

PRESS RELEASE

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AUTOMOTIVE INDUSTRY SHOWS RESILIENCE AS EUROPE SEES HIGHEST YEAR-TO-DATE CAR REGISTRATIONS SINCE 2007

- **The European automotive industry has weathered the storm of 2016, posting positive growth despite the macro climate of economic and geopolitical uncertainty**
- **Registrations in the 29 European markets in November showed a 6.8% increase for the year-to-date, constituting the highest YTD increase since 2007**
- **The Renault Captur became Europe's best-selling SUV, beating the Volkswagen Tiguan and pushing the Nissan Qashqai to third place**

The European automotive industry continued to thrive in November, despite the continuing questions over the Brexit referendum and the future of the EU knocking consumer confidence. European car registrations in November showed that the automotive industry is proving resilient. Total registrations in the 29 European markets analysed by JATO Dynamics totalled 1,184,140 – an overall growth of 5% when compared to November 2015. Year-to-date registrations for 2016 so far totalled 13,937,339 – an increase of 6.8% when compared to last year, and the largest YTD increase since 2007. The SAAR came in at 15,097,119.

Europe's largest five markets all posted an increase in registrations during November, with the Spanish market seeing the highest increase in sales of 13% compared to the same period in 2015. France ranked second, achieving a healthy growth of 8.2%. Meanwhile, Germany, Italy and the UK all posted modest increases of 1.5%, 5% and 2.9% respectively. November was a positive month for car registrations across Europe – with 26 out of 29 markets recording an increase in registrations compared to 2015. The only markets experiencing a decline were Ireland, Switzerland and the Netherlands where registrations declined by 20.4%, 0.4% and 20.7% respectively.

Volkswagen Group maintained its position as Europe's largest car group in November 2016. Despite experiencing a drop in market share of 0.28 percentage points, it still accounted for 24.56% of the market in November. Renault-Nissan increased its market share by 0.72 percentage points, keeping its second-place position and constituting 14.1% of the market. Daimler posted the highest market share increase of 0.83 percentage points, making it the 5th largest car maker in Europe and meaning it accounted for 6.74% of the market in November. Conversely, the biggest decline in market share was experienced by PSA, which

remained Europe's third largest car group despite a decrease in market share of 1.19 percentage points due to declines posted by all of its brands.

In the segment ranking, SUVs continued to perform well in November, 316,278 SUVs were registered, which was a 16.1% increase on the same month last year. The SUV segment continued to increase its hold on the market – posting the highest market share gain of any segment and meaning it accounted for 26.7% of the market in November. This was detrimental to traditional segments such the MPV, A, and E segments which all posted declines in registrations compared to November 2015.

The Volkswagen Golf maintained its long held position of being Europe's leading car, despite registrations for the model declining by 7.5% when compared to November 2015. The Renault Clio was the second best-selling model across Europe's 29 markets, its November registrations increased by 20.3% when compared to the same month last year. The Renault Captur was Europe's best-selling SUV in November, it registered 188 more models than its rival – the Volkswagen Tiguan, and pushed the Nissan Qashqai in to third place.

"It's looking highly likely that 2016 will top 2015's strong registration figures, which is a remarkable feat given the political and economic uncertainty that has dominated 2016. However, it's important that this growth isn't taken for granted, as 2017 will bring further uncertainty – with the UK expected to trigger Article 50 in March, beginning the process of exiting the EU. Any decline in consumer confidence in the UK is likely to impact the European automotive market greatly – especially given that the German car market counts the UK as its biggest export market," concluded Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

Full information overleaf

THIS MONTH	
Europe-29	1,184,140
Var. Y-o-Y	+5.0%
Big 5	860,772
Var. Y-o-Y	+4.8%

YTD	
Europe-29	13,937,339
Var. Y-o-Y	+6.8%
Big 5	10,201,227
Var. Y-o-Y	+6.5%

SAAR	
Europe-29	15,097,119

EUROPE-29 NOVEMBER 2016 VOLUME BY COUNTRIES

	Nov/16	Nov/15	Var. Nov 15-16	Nov/16 YTD	Nov/15 YTD	Var. YTD 15-16
Austria	25,491	23,381	+9.0%	303,941	285,723	+6.4%
Belgium	39,645	36,329	+9.1%	505,996	468,325	+8.0%
Croatia	2,693	2,212	+21.7%	39,554	32,967	+20.0%
Cyprus+	901	886	+1.7%	9,899	8,274	+19.6%
Czech Rep.	23,161	20,421	+13.4%	237,778	211,089	+12.6%
Denmark	17,999	17,101	+5.3%	203,616	189,121	+7.7%
Estonia	1,880	1,611	+16.7%	21,616	19,678	+9.8%
Finland	9,007	8,988	+0.2%	110,738	100,859	+9.8%
France	162,657	150,302	+8.2%	1,818,313	1,732,975	+4.9%
Germany	276,567	272,377	+1.5%	3,095,075	2,958,688	+4.6%
Greece	5,882	5,851	+0.5%	74,026	68,691	+7.8%
Hungary	9,415	6,604	+42.6%	86,910	70,310	+23.6%
Ireland	748	940	-20.4%	146,181	124,603	+17.3%
Italy*	143,619	136,724	+5.0%	1,711,673	1,478,294	+15.8%
Latvia	1,275	1,128	+13.0%	15,216	12,706	+19.8%
Lithuania	1,536	1,438	+6.8%	18,870	15,865	+18.9%
Luxembourg	3,838	3,412	+12.5%	47,496	43,837	+8.3%
Netherlands	32,114	40,472	-20.7%	348,720	382,773	-8.9%
Norway	13,248	12,637	+4.8%	143,035	139,538	+2.5%
Poland	37,191	30,312	+22.7%	372,374	317,571	+17.3%
Portugal	15,068	13,379	+12.6%	188,942	165,416	+14.2%
Romania	9,645	8,022	+20.2%	85,588	72,423	+18.2%
Serbia	1,742	1,741	+0.1%	21,309	18,098	+17.7%
Slovakia	7,842	6,896	+13.7%	79,894	70,153	+13.9%
Slovenia	5,337	5,095	+4.7%	59,596	56,017	+6.4%
Spain	93,828	83,041	+13.0%	1,061,402	956,455	+11.0%
Sweden	31,801	31,352	+1.4%	335,037	311,568	+7.5%
Switzerland	25,909	26,010	-0.4%	279,780	289,555	-3.4%
UK	184,101	178,876	+2.9%	2,514,764	2,453,426	+2.5%

+ Forecast by JATO * Forecast by LMCA

TOP SELLING BRANDS

	Nov/16	Var. Nov 15-16	Nov/16 YTD	Var. YTD 15- 16
VOLKSWAGEN	136,304	0.0%	1,562,417	-0.8%
RENAULT	93,323	+18.2%	986,928	+12.5%
FORD	78,367	-0.7%	977,331	+2.0%
OPEL/VAUXHALL	75,047	-0.3%	919,488	+5.8%
MERCEDES	70,095	+11.5%	775,541	+13.6%
BMW	68,511	+12.4%	751,391	+11.0%
PEUGEOT	66,214	-2.3%	799,349	+2.6%
AUDI	62,685	+6.2%	768,674	+7.4%
SKODA	54,723	+8.7%	610,806	+6.7%
FIAT	53,051	+4.5%	676,985	+13.0%
TOYOTA	47,653	+7.2%	551,628	+7.1%
NISSAN	40,324	+4.2%	508,778	-1.5%
HYUNDAI	39,695	+10.9%	463,874	+8.7%
CITROEN	38,436	-5.2%	504,009	-0.7%
DACIA	31,724	+6.8%	381,853	+10.5%
KIA	31,421	+5.6%	406,864	+12.5%
SEAT	31,017	+26.1%	322,490	+3.2%
VOLVO	25,648	-6.0%	260,584	+3.8%
SUZUKI	16,774	+18.0%	186,220	+11.9%
MINI	16,118	+4.3%	191,579	+12.8%
MAZDA	15,475	-10.2%	219,521	+12.6%
LAND ROVER	11,746	-14.9%	155,222	+20.3%
HONDA	10,651	-6.3%	148,690	+22.8%
SMART	9,757	+26.2%	98,489	+10.3%
MITSUBISHI	9,047	-13.0%	107,110	-10.4%
JEEP	8,245	+9.5%	96,405	+20.0%
PORSCHE	5,764	+21.8%	65,377	+0.9%
ALFA ROMEO	5,647	+24.2%	59,629	+13.5%
JAGUAR	5,626	+57.4%	62,067	+72.4%
LANCIA	4,811	+6.7%	63,099	+10.4%
DS	4,189	-31.6%	62,053	-9.7%
LEXUS	3,155	+1.2%	40,810	+14.6%
SUBARU	2,795	-12.5%	35,198	-2.4%
SSANGYONG	1,229	-7.8%	17,890	+37.5%
INFINITI	1,196	+191.0%	12,781	+153.9%
ABARTH	1,068	+4.9%	13,750	+36.0%
TESLA	965	-38.5%	13,395	-1.3%
MASERATI	532	+43.4%	6,774	+17.4%
LADA	358	+73.8%	3,643	+81.0%
MG	263	+5.2%	3,827	+33.1%
BENTLEY	262	+52.3%	3,262	+43.9%
FERRARI	163	+2.5%	2,735	+6.8%
ASTON MARTIN	138	+17.9%	1,339	-12.4%
CHEVROLET	96	-15.8%	1,580	-32.2%
CADILLAC	73	+43.1%	682	+42.7%
ROLLS-ROYCE	68	+106.1%	733	+33.8%
ALPINA	65	-15.6%	704	+2.3%
MORGAN	64	+178.3%	476	+6.5%
LOTUS	62	+5.1%	809	+2.3%
LAMBORGHINI	49	+58.1%	871	+16.3%

TOP 10 CAR GROUPS MARKET SHARE

**THIS
MONTH**

VW Group	24.56%
Renault-Nissan	14.10%
PSA	9.19%
BMW Group	7.16%
Daimler	6.74%
Ford	6.62%
GM	6.35%
FCA	6.20%
Hyundai-Kia	6.01%
Toyota	4.29%

TOP 5 MKT SHARES WINNERS & LOSERS

Daimler	+0.83
Renault-Nissan	+0.72
BMW Group	+0.66
Geely	+0.24
Tata Group	+0.20
Mazda	-0.19
VW Group	-0.28
GM	-0.32
Ford	-0.72
PSA	-1.19

MARKET SHARE % POINTS CHANGE

TOP SELLING MODELS

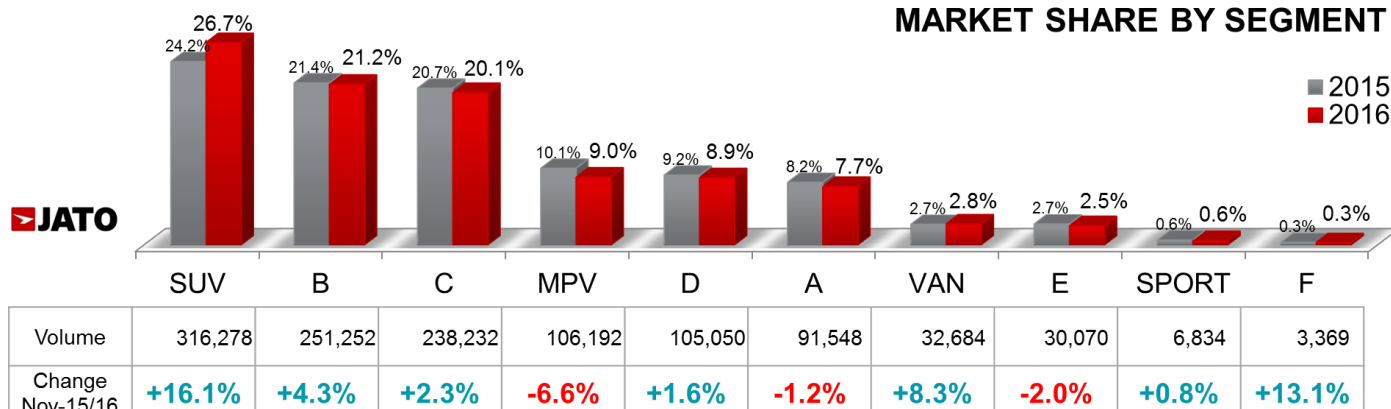
	Nov/16	Var. Nov 15-16	Nov/16 YTD	Var. YTD 15-16
GOLF	37,686	-7.5%	455,203	-8.0%
CLIO	27,716	+20.3%	282,666	+2.0%
POLO	25,989	+6.7%	286,386	+2.4%
FIESTA	23,166	+5.8%	277,637	-4.8%
ASTRA	21,312	+34.2%	232,447	+29.7%
OCTAVIA	20,087	+7.9%	211,589	+4.7%
CORSA	18,642	-9.4%	247,249	-1.2%
208	18,197	+0.9%	230,747	+9.1%
CAPTUR	18,081	+21.6%	197,296	+10.8%
TIGUAN	17,893	+55.7%	160,321	+17.3%
QASHQAI	17,742	+7.0%	216,309	+0.7%
PASSAT	16,288	-22.7%	190,736	-8.0%
FOCUS	15,878	-2.2%	198,035	-9.1%
YARIS	15,787	+0.5%	179,708	+5.1%
MEGANE	15,564	+98.0%	129,367	+13.4%
PANDA	14,718	+6.4%	176,684	+9.9%
C-CLASS	14,664	+13.4%	162,639	+1.1%
FABIA	14,230	+0.4%	163,178	+9.2%
MOKKA	13,485	+7.7%	151,906	+0.3%
A3	13,358	-16.8%	176,924	-5.0%
2008	13,297	+4.4%	162,449	+13.6%
308	13,226	-28.0%	181,969	-3.2%
SERIES 3	12,409	+6.7%	132,763	+1.3%
500	12,313	-1.6%	171,051	+2.0%
DUSTER	11,912	+26.6%	128,036	+11.2%
SANDERO	11,885	+1.8%	157,276	+16.0%
LEON	11,613	+5.0%	135,534	+3.5%
C3	11,474	+17.2%	121,897	+6.0%
A4	11,220	+44.2%	152,755	+29.8%
A-CLASS	11,094	+7.8%	130,903	+17.7%
SERIES 1	10,957	+5.3%	119,070	+1.0%
TUCSON	10,804	+26.7%	140,303	+384.7%
KADJAR	10,671	+19.5%	116,402	+205.0%
MINI	10,282	+2.6%	124,186	+0.2%
SPORTAGE	9,980	+21.9%	131,594	+32.8%
500X	9,591	+13.6%	99,850	+51.6%
IBIZA	9,507	+9.3%	113,179	+2.7%
AURIS	9,443	-14.7%	119,044	+2.3%
3008	9,365	+82.5%	65,042	+5.0%
E-CLASS	8,899	+34.0%	91,391	+15.3%
X1	8,664	+69.4%	87,090	+151.6%
UP	8,245	+3.9%	91,652	-6.7%
TOURAN	8,209	+21.1%	104,519	+58.8%
I20	8,085	+35.5%	91,427	+7.8%
KUGA	7,958	-10.9%	112,011	+19.5%
SERIES 5	7,954	+24.5%	75,234	-8.6%
XC60	7,889	+12.5%	73,970	+5.8%
SERIES 2 A/G TOURER	7,511	-6.3%	93,277	+20.4%
A1	7,285	-1.8%	90,732	+6.4%
C4 PICASSO/GRAND	6,969	-12.0%	99,774	-3.3%

SEGMENT SHARE	
TOP WINNER	TOP LOSER
CITY-CARS (A-SEGMENT)	
 Smart Fortwo	 Ford Ka
SUBCOMPACTS (B-SEGMENT)	
 Renault Clio	 O/V Corsa
COMPACTS (C-SEGMENT)	
 Renault Megane	 Peugeot 308
MIDSIZE SEDAN/SW (D-SEGMENT)	
 Renault Talisman	 VW Passat
EXECUTIVE (E-SEGMENT)	
 Mercedes E-Class	 Volvo S80/V70
LUXURY (F-SEGMENT)	
 Porsche Panamera	 Mercedes S-Class
MPVs	
 Peugeot 3008*	 Renault Scenic
SUVs	
 Seat Ateca	 Ford Kuga
SPORT CARS	
 Fiat 124	 Audi TT

* Includes SUV generation

SEGMENTS

MARKET SHARE BY SEGMENT



-Ends-

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More insights:



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