

# AID NEWSLETTER REPORT

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## W.EUROPE | SUV BY MODEL

VW Tiguan now W-Europe's top selling SUV/Crossover...4

## W.EUROPE | AUGUST BEV SALES

W.Europe's BEV market approached 1.5% mix in August...4 - 6

## W.EUROPE | DIESEL MARKET

Europe's diesel market fall coming to an end or just WLTP impact?...8 - 9

## WESTERN EUROPE | H1 BY SECTOR

# SUV/Crossovers continue to dominate Western Europe's car market

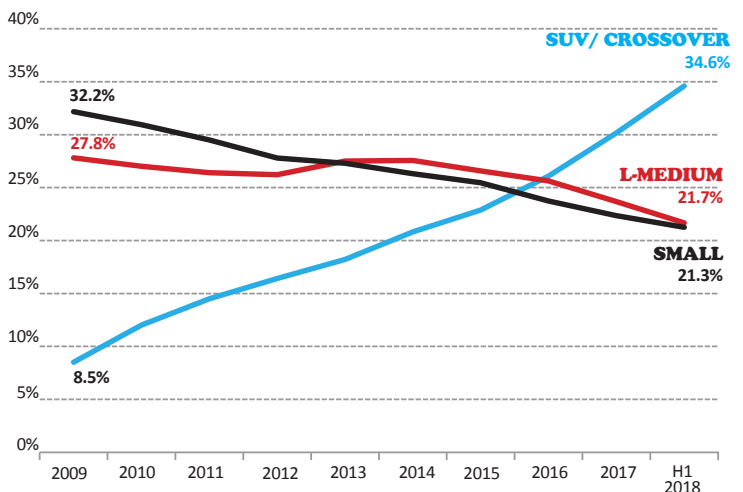
Consumer's love-affair with trendy SUV/Crossovers shows no sign of ending any time soon. On the contrary, AID compiled figures reveal that during this year's first half the sales share of these conspicuous fashion motors soared to yet another all-time high. By conventional historic measures, the underlying growth and momentum of this sector overshadows anything seen in Europe in recent memory. One development in particular throws a timely spotlight on the extent to which this sector is still expanding. Italy's Maserati, renowned foremost for its muscle-packed Sports Cars, repeated last year's trend and sold more SUV/Crossovers than Sports Cars in Western Europe this first half, according to AID's latest half-year car sales numbers.

Never in West European car sales history have SUV/Crossovers attracted so much passionate consumer interest as today. AID's autoindustry observers now take the view that the stored up heat in the sector is such that this year's total sector sales in Western Europe are forecast to set yet another

AID Graph 18/129

## SUV/CROSSOVERS DOMINATION ACCELERATES

W-Europe car sales by major sectors history  
10 year history 2009 - 2018 (H1)



## W-Europe top models (sales) by sector | H1 2018

SOURCE:AID

### SUV/ Crossover

1. VW Tiguan: 135.5k
2. Nissan Qasqai: 123.0k
3. Renault Captur: 113.7k

### Lower-Medium

1. VW Golf: 238.8k
2. Ford Focus: 102.8k
3. Škoda Octavia: 85.6k

### Small

1. Renault Clio: 171.6k
2. VW Polo: 158.1k
3. Ford Fiesta: 151.8k

## COUNTRIES

W-Europe.	1 - 6, 8, 9, 10, 14, 17, 19, 20
Austria	2, 3, 5, 9, 20
BeLux	2, 3, 5, 9, 20
China	16, 19
Denmark	2, 3, 5, 9, 20
Eire	2, 3, 5, 9, 20
Finland	2, 3, 5, 9, 20
France	2, 3, 5, 9, 10 - 12, 16, 17, 20
Germany	2, 3, 5, 9, 16, 18, 19, 20
Greece	2, 3, 5, 9, 20
Italy	2, 3, 5, 9, 20
Netherlands	2, 3, 4, 5, 6, 9, 19, 20
Norway	2, 3, 4, 5, 9, 18, 20
Portugal	2, 3, 5, 9, 20
Spain	2, 3, 5, 9, 20
Sweden	2, 3, 5, 9, 20
Switzerland	2, 3, 5, 9, 20
UK	2, 3, 5, 6, 7, 8, 9, 16, 18, 19, 20
USA	4, 16, 19

## IN DEPTH & OTHER TOPICS

### EUROPE | SUVs TOP IN 16 OF 17 MARKETS

All but one market saw SUV/Crossovers as most popular sector during H1 2018 .. 2 - 3

### UK | PLUG-IN HYBRID SALES

August PHEV registrations see near threefold jump .....7 - 8

### FRANCE | WLTP BOOST FOR CAR SALES

Skyrocketing August car registrations in France ..... 9 - 12

### FRANCE | CAR SALES SEPTEMBER UPDATE

Consumer rush to petrol safe-haven accelerates in September..... 12

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Trade wars, regulatory hiccup threaten Europe at Paris Auto Show..... 16 - 17

### PRODUCT STRATEGY | BMW iNEXT

BMW's next generation begins in 2021, showcasing the next generation ..... 17 - 18

## COMPANIES

Alfa Romeo	11	Lamborghini	15
Alibaba	16	Land Rover	11, 19
Amazon	16	Lexus	11
Apple	16	Maserati	1, 11
Aston Martin	15	Mercedes	6, 7, 11, 13, 16
Audi	11	Mini	11, 19, 20
Bentley	15	Mitsubishi	6, 7, 11
Bernstein Research	14, 15	Moody's	16
BMW	4 - 6, 11, 13, 14 - 17, 18 - 20	Morgan Stanley	13, 15
Bolloré	11	Nissan	1, 2, 4, 5, 6, 11, 19
CAM	16, 17	Opel/Vauxhall	2, 4, 6, 11
Continental	14	Porsche	10, 11
Citi Equity Research	15	PSA Peugeot	2, 3, 4, 6, 10, 11
Citroën	4, 6, 9, 10, 11	Renault	1, 2, 4, 5, 6, 9, 10, 11
Dacia	4, 9, 10, 11	Rolls-Royce	15
Daimler	6, 11, 16	Rover	19
DriveNow	17	SEAT	10, 11
DS	11	Skoda	1, 11
EY	16	Smart	6, 11
Evercore ISI	13, 14, 15	SsangYong	11
Ferrari	11, 15	Subaru	11
Fiat	11	Suzuki	11
Fitch Solutions	13	Tata	11
FCA Fiat-Chrysler	11	TenCent	16
Ford	1, 4, 11, 13	Tesla	4, 5, 6, 11, 12, 13, 16
Great Wall	19	Toyota	4, 8, 11
Honda	10, 11	Uber	16
Hyundai-Kia	4, 6, 8, 10, 11	VDL Nedcar	19
Infiniti	10, 11	VW	1, 2, 4, 5, 6, 7, 8, 11, 12, 14, 15
Jaguar	6, 11, 13, 15, 19	Volvo Cars	11
Jeep	10, 11	Waymo	16
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