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WORLD | CAR SALES Q1 2018

AID's Q1 global car sales monitor
Selected markets.....**Centre pages**

W-EUROPE | DIESEL CARS

Headlong plunge in diesel car sales
continues this 1st quarter...**5 - 7**

W-EUROPE | BEV SALES

March electric car market - picture of
health, but can it last?...**7 - 9**

UK | 2017 PHEV MARKET BY MANUFACTURER AND MODEL

For PHEVs UK remains leading market in Western Europe

For plug-in hybrids (PHEVs), a growth sector long-dominated in Europe by Mitsubishi's Outlander PHEV, the UK remains West Europe's largest market. That's largely thanks to government car purchase grants plus notable benefit-in-kind (BIK) savings for company car users.

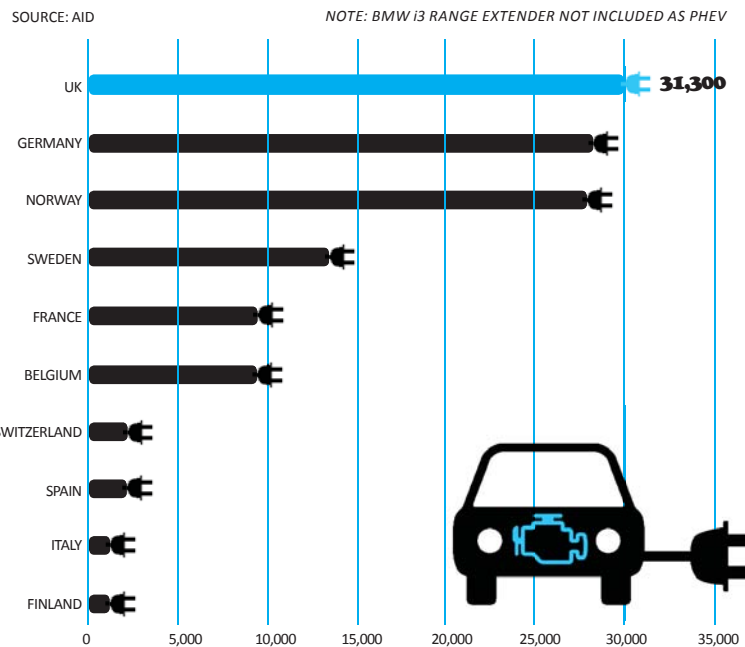
This first quarter, buoyed in no small measure by the UK's traditional March car sales bulge, the UK comfortably retained the lead as West Europe's biggest PHEV market. But the way things have unfolded of late, it looks as if the UK could soon be losing its European PHEV sales crown to Germany's currently heavily subsidised car market. In terms of PHEV sales, the gap between the UK and Germany at the first quarter point was just over 2,200 units.

In retrospect, last year, yet another good sales year for PHEVs in the UK, a continent-leading 31,286 PHEVs were newly registered in the UK's otherwise dwindling car market. Drawing attention to the on-going sales gains of both subsidised

AID Graph 18/57

UK LEADS EUROPE'S PHEV LEAGUE

TOP 10 W-EUROPEAN PLUG-IN HYBRID (PHEV) MARKETS REGISTRATIONS 2017 EXCLUDES PURE ELECTRIC CARS (BEVS)



COUNTRIES

W-Europe 1 - 8, 10, 12 - 15, 16, i, ii, iii, iv
Austria 6, 7, 8, 10, 16, ii, iii
Belgium 6, 8, 10, 16, ii, iii
Brazil 4, 5, i, iii
China 3, 4, 5, 11, 15, i, iii
Denmark 6, 8, 10, 16, ii, iii
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Greece 6, 8, 10, 16, ii, iii
Iceland/Luxembourg 10
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Norway 2, 6, 8, 9, 10, 16, ii, iii
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South Korea i, iii, iv
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USA 3, 4, 5, 13, i, iii
World 4, 5, 11, 13, 15, i, iii

IN DEPTH & OTHER TOPICS

UK | SIGNS OF THINGS TO COME?
BMW turns up heat, takes top slot in UK's 2017 PHEV sector **3**

WORLD | BRICS BACK ON HEAT
Global car sales patterns return back to business as usual **4 - 5**

W-EUROPE | DIESEL CAR SALES
March diesel car sales dip four times faster than overall car market **5 - 7**

W-EUROPE | TRUCK SALES
March truck business slackens, pulled down by fewer working days **10**

PROFIT & LOSS | VW GROUP Q1 2018
VW Group's Q1 2018 operating profit down 3.6% to €4.2bn **11**

STOCK MARKET VIEW | PSA GROUP Q1
PSA Q1 vehicle sales surge camouflages Opel-Vauxhall struggle **12 - 13**

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