

PRESS RELEASE

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EUROPEAN REGISTRATIONS OF B-SUVS INCREASED BY 16% IN JULY, AHEAD OF THE LAUNCH OF THE VOLKSWAGEN T-ROC

- European car registrations grew by 2.6% in July with a total of 1.19 million registrations, however, growth in the UK declined by 9.3% due to uncertainty around Brexit
- France contributed significantly to the positive performance of the region as a result of strong growth in registrations, which was led by demand for local car makers
- The B-SUV segment increased its share of the market to over 10% and volume increased by 16%, showing the strength of the segment as [Volkswagen launches the T-Roc](#)

The European car industry continued to grow in July 2017, with new registrations for the month totalling 1.19 million units, which was an increase of 2.6% on the same period last year. This represents the best July result since 2009, and the best result for the January – July period since 2008, indicating that 2017 is shaping up to match or even exceed the record result seen in 2007. However, despite this strong performance, growth is slowing. Uncertainty caused by Brexit for the UK market resulted in registrations for the country declining by 9.3% when compared to July 2016. In contrast, France contributed greatly to the positive overall performance of Europe, registering a 10.8% increase on the same period last year as a result of higher private purchases and strong increases from the country's local car manufacturers. Notably, Poland also recorded an outstanding result, registering a significant 17.8% increase in growth, meaning that the country is now one of Europe's six largest car markets due to increased purchases by institutional customers.

Significantly, in July, most new purchasers opted for small, compact and midsize SUVs. While most traditional passenger car segments posted declines during the month, SUVs increased their volume by 18.3% to more than 350,000 units, as a result they accounted for a record 29.4% share of the market. The market share of the B-SUV segment notably surpassed the 10% mark, with the volume up by 16% to almost 121,000 units in July and almost 1 million units for the year to date. This volume increase can be attributed to the new Toyota C-HR, Audi Q2, Opel/Vauxhall Crossland X and the new Mini Countryman.

EUROPE-27 JULY 2017 VOLUME BY COUNTRIES

	Jul-17	Jul-16	Var. Jul 16-17	YTD-17	YTD-16	Var. YTD 16-17
Austria	27,731	26,881	+3.2%	214,292	198,651	+7.9%
Belgium	36,627	34,373	+6.6%	358,929	343,979	+4.3%
Croatia	3,976	3,511	+13.2%	35,958	29,239	+23.0%
Czech Rep.	19,649	18,739	+4.9%	164,100	151,517	+8.3%
Denmark	15,222	15,736	-3.3%	139,167	132,657	+4.9%
Estonia	2,068	1,937	+6.8%	15,775	14,017	+12.5%
Finland	8,842	8,331	+6.1%	73,249	73,746	-0.7%
France	147,220	132,893	+10.8%	1,277,797	1,235,038	+3.5%
Germany	283,080	278,866	+1.5%	2,070,106	2,012,705	+2.9%
Greece	8,419	7,028	+19.8%	58,734	54,399	+8.0%
Hungary	9,336	8,076	+15.6%	64,143	54,132	+18.5%
Ireland	27,748	29,883	-7.1%	118,937	131,212	-9.4%
Italy	145,797	138,495	+5.3%	1,282,192	1,190,906	+7.7%
Latvia	1,408	1,257	+12.0%	10,026	9,955	+0.7%
Lithuania	1,769	1,651	+7.1%	14,563	12,339	+18.0%
Luxembourg	4,529	4,141	+9.4%	33,475	32,456	+3.1%
Netherlands	32,475	31,160	+4.2%	258,907	225,968	+14.6%
Norway	11,837	11,371	+4.1%	91,169	90,369	+0.9%
Poland	36,809	31,260	+17.8%	284,829	241,971	+17.7%
Portugal*	19,972	15,632	+27.8%	147,158	134,258	+9.6%
Romania	11,335	10,768	+5.3%	56,336	46,220	+21.9%
Slovakia	7,913	6,828	+15.9%	56,501	50,599	+11.7%
Slovenia	5,310	5,062	+4.9%	44,342	40,042	+10.7%
Spain	111,553	108,768	+2.6%	785,090	737,724	+6.4%
Sweden	24,722	24,197	+2.2%	218,253	211,789	+3.1%
Switzerland	24,327	25,916	-6.1%	182,180	183,303	-0.6%
UK	161,997	178,523	-9.3%	1,563,808	1,599,159	-2.2%

* Forecast by LMC

JUL-17	
Europe-27	1,191,671
Var. Y-o-Y	+2.6%
Big 5	849,647
Var. Y-o-Y	+1.4%

YTD-17	
Europe-27	9,620,016
Var. Y-o-Y	+4.1%
Big 5	6,978,993
Var. Y-o-Y	+3.0%

SAAR	
Europe-27	14,545,036

“In general, the market is performing well, but growth is slowing, in particular in the UK as the uncertainty around Brexit continues to bite. On a segment level, a shift is happening in the B-SUV market. As many of the current B-SUV vehicles available on the market age and are replaced, the segment’s traditional leaders such as the Peugeot 2008, Nissan Juke and Fiat 500X are posting lower increases or even declines. However, consumer demand still exists. This will have a positive impact on the newly launched Volkswagen T-Roc, which will hit the market just as many of its rivals such as the Nissan Juke and Dacia Duster are set to be replaced. Given the importance of the segment, it is hugely significant that Europe’s best-selling brand - Volkswagen - is entering the B-SUV market,” commented Felipe Munoz, Global Automotive Analyst at JATO Dynamics.

TOP SELLING BRANDS

		Jul-17	Var. Jul 16-17	YTD-17	Var. YTD 16-17
1	VOLKSWAGEN	130,356	-4.7%	1,035,610	-0.6%
2	FORD	77,033	-8.4%	666,712	+2.2%
3	RENAULT	76,636	+7.0%	700,387	+5.2%
4	MERCEDES	74,012	+11.5%	546,931	+10.9%
5	OPEL/VAUXHALL	69,930	-8.4%	596,235	-3.1%
6	PEUGEOT	69,707	+9.7%	568,816	+4.6%
7	AUDI	69,522	+4.4%	508,857	0.0%
8	BMW	57,767	-1.2%	490,764	+1.5%
9	FIAT	56,418	-2.9%	507,932	+8.6%
10	TOYOTA	54,137	+21.6%	419,843	+16.5%
11	SKODA	52,754	+6.2%	420,850	+6.0%
12	CITROEN	44,797	+8.9%	367,873	+4.5%
13	HYUNDAI	42,490	+1.3%	309,321	+2.9%
14	NISSAN	40,913	0.0%	355,481	+4.7%
15	DACIA	40,673	+6.0%	282,009	+8.9%
16	KIA	40,196	+9.5%	284,160	+6.4%
17	SEAT	32,511	+9.1%	244,780	+15.8%
18	VOLVO	21,518	+0.1%	181,550	+6.3%
19	SUZUKI	19,127	+15.5%	145,697	+21.9%
20	MAZDA	18,016	+2.1%	137,944	-5.0%
21	MINI	14,756	-1.4%	125,175	+2.3%
22	LAND ROVER	12,579	+9.7%	104,913	+1.3%
23	HONDA	9,862	-10.3%	85,645	-13.9%
24	MITSUBISHI	9,192	+10.8%	71,070	-1.5%
25	JEEP	8,038	-1.7%	61,575	-2.5%
26	SMART	7,522	+2.9%	60,364	-7.1%
27	ALFA ROMEO	7,213	+39.0%	53,439	+39.7%
28	PORSCHE	6,177	+21.8%	46,698	+8.9%
29	JAGUAR	4,608	-16.6%	44,409	+18.6%
30	LANCIA	4,260	-7.1%	41,629	-7.2%
31	DS	3,600	-26.9%	28,692	-35.9%
32	LEXUS	3,281	+5.6%	25,831	+0.3%
33	SUBARU	2,320	-8.0%	20,982	-8.3%
34	ABARTH	1,767	+87.2%	12,717	+45.1%
35	SSANGYONG	1,247	-18.6%	11,015	-6.8%
36	TESLA	1,090	+76.4%	13,264	+78.6%
37	INFINITI	1,015	-42.5%	8,686	+1.7%
38	MASERATI	824	+36.2%	6,330	+61.7%
39	LADA	420	+39.1%	2,723	+28.3%
40	BENTLEY	344	+4.9%	2,494	+21.1%
41	MG	305	0.0%	2,299	+4.4%
42	FERRARI	301	+18.5%	2,183	+8.3%
43	CHEVROLET	287	+34.1%	1,720	+60.6%
44	ASTON MARTIN	154	+105.3%	1,751	+92.8%
45	LAMBORGHINI	94	+1.1%	599	-2.8%
46	CADILLAC	89	+134.2%	582	+44.8%
47	MCLAREN	84	+140.0%	504	+141.1%
48	ROLLS-ROYCE	83	0.0%	466	+6.2%
49	LOTUS	73	+55.3%	514	+14.7%
50	IVECO	69	-6.8%	607	+17.6%

TOP 10 CAR GROUPS MARKET SHARE

JUL-17

VW Group	24.48%
PSA*	15.78%
Renault-Nissan**	14.17%
Hyundai-Kia	6.94%
Daimler	6.84%
FCA	6.59%
Ford	6.46%
BMW Group	6.10%
Toyota	4.82%
Geely	1.81%

TOP 5 MKT SHARE WINNERS & LOSERS

Toyota	+0.72
Daimler	+0.50
Renault-Nissan**	+0.28
Suzuki	+0.18
Hyundai-Kia	+0.17
Honda	-0.12
PSA*	-0.23
BMW Group	-0.24
VW Group	-0.35
Ford	-0.78

*Includes Opel/Vauxhall

**Includes Mitsubishi

VW Group's market share continued to fall – declining from 24.8% to 24.5%, however, its volume increased by 1.2%. This can be attributed to the strong performances of the Seat and Porsche brands.

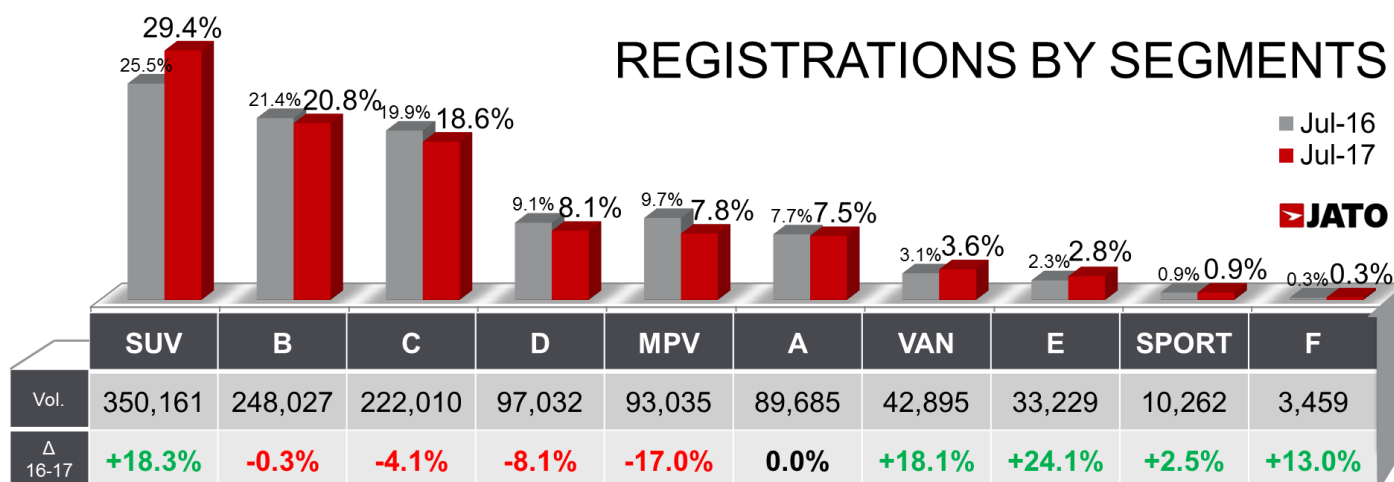
TOP SELLING MODELS

		Jul-17	Var. Jul 16-17	YTD-17	Var. YTD 16-17
1	GOLF	36,604	+0.8%	274,010	-10.2%
2	POLO	23,600	-4.5%	195,118	+2.0%
3	CLIO	21,436	+5.4%	205,448	+6.2%
4	OCTAVIA	18,131	+8.7%	138,136	+0.5%
5	208	17,596	-2.2%	149,686	-4.3%
6	QASHQAI	17,543	-4.3%	153,767	+6.8%
7	SANDERO	17,451	+8.6%	122,315	+13.5%
8	YARIS	16,885	+15.0%	118,762	0.0%
9	FOCUS	16,578	-5.2%	135,784	-1.5%
10	CORSA	16,256	-15.4%	154,951	-7.0%
11	500	16,160	+22.8%	124,554	+7.0%
12	TIGUAN	15,918	+10.3%	143,373	+64.5%
13	C3	15,834	+67.5%	132,201	+63.1%
14	ASTRA	14,901	-29.1%	148,599	-1.2%
15	C-CLASS	14,884	+4.9%	112,231	+9.4%
16	CAPTUR	14,794	+7.9%	126,949	-3.9%
17	3008 SUV	14,521	New	93,560	New
18	PASSAT	14,158	-17.6%	109,381	-15.1%
19	MOKKA	14,028	+12.6%	110,460	+8.8%
20	A3	13,322	+2.1%	103,881	-11.6%
21	FABIA	13,086	-4.6%	109,888	+4.0%
22	FIESTA	12,813	-42.3%	169,224	-6.6%
23	LEON	12,754	+5.3%	91,503	-0.8%
24	PANDA	12,724	-13.0%	123,311	-0.7%
25	TUCSON	12,718	-4.2%	92,146	-0.1%
26	DUSTER	12,511	+7.1%	86,526	+0.8%
27	A4	12,237	-16.4%	90,335	-9.7%
28	KUGA	12,206	+22.0%	90,663	+23.7%
29	SPORTAGE	11,898	-0.9%	82,875	-7.6%
30	2008	11,896	-9.1%	117,048	+7.2%
31	308	11,301	-20.5%	103,958	-18.8%
32	A-CLASS	10,648	+2.6%	85,629	+1.9%
33	MEGANE	10,622	+18.4%	103,343	+31.1%
34	E-CLASS	10,266	+39.2%	78,476	+37.1%
35	SERIES 3	9,645	-12.1%	81,483	-5.7%
36	IBIZA	9,590	-13.3%	73,621	-6.7%
37	C4 PICASSO/GRAND	9,453	+13.5%	66,882	-6.7%
38	SERIES 5	9,281	+54.6%	60,562	+26.5%
39	MINI	9,098	-10.1%	81,992	+3.2%
40	GLC-CLASS/COUPE	9,057	+52.7%	60,801	+50.6%
41	C-HR	8,845	New	70,404	New
42	SERIES 1	8,776	+3.2%	80,018	+7.1%
43	TOURAN	8,744	-8.2%	68,000	-5.3%
44	AURIS	8,653	-9.0%	71,360	-11.0%
45	SCENIC/GRAND	8,515	+42.3%	61,755	+13.7%
46	TIPO	8,513	+34.1%	86,601	+199.9%
47	I20	8,484	-1.3%	63,495	+10.8%
48	XC60	8,266	+23.2%	60,411	+32.9%
49	MICRA	7,788	+73.3%	52,777	+45.9%
50	I10	7,333	+1.2%	55,895	+9.0%

SEGMENT SHARE JUL-17	
TOP WINNER	TOP LOSER
CITY-CARS (A-SEGMENT)	
 Suzuki Ignis	 Fiat Panda
SUBCOMPACTS (B-SEGMENT)	
 Citroen C3	 Ford Fiesta
COMPACTS (C-SEGMENT)	
 Fiat Tipo	 Opel/Vhall Astra
MIDSIZE SEDAN/SW (D-SEGMENT)	
 Audi A5	 VW Passat
EXECUTIVE (E-SEGMENT)	
 Volvo S90/V90	 Audi A6
LUXURY (F-SEGMENT)	
 Porsche Panamera	 Mercedes S-Class
MPVs	
 Renault Scenic	 Peugeot 3008
SUVs	
 Peugeot 3008	 Renault Kadjar
SPORT CARS	
 Mazda MX-5	 Audi TT

The Skoda Octavia impresses occupying the fourth position despite its age. The updated Yaris hits the top 10 outselling the Corsa and C3. Best performers: Peugeot 3008 SUV, Toyota C-HR, Audi Q2, Citroen C3 and Peugeot 5008 SUV.

REGISTRATIONS BY SEGMENTS



-Ends-

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More insights:



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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.

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