

PRESS RELEASE

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PSA-OPEL LOST MARKET SHARE, AS EUROPEAN CAR REGISTRATIONS INCREASED BY 1.2% IN FEBRUARY 2017

- **European car registrations totalled 1.1 million units in February – which constitutes the second highest February result since 2008**
- **Key markets driving the growth were Italy, Poland, the Netherlands and Austria**
- **PSA-Opel posted the second highest market share drop among car groups, with their registrations counting for 16.5% of the total market in February**

The European car industry has continued to grow in February 2017 - with new car registrations for the month totalling 1.1 million units, a 1.2% increase when compared to February 2016. This is the second highest February volume recorded since 2008, but there are signs that market growth has started to slow. Notably, this growth is dramatically lower than the 14% growth recorded in February 2016.

Three of Europe's largest five markets posted a drop in registrations, with France, Germany, and the UK all experiencing a decline. The largest decline was posted by France, where the significant increase in registrations of SUVs was not enough to offset the drops posted by MPVs and compact cars. Germany's registrations decreased by 2.6%, and registrations for Diesel cars fell by 10.5% compared to February 2016. This means that Diesel cars account for 43.4% of the German car market, which is the lowest level since February 2010. The decline in German Diesel registrations began midway through 2016, and can be expected to continue over the upcoming months.

Of Europe's largest five markets, Italy and Spain were the only two to increase car registrations. The Italian market has begun to cool off after years of dramatic growth – with an increase in registrations of 6.2%. Spain's spring break will take place in April, which will likely cause an uptick in rental car purchases over March. Poland's performance is particularly notable as it signals the 23rd month of growth for the country, with a boost in registrations coming from company purchases.

EUROPE-27 FEBRUARY 2017 VOLUME BY COUNTRIES

	Feb/17	Feb/16	Var. Feb 16-17	Feb/17 YTD	Feb/16 YTD	Var. YTD 16-17
Austria	25,311	22,495	+12.5%	51,663	46,514	+11.1%
Belgium	51,942	49,707	+4.5%	103,643	94,033	+10.2%
Croatia	2,591	2,448	+5.8%	5,401	4,719	+14.5%
Czech Rep*	19,016	19,300	-1.5%	39,121	36,803	+6.3%
Denmark	17,633	16,627	+6.1%	37,162	33,065	+12.4%
Estonia	1,653	1,671	-1.1%	3,695	3,459	+6.8%
Finland	9,166	9,656	-5.1%	21,903	21,435	+2.2%
France	160,931	166,694	-3.5%	313,696	305,066	+2.8%
Germany	243,602	250,146	-2.6%	485,001	468,511	+3.5%
Greece*	5,033	3,048	+65.1%	10,361	7,137	+45.2%
Hungary	8,003	6,631	+20.7%	14,421	12,220	+18.0%
Ireland	17,128	21,573	-20.6%	56,147	61,295	-8.4%
Italy*	183,777	173,098	+6.2%	352,232	332,371	+6.0%
Latvia	1,177	1,246	-5.5%	2,622	2,336	+12.2%
Lithuania	1,639	1,407	+16.5%	3,466	2,968	+16.8%
Luxembourg	4,042	4,448	-9.1%	8,150	7,925	+2.8%
Netherlands	32,065	28,308	+13.3%	83,500	68,928	+21.1%
Norway	11,861	12,304	-3.6%	24,952	23,333	+6.9%
Poland	38,427	33,657	+14.2%	76,501	65,452	+16.9%
Portugal*	15,955	18,029	-11.5%	31,001	31,969	-3.0%
Romania*	7,284	6,426	+13.4%	13,219	11,537	+14.6%
Slovakia	8,188	6,689	+22.4%	13,575	12,119	+12.0%
Slovenia	5,680	4,762	+19.3%	12,152	10,585	+14.8%
Spain	98,840	98,489	+0.4%	182,753	175,892	+3.9%
Sweden	27,735	26,869	+3.2%	51,017	48,517	+5.2%
Switzerland	22,468	22,562	-0.4%	41,735	42,931	-2.8%
UK	83,115	83,395	-0.3%	257,679	253,073	+1.8%

FEBRUARY	
Europe-27	1,104,262
Var. Y-o-Y	+1.2%
Big 5	770,265
Var. Y-o-Y	-0.2%

YTD	
Europe-27	2,296,768
Var. Y-o-Y	+5.2%
Big 5	1,591,361
Var. Y-o-Y	+3.7%

SAAR	
Europe-27	15,605,932

* Forecast by LMCA

“Despite the recent declines in certain markets across Europe, the outlook for the industry is still positive. This slowdown is expected – as we saw dramatic increases in registrations as markets recovered from the European recession. We now anticipate growth slowing down, and the market to stabilise over the coming months. PSA’s declining market share is notable in light of recent news of the manufacturer’s takeover of Opel/Vauxhall. PSA stands to benefit from the European reach of Opel/Vauxhall, particularly in the UK and German markets. But it will be interesting to see how the two companies’ ranges are integrated and what impact this consolidation has on the industry,” commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

TOP SELLING BRANDS

	Feb/17	Var. Feb 16-17	Feb/17 YTD	Var. YTD 16-17
VOLKSWAGEN	114,527	-8.3%	253,664	+0.2%
RENAULT	79,752	+3.3%	153,347	+6.1%
FORD	71,021	-3.4%	155,759	+3.1%
OPEL/VAUXHALL	69,505	-1.9%	144,530	+1.8%
PEUGEOT	67,583	-4.9%	136,623	-0.1%
FIAT	64,532	+7.0%	126,786	+11.2%
AUDI	58,015	+0.4%	121,358	+0.9%
MERCEDES	57,282	+4.6%	123,649	+10.4%
BMW	55,523	-0.4%	116,070	+5.2%
TOYOTA	52,062	+17.1%	109,966	+18.4%
SKODA	49,894	0.0%	102,034	+5.0%
CITROEN	45,858	+0.9%	91,221	+3.2%
NISSAN	41,195	+2.1%	84,609	+3.3%
HYUNDAI	35,185	+0.5%	74,370	+4.8%
KIA	33,983	+4.6%	72,337	+11.7%
DACIA	33,018	+9.7%	66,868	+9.5%
SEAT	28,988	+13.7%	57,606	+19.2%
VOLVO	21,087	+2.5%	43,200	+7.9%
SUZUKI	18,888	+48.3%	36,089	+35.1%
MAZDA	15,986	-9.4%	34,048	-9.6%
MINI	12,257	+4.7%	24,421	+6.5%
HONDA	10,711	-8.4%	22,358	-8.2%
LAND ROVER	8,328	-12.0%	20,795	-7.7%
MITSUBISHI	8,220	-11.7%	17,135	-5.9%
JEEP	7,885	+0.2%	15,302	-2.6%
LANCIA	7,256	+5.2%	13,093	+3.9%
SMART	7,078	-15.7%	14,489	-5.6%
ALFA ROMEO	6,380	+25.8%	12,396	+28.4%
PORSCHE	4,369	-1.1%	9,650	+3.6%
JAGUAR	3,445	+43.8%	9,257	+47.6%
DS	3,334	-37.1%	7,099	-35.0%
SUBARU	2,725	-5.8%	5,417	-0.6%
LEXUS	2,446	+0.2%	6,106	+1.5%
SSANGYONG	1,304	-5.2%	2,679	+2.5%
TESLA	1,115	+100.5%	2,547	+89.7%
INFINITI	979	+78.0%	2,089	+108.5%
ABARTH	847	+44.0%	1,823	+48.2%
MASERATI	708	+89.8%	1,706	+110.9%
LADA	331	+39.1%	602	+50.9%
FERRARI	214	+13.8%	427	+11.8%
BENTLEY	204	+36.0%	572	+59.3%
CHEVROLET	127	+0.8%	276	+12.2%
MG	111	+7.8%	316	-24.0%
ASTON MARTIN	102	+59.4%	383	+120.1%
CADILLAC	73	0.0%	147	+22.5%
IVECO	65	-3.0%	108	+10.2%
LOTUS	56	-34.9%	107	-15.7%
LAMBORGHINI	55	+12.2%	107	+8.1%
MCLAREN	37	+76.2%	106	+202.9%
ROLLS-ROYCE	36	+56.5%	102	+37.8%

TOP 10 CAR GROUPS MARKET SHARE

FEB

VW Group	23.19%
PSA*	16.51%
Renault-Nissan**	14.81%
FCA	7.94%
Ford	6.43%
Hyundai-Kia	6.26%
BMW Group	6.14%
Daimler	5.83%
Toyota	4.94%
Geely	1.91%

TOP 5 MKT SHARE WINNERS & LOSERS

Toyota	+0.64
Suzuki	+0.54
FCA	+0.50
Renault-Nissan**	+0.36
Hyundai-Kia	+0.08
Honda	-0.10
Mazda	-0.17
Ford	-0.30
PSA*	-0.78
VW Group	-0.87

*Includes Opel/Vauxhall

**Includes Mitsubishi

VW Group retained its leading position, despite losing market share. Notably, VW Group sold more SUVs than midsize cars, with its Seat brand posting a huge increase thanks to the performance of its Ateca SUV model.

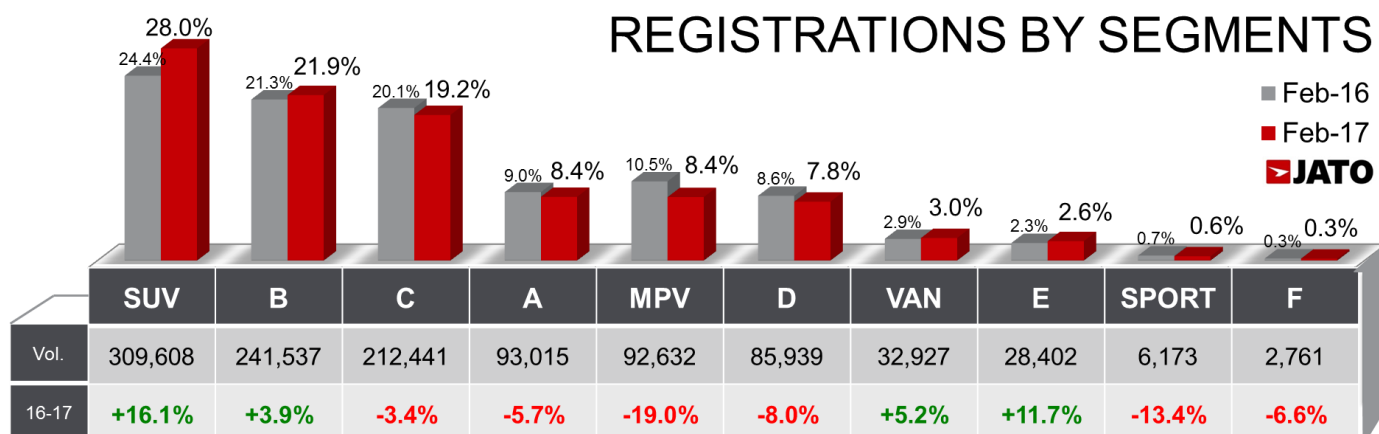
TOP SELLING MODELS

	Feb/17	Var. Feb 16-17	Feb/17 YTD	Var. YTD 16-17
GOLF	31,910	-12.0%	68,774	-6.3%
CLIO	24,415	+11.7%	49,310	+15.3%
POLO	19,678	-13.4%	43,165	-9.0%
FIESTA	19,462	-5.0%	44,373	+6.7%
PANDA	19,153	+1.2%	37,050	+2.8%
QASHQAI	19,057	+11.6%	38,316	+9.8%
CORSA	18,691	-3.5%	37,980	+1.5%
208	18,486	-10.4%	38,591	-3.5%
ASTRA	17,954	+7.2%	38,682	+15.2%
OCTAVIA	17,796	-1.6%	36,663	+3.3%
C3	17,572	+59.0%	34,565	+62.1%
TIGUAN	17,083	+59.8%	39,312	+80.8%
2008	15,361	+12.7%	30,571	+19.5%
CAPTUR	14,909	-5.0%	28,095	-7.0%
YARIS	14,532	+4.4%	30,115	+1.3%
FOCUS	13,828	-6.0%	30,643	+3.5%
SANDERO	13,351	+12.2%	28,588	+16.9%
308	13,350	-22.1%	23,214	-28.5%
PASSAT	13,294	-17.9%	29,648	-5.5%
A3	12,995	-10.1%	27,261	-9.8%
MOKKA	12,715	+5.6%	27,040	+11.5%
500	12,609	-6.5%	28,240	+4.1%
FABIA	12,387	-2.5%	26,262	+6.2%
MEGANE	11,645	+48.0%	21,319	+49.9%
C-CLASS	11,137	+3.0%	26,377	+12.8%
DUSTER	11,105	+5.0%	21,343	+2.5%
TUCSON	10,804	-8.2%	23,171	-4.6%
A4	10,257	-1.8%	22,324	+13.7%
SERIES 3	10,060	-11.9%	18,439	-9.1%
LEON	9,981	-15.6%	19,237	-12.7%
C-HR	9,187	New	18,758	New
TIPO	9,186	+257.6%	18,808	+368.3%
KUGA	9,074	+14.1%	19,019	+18.1%
AURIS	9,055	-17.0%	18,104	-18.1%
IBIZA	9,030	-4.2%	17,731	0.0%
SPORTAGE	8,960	-16.3%	20,504	-2.0%
3008 SUV (e)	8,800	New	17,162	New
X1	8,704	+38.2%	20,571	+61.9%
A-CLASS	8,693	-8.0%	17,838	-4.3%
SERIES 1	8,668	+3.5%	18,870	+9.6%
500X	8,520	0.0%	15,868	-5.5%
TOURAN	7,697	-17.8%	16,722	-8.4%
500L/LIVING	7,687	-3.5%	12,636	-12.2%
I20	7,566	+9.0%	14,578	+10.6%
MINI	7,506	+11.9%	15,420	+17.2%
E-CLASS	7,498	+45.1%	16,431	+53.2%
C4 PICASSO/GRAND	7,450	-19.3%	14,773	-15.4%
YPSILON	7,254	+5.6%	13,089	+4.3%
KADJAR	7,249	-23.3%	13,864	-20.4%
AYGO	6,758	+6.5%	14,182	+13.0%

SEGMENT SHARE	
TOP WINNER	TOP LOSER
CITY-CARS (A-SEGMENT)	
 Suzuki Ignis	 Ford Ka
SUBCOMPACTS (B-SEGMENT)	
 Citroen C3	 VW Polo
COMPACTS (C-SEGMENT)	
 Fiat Tipo	 Peugeot 308
MIDSIZE SEDAN/SW (D-SEGMENT)	
 Alfa Giulia	 VW Passat
EXECUTIVE (E-SEGMENT)	
 Volvo S90/V90	 Volvo S80/V70
LUXURY (F-SEGMENT)	
 Porsche Panamera	 Mercedes S-Class
MPVs	
 Fiat 500L	 Peugeot 3008
SUVs	
 Toyota C-HR	 Renault Kadjar
SPORT CARS	
 Fiat 124	 Porsche 911

Both the SUV and Executive segment experienced double digit growth due to the performance of the latest launches – such as the VW Tiguan, Toyota C-HR, Mercedes E-Class and Volvo S90/V90.

REGISTRATIONS BY SEGMENTS



-Ends-

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More insights:



About JATO

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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.

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