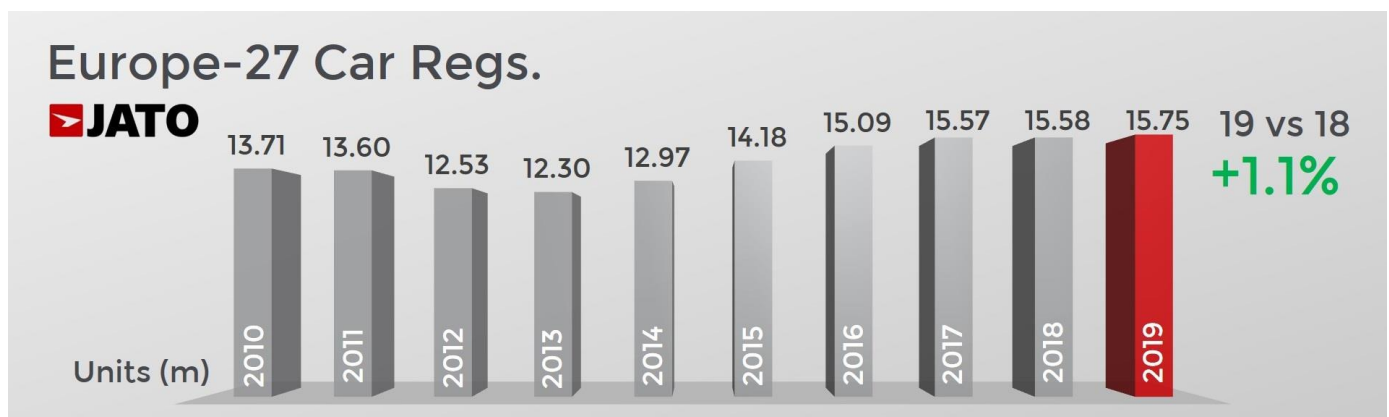# PRESS RELEASE

9:30 BST, 18ᵗʰ February 2020

London, UK

EUROPE OUTPERFORMS GLOBAL MARKET IN 2019 - POSTING THE HIGHEST REGISTRATIONS OF THE LAST TWELVE YEARS

▪ **Last minute purchases in December helped to reverse the negative trend seen throughout the rest of the year**

▪ **The European market outperformed its peers despite difficulties generated by tougher regulation and global uncertainty**

▪ **SUVs accounted for 38.3% of total market, a new record for this segment**

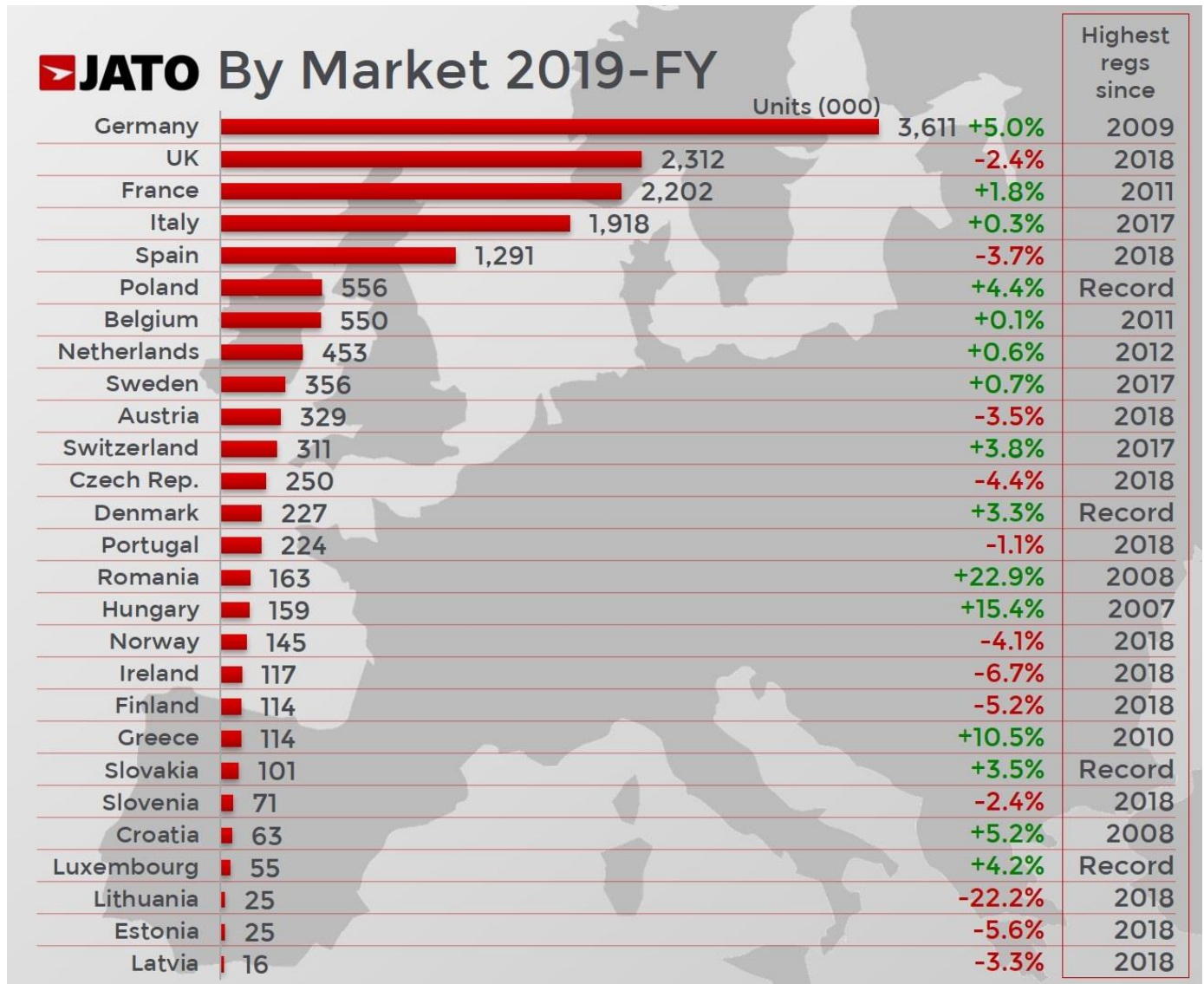▪ **A total of 1.28 million electrified vehicles were registered in 2019**

The turbulence that hit the global auto industry in 2019 was not strong enough to damage the demand for new cars in Europe. In fact, the volume of vehicle sales increased by 1.1% for the passenger car market in Europe-27, this is in contrast to the negative results experienced in China and the USA, where sales fell by 8% and 2% respectively. In addition, 2019 was the fifth consecutive year of growth for Europe, and the highest result seen since 2007 when the market exceeded the 16 million units mark. In total, 15,757,412 new cars were registered last year - 171,452 more registrations than in 2018.

Europe-27 Car Regs. — JATO. Units (m): 2010: 13.71, 2011: 13.60, 2012: 12.53, 2013: 12.30, 2014: 12.97, 2015: 14.18, 2016: 15.09, 2017: 15.57, 2018: 15.58, 2019: 15.75. 19 vs 18 +1.1%

However, these positive results can be largely explained by purchases made in December to get ahead of the new EU emissions regulations that took effect at the beginning of 2020. In fact, the year-to-date figures from January to November 2019 indicate that registrations had actually decreased by 0.4%. The last-minute
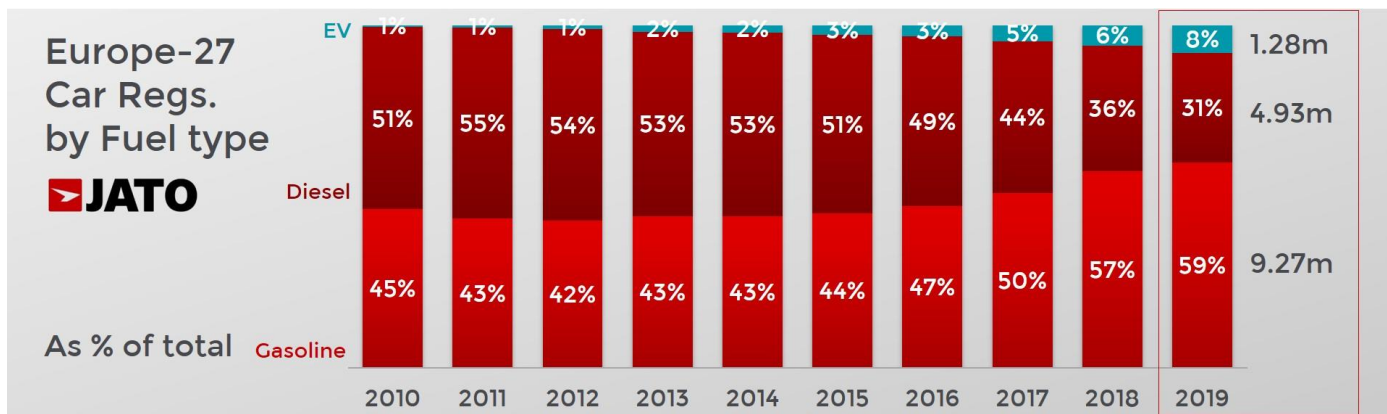
actions to replace gas-guzzling vehicles deemed unacceptable under EU emissions regulations, in December pushed the cumulative figures into the positive.

Felipe Munoz, global analyst at JATO Dynamics, commented: "Despite the artificial effect of the December figures, it is important to note that car registrations in Europe remained stable until November. Last year was not an easy period for the industry, but Europe demonstrated its strength despite the challenges. The question is now whether this strength will continue under even tougher regulations".

JATO By Market 2019-FY — Units (000)

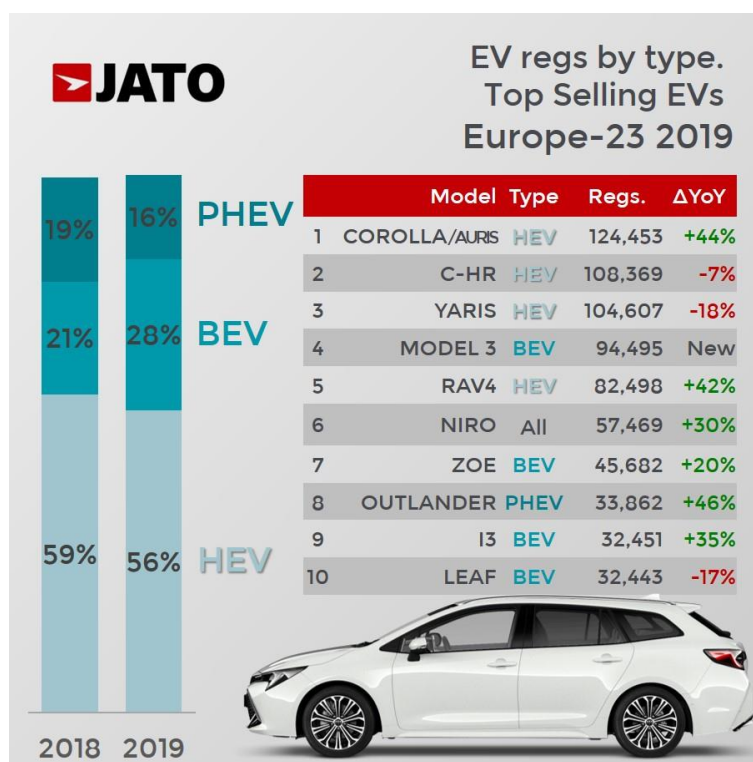| Market	Units (000)	% Change	Highest regs since
Germany	3,611	+5.0%	2009
UK	2,312	-2.4%	2018
France	2,202	+1.8%	2011
Italy	1,918	+0.3%	2017
Spain	1,291	-3.7%	2018
Poland	556	+4.4%	Record
Belgium	550	+0.1%	2011
Netherlands	453	+0.6%	2012
Sweden	356	+0.7%	2017
Austria	329	-3.5%	2018
Switzerland	311	+3.8%	2017
Czech Rep.	250	-4.4%	2018
Denmark	227	+3.3%	Record
Portugal	224	-1.1%	2018
Romania	163	+22.9%	2008
Hungary	159	+15.4%	2007
Norway	145	-4.1%	2018
Ireland	117	-6.7%	2018
Finland	114	-5.2%	2018
Greece	114	+10.5%	2010
Slovakia	101	+3.5%	Record
Slovenia	71	-2.4%	2018
Croatia	63	+5.2%	2008
Luxembourg	55	+4.2%	Record
Lithuania	25	-22.2%	2018
Estonia	25	-5.6%	2018
Latvia	16	-3.3%	2018

Our data shows that four markets listed record numbers for registrations in 2019. Poland became Europe's sixth largest market outselling Belgium, Denmark, Slovakia and Luxembourg. Hungary also experienced the best results since 2007; Romania and Croatia beat records since 2008; and Germany saw the highest levels of registrations since 2009. It wasn't good news across every market however, as 12 countries posted a decline in figures in comparison to 2018, including the UK and Spain. Munoz noted: "The good results can be partially explained by better deals and, crucially, more business registrations which increased by 4%,

counting for 58% of the market. It's worth remembering that self-registrations make up a large part of business registrations."

Europe-27 Car Regs. by Fuel type

JATO

As % of total

EV / Diesel / Gasoline	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
EV	1%	1%	1%	2%	2%	3%	3%	5%	6%	8%	1.28m
Diesel	51%	55%	54%	53%	53%	51%	49%	44%	36%	31%	4.93m
Gasoline	45%	43%	42%	43%	43%	44%	47%	50%	57%	59%	9.27m

Electrified vehicles made up 8.1% of total registrations, setting a new world record for this type of car. Volume totaled 1,277,908 units, up by 35% compared to 2018. This strong growth contrasts with the 12% decline posted by diesel car registrations, and the timid growth of 5% recorded by gasoline cars. Munoz notes: "The increasing sales of electrified cars in Europe solidifies their key position in the global market. In addition to Europe's importance as a development hub, it is now the most significant market for EV penetration, only behind Japan and its popular hybrids."

Pure electric cars accounted for 28% of all EV registrations, totaling 356,300 units. They made up 2.3% of total passenger car registrations in Europe - a record for this kind of vehicle. China was the only market to surpass these rates, and these figures were higher than the total BEVs sold in the USA.

JATO

EV regs by type. Top Selling EVs Europe-23 2019

	PHEV	BEV	HEV
2018	19%	21%	59%
2019	16%	28%	56%

|	Model	Type	Regs.	ΔYoY
1	COROLLA/AURIS	HEV	124,453	+44%
2	C-HR	HEV	108,369	-7%
3	YARIS	HEV	104,607	-18%
4	MODEL 3	BEV	94,495	New
5	RAV4	HEV	82,498	+42%
6	NIRO	All	57,469	+30%
7	ZOE	BEV	45,682	+20%
8	OUTLANDER	PHEV	33,862	+46%
9	I3	BEV	32,451	+35%
10	LEAF	BEV	32,443	-17%

Tesla is a key contributor to the outstanding results, as the Model 3 achieved enormous levels of success during its first year in the market and became the top-selling pure electric car. The brand registered more than 95,000 units of this midsize premium sedan, landing in 51st position in the overall model ranking. Munoz stated: "There is no doubt that the Model 3 disrupted the European market by becoming the top-selling electric car and outselling other key premium models. However, we have to consider that it is a sedan, which is not necessarily the body-type that consumers are looking for. Its success will only be fairly measured when the electric

SUVs hit the market, and consumers have more choice." Other BEVs that shone in 2019 were the Renault Zoe, BMW i3, Hyundai Kona, Audi E-Tron and Jaguar I-Pace.

The hybrid market continued to be dominated by Toyota, which controlled 70% of the registrations for this market when combined with Lexus. However, Toyota lost market share due to the outstanding results of Mercedes and Land Rover, whose hybrids and mild hybrids hit 86,700 registrations.

Only two manufacturers, Tesla and Toyota, had over half of their total registrations comprise of electrified car registrations. They were followed by JLR, Hyundai-Kia, Honda and Nissan Group. These cars counted for 2% of Volkswagen Group total registrations, 3% of Renault Group, and 0.2% of PSA. Munoz stated: "While the EV market is undoubtedly growing, we are still a long way off from the full electrification of car makers' fleets. Europe's top selling car groups did not produce the expected mix that the industry was anticipating."
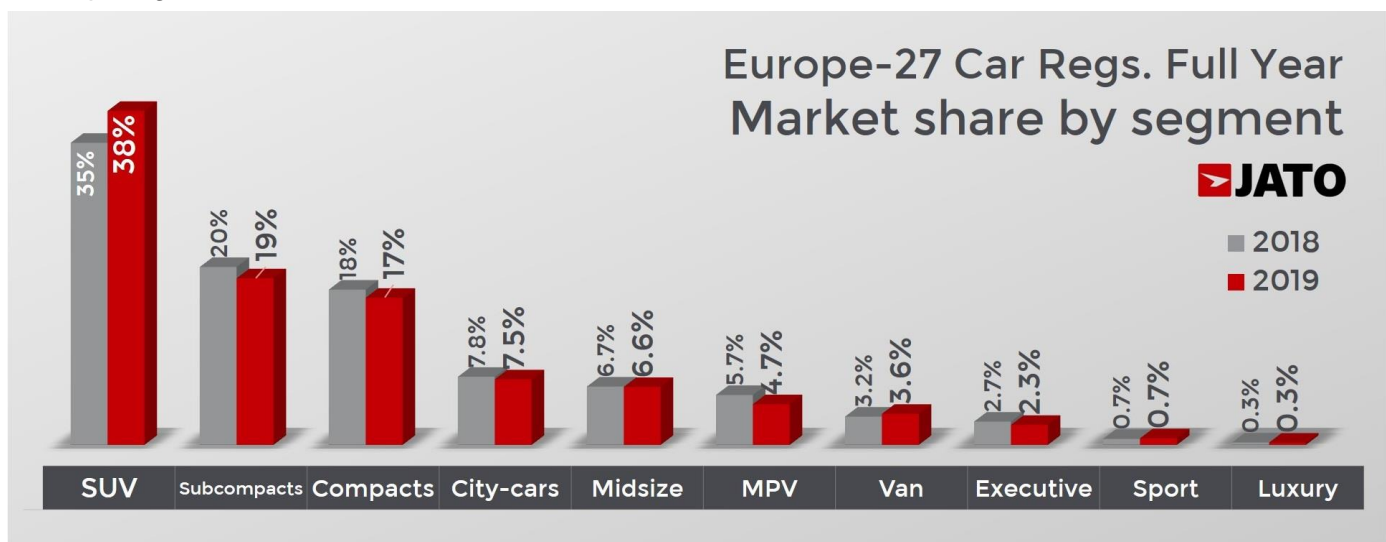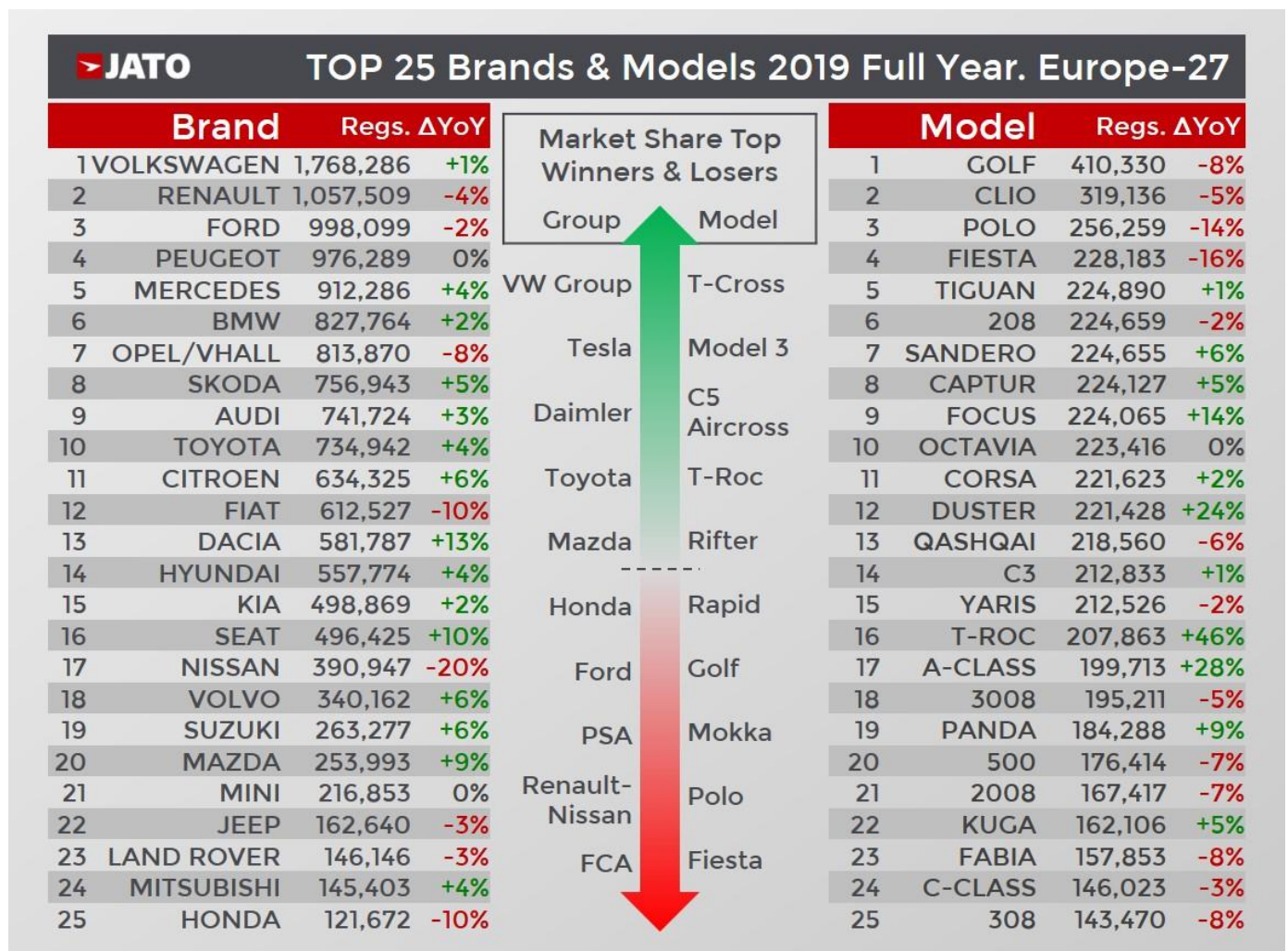

The SUV segment experienced the seventh consecutive year of double-digit growth in 2019 with 38% of the total market. Registrations totaled 6,030,481 units, up by 12% - this is the first time these registrations exceed the six-million-unit mark. But while the SUVs gained 3.6 points of share compared to 2018, the subcompacts, MPVs, compacts and executive cars lost a combined 3.6 points.

SUVs are a key driver of growth for volume and profits and are therefore highly important for the strength of car makers in Europe. SUVs gained the most market share at Volkswagen Group, where their share within the group sales increased by 8.7 points, followed by Volvo (+8.2 points), and Suzuki (+6.5 points). Volkswagen's assertive approach is paying off as it registered 1.38 million units, an increase of 37% from 2018, and became the only car maker to sell more than one million SUVs in Europe.

Volume increased at a double-digit rate for small and compact SUVs, which were led by the Renault Captur and Volkswagen Tiguan respectively. The premium category was led by the BMW X1, despite losing traction to the Audi Q3 and Volvo XC40, the second and third best-selling premium SUVs.

The continuous rise of SUVs comes at the expense of registrations for traditional cars in Europe, with SUVs outselling hatchbacks and sedans outselling MPVs for the first time. Munoz commented: "The continued success of SUVs is reshaping the car industry in Europe. This represents new challenges, including how the industry will meet increasingly tough emissions targets."

TOP 25 Brands & Models 2019 Full Year. Europe-27

#	Brand	Regs.	ΔYoY
1	VOLKSWAGEN	1,768,286	+1%
2	RENAULT	1,057,509	-4%
3	FORD	998,099	-2%
4	PEUGEOT	976,289	0%
5	MERCEDES	912,286	+4%
6	BMW	827,764	+2%
7	OPEL/VHALL	813,870	-8%
8	SKODA	756,943	+5%
9	AUDI	741,724	+3%
10	TOYOTA	734,942	+4%
11	CITROEN	634,325	+6%
12	FIAT	612,527	-10%
13	DACIA	581,787	+13%
14	HYUNDAI	557,774	+4%
15	KIA	498,869	+2%
16	SEAT	496,425	+10%
17	NISSAN	390,947	-20%
18	VOLVO	340,162	+6%
19	SUZUKI	263,277	+6%
20	MAZDA	253,993	+9%
21	MINI	216,853	0%
22	JEEP	162,640	-3%
23	LAND ROVER	146,146	-3%
24	MITSUBISHI	145,403	+4%
25	HONDA	121,672	-10%

Market Share Top Winners & Losers

Group	Model
VW Group	T-Cross
Tesla	Model 3
Daimler	C5 Aircross
Toyota	T-Roc
Mazda	Rifter
Honda	Rapid
Ford	Golf
PSA	Mokka
Renault-Nissan	Polo
FCA	Fiesta

#	Model	Regs.	ΔYoY
1	GOLF	410,330	-8%
2	CLIO	319,136	-5%
3	POLO	256,259	-14%
4	FIESTA	228,183	-16%
5	TIGUAN	224,890	+1%
6	208	224,659	-2%
7	SANDERO	224,655	+6%
8	CAPTUR	224,127	+5%
9	FOCUS	224,065	+14%
10	OCTAVIA	223,416	0%
11	CORSA	221,623	+2%
12	DUSTER	221,428	+24%
13	QASHQAI	218,560	-6%
14	C3	212,833	+1%
15	YARIS	212,526	-2%
16	T-ROC	207,863	+46%
17	A-CLASS	199,713	+28%
18	3008	195,211	-5%
19	PANDA	184,288	+9%
20	500	176,414	-7%
21	2008	167,417	-7%
22	KUGA	162,106	+5%
23	FABIA	157,853	-8%
24	C-CLASS	146,023	-3%
25	308	143,470	-8%

-Ends-

Contact:

Josie Workman, +44 (0) 203 617 7240, jatoteam@firstlightpr.com

Felipe Munoz, +39 349 797 32 44, 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 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.