AID NEWSLETTER REPORT

EUROPE'S LEADING AUTO INDUSTRY TREND & MARKET INTELLIGENCE JOURNAL

03. August 2018 | **EDITION 1814** | Annual subscription price: £534 | €638 + p&p| \$710 + p&p

WORLD | CAR SALES Q2 2018

AID's global car sales monitor Selected markets ..Centre Pages

EUROPE | DIESEL CAR SALES

Diesel cars out of favour - but have we seen the worst of the plunge?...4 - 6

W-EUROPE | H1 BEV CAR SALES

DACIA IN-DEPTH

MARKET NTELLIGENCE REPORT PAGES 15-16

Touch on the brakes, signs of slowing BEV sales growth in Germany.....3

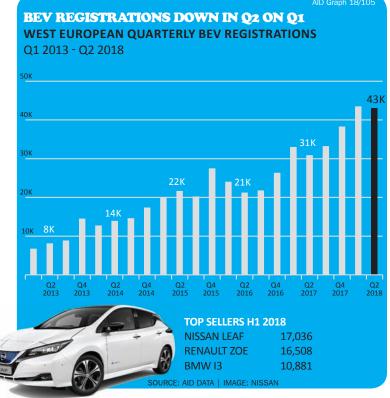
WESTERN EUROPE | BEV CAR SALES MONITOR

June says BEV pulse rate in Europe may be slowing

June's electric car sales (BEVs) in Western Europe, compared with the earlier months of this year, were markedly more sluggish than could have been expected. In spite of an outwardly satisfactory looking 18.2 per cent rise in sales, some segment observers take the view that June's turnout points to a likely slowing in second half demand. June's renewed double-digit rise in West Europe's BEV sales also stands out as the lowest rate of expansion for five months.

Drawing attention to the anticipated slowing in West Europe's underlying demand this second half, June's BEV sales in Norway, Europe's leading market for vehicles of this type, remained largely unchanged.

In Norway, in spite of a sizzling June sales blitz from Nissan's new Leaf, whose June sales saw a threefold jump, in terms of overall BEV sales June ended with largely unchanged sales of 3,970 units, according to OFV numbers. With few exceptions, many of Norway's leading



COUNTRIES

W-Europe 1, 2, 4-6, 8-10, 15, 16, i, ii, iii, iv
Austria/Belgium 2, 5, 6, ii, iii
Brazil
China 9, i, iii
Denmark 2, 5, 6, ii, iii
Eire
Finland2, 5, 6, ii, iii
France 2, 5, 6 - 9, 14, 15, 16, ii, iii
Germany2, 4, 5, 6, 12, ii, iii
Greece
India
Italy2, 5, 6, ii, iii
Japan 11, i, iii, iv
Luxembourg6
Netherlands2, 3, 5, 6, ii, iii
Name 4 O 4 E C :: :::
Norway
Polandiii
Polandiii
Polandiii Portugal/Sweden/Switzerland 2, 5, 6, ii, iii
Poland
Polandiii Portugal/Sweden/Switzerland 2, 5, 6, ii, iii Romania
Poland iii Portugal/Sweden/Switzerland 2, 5, 6, ii, iii Romania 15, 16 Russia 9, 10, 15, iii South Korea 11, i, iii, iv Spain 2, 6, ii, iii
Poland
Poland iii Portugal/Sweden/Switzerland 2, 5, 6, ii, iii Romania 15, 16 Russia 9, 10, 15, iii South Korea 11, i, iii, iv Spain 2, 6, ii, iii Turkey 9, iii UK 2, 3, 5, 6, ii, iii
Poland iii Portugal/Sweden/Switzerland 2, 5, 6, ii, iii Romania 15, 16 Russia 9, 10, 15, iii South Korea 11, i, iii, iv Spain 2, 6, ii, iii Turkey 9, iii

IN DEPTH & OTHER TOPICS

W-EUROPE H1 TRUCK SALES Truck sales may have stopped growing, but as yet no sign of a slowdown				
P&L GROUPE PSA H1 Peugeot Citroën mastermind financial turnaround at Opel-Vauxhall				

P&L | GROUPE RENAULT H1 Renault ends first half with slightly improved 6.4% group operating margin 9 - 10

BRAZIL CAR SALES H1
Change and mixed readings for front-runners
in Brazil's rebounding car market 10 - 12

STOCK MARKET VIEW FCA H1
FCA investors like choice of Manley as
new CEO 13 - 14

STOCK MARKET VIEW PSA H1
PSA stuns investors with strong profits and
Opel-Vauxhall's return to the black14

COMPANIES

Alfa Romeo13, 14, ii, iv
Audi 11, 15, ii, iv
Bernstein Research14, 15
BMW2, 4, 11, 15, ii, iv
Chery11
Chrysler13, 14, ii, iv
Citroën 2, 7, 11, 15, ii, iv
Chevrolet 11, 12
CNH
Dacia15, 16, ii, iv
Daimler2, 4, 10, 14, ii, iv
DS8
Evercore ISI
Ferrari14
Fiat10, 11, 12, 13, 14, ii, iv
FCA Fiat-Chrysler 13, 14, 15, ii, iv
Ford12, 14, ii, iv
GM 9, 11, 12, 13, 14, ii, iv
Honda 11, 12, ii, iv
Hyundai-Kia 2, 4, 11, 12, 14, 15, ii, iv
Infinitiii, iv
Jaguar2, ii, iv
Jeep10, 11, 12, 13, 14
Jefferies Investment Bank 13. 14

Land Rover	11, ii, iv
Lexus	ii, iv
Maserati	13, 14
Mazda	ii, iv
Mercedes2	2, 7, 11, 15, ii, iv
Mini	
Mitsubishi	
Morgan Stanley	
Nissan1, 2, 4, 11,	
Opel/Vauxhall2,	
Porsche	
PSA Peugeot 2, 7 - 9	
Renault2, 4, 9, 11,	
SEAT	
Škoda	
Smart	
Subaru	
Suzuki	
Tata	
Tesla	
Toyota	.11, 12, 15, ii, iv
UBS	
VW2. 3, 4,	
Volvo	

