

# PRESS RELEASE

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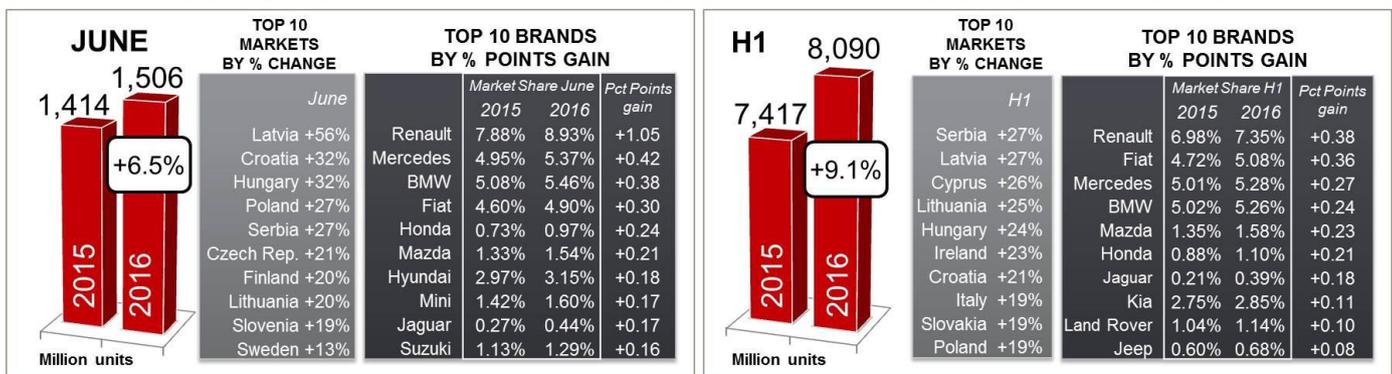
## EUROPE SEES HIGHEST NUMBER OF FIRST HALF YEAR CAR REGISTRATIONS SINCE 2008

### NEW SUVs AND OPEL/VAUXHALL ASTRA AMONGST THE BIG WINNERS

- Traditional model leaders threatened by latest launches and Volkswagen’s market share tumbles
- The highest market share gains were posted by three SUVs
- The UK market showed negative growth following uncertainty around the EU referendum

Stronger economic conditions, new products and continuing shifts in consumer taste have all helped maintain positive momentum in the European car market during the first half (H1) of 2016. Total registrations grew by 9.1% during the first six months of the year, taking them up to 8.09 million units, the highest level seen since H1 2008. June’s figures showed a slowdown in growth, 6.5% compared to 15% in May. The UK posted negative growth following uncertainty caused by the EU referendum result, while the SAAR came in at 15.5 million vehicles.

### EUROPEAN NEW CAR REGISTRATIONS JUNE & H1 2016



Source: JATO Dynamics Limited

Not all car makers benefitted equally from the overall growth seen in H1. Most mainstream brands lost market share, underperforming against the average growth rate especially Volkswagen (+0.6%) and Nissan (-1.5%). Volkswagen has seen its market share fall almost one percentage point, due to diesel and emissions issues, from 12.1% in H1 2015 to 11.2% in H1 2016, which is their lowest H1 market share since 2010.

“Volkswagen is not only dealing with the emissions problem but also the brand’s top-seller - the Golf - is well established, whilst its rivals continue to overtake it with newer products,” commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

In contrast, Renault’s registrations grew by a massive 15%, making it the second largest car brand in Europe and clearly outpacing its mainstream rivals; Ford, Opel/Vauxhall and Peugeot – who all posted market share losses. An updated range, Europe’s strength and Volkswagen’s stagnation have all helped improve Renault’s position in the ranking. Fiat was the other big mainstream brand to gain ground during H1, mostly due to good results in its home market, along with good sales momentum from its five year old Panda and the 500X mini SUV. Audi, Mercedes and BMW were ahead of Fiat, with all of them posting double-digit growth, and with Mercedes outselling BMW. Hyundai and Kia were the also improvers amongst the top 20. Other successes included Mazda, Land Rover, Honda, Jeep, Jaguar, Ssangyong, Abarth and Infiniti.

## TOP 20 BEST-SELLING MODELS

### JUNE 2016

### H1 2016

	Jun-16	Change	Top Winners %	Points Gain		H1-2016	Change	Top Winners %	Points Gain
VW Golf	46,946	-5%	Hyundai Tucson	+0.86	VW Golf	269,430	-2%	Hyundai Tucson	+0.96
Renault Clio	36,701	+18%	Renault Kadjar	+0.69	Renault Clio	173,462	+4%	Renault Kadjar	+0.78
VW Polo	30,365	-3%	Mercedes GLC	+0.43	VW Polo	166,894	+5%	Mercedes GLC	+0.43
Ford Fiesta	29,260	-14%	Fiat Tipo	+0.35	Ford Fiesta	159,534	-9%	Opel/Vhall Karl/Viva	+0.35
Opel/Vhall Corsa	28,173	+4%	Skoda Superb	+0.33	Opel/Vhall Corsa	147,494	-2%	Fiat 500X	+0.34
Opel/Vhall Astra	26,941	+25%	VW Touran	+0.29	Peugeot 208	138,368	+14%	Suzuki Vitara	+0.31
Renault Captur	25,389	+6%	Renault Megane	+0.27	Opel/Vhall Astra	129,691	+26%	Mazda CX-3	+0.31
Peugeot 208	23,963	+3%	Opel/Vhall Astra	+0.27	Nissan Qashqai	126,113	+1%	BMW X1	+0.28
Nissan Qashqai	22,528	-2%	Renault Talisman	+0.26	Skoda Octavia	121,297	+9%	Fiat Tipo	+0.28
Skoda Octavia	21,837	+6%	Renault Clio	+0.23	Ford Focus	120,534	-6%	Skoda Superb	+0.27
Ford Focus	21,625	-14%	Mini Clubman	+0.22	Renault Captur	118,543	+10%	Honda HR-V	+0.23
Peugeot 308	21,034	+4%	Honda HR-V	+0.21	Peugeot 308	113,722	+9%	Opel/Vhall Astra	+0.22
Renault Megane	19,525	+34%	Fiat 500X	+0.21	VW Passat	111,686	0%	BMW 2-Series Tourer	+0.21
VW Passat	19,147	-12%	Audi A4/S4/RS4	+0.21	Fiat Panda	109,694	+20%	Mini Clubman	+0.21
Toyota Yaris	19,109	+9%	BMW X1	+0.19	Audi A3/S3/RS3	104,524	-4%	Kia Sportage	+0.19
Fiat 500	18,473	-3%	Ford S-Max	+0.19	Toyota Yaris	104,442	+9%	Ford S-Max	+0.18
Dacia Sandero	17,926	+13%	Mazda CX-3	+0.19	Fiat 500	103,014	+3%	Volvo XC90	+0.18
Skoda Fabia	17,810	+1%	BMW 2-Series Tourer	+0.18	Peugeot 208	96,035	+13%	Audi A4/S4/RS4	+0.17
Audi A4/S4/RS4	17,452	+30%	Suzuki Baleno	+0.17	Skoda Fabia	92,294	+19%	Renault Talisman	+0.16
Fiat Panda	17,248	+17%	Kia Sportage	+0.15	Dacia Sandero	92,110	+14%	VW Touran	+0.16

Source: JATO Dynamics Limited

The market continued to shift towards SUVs, with the smallest ones – B-SUVs – grabbing the biggest part of the market share gain, from 8.3% share in H1 2015 to 9.4% in H1 2016. B-Segment cars lost the same amount of market share over the same period, going from 22.6% down to 21.4%. Overall, SUVs accounted for 24.7% of the market and posted the second highest percentage growth at 24%, after the Sport cars category which grew by 31%. The markets with the biggest gains in SUV share were Cyprus, Ireland, Croatia, Hungary and UK. SUV growth was more moderate in Latvia, Finland and Sweden. The brands whose SUV ranges gained the most were Bentley, Jaguar, Mazda, Suzuki and Honda.

The model ranking showed that most of the traditional market leaders posted very limited growth, while the latest launches, especially the new SUVs, were the biggest winners during H1. The Volkswagen Golf was once again Europe’s best-selling car with 3.3% market share, which amounted to 269,400 units. Their total

was 2% lower than its result for the same period last year, which means that, along with the Hyundai ix35 and Ford Fiesta, it was the model that posted the biggest market share drop. The Renault Clio, Volkswagen Polo, Opel/Vauxhall Corsa and Nissan Qashqai were the other leaders that underperformed against the market's average growth. These models lost out to small SUVs like the Renault Captur, Peugeot 2008 and Fiat 500X, which all recorded double to and triple growth.

## REGS. BY SEGMENTS / TOP 3 SEGMENT SHARE WINNERS H1 2016



Source: JATO Dynamics Limited

The biggest changes are taking place in the SUV segment. Small SUVs are becoming almost as popular as compact ones (C-SUV) due to their pricing and a greater amount of choice. During H1, 40% of the SUV sales corresponded to C-SUVs, with B-SUVs just behind at 38.2% share. The fastest growing were the large SUVs (E-SUV) with 145,700 units, up by 30%. The Qashqai (+1%) was still Europe's best-selling SUV, but its sales were impacted by the arrival of the Hyundai Tucson (which has almost 1% market share), the new Kia Sportage and the Renault Kadjar. However, the Renault Captur got closer to the Qashqai with its volume growing by 10%, despite the popularity gained by its rivals Fiat 500X, Suzuki Vitara and Jeep Renegade. In the upper segments Volvo and the German premiums continued to dominate.

Felipe Munoz, Global Automotive Analyst at JATO Dynamics concluded: "These first half results show a healthy market that clearly favours new products and SUVs. The second half will be more challenging due to current uncertainty in the UK, and possible stagnation in other key markets. New launches with innovative solutions for the driving experience will become a key factor for success"

For further details, tables and rankings please visit [JATO Blog](#)

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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.

Major leasing companies use JATO's intelligence to drive the vehicle quotation process.

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*See notes to editors on following page.*

**Notes to editors:**

**Sales by Market/Make/Model**

Country	Jun-16	Jun-15	June Change	H1 16	H1 15	H1 Change
Austria	33,751	30,462	+10.8%	171,770	161,633	+6.3%
Belgium	55,272	49,426	+11.8%	308,820	288,424	+7.1%
Switzerland	30,796	32,848	-6.2%	156,738	161,312	-2.8%
Serbia	2,504	1,979	+26.5%	12,349	9,701	+27.3%
Cyprus	890	819	+8.7%	5,359	4,249	+26.1%
Czech Rep.	25,714	21,318	+20.6%	132,377	113,280	+16.9%
Germany	339,548	313,539	+8.3%	1,733,892	1,618,949	+7.1%
Denmark	23,646	21,340	+10.8%	116,922	104,934	+11.4%
Spain	125,183	112,648	+11.1%	628,963	559,661	+12.4%
Estonia	2,022	2,065	-2.1%	12,080	10,762	+12.2%
France	227,273	225,554	+0.8%	1,102,145	1,017,235	+8.3%
UK	255,766	257,817	-0.8%	1,420,636	1,376,889	+3.2%
Greece	8,856	8,994	-1.5%	47,371	43,118	+9.9%
Hungary	9,702	7,370	+31.6%	46,023	37,184	+23.8%
Croatia	6,136	4,649	+32.0%	25,719	21,285	+20.8%
Italy	166,050	148,521	+11.8%	1,050,132	879,952	+19.3%
Ireland	1,626	1,448	+12.3%	101,366	82,337	+23.1%
Lithuania	1,899	1,589	+19.5%	10,681	8,563	+24.7%
Luxembourg	5,106	4,548	+12.3%	28,315	25,681	+10.3%
Latvia	1,936	1,243	+55.8%	8,697	6,866	+26.7%
Norway	14,047	14,534	-3.4%	78,998	75,572	+4.5%
Netherlands	39,431	37,023	+6.5%	193,820	203,011	-4.5%
Poland	38,555	30,389	+26.9%	210,710	177,748	+18.5%
Portugal	23,369	21,076	+10.9%	118,638	100,703	+17.8%
Romania	5,462	8,630	-36.7%	35,452	34,472	+2.8%
Sweden	36,307	32,257	+12.6%	187,591	167,984	+11.7%
Finland	10,750	8,973	+19.8%	65,415	57,056	+14.7%
Slovakia	8,302	7,504	+10.6%	43,771	36,823	+18.9%
Slovenia	6,492	5,467	+18.7%	34,980	31,850	+9.8%
<b>TOTAL</b>	<b>1,506,391</b>	<b>1,414,030</b>	<b>+6.5%</b>	<b>8,089,730</b>	<b>7,417,234</b>	<b>+9.1%</b>

Make	Jun-16	Jun-15	June Change	H1 16	H1 15	H1 Change
Volkswagen	165,079	166,649	-0.9%	905,006	899,945	+0.6%
Renault	134,494	111,357	+20.8%	594,968	517,516	+15.0%
Ford	102,830	105,254	-2.3%	569,299	548,551	+3.8%
Opel/Vauxhall	101,996	101,877	+0.1%	539,500	499,043	+8.1%
Peugeot	85,802	85,267	+0.6%	480,207	449,873	+6.7%
BMW	82,214	71,780	0.0%	425,268	372,039	+10.5%
Mercedes	80,936	69,972	+15.7%	426,846	371,640	+14.9%
Audi	75,354	75,363	+14.5%	442,651	400,582	+14.3%
Fiat	73,764	65,033	+13.4%	410,974	350,325	+17.3%
Skoda	65,585	60,818	+7.8%	349,369	319,457	+9.4%

Model	Jun-16	Jun-15	June Change	H1 16	H1 15	H1 Change
Volkswagen Golf	46,946	49,244	-4.7%	269,430	274,540	-1.9%
Renault Clio	36,701	31,131	+17.9%	173,462	166,227	+4.4%
Volkswagen Polo	30,365	31,343	-3.1%	166,894	159,256	+4.8%
Ford Fiesta	29,260	33,831	-13.5%	159,534	174,375	-8.5%
Opel/Vhall Corsa	28,173	27,070	+4.1%	147,494	150,941	-2.3%
Opel/Vhall Astra	26,941	21,532	+25.1%	129,691	102,550	+26.5%
Renault Captur	25,389	23,902	+6.2%	118,543	107,441	+10.3%
Peugeot 208	23,963	23,360	+2.6%	138,368	121,319	+14.1%
Nissan Qashqai	22,528	23,087	-2.4%	126,113	125,092	+0.8%
Skoda Octavia	21,837	20,570	+6.2%	121,297	111,729	+8.6%