

# PRESS RELEASE

9:30 BST, 27<sup>th</sup> June 2017

London, UK

## THREE-DOOR HATCHBACKS DECLINE DESPITE EUROPEAN MARKET PERFORMING WELL WITH 7.5% INCREASE IN MAY 2017

- **European car registrations totalled 1.4 million units in May 2017, an increase of 7.5% when compared to the same month last year, and the highest May total for a decade**
- **Registrations of 3-door hatchbacks declined by 8.4% in May as European consumer preferences continued to change**
- **The Volkswagen Golf retained its position as Europe's most popular car model – with the Polo taking second place**

The European car industry returned to growth in May 2017, with new registrations for the month totalling 1.4 million – an increase of 7.5% when compared to the same month last year. In terms of volume this represents the highest total for May in the last decade, and is only 19,000 units behind the record total which occurred in May 2007. The positive performance was driven by a relatively stable economic and political situation in the majority of markets, as well as evolution in the automotive sector, with manufacturers bringing more models, new technology and purchasing routes to market.

Germany was a significant driver of the growth, the country posted an increase of 12.9%, Italy also performed well, recording an increase of 7.6% to become Europe's second largest market. Other significant markets such as Spain, Poland, the Netherlands and Austria all posted double-digit increases.

Despite the overall growth of the market, a shift became evident as sales of 2/3 door versions of city-cars, subcompacts and compacts totalled 76,800 units, which is a decline of 8.4% on the same period last year. In comparison, their 4/5 door counterparts posted a 5.1% increase, registering 594,300 units. The poor performance of 2/3 door hatchbacks is the culmination of a [longer-term decline](#) which has seen sales of hatchbacks fall from 2.45 million in 2009 to less than 1 million in 2016 as manufacturers eliminate 3-door models. This was evidenced by the launch of the new Volkswagen Polo, which despite being a subcompact, will not be offered in a 3-door version. The decline of 3-door hatchbacks can be attributed to the changing preferences of European consumers who are increasingly rational when choosing small and compact cars.

## EUROPE-27 MAY 2017 VOLUME BY COUNTRIES

	May/17	May/16	Var. May 16-17	YTD-17	YTD-16	Var. YTD 16-17
Austria	32,349	28,462	+13.7%	151,043	138,019	+9.4%
Belgium	51,343	48,856	+5.1%	267,184	254,333	+5.1%
Croatia	8,045	6,001	+34.1%	25,110	19,586	+28.2%
Czech Rep.	27,096	24,336	+11.3%	117,927	107,079	+10.1%
Denmark	22,349	21,152	+5.7%	99,956	93,276	+7.2%
Estonia	2,596	2,279	+13.9%	10,983	10,058	+9.2%
Finland	11,055	10,516	+5.1%	53,545	54,665	-2.0%
France	190,212	175,768	+8.2%	900,820	874,872	+3.0%
Germany	323,952	286,931	+12.9%	1,459,333	1,394,276	+4.7%
Greece	10,660	13,483	-20.9%	40,179	38,515	+4.3%
Hungary	10,975	8,530	+28.7%	44,022	36,342	+21.1%
Ireland	5,991	6,499	-7.8%	89,822	99,705	-9.9%
Italy	204,530	190,007	+7.6%	948,283	885,216	+7.1%
Latvia	1,545	1,415	+9.2%	7,031	6,761	+4.0%
Lithuania	2,351	2,160	+8.8%	10,123	8,789	+15.2%
Luxembourg	5,518	5,011	+10.1%	23,723	23,209	+2.2%
Netherlands	36,353	29,074	+25.0%	185,264	155,377	+19.2%
Norway	14,599	13,159	+10.9%	64,698	64,951	-0.4%
Poland	39,721	32,969	+20.5%	205,583	172,156	+19.4%
Portugal*	22,879	20,851	+9.7%	101,563	95,257	+6.6%
Romania	8,062	6,345	+27.1%	36,961	29,990	+23.2%
Slovakia	9,156	8,265	+10.8%	39,040	35,469	+10.1%
Slovenia	6,786	6,325	+7.3%	31,477	28,488	+10.5%
Spain	127,896	113,749	+12.4%	540,165	503,775	+7.2%
Sweden	35,326	34,475	+2.5%	155,206	151,284	+2.6%
Switzerland	27,810	25,851	+7.6%	125,233	126,295	-0.8%
UK	186,265	203,585	-8.5%	1,158,357	1,164,870	-0.6%

\* Forecast by LMCA

MAY	
Europe-27	1,425,420
Var. Y-o-Y	+7.5%
Big 5	1,032,855
Var. Y-o-Y	+6.5%

YTD	
Europe-27	6,892,631
Var. Y-o-Y	+4.9%
Big 5	5,006,958
Var. Y-o-Y	+3.8%

SAAR	
Europe-27	16,074,419

“Overall, the market has returned to growth, driven by double-digit increases in many of Europe’s major markets. Amidst this, a shift is taking place with hatchbacks in decline. The presentation of the new VW Polo in June with the omission of a 3-door model is a symptom of a fundamental decline that could see 3-door hatchbacks vanishing from roads. There are many reasons for this, but the increasing practicality of cautious consumers is a major factor. As manufacturers shun 3-door vehicles meaning less choice for customers, the 3-door hatch - once a synonym for sportiness - could soon be consigned to history,” commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

## TOP SELLING BRANDS

		May/17	Var. May 16-17	YTD-17	Var. YTD 16-17
1	VOLKSWAGEN	161,327	+8.7%	740,316	0.0%
2	RENAULT	104,694	+3.1%	488,603	+6.3%
3	FORD	92,624	+5.7%	489,835	+5.2%
4	OPEL/VAUXHALL	85,888	-1.7%	431,684	-1.3%
5	PEUGEOT	84,027	+4.7%	405,781	+2.9%
6	MERCEDES	83,957	+20.2%	386,429	+11.8%
7	FIAT	83,310	+14.6%	371,453	+10.5%
8	AUDI	76,154	+1.6%	364,961	-0.5%
9	BMW	71,483	+2.5%	353,878	+3.3%
10	SKODA	67,532	+15.6%	299,685	+6.2%
11	TOYOTA	59,118	+19.2%	303,844	+16.3%
12	CITROEN	55,615	+8.1%	264,349	+4.3%
13	NISSAN	47,096	+5.6%	260,304	+5.4%
14	HYUNDAI	45,721	+7.7%	218,053	+3.1%
15	DACIA	45,319	+21.9%	193,429	+9.0%
16	KIA	40,467	+5.2%	203,246	+7.8%
17	SEAT	34,664	+12.7%	171,829	+16.9%
18	VOLVO	26,421	+11.4%	130,692	+8.9%
19	SUZUKI	21,163	+24.5%	103,841	+24.3%
20	MINI	18,844	+4.9%	86,383	+3.7%
21	MAZDA	18,346	-2.6%	98,115	-6.0%
22	LAND ROVER	13,146	-8.2%	78,153	0.0%
23	HONDA	10,625	-12.7%	63,722	-13.7%
24	MITSUBISHI	10,402	+3.2%	50,589	-4.7%
25	SMART	9,665	-4.5%	43,520	-7.6%
26	JEEP	9,154	-7.0%	44,242	-1.9%
27	ALFA ROMEO	8,237	+49.2%	37,170	+41.0%
28	PORSCHE	7,610	+13.2%	33,185	+5.2%
29	JAGUAR	6,031	+6.0%	33,696	+33.5%
30	LANCIA	5,351	-28.7%	32,749	-5.0%
31	DS	3,782	-36.6%	20,483	-36.3%
32	LEXUS	3,373	-4.2%	18,434	-1.1%
33	SUBARU	2,939	-5.5%	15,571	-7.5%
34	ABARTH	1,948	+40.4%	8,790	+33.0%
35	TESLA	1,659	+220.3%	9,168	+81.0%
36	SSANGYONG	1,610	-4.2%	8,103	-3.5%
37	INFINITI	1,239	+1.6%	6,387	+29.3%
38	MASERATI	805	+44.3%	4,611	+75.8%
39	LADA	425	-4.3%	1,852	+31.4%
40	MG	395	+33.4%	1,680	+7.6%
41	CHEVROLET	320	+133.6%	1,059	+50.2%
42	BENTLEY	314	+14.2%	1,777	+26.2%
43	FERRARI	308	0.0%	1,533	+5.4%
44	ASTON MARTIN	266	+91.4%	1,377	+100.7%
45	IVECO	116	+43.2%	448	+22.7%
46	LAMBORGHINI	105	+12.9%	407	+6.5%
47	CADILLAC	94	+113.6%	367	+20.3%
48	MCLAREN	91	+160.0%	339	+151.1%
49	LOTUS	67	-10.7%	352	+2.0%
50	DODGE	64	-3.0%	228	-16.2%

### TOP 10 CAR GROUPS MARKET SHARE

**MAY**

VW Group	24.39%
PSA*	16.09%
Renault-Nissan**	14.67%
FCA	7.64%
Daimler	6.57%
Ford	6.50%
BMW Group	6.34%
Hyundai-Kia	6.05%
Toyota	4.38%
Geely	1.85%

### TOP 5 MKT SHARE WINNERS & LOSERS

Daimler	+0.54
Toyota	+0.38
VW Group	+0.29
FCA	+0.28
Suzuki	+0.20
Mazda	-0.13
Tata Group	-0.16
Honda	-0.17
BMW Group	-0.28
PSA*	-0.88

\*Includes Opel/Vauxhall

\*\*Includes Mitsubishi

VW Group increased its market share following months of decline, as a result of the strong performance of the Skoda and Seat brands, both posted double-digit growth, whilst the Volkswagen brand registered an 8.7% increase.

## TOP SELLING MODELS

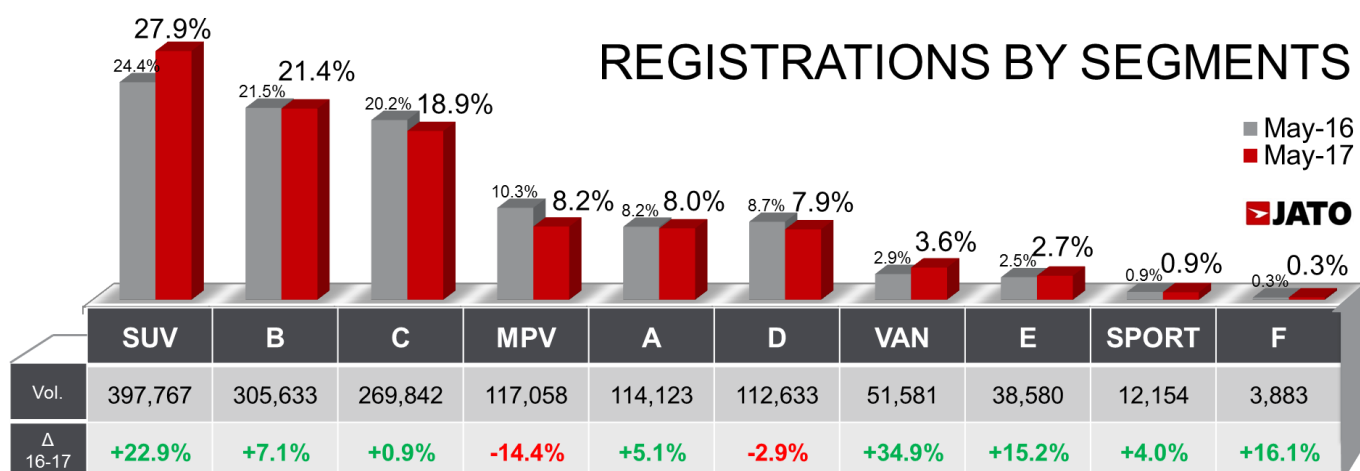
		May/17	Var. May 16-17	YTD-17	Var. YTD 16-17
1	GOLF	42,739	-1.7%	192,469	-13.3%
2	POLO	31,034	+12.5%	139,366	+2.2%
3	CLIO	30,842	-0.1%	147,420	+8.0%
4	FIESTA	24,592	+4.8%	133,954	+3.2%
5	CORSA	22,165	-7.9%	116,553	-2.3%
6	208	21,859	-3.9%	108,793	-4.9%
7	QASHQAI	21,566	+10.3%	113,883	+10.3%
8	OCTAVIA	21,503	+6.8%	97,654	-1.3%
9	TIGUAN	21,247	+111.3%	107,220	+81.9%
10	ASTRA	20,695	-1.4%	109,425	+6.7%
11	C3	20,562	+83.9%	95,751	+63.0%
12	SANDERO	20,513	+29.3%	83,369	+13.0%
13	PASSAT	20,400	+9.3%	78,068	-15.5%
14	500	19,994	+23.0%	89,672	+6.2%
15	PANDA	18,879	+3.7%	92,957	+0.7%
16	2008	17,760	+3.2%	87,354	+10.7%
17	FABIA	17,473	+12.1%	79,144	+6.7%
18	YARIS	17,294	+5.5%	83,047	-2.3%
19	MOKKA	17,029	+13.5%	78,888	+8.9%
20	FOCUS	16,836	-10.4%	96,905	-1.9%
21	CAPTUR	16,587	-16.9%	88,310	-5.1%
22	MEGANE	16,399	+30.4%	73,119	+45.3%
23	C-CLASS	16,301	+13.3%	80,400	+12.2%
24	TIPO	15,521	+224.0%	61,902	+258.0%
25	A3	15,397	-14.8%	76,913	-14.4%
26	308	15,391	-20.6%	75,814	-18.2%
27	3008 SUV	15,189	New	58,684	New
28	TUCSON	13,855	+8.2%	66,477	+2.9%
29	A4	13,559	-11.9%	65,784	-3.1%
30	A-CLASS	13,268	+3.7%	62,063	+4.0%
31	LEON	13,198	-4.6%	63,788	-2.5%
32	DUSTER	13,154	+6.3%	60,464	+1.2%
33	E-CLASS	12,726	+40.0%	55,867	+37.4%
34	MINI	11,929	+1.1%	57,068	+7.5%
35	SERIES 1	11,907	+10.5%	58,421	+11.8%
36	KUGA	11,765	+9.0%	63,346	+23.2%
37	SCENIC/GRAND	11,469	+35.9%	37,263	+2.2%
38	SPORTAGE	11,250	-10.3%	59,391	-7.3%
39	SERIES 3	10,684	-15.0%	58,474	-5.5%
40	TOURAN	10,311	-7.6%	48,963	-2.1%
41	C-HR	10,264	New	51,785	New
42	AURIS	10,193	-4.9%	52,319	-10.6%
43	X1	10,162	+28.1%	54,014	+40.4%
44	C4 PICASSO/GRAND	10,054	-6.6%	45,794	-9.8%
45	KADJAR	10,020	-8.8%	50,246	-8.1%
46	IBIZA	9,940	-11.3%	50,765	-8.3%
47	SERIES 5	9,899	+44.4%	39,560	+15.7%
48	500X	9,436	-8.9%	44,047	-11.3%
49	GLC-CLASS/COUPE	9,369	+87.1%	41,819	+49.6%
50	A1	9,155	-2.3%	37,675	-15.2%

SEGMENT SHARE MAY	
TOP WINNER	TOP LOSER
<b>CITY-CARS (A-SEGMENT)</b>	
 Suzuki Ignis	 Ford Ka
<b>SUBCOMPACTS (B-SEGMENT)</b>	
 Citroen C3	 Opel Corsa
<b>COMPACTS (C-SEGMENT)</b>	
 Fiat Tipo	 Peugeot 308
<b>MIDSIZE SEDAN/SW (D-SEGMENT)</b>	
 Audi A5	 Opel Insignia
<b>EXECUTIVE (E-SEGMENT)</b>	
 Volvo S90/V90	 Volvo S80/V70
<b>LUXURY (F-SEGMENT)</b>	
 Porsche Panamera	 BMW 7-Series
<b>MPVs</b>	
 Renault Scenic	 Peugeot 3008
<b>SUVs</b>	
 Peugeot 3008	 Renault Captur
<b>SPORT CARS</b>	
 Fiat 124	 Audi TT



SUVs were a major driver of growth, accounting for 28% of the total market as a result of a 22.9% increase in registrations. The VW Golf maintained its lead but lost ground, whilst the Polo was the second best performing car.

## REGISTRATIONS BY SEGMENTS



-Ends-

### Contact:

Nick Lawrie / Laura Eagar, +44 (0) 203 617 7240, [jatoteam@firstlightpr.com](mailto:jatoteam@firstlightpr.com)

Felipe Munoz, +44 7482 077064, [felipe.munoz@jato.com](mailto:felipe.munoz@jato.com)

### More insights:



### 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. Visit JATO at [www.jato.com](http://www.jato.com) for more information.

**For media use only.** Advertising and/or any other promotional use of the information contained within this release must be pre-agreed with JATO Dynamics Ltd.