market share jumped from 6.6% to almost 8%. Volkswagen's May market share was the lowest the company has recorded for the month since 2008, whereas Renault's was its highest since May 2010.

## BIG 5 REGISTRATIONS MAY 2016

### TOP 20 Brands

By Volume			By Share gain	
Brand	Volume (000)	Change May15/16	Brand	Pct. Points Gain
Volkswagen	106.0	+1%	Renault	+1.31
Renault	77.0	+38%	Fiat	+0.59
Ford	68.7	+6%	Audi	+0.30
Opel/Vauxhall	63.9	+7%	Citroen	+0.26
Fiat	62.4	+27%	BMW	+0.25
Peugeot	62.1	+19%	Kia	+0.24
Audi	58.8	+21%	Peugeot	+0.23
Mercedes	53.7	+11%	Jaguar	+0.21
BMW	51.0	+21%	Dacia	+0.20
Citroen	41.1	+23%	Jeep	+0.12
Nissan	33.8	+3%	Lancia	+0.11
Toyota	31.0	+12%	Mazda	+0.11
Skoda	29.0	+11%	Honda	+0.10
Hyundai	28.8	+16%	Infiniti	+0.06
Dacia	26.5	+24%	Suzuki	+0.04
Kia	25.3	+27%	Abarth	+0.04
Seat	22.9	-4%	Land Rover	+0.03
Mini	14.6	+12%	Ssangyong	+0.03
Land Rover	12.4	+18%	Hyundai	+0.02
Mazda	11.6	+27%	Lexus	+0.01

### TOP 20 Models

By Volume		
Model	Volume (000)	Change May15/16
Volkswagen Golf	31.6	-1%
Renault Clio	22.8	+30%
Volkswagen Polo	20.8	+14%
Ford Fiesta	19.2	-7%
Opel/Vauxhall Corsa	18.7	+11%
Peugeot 208	17.4	+29%
Fiat Panda	16.6	+20%
Renault Captur	16.0	+44%
Peugeot 308	15.0	+22%
Nissan Qashqai	14.6	+12%
Audi A3/S3/RS3	14.0	+14%
Peugeot 2008	13.8	+20%
Ford Focus	13.5	-10%
Opel/Vauxhall Astra	13.3	+6%
Dacia Sandero	12.9	+37%
Fiat 500	12.6	+5%
Opel/Vauxhall Mokka	11.9	+9%
Audi A4/S4/RS4	11.5	+49%
Mercedes C-Class	11.5	+7%
Volkswagen Passat	11.4	0%

Ford and Opel/Vauxhall both recorded market share falls as a result of the reduced demand in the UK. Fiat's volume grew by 27%, which took its market share to 6.4% as a result of significant increases in demand across Italy, France and Spain. Peugeot followed with a 19% increase, while the three German premium brands occupied the seventh (Audi), eighth (Mercedes) and ninth (BMW) positions, all of them with double-digit growth. The top 10 was completed by Citroen, which posted a 23% increase to 41,100 units. Outside of the top 10, other brands that performed well included Infiniti (+158%), Jaguar (+108%), Abarth (+64%), Bentley (+62%) and Ssangyong (+48%).

Volumes grew in all segments with the exception of luxury sedans (F-Segment), which posted a 3% decline. Once again the market was dominated by SUVs of all sizes. SUV sales in the 'Big 5' totalled 241,000 units in May and accounted for almost one in every four (24.9%) of new registrations. This represents a 30% uplift compared to May 2015, easily the highest increase amongst all segments. SUVs reported double-digit growth in all five markets, with Spain in first place with a 40% increase, closely followed by Italy at 38%, and France at 34%.

"While SUVs continue to gain market share in the UK, France, Italy and Spain, in Germany they are still behind due to Volkswagen's limited range and the strength of demand for C-Segment models," said Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

The C-Segment, third in the ranking, was the month's big loser as its market share fell from 19.7% in May 2015 to 19.0% last month. Registrations fell in the UK by 6.2% and significantly, the segment only grew by 8.6% in Germany, its largest market. The B-Segment was led by Renault thanks to its Clio and Zoe models, which grew by 30% and 37% respectively to outsell Volkswagen and Ford, the leaders in May 2015. The MPV, City-car (A-Segment) and midsize (D-Segment) segments all lost market share.

In terms of models, Volkswagen registered 31,600 units of its Golf, which was enough to maintain its pole position, but it still lost market share. In May 2015, the German compact car accounted for 3.79% of total registrations, and one year later its share has dropped to 3.27%, its lowest market share since May 2008. Renault's Clio was the second best-seller, outselling its rivals - Volkswagen's Polo and Ford's Fiesta. The Fiesta posted the highest percentage decrease within the top 10 due to a challenging month in Germany (-15%), France (-22%) and the UK (-12%). The rest of the top 10 models recorded double-digit increases, led by the Renault Captur with a 44% increase, continuing its run as the best-selling SUV in Europe's 'Big 5'.



Among the latest launches, it is important to mention the strong growth posted by the new Audi A4 (+49%), Kia Sportage (+45%), Renault Kadjar (+420%), and the new Hyundai Tucson, whose registrations totalled 8,700 units, becoming the fifth best-selling compact SUV. Other big increases came from the BMW X1, up by 137%, and the Fiat Tipo which occupied second position among the C-Segment models in Italy with 4,000 units sold. The Skoda Superb (+102%), Mercedes GLC (3,900 units), Ford S-Max (+373%), Opel/Vauxhall Karl/Viva (2,800 units), Mazda CX-3 with 2,400 units, and the Mini Clubman (2,100 vehicles registered), all recorded significant positive results.

“Improved economic conditions as a result of higher consumer confidence and lower fuel prices continue to boost the largest European car markets. The higher demand is clearly focused on the best-selling SUVs as more car makers join this key segment,” concluded Munoz.

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