

PRESS RELEASE

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BREXIT UNCERTAINTY CAUSED UK REGISTRATIONS TO DECLINE IN H1 2017, AS EUROPE'S OTHER LARGE MARKETS CONTINUED TO GROW

- **European car registrations experienced the highest H1 total since 2007, with a total of 8.4 million registrations, meaning Europe was a region helping to drive growth in terms of automotive sales**
- **Registrations totalled 1.5 million units in June 2017, an increase of 1.9% when compared to the same month last year, and the highest June total for a decade**
- **The Volkswagen Golf, Europe's most popular car model, saw its volume drop by 11.6% for H1 2017**

The European car industry continued to grow in June 2017, with new registrations for the month totalling 1.5 million – an increase of 1.9% when compared to the same month last year. In terms of volume this represents the highest total for June in the last decade, and is only 22,000 units behind the record total which occurred in June 2007. This performance concluded the strongest H1 since 2007, with a total of 8.4 million registrations for the half year, an increase of 4.3% on H1 2016. However, growth in the region is slowing following the exceptional performance of recent years; in comparison, 2016 saw growth of 9.1% on the previous year.

Four of Europe's five largest markets - Germany, France, Italy and Spain – led this growth, with their collective H1 registrations up by 4.7% to 4.7 million units. This can largely be attributed to the healthy economic performance of Germany, and Italy's increased stability and economic recovery. The European region is helping to drive growth in terms of automotive registrations, in comparison, the USA experienced a fall in car sales of 2.1% over the same period, whilst China saw registrations grow by a modest 2.6%.

Despite the strong performance across Europe, the UK was one of only five markets that posted a decline in registrations for H1 2017. The UK posted a fall in registrations of 1.3% compared to H1 2016. This decline comes after five consecutive periods of H1 growth for the UK - registrations jumped from 1.0 million units in H1 2011 to 1.4 in H1 2016. The negative performance demonstrates that Brexit has begun to impact the automotive market, with consumers delaying purchase amidst economic uncertainty.

EUROPE-27 H1 & JUNE 2017 VOLUME BY COUNTRIES

	H1-17	H1-16	Var. H1 16-17	Jun-17	Jun-16	Var. Jun 16-17
Austria	186,561	171,770	+8.6%	35,441	33,751	+5.0%
Belgium	322,301	309,605	+4.1%	55,118	55,272	-0.3%
Croatia	31,982	25,728	+24.3%	6,797	6,142	+10.7%
Czech Rep.	144,452	132,780	+8.8%	26,634	25,714	+3.6%
Denmark	123,945	116,921	+6.0%	23,989	23,645	+1.5%
Estonia	13,707	12,080	+13.5%	2,728	2,022	+34.9%
Finland	64,407	65,415	-1.5%	10,862	10,750	+1.0%
France	1,130,578	1,102,147	+2.6%	229,757	227,273	+1.1%
Germany	1,787,026	1,733,839	+3.1%	327,693	339,563	-3.5%
Greece	50,309	47,367	+6.2%	10,135	8,847	+14.6%
Hungary	54,810	46,056	+19.0%	10,820	9,714	+11.4%
Ireland	91,190	101,329	-10.0%	1,397	1,624	-14.0%
Italy	1,136,395	1,052,411	+8.0%	188,037	167,195	+12.5%
Latvia	8,618	8,698	-0.9%	1,591	1,937	-17.9%
Lithuania	12,794	10,688	+19.7%	2,672	1,899	+40.7%
Luxembourg*	28,078	28,315	-0.8%	4,338	5,106	-15.0%
Netherlands	226,431	194,808	+16.2%	41,167	39,431	+4.4%
Norway	79,332	78,998	+0.4%	14,634	14,047	+4.2%
Poland	248,020	210,711	+17.7%	41,881	38,555	+8.6%
Portugal	127,186	118,626	+7.2%	24,834	23,369	+6.3%
Romania	45,008	35,452	+27.0%	8,030	5,462	+47.0%
Slovakia	48,588	43,771	+11.0%	9,543	8,302	+14.9%
Slovenia	39,032	34,980	+11.6%	7,555	6,492	+16.4%
Spain	673,535	628,957	+7.1%	133,371	125,181	+6.5%
Sweden	193,530	187,591	+3.2%	38,324	36,307	+5.6%
Switzerland	157,569	157,388	+0.1%	31,509	31,093	+1.3%
UK	1,401,811	1,420,636	-1.3%	243,454	255,766	-4.8%

* Forecast by JATO

H1-17	
Europe-27	8,427,195
Var. Y-o-Y	+4.3%
Big 5	6,129,345
Var. Y-o-Y	+3.2%

JUN-17	
Europe-27	1,532,311
Var. Y-o-Y	+1.9%
Big 5	1,122,312
Var. Y-o-Y	+0.7%

SAAR	
Europe-27	15,735,888

“Overall, the market is looking healthy in Europe, with the strongest H1 performance since 2007. In particular, the Central and Eastern European markets have grown strongly this year and with some of them recording record levels of employment this trend looks set to continue. However, it’s notable that the UK is experiencing a slowdown in registrations which can be attributed to uncertainty about the nature of the country’s exit from the EU. Until there is clarity over how Brexit will work and what the UK’s relationship with the EU will look like, the UK market may continue to decline, whilst the rest of Europe continues to grow.” commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

TOP SELLING BRANDS

		H1-17	Var. H1 16-17	Jun-17	Var. Jun 16-17
1	VOLKSWAGEN	905,148	0.0%	164,726	-0.1%
2	RENAULT	623,606	+4.9%	134,196	-0.2%
3	FORD	589,644	+3.8%	99,846	-2.7%
4	OPEL/VAUXHALL	526,221	-2.4%	94,495	-7.2%
5	PEUGEOT	499,064	+3.9%	92,827	+8.1%
6	MERCEDES	472,761	+10.8%	86,551	+6.7%
7	FIAT	451,445	+10.2%	79,492	+8.1%
8	AUDI	439,264	-0.7%	74,569	-1.0%
9	BMW	432,919	+1.9%	79,085	-3.8%
10	SKODA	368,043	+5.9%	68,441	+4.8%
11	TOYOTA	365,680	+15.8%	61,562	+13.0%
12	CITROEN	323,089	+4.0%	58,694	+2.6%
13	NISSAN	314,566	+5.4%	53,939	+4.9%
14	HYUNDAI	266,818	+3.1%	48,596	+2.6%
15	KIA	243,952	+5.9%	40,617	-2.9%
16	DACIA	241,327	+9.5%	47,768	+10.9%
17	SEAT	212,218	+16.9%	40,244	+16.5%
18	VOLVO	160,024	+7.2%	29,369	+0.3%
19	SUZUKI	126,555	+22.9%	22,666	+16.7%
20	MAZDA	119,915	-6.0%	21,790	-6.0%
21	MINI	110,395	+2.8%	24,078	0.0%
22	LAND ROVER	92,317	+0.3%	14,146	+1.5%
23	HONDA	75,784	-14.3%	12,298	-15.9%
24	MITSUBISHI	61,859	-3.2%	11,279	+4.3%
25	JEEP	53,570	-2.6%	9,322	-5.8%
26	SMART	52,832	-8.3%	9,310	-11.5%
27	ALFA ROMEO	46,204	+39.7%	9,078	+35.3%
28	PORSCHE	40,486	+7.1%	7,289	+16.3%
29	JAGUAR	39,780	+24.7%	6,103	-8.3%
30	LANCIA	37,370	-7.2%	4,627	-19.8%
31	DS	25,102	-37.0%	4,541	-40.7%
32	LEXUS	22,540	-0.5%	4,103	+1.9%
33	SUBARU	18,665	-8.4%	3,078	-12.7%
34	TESLA	12,157	+78.6%	2,972	+70.5%
35	ABARTH	10,941	+39.9%	2,146	+77.5%
36	SSANGYONG	9,762	-5.1%	1,657	-12.7%
37	INFINITI	7,689	+13.5%	1,299	-29.2%
38	MASERATI	5,506	+66.4%	893	+30.2%
39	LADA	2,301	+26.4%	449	+9.2%
40	BENTLEY	2,147	+24.0%	369	+14.2%
41	MG	1,994	+5.1%	314	-6.5%
42	FERRARI	1,873	+6.4%	339	+10.4%
43	ASTON MARTIN	1,593	+91.2%	214	+45.6%
44	CHEVROLET	1,423	+66.0%	362	+138.2%
45	IVECO	542	+22.6%	94	+22.1%
46	LAMBORGHINI	504	-3.6%	96	-31.9%
47	CADILLAC	490	+34.6%	123	+108.5%
48	LOTUS	439	+9.5%	86	+53.6%
49	MCLAREN	420	+141.4%	81	+107.7%
50	ROLLS-ROYCE	383	+7.6%	59	-24.4%

TOP 10 CAR GROUPS MARKET SHARE

H1-17

VW Group	23.35%
PSA*	16.30%
Renault-Nissan**	14.85%
FCA	7.18%
Ford	7.00%
BMW Group	6.45%
Daimler	6.24%
Hyundai-Kia	6.06%
Toyota	4.61%
Geely	1.90%

TOP 5 MKT SHARES WINNERS & LOSERS

Toyota	+0.42
FCA	+0.38
Daimler	+0.24
Suzuki	+0.23
Renault-Nissan**	+0.17
BMW Group	-0.15
Mazda	-0.16
Honda	-0.20
VW Group	-0.38
PSA*	-0.66


*Includes Opel/Vauxhall

**Includes Mitsubishi

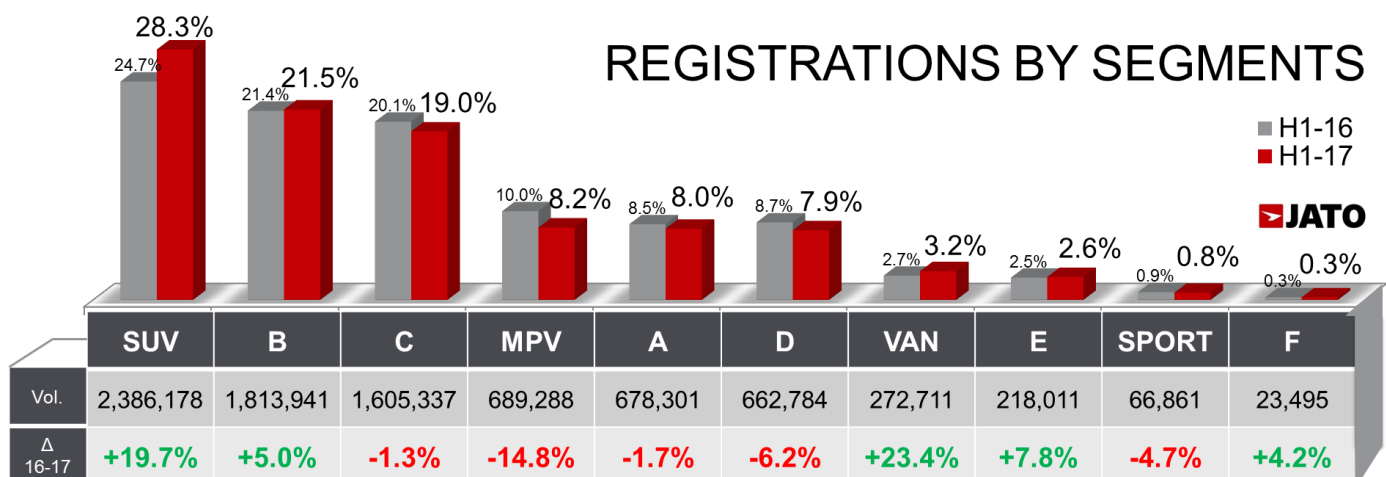
VW Group's market share decreased – it fell from 23.7% in H1 2016 to 23.3% in H1 2017. This was the second highest fall in market share, only PSA experienced a larger decline with its market share declining by 0.6 percentage points of share.

TOP SELLING MODELS

		H1-17	Var. H1 16-17	Jun-17	Var. Jun 16-17
1	GOLF	237,405	-11.6%	44,684	-2.9%
2	CLIO	183,994	+6.3%	36,134	-1.5%
3	POLO	171,554	+3.0%	32,021	+5.7%
4	FIESTA	156,424	-1.6%	22,445	-22.9%
5	CORSA	138,703	-5.9%	22,024	-21.8%
6	QASHQAI	136,239	+8.4%	22,339	-0.4%
7	ASTRA	133,709	+3.4%	24,382	-9.1%
8	208	132,103	-4.5%	22,974	-4.2%
9	TIGUAN	127,392	+75.2%	20,125	+46.0%
10	OCTAVIA	120,020	-0.6%	22,376	+2.8%
11	FOCUS	119,197	-0.9%	22,377	+3.8%
12	C3	116,371	+62.5%	20,696	+60.8%
13	CAPTUR	112,263	-5.2%	23,963	-5.5%
14	PANDA	110,587	+0.9%	17,527	+1.7%
15	500	108,348	+5.0%	18,700	-0.3%
16	2008	105,138	+9.4%	17,738	+3.5%
17	SANDERO	104,861	+14.4%	21,351	+19.5%
18	YARIS	101,871	-2.1%	18,579	-2.6%
19	C-CLASS	97,380	+10.2%	17,022	+1.7%
20	FABIA	96,787	+5.3%	17,701	-0.3%
21	MOKKA	96,341	+8.1%	17,444	+5.0%
22	PASSAT	95,209	-14.7%	17,133	-10.9%
23	308	92,698	-18.5%	16,901	-19.7%
24	MEGANE	92,690	+32.7%	19,546	+0.2%
25	A3	90,549	-13.3%	13,627	-6.8%
26	3008 SUV	82,448	New	17,942	New
27	TUCSON	79,410	+0.5%	12,887	-10.3%
28	LEON	78,735	-1.7%	14,821	+0.8%
29	KUGA	78,430	+23.9%	15,040	+26.7%
30	A4	78,107	-8.5%	12,364	-29.2%
31	TIPO	78,070	+246.5%	16,046	+206.3%
32	A-CLASS	74,961	+1.8%	13,008	-7.0%
33	DUSTER	74,011	-0.2%	13,557	-6.3%
34	MINI	72,904	+5.2%	15,826	-2.3%
35	SERIES 3	71,849	-4.7%	13,500	-0.2%
36	SERIES 1	71,235	+7.6%	12,720	-8.8%
37	SPORTAGE	70,976	-8.6%	11,593	-14.5%
38	E-CLASS	68,212	+36.8%	12,374	+34.8%
39	IBIZA	64,014	-5.7%	13,212	+5.3%
40	KADJAR	63,095	-10.7%	12,664	-20.8%
41	AURIS	62,712	-11.3%	10,428	-14.4%
42	C-HR	61,544	New	9,749	New
43	X1	61,223	+29.3%	7,218	-18.7%
44	TOURAN	59,250	-4.9%	10,282	-16.3%
45	C4 PICASSO/GRAND	57,417	-9.4%	11,607	-7.9%
46	I20	55,006	+12.9%	10,927	+23.7%
47	UP	53,441	-2.3%	9,551	-13.9%
48	SCENIC/GRAND	53,177	+10.0%	15,917	+34.1%
49	500X	52,814	-13.2%	8,733	-21.7%
50	XC60	52,134	+34.6%	10,298	+21.9%

SEGMENT SHARE H1-17	
TOP WINNER	TOP LOSER
CITY-CARS (A-SEGMENT)	
 Suzuki Ignis	 Ford Ka
SUBCOMPACTS (B-SEGMENT)	
 Citroen C3	 Opel Corsa
COMPACTS (C-SEGMENT)	
 Fiat Tipo	 VW Golf
MIDSIZE SEDAN/SW (D-SEGMENT)	
 Mercedes C-Class	 VW Passat
EXECUTIVE (E-SEGMENT)	
 Volvo S90/V90	 Volvo S80/V70
LUXURY (F-SEGMENT)	
 Porsche Panamera	 Mercedes S-Class
MPVs	
 Renault Scenic	 Peugeot 3008
SUVs	
 Peugeot 3008	 Renault Captur
SPORT CARS	
 Fiat 124	 Audi TT

The market continued to be driven by SUVs such as the VW Tiguan and Peugeot 3008. In the compact segment, the VW Golf leads, but its volume for H1 2017 fell by 11.6%, whilst the Renault Megane experienced growth of 32.7%.



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More insights:



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