

PRESS RELEASE

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EUROPEAN CAR REGISTRATIONS UP BY 7.1% - THE BEST SEPTEMBER MONTHLY SALES PERFORMANCE FOR A DECADE

- Growth was due to positive results across all but three markets
- Year-to-date registrations increased to 11.6 million units, a rise of 7.7% on the same period last year
- SUV registrations surpassed 400,000 units for the first time in the history of European car sales

New car registrations in the 29 European markets analysed by JATO Dynamics increased by 7.1% in September compared to the same month last year, with 1,495,815 units registered. This is the strongest September monthly sales result for ten years. For the year to date, registrations were 11.6 million units, an increase of 7.7% when compared to 2015, the best result since 2008.

EUROPEAN NEW CAR REGS. SEPTEMBER 2016



Source: JATO Dynamics Limited

The strong result in September was driven by good performances in the majority of markets, but particularly Italy, Poland, Belgium, Austria and Spain which recorded increases of 17.4%, 19.8%, 13.7%, 14.9% and 13.4% respectively. There was double-digit growth in sixteen of the 29 markets analysed and negative change in only three – Ireland, the Netherlands and Greece which recorded decreases of 1.5%, 4.8% and 9.9% respectively.

In the segment ranking, SUV registrations exceeded 400,000 units for the first time in the history of European car sales. As a result, the market share for the SUV segment jumped from 23.3% to 26.9%. The SUV segment's growth in market share had a knock on effect on the Subcompact (B-Segment), City-car (A-Segment) and MPV segments which all showed negative market share growth. The Renault-Nissan Alliance maintained its lead in the SUV segment with a significant 21.7% share and continued to perform well, with volume up by 14%. Jaguar Land Rover continued to grow by outselling the mainstream players like PSA, Ford, FCA and General Motors.

Felipe Munoz, Global Automotive Analyst at JATO Dynamics commented: "Following a return to growth in August, September's results show that the automotive industry is continuing to benefit from a more stable economy and new product launches. The industry does face challenges, notably regarding investment considerations as a result of Brexit, but at present it remains buoyant."

TOP 20 BEST-SELLING MODELS SEPTEMBER 2016

BY VOLUME

	Sep-16	Change Sep15-16	Sep YTD 2016	Change Sep YTD
Volkswagen Golf	46,392	-15.2%	381,830	-6.7%
Ford Fiesta	35,235	-7.4%	231,675	-6.8%
Volkswagen Polo	31,753	+10.8%	238,254	+3.3%
Opel/Vauxhall Corsa	30,370	-1.3%	210,787	+0.2%
Renault Clio	26,107	+7.2%	232,865	+0.6%
Nissan Qashqai	25,570	+2.9%	180,763	0.0%
Opel/Vauxhall Astra	25,301	+31.1%	190,636	+26.9%
Peugeot 208	23,474	+1.8%	193,683	+11.4%
Volkswagen Tiguan	22,124	+47.1%	123,680	+9.5%
Mercedes C-Class	21,070	+12.1%	135,152	-0.2%
Skoda Octavia	20,803	+7.5%	173,187	+4.5%
Renault Captur	20,652	+15.4%	163,635	+10.2%
Ford Focus	20,330	-18.6%	168,701	-8.6%
Audi A3/S3/RS3	20,194	+17.6%	147,256	-4.3%
Fiat 500	20,005	+4.9%	145,607	+2.6%
Toyota Yaris	18,837	-2.7%	148,538	+6.2%
Volkswagen Passat	17,185	-1.3%	158,257	-4.3%
Mini Hatch	17,137	+2.7%	103,695	-0.4%
Audi A4/S4/RS4	17,076	+34.0%	129,336	+29.3%
Skoda Fabia	17,067	+2.6%	134,714	+10.9%

BY PERCENTAGE POINTS GAIN

	Market Share 2015	Market Share 2016	Pct Points Gain
Hyundai Tucson	0.51%	1.04%	+0.53
BMW X1	0.06%	0.52%	+0.46
Fiat Tipo	0.00%	0.44%	+0.44
Volkswagen Tiguan	1.08%	1.48%	+0.40
Volkswagen Touran	0.23%	0.60%	+0.37
Renault Kadjar	0.44%	0.80%	+0.35
Renault Megane	0.65%	1.00%	+0.35
Mercedes GLC/Coupe	0.19%	0.52%	+0.33
Opel/Vauxhall Astra	1.38%	1.69%	+0.31
LR RR Evoque	0.23%	0.51%	+0.29
Toyota RAV4	0.28%	0.56%	+0.28
Ford Kuga	0.70%	0.97%	+0.28
Jaguar F-Pace	0.00%	0.27%	+0.27
Seat Ateca	0.00%	0.26%	+0.26
Mini Clubman	0.03%	0.28%	+0.25
Renault Talisman	0.00%	0.24%	+0.24
Audi A4/S4/RS4	0.91%	1.14%	+0.23
Skoda Superb	0.32%	0.53%	+0.21
LR Discovery Sport	0.24%	0.42%	+0.18
Kia Sportage	0.71%	0.89%	+0.18

Source: JATO Dynamics Limited

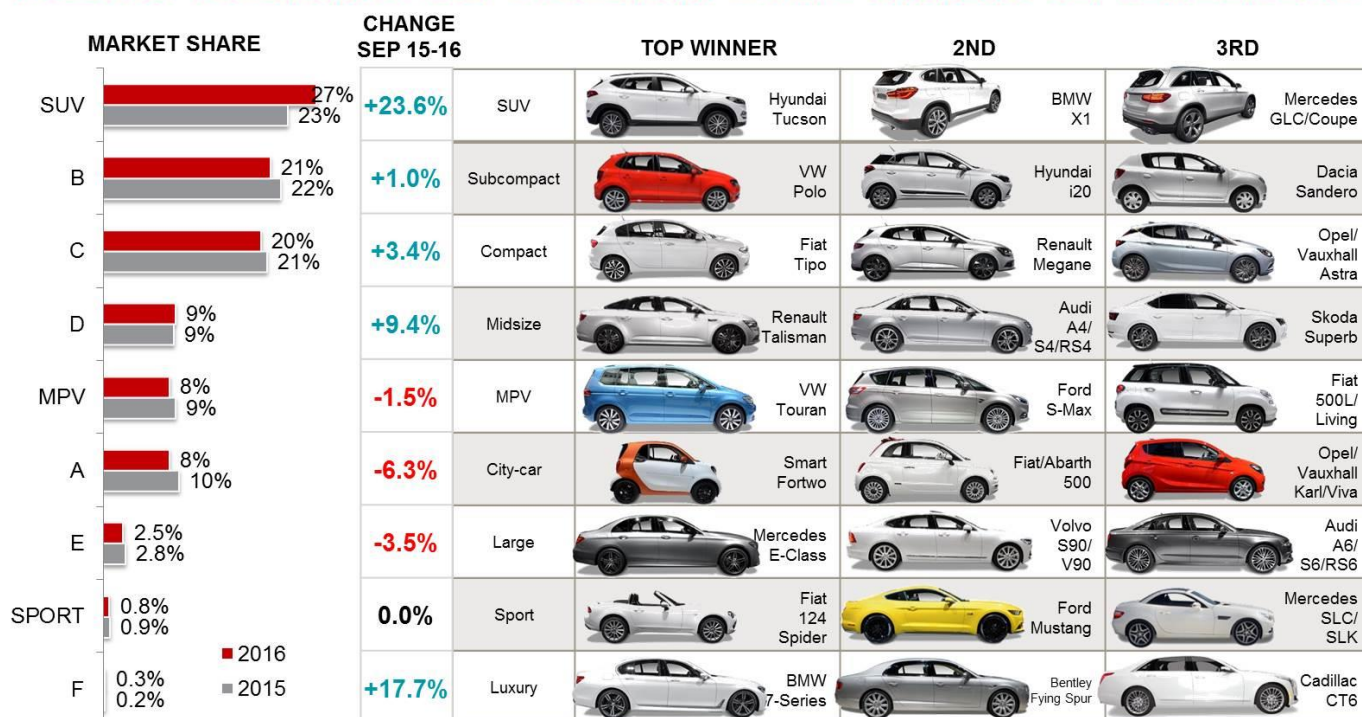
Following on from its market share loss in August, Volkswagen Group continued on a downward trajectory in September, but its losses have stabilized. It declined from 23.2% in September 2015 to 22.9% for the same month in 2016. Within the Volkswagen Group, the Volkswagen and Seat brands posted moderate growth of 3.5% and 0.6% respectively, but this was enhanced by better results from Porsche, Audi and Skoda growing by 9.6%, 8.7% and 9.9% respectively. SUVs continued to boost Volkswagen Group's performance, with the manufacturer's SUV models growing by 26.5% and accounting for 16.7% of its total sales. In comparison, its compact cars continued to perform less well, with registrations falling by 4.3%.

The Renault-Nissan Alliance increased its market share, going from 12.4% in September 2015 to 12.9% for the same period this year whilst maintaining its second position in the ranking. Of the top ten

manufacturers, it was the Renault-Nissan Alliance which was most heavily reliant on the SUV segment, with it accounting for 45.4% of the Group's registrations. In contrast, PSA continued to face challenges, with its volume falling by 5.9% and all of its three brands posting declines. The Group's losses should be reversed with the imminent launches of new generation key models, such as the Citroen C3 and Peugeot 3008 which have yet to make their mark on the market.

The biggest surprise of the month came from premium manufacturers, BMW and Daimler. BMW outsold Ford due to a 13% increase in overall volumes compared to the same period last year, and double digit growth from all of its brands. Daimler similarly posted dramatic growth with its registrations up by 17.8% and it registered the highest market share increase of all manufacturers, with an increase of 0.61 percentage points. The Mercedes brand performed exceptionally well, it recorded a 17.8% increase on the same period last year and registered 91,572 vehicles in September which made it the best-selling premium brand in Europe for the month.

REGS. BY SEGMENTS / TOP 3 SEGMENT SHARE WINNERS SEPTEMBER 2016



Source: JATO Dynamics Limited

At a model level, the Volkswagen Golf continued to lead the market, registering 46,392 units in September which was enough to make it the best-selling model in the month. However, this was a 15.2% decline on the same period last year which is the biggest market share drop of the 473 models analysed by JATO Dynamics.

The model faced challenging conditions in significant markets such as France, the UK and Germany where it posted double digit drops. Despite such dramatic losses, the Golf was 21,000 units ahead of its rival the Opel/Vauxhall Astra which posted a 31.1% increase and registered 25,301 vehicles. Amongst the

Golf's other competitors, the Renault Megane performed well, posting a 65% increase on the same month last year, whilst the Fiat Tipo registered 6,500 units, a strong performance for the model.

The Ford Fiesta was just 11,000 units behind the Golf, registering 35,235 units, but this was a fall of 7.4% compared to the same period last year. In contrast, the Fiesta's closest rival, the VW Polo posted a 10.8% increase and registered 31,753 units which meant that it outsold the Opel/Vauxhall Corsa. The Nissan Qashqai maintained its position as the best selling SUV, despite increased competition in the segment. However, its volume grew by a moderate 2.9% and in contrast, the Volkswagen Tiguan continued to perform well with it recording a 47.1% increase in comparison to last year, meaning it was only 3,400 units behind the Qashqai.

Felipe Munoz, Global Automotive Analyst at JATO Dynamics concluded: "With SUVs continuing to dominate the market, this is having an impact on the performance of all manufacturers. Competition in this segment is increasing further, with no sign of this changing in 2017 as further SUV launches are set to hit the market."

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About JATO

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	Sep-16	Sep-15	Sep Change	Sep YTD-16	Sep YTD-15	YTD Change
Austria	29,836	25,966	+14.9%	252,177	237,193	+6.3%
Belgium	41,749	36,725	+13.7%	424,383	392,522	+8.1%
Croatia	2,476	2,119	+16.8%	34,010	28,345	+20.0%
Cyprus	947	786	+20.5%	8,093	6,579	+23.0%
Czech Rep.	19,943	18,061	+10.4%	192,737	171,048	+12.7%
Denmark	18,488	17,834	+3.7%	168,557	155,151	+8.6%
Estonia	1,959	1,846	+6.1%	17,826	16,117	+10.6%
Finland	9,635	8,511	+13.2%	92,573	82,698	+11.9%
France	168,027	164,710	+2.0%	1,501,113	1,420,973	+5.6%
Germany	298,002	272,479	+9.4%	2,555,784	2,407,939	+6.1%
Greece	4,593	5,098	-9.9%	63,160	57,900	+9.1%
Hungary	8,238	6,286	+31.1%	69,532	55,507	+25.3%
Ireland	4,698	4,769	-1.5%	143,236	121,104	+18.3%
Italy	155,361	132,314	+17.4%	1,418,074	1,206,204	+17.6%
Latvia	1,530	1,184	+29.2%	12,653	10,287	+23.0%
Lithuania	1,703	1,529	+11.4%	15,594	12,855	+21.3%
Luxembourg	3,568	3,376	+5.7%	39,383	36,027	+9.3%
Netherlands	33,539	35,226	-4.8%	286,545	303,297	-5.5%
Norway	13,984	12,534	+11.6%	117,763	113,609	+3.7%
Poland	32,652	27,247	+19.8%	302,942	258,204	+17.3%
Portugal*	13,262	12,624	+5.1%	158,228	138,313	+14.4%
Romania	9,361	5,752	+62.7%	67,992	56,839	+19.6%
Serbia**	1,742	1,669	+4.4%	17,806	14,571	+22.2%
Slovakia	7,068	5,930	+19.2%	64,556	56,520	+14.2%
Slovenia	5,036	4,546	+10.8%	49,020	45,468	+7.8%
Spain	80,702	71,193	+13.4%	883,532	792,033	+11.6%
Sweden	32,292	29,653	+8.9%	271,396	248,653	+9.1%
Switzerland	25,728	23,999	+7.2%	230,435	238,378	-3.3%
UK	469,696	462,517	+1.6%	2,150,495	2,096,886	+2.6%
Total	1,495,815	1,396,483	+7.1%	11,609,595	10,781,220	+7.7%

*Forecast by LMC Automotive **Forecast by JATO

TOP 10 Makes	Sep-16	Sep-15	Sep Change	Sep YTD-16	Sep YTD-15	YTD Change
Volkswagen	161,428	155,993	+3.5%	1,311,359	1,310,210	+0.1%
Ford	110,168	111,335	-1.0%	822,267	799,390	+2.9%
Opel/Vauxhall	103,080	98,910	+4.2%	774,670	725,150	+6.8%
Renault	97,147	81,348	+19.4%	816,717	719,855	+13.5%
Mercedes	91,572	77,753	+17.8%	638,968	557,848	+14.5%
BMW	87,510	78,648	+11.3%	618,131	553,384	+11.7%
Audi	81,969	75,434	+8.7%	638,639	590,435	+8.2%
Peugeot	77,229	78,820	-2.0%	666,136	641,654	+3.8%
Fiat	65,779	59,648	+10.3%	569,817	495,426	+15.0%
Skoda	62,963	57,278	+9.9%	504,045	472,625	+6.6%

TOP 10 Models	Sep-16	Sep-15	Sep Change	Sep YTD-16	Sep YTD-15	YTD Change
Volkswagen Golf	46,392	54,694	-15.2%	381,830	409,126	-6.7%
Ford Fiesta	35,235	38,042	-7.4%	231,675	248,456	-6.8%
Volkswagen Polo	31,753	28,655	+10.8%	238,254	230,651	+3.3%
Opel/Vauxhall Corsa	30,370	30,780	-1.3%	210,787	210,394	+0.2%
Renault Clio	26,107	24,352	+7.2%	232,865	231,365	+0.6%
Nissan Qashqai	25,570	24,861	+2.9%	180,763	180,838	0.0%
Opel/Vauxhall Astra	25,301	19,297	+31.1%	190,636	150,212	+26.9%
Peugeot 208	23,474	23,062	+1.8%	193,683	173,873	+11.4%
Volkswagen Tiguan	22,124	15,040	+47.1%	123,680	112,909	+9.5%
Mercedes C-Class	21,070	18,789	+12.1%	135,152	135,439	-0.2%