AID NEWSLETTER REPORT

EUROPE'S LEADING AUTO INDUSTRY TREND & MARKET INTELLIGENCE JOURNAL

20. July 2018 | **EDITION 1813** | Annual subscription price: £534 | €638 + p&p| \$710 + p&p

W-EUROPE | 1st HALF CAR SALES

Burst of hot June sunshine, but cooler car sales on horizon ...6 - 7

EUROPE | JUNE CAR SALES

Weren't Volkswagen's car sales supposed to fall?...2 - 5

SWEDEN | CAR TAX CHANGES

July 1 steep vehicle tax hike sparks last minute June car sales frenzy...13 - 15

JAGUAR IN-DEPTH

NTELLIGENCE REPORT PAGES 19-20

WORLD | RISE OF TESLA

Tesla sales already hot on Jaguar's heels on world stage

Tesla, the world's most closely followed manufacturer of premium—priced electric cars (BEVs) is already snapping at the heels of UK premium carmaker Jaguar. Based on Tesla's latest upbeat news on June's Model 3 production, the question for AID forecasters now is not so much whether Tesla will outsell Jaguar on the global prestige sector sales scene, but how soon.

In terms of worldwide sales, the state of play at this year's second quarter shows the gap between Jaguar and Tesla shrank to just over 3,000 units. Revealingly, if Tesla's claimed milestone Model 3 production during the closing days of June is any guide to the future, Tesla's pure electric cars (BEVs) will comfortably outsell Jaguar by some considerable margin sooner rather than later.

Figures compiled by AID every month reveal that in this second quarter, thanks in large measure to the long-expected but belated sales bounce from Tesla's all-new Model 3 in its domestic US backyard, worldwide sales of Tesla skyrocketed to 40,740 units, according to Tesla.

GLOBAL QUARTERLY TESLA/JAGUAR SALES
Q3 2017 - Q2 2018
60,000
50,000
JAGUAR
42,260
40,000
20,000
TESLA
26,150
10,000

Q3 2017
Q4 2017
Q1 2018
Q2 2018

AID Graph 18/90
SOURCE: TESLA/JILR/AID RESEARCH

JAGUAR FIRST PREMIUM OEM ON TESLA HIT LIST



COUNTRIES

W-Europe 2 - 9, 10, 11, 16, 18, 19, 20 Austria/Belux
France
Germany 2, 3, 6 - 8, 11 - 13, 15, 18, 20
Greece
Hungary
Italy
Japan 4
Latvia/Lithuania/Estonia7
Netherlands 6, 7, 20
Norway 7, 20
Poland
The state of the s
Poland
Poland
Poland
Poland 7, 18 Portugal 6, 7, 18, 20 Romania/Slovenia/Slovakia 7 South Korea 4, 5 Spain 3, 6, 7, 20
Poland 7, 18 Portugal 6, 7, 18, 20 Romania/Slovenia/Slovakia 7 South Korea 4, 5 Spain 3, 6, 7, 20 Sweden 3, 6, 7, 13, 14, 15, 20
Poland 7, 18 Portugal 6, 7, 18, 20 Romania/Slovenia/Slovakia 7 South Korea 4, 5 Spain 3, 6, 7, 20
Poland 7, 18 Portugal 6, 7, 18, 20 Romania/Slovenia/Slovakia 7 South Korea 4, 5 Spain 3, 6, 7, 20 Sweden 3, 6, 7, 13, 14, 15, 20 Switzerland/Luxembourg 7
Poland 7, 18 Portugal 6, 7, 18, 20 Romania/Slovenia/Slovakia 7 South Korea 4, 5 Spain 3, 6, 7, 20 Sweden 3, 6, 7, 13, 14, 15, 20 Switzerland/Luxembourg 7 UK 1, 2, 3, 5, 6, 7, 12, 15, 16, 20

IN DEPTH & OTHER TOPICS

W-EUROPE KOREAN CAR SALES RECORD In Western Europe tireless Hyundai-Kia climbs into record orbit
WORLD PRESTIGE CAR SALES MONITOR Double trouble - Mercedes Cars' juggernaut slips into reverse8 - 9
FRANCE CAR BUYING TRENDS Today's French new car buyers go with Europe's car buying patterns 10 - 11
GERMANY PETROL-ELECTRIC HYBRIDS Hybrids (HEVs) continuing to make solid inroads into Germany's car market 11 - 13
STOCK MARKET VIEW JLR Jaguar Land Rover needs to act to match German profit levels
CHINA TESLA FACTORY Tesla China factory: investors will believe it

OMPANIES

Alfa Romeo4
Audi
Barclays Equity Research 17, 18
Bentley
Bernstein Research
BMI Research
BMW2, 4, 5, 8, 9, 18, 19
Citroën 4
Dacia
Daimler
Evercore ISI
Fiat 4
FCA Fiat-Chrysler 4, 15
Ford 3, 4, 12, 13, 15, 18
GM 18
Google
Honda 4
Hyundai-Kia
IHS Markit17
Jaguar 1, 2, 4, 5, 9, 15, 16, 19, 20
Jeep4
Land Rover 4, 5, 9, 15, 16, 20
Lexus

Mazda4
Mercedes
Mini4, 9
Mitsubishi4
Moody's Investors Service15, 16
Morgan Stanley17, 18
Nissan 2, 4, 5, 13, 15
Opel/Vauxhall3, 4
Panasonic
Porsche 4, 5, 9
PSA Peugeot
Renault
SEAT 3, 4
Škoda3, 4
Smart 4, 9
Subaru4
Suzuki 4
「ata 4, 5, 9, 15
Tesla
Toyota3, 4, 5, 11, 13, 19
/W2, 3, 4, 12, 15, 18
/olvo 3, 4, 13, 15, 19
Maymo 10

