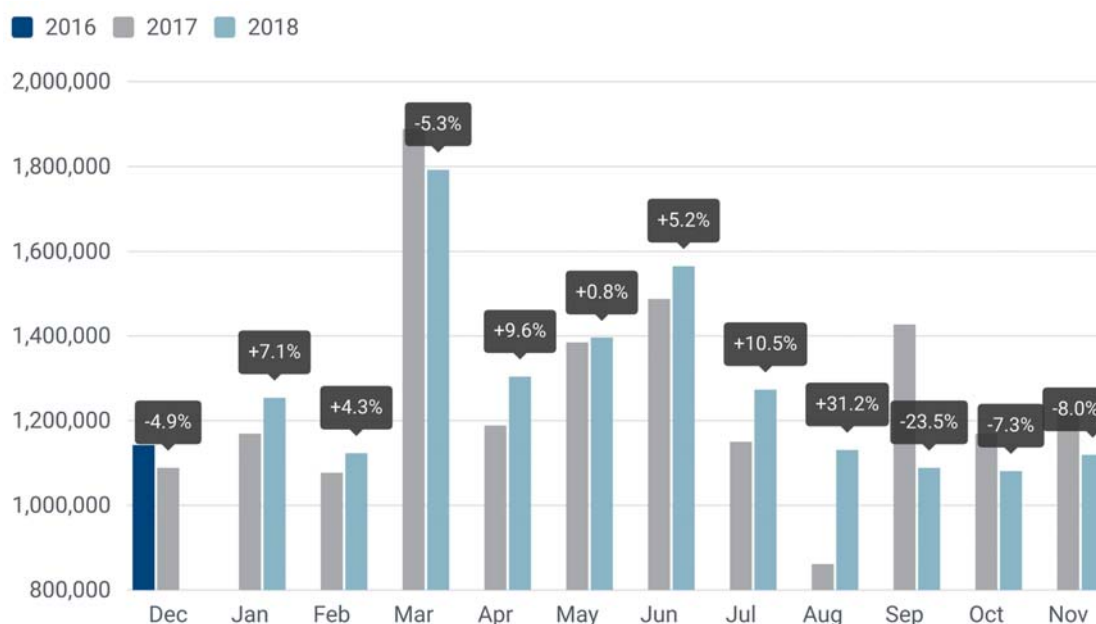


NEW PASSENGER CAR REGISTRATIONS EUROPEAN UNION¹



Passenger car registrations: +0.8% 11 months into 2018; -8.0% in November

In November 2018, passenger car demand fell by 8.0%, marking the third consecutive month of decline across the European Union. Ahead of the introduction of the new WLTP test in September, car registrations jumped by +31.2% in August, which led to a drop in demand in the following months. Also in November, the market continued to contract in most EU countries, including the five biggest car markets.

Eleven months into the year, registrations of new passenger cars in the EU increased slightly (+0.8%) compared to one year ago. Demand continues to be fuelled by Central Europe, where new car registrations went up by 9.6% so far this year. Looking at the major EU markets, Spain (+8.0%) and France (+4.7%) posted solid growth from January to November 2018, while registrations fell in Italy (-3.5%) and the United Kingdom (-6.9%) during the same period.

¹ Data for Malta not available on a monthly basis

PROVISIONAL

NEW PASSENGER CAR REGISTRATIONS BY MARKET EUROPEAN UNION¹

14/12/2018

	November '18	November '17	%Change 18/17	Jan-Nov '18	Jan-Nov '17	%Change 18/17
AUSTRIA	23,604	29,547	-20.1	321,875	327,669	-1.8
BELGIUM	33,819	39,645	-14.7	526,435	518,486	+1.5
BULGARIA	2,768	3,082	-10.2	31,773	28,180	+12.8
CROATIA	3,448	3,503	-1.6	57,511	48,388	+18.9
CYPRUS	888	990	-10.3	12,281	12,367	-0.7
CZECH REPUBLIC	19,283	22,925	-15.9	246,771	251,628	-1.9
DENMARK	17,931	18,045	-0.6	204,650	205,273	-0.3
ESTONIA	2,031	2,033	-0.1	24,274	23,031	+5.4
FINLAND	8,662	9,670	-10.4	114,335	110,518	+3.5
FRANCE	171,611	180,005	-4.7	2,008,091	1,917,376	+4.7
GERMANY	272,674	302,636	-9.9	3,198,720	3,187,312	+0.4
GREECE	6,893	6,523	+5.7	98,094	82,687	+18.6
HUNGARY	11,373	12,369	-8.1	126,910	105,433	+20.4
IRELAND	643	682	-5.7	125,415	131,173	-4.4
ITALY	146,991	156,886	-6.3	1,785,722	1,849,656	-3.5
LATVIA	1,341	1,278	+4.9	15,808	15,393	+2.7
LITHUANIA	2,841	2,425	+17.2	29,992	23,900	+25.5
LUXEMBOURG	3,529	4,389	-19.6	50,196	49,931	+0.5
NETHERLANDS	34,785	37,569	-7.4	423,938	396,941	+6.8
POLAND	43,248	42,373	+2.1	486,499	438,341	+11.0
PORTUGAL	15,466	17,626	-12.3	212,113	205,076	+3.4
ROMANIA	8,303	9,311	-10.8	121,634	98,116	+24.0
SLOVAKIA	8,323	8,275	+0.6	92,115	88,056	+4.6
SLOVENIA	5,192	6,292	-17.5	69,192	66,853	+3.5
SPAIN	91,063	104,170	-12.6	1,222,147	1,131,988	+8.0
SWEDEN	25,813	32,484	-20.5	330,729	344,435	-4.0
UNITED KINGDOM	158,639	163,541	-3.0	2,223,058	2,388,144	-6.9
EUROPEAN UNION	1,121,162	1,218,274	-8.0	14,160,278	14,046,351	+0.8
EU15 ²	1,012,123	1,103,418	-8.3	12,845,518	12,846,665	-0.01
EU12 ³	109,039	114,856	-5.1	1,314,760	1,199,686	+9.6
ICELAND	722	1,027	-29.7	17,494	20,439	-14.4
NORWAY	12,313	13,743	-10.4	135,468	142,573	-5.0
SWITZERLAND	24,103	26,749	-9.9	272,177	282,956	-3.8
EFTA	37,138	41,519	-10.6	425,139	445,968	-4.7
EU + EFTA	1,158,300	1,259,793	-8.1	14,585,417	14,492,319	+0.6
EU15 + EFTA	1,049,261	1,144,937	-8.4	13,270,657	13,292,633	-0.2

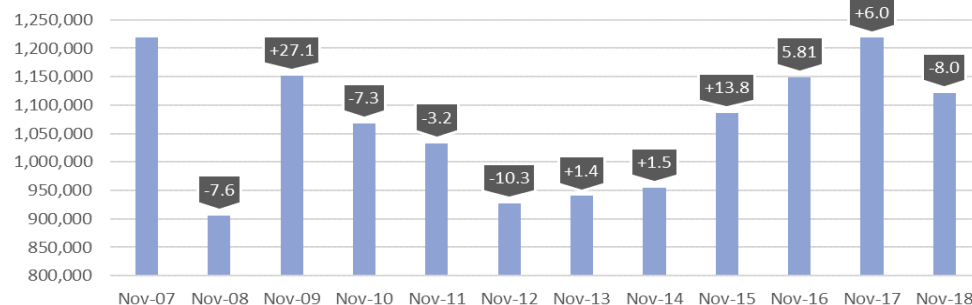
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Data for Malta n.a.

² Member States before the 2004 enlargement

³ Member States having joined the EU since 2004

New passenger car registrations in the EU - month trend | 2007-2018



PRESS RELEASE

PROVISIONAL

NEW PASSENGER CAR REGISTRATIONS BY MANUFACTURER¹

EUROPEAN UNION (EU)

14/12/2018

	November					January-November				
	%Share ²		Units		%Change	%Share ²		Units		%Change
	'18	'17	'18	'17	18/17	'18	'17	'18	'17	18/17
VW Group	23.7	24.5	265,814	298,427	-10.9	23.9	23.7	3,381,682	3,327,640	+1.6
VOLKSWAGEN	11.8	11.2	131,959	136,956	-3.6	11.2	10.9	1,584,461	1,524,643	+3.9
AUDI	3.3	5.2	37,443	62,868	-40.4	4.6	5.3	658,325	746,069	-11.8
SKODA	5.3	4.8	59,193	58,533	+1.1	4.6	4.5	655,537	627,522	+4.5
SEAT	3.1	2.8	34,802	34,385	+1.2	2.9	2.6	416,947	361,357	+15.4
PORSCHE	0.2	0.4	2,031	5,360	-62.1	0.4	0.5	62,072	63,721	-2.6
OTHERS ³	0.0	0.0	386	325	+18.8	0.0	0.0	4,340	4,328	+0.3
PSA Group	16.5	16.1	185,071	196,493	-5.8	16.3	12.0	2,302,491	1,685,159	+36.6
PEUGEOT	6.6	6.5	74,094	79,186	-6.4	6.3	6.0	893,640	838,792	+6.5
OPEL/VAUXHALL ⁴	5.8	5.8	64,907	70,342	-7.7	5.8	2.0	815,485	281,102	+190.1
CITROEN	3.8	3.6	43,003	43,415	-0.9	3.9	3.7	551,891	523,471	+5.4
DS	0.3	0.3	3,067	3,550	-13.6	0.3	0.3	41,475	41,794	-0.8
RENAULT Group	10.3	11.3	115,108	137,098	-16.0	10.6	10.4	1,496,663	1,459,819	+2.5
RENAULT	6.3	8.1	70,232	98,124	-28.4	7.1	7.3	1,010,447	1,032,362	-2.1
DACIA	4.0	3.2	44,317	38,498	+15.1	3.4	3.0	479,768	422,733	+13.5
LADA	0.0	0.0	350	476	-26.5	0.0	0.0	4,863	4,723	+3.0
ALPINE	0.0	0.0	209	0		0.0	0.0	1,585	1	∞
FCA Group	6.0	6.0	67,173	73,070	-8.1	6.7	6.9	942,834	965,073	-2.3
FIAT	4.0	4.2	45,165	51,004	-11.4	4.7	5.2	663,773	726,191	-8.6
JEEP	1.2	0.8	13,317	10,299	+29.3	1.1	0.7	151,406	95,872	+57.9
ALFA ROMEO	0.3	0.6	3,689	7,178	-48.6	0.5	0.5	75,074	76,826	-2.3
LANCIA/CHRYSLER	0.4	0.3	4,467	3,925	+13.8	0.3	0.4	44,432	57,703	-23.0
OTHERS ⁵	0.0	0.1	535	664	-19.4	0.1	0.1	8,149	8,481	-3.9
FORD	6.4	6.4	71,266	77,659	-8.2	6.4	6.6	910,391	931,592	-2.3
BMW Group	7.3	6.9	81,725	84,064	-2.8	6.4	6.5	909,616	911,353	-0.2
BMW	5.6	5.4	63,279	65,227	-3.0	5.1	5.1	717,181	721,615	-0.6
MINI	1.6	1.5	18,446	18,837	-2.1	1.4	1.4	192,435	189,738	+1.4
DAIMLER	7.1	6.4	80,126	77,537	+3.3	6.1	6.3	862,609	887,114	-2.8
MERCEDES	6.4	5.7	72,247	69,164	+4.5	5.5	5.7	772,629	798,162	-3.2
SMART	0.7	0.7	7,879	8,373	-5.9	0.6	0.6	89,980	88,952	+1.2
TOYOTA Group	5.0	4.5	56,484	54,416	+3.8	4.9	4.6	688,749	650,126	+5.9
TOYOTA	4.7	4.2	53,119	50,815	+4.5	4.6	4.3	647,065	609,894	+6.1
LEXUS	0.3	0.3	3,365	3,601	-6.6	0.3	0.3	41,684	40,232	+3.6
HYUNDAI	3.5	3.4	39,190	41,756	-6.1	3.5	3.3	494,030	470,414	+5.0
KIA	3.2	3.0	36,066	36,104	-0.1	3.2	3.1	453,764	430,939	+5.3
NISSAN	2.3	3.1	25,705	37,161	-30.8	3.2	3.7	447,609	515,601	-13.2
VOLVO CAR CORP.	2.3	1.9	26,091	23,004	+13.4	1.9	1.8	275,187	256,302	+7.4
JAGUAR LAND ROVER Group	1.6	1.4	17,470	16,616	+5.1	1.4	1.4	191,229	200,984	-4.9
LAND ROVER	0.9	1.0	10,541	11,617	-9.3	0.8	1.0	117,405	137,929	-14.9
JAGUAR	0.6	0.4	6,929	4,999	+38.6	0.5	0.4	73,824	63,055	+17.1
HONDA	0.8	0.8	8,633	9,948	-13.2	0.9	0.9	122,828	125,567	-2.2
GM⁴	0.0	0.0	162	165	-1.8	0.0	4.1	2,711	589,423	-99.5

SOURCE: ACEA MEMBERS

¹ Includes data for ACEA members

² ACEA estimation based on total by market

³ Includes Bentley, Lamborghini and Bugatti

⁴ Following PSA acquisition of the Opel and Vauxhall brands, as of 1 August 2017 Opel/Vauxhall registrations are accounted in the PSA Group

⁵ Includes Dodge and Maserati

PRESS RELEASE

PROVISIONAL

NEW PASSENGER CAR REGISTRATIONS BY MANUFACTURER¹

EU + EFTA Countries

14/12/2018

	November					January-November				
	%Share ²		Units	Units	%Change	%Share ²		Units	Units	%Change
	'18	'17	'18	'17	18/17	'18	'17	'18	'17	18/17
VW Group	23.7	24.6	275,004	310,049	-11.3	23.9	23.8	3,492,004	3,450,545	+1.2
VOLKSWAGEN	11.8	11.2	136,265	141,642	-3.8	11.2	10.9	1,633,485	1,579,324	+3.4
AUDI	3.3	5.2	38,693	65,420	-40.9	4.7	5.3	679,779	770,919	-11.8
SKODA	5.3	4.9	61,699	61,350	+0.6	4.7	4.5	680,260	655,281	+3.8
SEAT	3.1	2.8	35,706	35,520	+0.5	2.9	2.6	427,634	372,299	+14.9
PORSCHE	0.2	0.5	2,205	5,770	-61.8	0.5	0.5	66,169	68,060	-2.8
OTHERS ³	0.0	0.0	436	347	+25.6	0.0	0.0	4,677	4,662	+0.3
PSA Group	16.2	15.9	187,901	200,020	-6.1	16.0	11.8	2,339,181	1,715,082	+36.4
PEUGEOT	6.5	6.4	75,343	80,523	-6.4	6.2	5.9	907,710	853,499	+6.4
OPEL/VAUXHALL ⁴	5.7	5.7	65,968	71,752	-8.1	5.7	2.0	829,594	286,979	+189.1
CITROEN	3.8	3.5	43,448	44,158	-1.6	3.8	3.7	559,647	532,071	+5.2
DS	0.3	0.3	3,142	3,587	-12.4	0.3	0.3	42,230	42,533	-0.7
RENAULT Group	10.1	11.1	117,269	139,416	-15.9	10.4	10.2	1,521,467	1,484,747	+2.5
RENAULT	6.2	7.9	71,720	99,583	-28.0	7.0	7.2	1,026,559	1,048,772	-2.1
DACIA	3.9	3.1	44,977	39,357	+14.3	3.3	3.0	488,330	431,242	+13.2
LADA	0.0	0.0	350	476	-26.5	0.0	0.0	4,868	4,732	+2.9
ALPINE	0.0	0.0	222	0				1,710	1	∞
FCA Group	5.9	5.9	68,720	74,680	-8.0	6.6	6.8	960,879	982,613	-2.2
FIAT	4.0	4.1	45,883	51,790	-11.4	4.6	5.1	672,618	736,120	-8.6
JEEP	1.2	0.8	13,789	10,680	+29.1	1.1	0.7	156,058	99,151	+57.4
ALFA ROMEO	0.3	0.6	3,969	7,548	-47.4	0.5	0.6	78,852	80,074	-1.5
LANCIA/CHRYSLER	0.4	0.3	4,470	3,928	+13.8	0.3	0.4	44,468	57,729	-23.0
OTHERS ⁵	0.1	0.1	609	734	-17.0	0.1	0.1	8,883	9,539	-6.9
BMW Group	7.4	7.0	85,679	87,950	-2.6	6.5	6.6	949,027	951,410	-0.3
BMW	5.8	5.4	66,771	68,532	-2.6	5.1	5.2	750,476	755,646	-0.7
MINI	1.6	1.5	18,908	19,418	-2.6	1.4	1.4	198,551	195,764	+1.4
FORD	6.3	6.3	72,783	79,482	-8.4	6.4	6.6	928,601	949,723	-2.2
DAIMLER	7.2	6.4	82,892	80,413	+3.1	6.1	6.4	894,273	922,571	-3.1
MERCEDES	6.5	5.7	74,816	71,805	+4.2	5.5	5.7	802,182	831,323	-3.5
SMART	0.7	0.7	8,076	8,608	-6.2	0.6	0.6	92,091	91,248	+0.9
TOYOTA Group	5.1	4.5	58,625	57,009	+2.8	4.9	4.7	715,865	681,733	+5.0
TOYOTA	4.8	4.2	55,085	53,239	+3.5	4.6	4.4	672,671	639,955	+5.1
LEXUS	0.3	0.3	3,540	3,770	-6.1	0.3	0.3	43,194	41,778	+3.4
HYUNDAI	3.5	3.4	40,656	42,936	-5.3	3.5	3.3	507,292	483,284	+5.0
NISSAN	2.4	3.0	27,411	38,061	-28.0	3.2	3.6	466,516	528,772	-11.8
KIA	3.2	3.0	36,871	37,178	-0.8	3.2	3.0	463,429	441,080	+5.1
VOLVO CAR CORP.	2.4	2.0	27,758	24,852	+11.7	2.0	1.9	293,111	273,035	+7.4
JAGUAR LAND ROVER Group	1.6	1.4	18,214	17,011	+7.1	1.4	1.4	197,417	205,752	-4.1
LAND ROVER	0.9	0.9	10,815	11,937	-9.4	0.8	1.0	120,746	141,339	-14.6
JAGUAR	0.6	0.4	7,399	5,074	+45.8	0.5	0.4	76,671	64,413	+19.0
HONDA	0.8	0.8	9,045	10,469	-13.6	0.9	0.9	127,461	130,954	-2.7
GM⁴	0.0	0.0	190	209	-9.1	0.0	4.1	3,046	600,603	-99.5

SOURCE: ACEA MEMBERS

¹ Includes data for ACEA members

² ACEA estimation based on total by market

³ Includes Bentley, Lamborghini and Bugatti

⁴ Following PSA acquisition of the Opel and Vauxhall brands, as of 1 August 2017 Opel/Vauxhall registrations are accounted in the PSA Group

⁵ Includes Dodge and Maserati

PRESS RELEASE

PROVISIONAL

NEW PASSENGER CAR REGISTRATIONS BY MANUFACTURER¹

WESTERN EUROPE (EU15 + EFTA Countries)

14/12/2018

	November					January-November				
	%Share ²		Units	Units	%Change	%Share ²		Units	Units	%Change
	'18	'17	'18	'17	18/17	'18	'17	'18	'17	18/17
VW Group	22.9	24.0	240,064	274,376	-12.5	23.3	23.2	3,092,497	3,080,577	+0.4
VOLKSWAGEN	11.8	11.4	124,261	130,569	-4.8	11.3	11.0	1,498,275	1,456,124	+2.9
AUDI	3.5	5.5	36,738	62,565	-41.3	4.9	5.6	652,010	743,147	-12.3
SKODA	4.1	3.7	42,580	41,901	+1.6	3.6	3.5	474,641	463,730	+2.4
SEAT	3.2	2.9	34,100	33,429	+2.0	3.0	2.6	400,167	347,742	+15.1
PORSCHE	0.2	0.5	1,968	5,579	-64.7	0.5	0.5	62,980	65,335	-3.6
OTHERS ³	0.0	0.0	417	333	+25.2	0.0	0.0	4,424	4,499	-1.7
PSA Group	16.8	16.3	176,518	186,977	-5.6	16.5	12.2	2,187,589	1,625,691	+34.6
PEUGEOT	6.8	6.7	71,484	76,980	-7.1	6.5	6.1	860,767	816,120	+5.5
OPEL/VAUXHALL ⁴	5.8	5.7	60,637	64,748	-6.3	5.7	2.0	756,676	261,509	+189.3
CITROEN	3.9	3.6	41,296	41,678	-0.9	4.0	3.8	528,204	506,002	+4.4
DS	0.3	0.3	3,101	3,571	-13.2	0.3	0.3	41,942	42,060	-0.3
RENAULT Group	9.5	10.7	99,369	123,020	-19.2	10.1	9.9	1,334,836	1,319,386	+1.2
RENAULT	6.2	8.0	65,418	91,913	-28.8	7.1	7.3	948,122	975,154	-2.8
DACIA	3.2	2.7	33,515	30,848	+8.6	2.9	2.6	382,335	341,526	+11.9
LADA	0.0	0.0	215	259	-17.0	0.0	0.0	2,687	2,705	-0.7
ALPINE	0.0	0.0	221	0		0.0	0.0	1,692	1	∞
BMW Group	7.9	7.4	82,415	84,526	-2.5	6.9	6.9	911,781	912,914	-0.1
BMW	6.1	5.7	63,874	65,412	-2.4	5.4	5.4	717,488	720,964	-0.5
MINI	1.8	1.7	18,541	19,114	-3.0	1.5	1.4	194,293	191,950	+1.2
FCA Group	6.1	6.2	63,694	70,707	-9.9	6.8	7.1	908,617	941,320	-3.5
FIAT	4.0	4.3	42,286	48,663	-13.1	4.8	5.3	632,772	703,936	-10.1
JEEP	1.2	0.9	12,591	10,103	+24.6	1.1	0.7	146,655	93,040	+57.6
ALFA ROMEO	0.4	0.6	3,766	7,313	-48.5	0.6	0.6	76,209	77,694	-1.9
LANCIA/CHRYSLER	0.4	0.3	4,468	3,928	+13.7	0.3	0.4	44,443	57,507	-22.7
OTHERS ⁵	0.1	0.1	583	700	-16.7	0.1	0.1	8,538	9,143	-6.6
DAIMLER	7.5	6.7	78,449	76,695	+2.3	6.4	6.6	853,496	883,733	-3.4
MERCEDES	6.7	6.0	70,443	68,154	+3.4	5.7	6.0	762,314	793,095	-3.9
SMART	0.8	0.7	8,006	8,541	-6.3	0.7	0.7	91,182	90,638	+0.6
FORD	6.3	6.3	66,217	72,617	-8.8	6.4	6.6	850,043	880,163	-3.4
TOYOTA Group	4.7	4.3	48,932	48,747	+0.4	4.6	4.4	610,413	590,884	+3.3
TOYOTA	4.4	4.0	45,919	45,537	+0.8	4.3	4.2	573,034	554,714	+3.3
LEXUS	0.3	0.3	3,013	3,210	-6.1	0.3	0.3	37,379	36,170	+3.3
HYUNDAI	3.3	3.2	34,266	36,327	-5.7	3.3	3.2	438,718	419,968	+4.5
NISSAN	2.4	3.0	24,898	34,616	-28.1	3.2	3.7	428,189	491,598	-12.9
KIA	3.0	2.8	31,765	31,987	-0.7	3.0	2.9	403,876	385,989	+4.6
VOLVO CAR CORP.	2.5	2.1	26,348	23,536	+11.9	2.1	1.9	276,895	258,525	+7.1
JAGUAR LAND ROVER Group	1.7	1.4	17,751	16,464	+7.8	1.4	1.5	192,296	200,376	-4.0
LAND ROVER	1.0	1.0	10,508	11,535	-8.9	0.9	1.0	117,631	137,312	-14.3
JAGUAR	0.7	0.4	7,243	4,929	+46.9	0.6	0.5	74,665	63,064	+18.4
HONDA	0.7	0.8	7,645	9,001	-15.1	0.8	0.9	111,768	116,489	-4.1
GM⁴	0.0	0.0	187	204	-8.3	0.0	4.2	3,025	554,242	-99.5

SOURCE: ACEA MEMBERS

¹ Includes data for ACEA members

² ACEA estimation based on total by market

³ Includes Bentley, Lamborghini and Bugatti

⁴ Following PSA acquisition of the Opel and Vauxhall brands, as of 1 August 2017 Opel/Vauxhall registrations are accounted in the PSA Group

⁵ Includes Dodge and Maserati