

# AID NEWSLETTER REPORT

EUROPE'S LEADING AUTO INDUSTRY TREND & MARKET INTELLIGENCE JOURNAL

**RUSSIA**  
FROM RUSSIA  
WITH LOVE  
CAR SALES  
RISING  
PAGES 14 - 16

16. March 2018 | **EDITION 1805** | Annual subscription price: £534 | €638 + p&p | \$710 + p&p

**GERMANY | BMW CO<sub>2</sub>**  
BMW's domestic average CO<sub>2</sub> car emissions up and not down... **2**

**UK | BEV CAR MARKET**  
Owners dump tarred diesels, but not yet heading for BEVs... **3 - 4**

**W-EUROPE | CAR SALES**  
February another good month for recovering car market... **4 - 7**



**GERMANY | FLEET AVERAGE CO<sub>2</sub> EMISSIONS FROM CARS | FEBRUARY 2018**

## Germany's fleet CO<sub>2</sub> emissions from cars are rising

AID Graph 18/29

### GERMANY'S CO<sub>2</sub> EMISSIONS PUT ON ICE

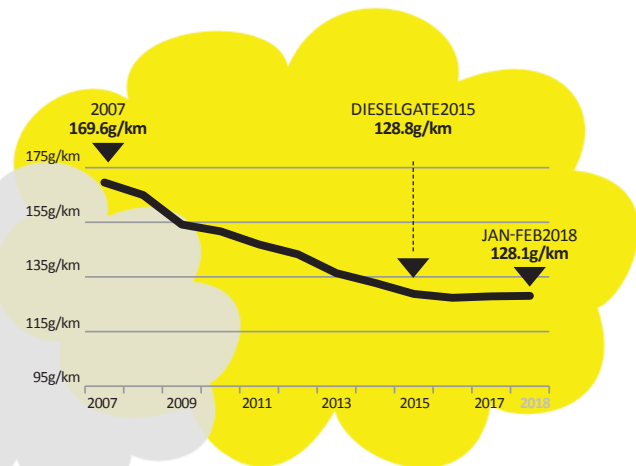
#### GERMANY

#### FLEET AVERAGE CO<sub>2</sub> EMISSIONS FROM NEW CAR REGISTRATIONS

#### HISTORY 2007 - 2018\* (\* JAN-FEB)

Never before in German history have so many electric cars, plug-in hybrids and petrol-electric hybrids entered the country's road network for the first time. And yet, contrary to conventional logic, Germany's fleet average CO<sub>2</sub> emissions didn't fall as expected. Instead, during this year's two months to February fleet average CO<sub>2</sub> levels rose to 128.1g/km from 127.7g/km. This trendbucking move, with Germany's average CO<sub>2</sub> levels from cars rising rather than falling probably ranks as one of the top items on today's autoindustry worry list.

Compared with the overall new car market, the numbers may still be tiny. But the combined sales share of these BEVs, PHEVs and HEVs that have reached Germany's road network during the two months to February already climbed to a notable 4.2 per cent from 2.7 per cent at the same stage last year. Significant progress by any measure. And yet, despite the significant recent progress on today's closely monitored CO<sub>2</sub> vehicle front, the average CO<sub>2</sub> emissions for cars are not falling as expected. That's borne out by



SOURCE: KBA/AID RESEARCH

#### COUNTRIES

W-Europe.....	3 - 9, 10, 12, 13, 16, 17, 18
Austria.....	5
BeLux.....	4, 5, 10
Brazil.....	13
Bulgaria.....	5
China.....	7, 8, 12, 13, 18
Czech Republic/Croatia/Cyprus.....	5
Denmark.....	5, 9
Eire/Finland.....	5
France.....	4, 5, 9, 10, 16, 17, 18
Germany.....	1, 2, 4, 5, 7, 9, 10, 11, 12, 13
Greece/Hungary/Iceland.....	5
Italy.....	4, 5, 9
Japan.....	6, 15, 18
Latvia/Lithuania/Estonia.....	5
Luxembourg.....	5
Mexico.....	20
Netherlands.....	5
Norway.....	5, 7, 9
Poland/Romania.....	5
Portugal.....	5
Russia.....	14, 15, 16
Slovenia/Slovakia.....	5
South Korea.....	6, 14, 15
Spain.....	4, 5, 9, 10
Sweden.....	5, 10
Switzerland.....	4, 5, 9
UK.....	3, 4, 5, 9, 10, 13
USA.....	8, 13, 18, 19, 20
World.....	7, 12, 16, 17, 18

#### IN DEPTH & OTHER TOPICS

<b>WORLD   PRESTIGE SECTOR MONITOR</b> Audi hampered this February by weak prestige-sector home showing ..... <b>7 - 8</b>
<b>EUROPE   MOST TRENDY MOTORS</b> Unstoppable rise of SUV-Crossovers - Sales more than double in just 4 years ... <b>9 - 10</b>
<b>GERMANY   HAPPY SCRAPPERS CASH IN</b> Car market, amidst diesel storms, got off to a good start, and it's getting better .... <b>10 - 12</b>
<b>WORLD   VW BRAND CAR DELIVERIES</b> VW quick to get out of the starting blocks - China responsible for more than half <b>12 - 13</b>
<b>STOCK MARKET VIEW   PSA GROUP</b> PSA raises 2017 earnings despite Opel-Vauxhall handicap..... <b>16 - 18</b>
<b>USA   DEATH OF THE CAR</b> America's still sizzling SUV market just keeps on growing ..... <b>19 - 20</b>

#### COMPANIES

Alfa Romeo.....	6
Audi.....	2, 6, 7, 8, 12, 15, 16, 20
Berenberg Bank.....	17
Bernstein Research.....	17, 18, 19
BMW.....	2, 4, 6, 7, 8, 13, 16
Brilliance.....	15
Changan.....	15
Chery.....	15
Citi Equity Research.....	17
Citroën.....	6, 15
Dacia.....	6, 10
Daimler.....	6, 8
Datsun.....	15, 16
DFM.....	15
DS.....	6
Evercore ISI.....	17, 18
FAX.....	15
Fiat.....	6, 15
FCA Fiat-Chrysler.....	6, 20
Ford.....	6, 13, 15, 20
GAZ.....	15
Geely.....	15
Genesis.....	15
GM.....	16, 17, 20
Haval.....	15
Honda.....	6, 15, 19, 20
Hyundai-Kia.....	6, 12, 14, 20
Infiniti.....	15, 16
Jaguar.....	6, 8, 15
Jeep.....	6, 15
Jefferies.....	17, 18
Lada.....	14, 16
Land Rover.....	6, 8, 15
Lexus.....	6, 12, 15, 16
Mazda.....	6
Mercedes.....	2, 6, 7, 8, 13, 15, 16
Mini.....	6, 8
Mitsubishi.....	6, 15, 18
Nissan.....	3, 4, 6, 10, 11, 14 - 16, 18, 19
Opel/Vauxhall.....	2, 6, 16, 17
Porsche.....	6, 15, 16
PSA Peugeot.....	6, 10, 15, 16, 17
Renault.....	6, 10, 11, 14, 16, 18
SEAT.....	6, 10
Škoda.....	6, 15
Smart.....	6, 15
Subaru.....	6, 15
Suzuki.....	6, 15
Tata.....	6
Tesla.....	6
Toyota.....	6, 12, 15, 19, 20
VW.....	2, 6, 7, 11 - 15, 16, 18, 19, 20
Volvo.....	6, 15



AID LTD.  
31 CAPE ROAD  
WARWICK  
CV34 4JP, UK

AUTOMOTIVE INDUSTRY DATA NEWSLETTER

ENTIRE CONTENTS COPY RIGHT. REPRODUCTION OR INCLUSION IN ANY DATABASE ONLY WITH WRITTEN PERMISSION FROM AID LTD.  
GRAPHIC DESIGN AND TYPESETTING BY AID SYSTEMS, WARWICK. INFO@EAGLEAID.COM | +44 (0)1926 410040

telephone: +44 (0)1926 410040  
telefax: +44(0)1926 776252  
subscriptions@eagleaid.com  
www.eagleaid.com  
twitter: @aidnewsletter