Table of Contents

"Today, yesterday & tomorrow"

2012 State of Europe's Market to Date
Car sales plunge to 18-year low
Just 11.8m new cars sold in 2012, there's worse in store this year
Steady deterioration in Germany's car market
From bad to worse as the year unfolds
Markedly chillier second half
Mixed bag of fortunes
Big push - SEAT's German car sales share soars to 19-year high
Bumper year for VW Group in the UK
VW Group's French sales share record also catapulted into record orbit
No end to Hyundai-Kia's winning game play
Test of strength in French carmakers' domestic backyard
ELECTRIC MARKET 2012
Few signs of life seen in Europe's 2012 electric car market
Last year's poor electric car sales numbers say a lot about the gravity of the problem faced by
the industry
451 - Nissan LEAF sales in 2012 German market, where it is priced at €33,990
First doubts about demand intensity and timing creep in
HYBRID MARKET 2012
Uphill slog for hybrid cars
Toyota single-handedly propped up last year's West European market for hybrid cars 29
Toyota - Big fish in a small pond
Toyota's own show, green diesels main opposition
Prius dominates Europe's hybrid sector, but only just
Clean sweep for Toyota hybrids
USA
Off to a good start, but sales rate tipped to slow as year unfolds
Flying good start from Ford, thanks to more than one-third jump from cars
Chrysler still storming ahead
43,772 - Fiat 500 2012 full year US sales
Toyota in full rebound
236,659 - Prius range sales in the US during 2012
Has Volkswagen's rally run out of steam?
BMW, for now at least, remains stuck in starting blocks

Japan	
Japan's car market performed much better than feared last year	40
317,675 - Last year's Prius sales in Japan	41
The Toyota marque, more than most, has benefited most from last year's hybrid car sales	
incentives, up 43.8%	
Hybrid boom has bypassed Nissan, mixed fortunes for fringe players Subaru and Mitsubis	shi 42
Importers left out in the cold	42
Gentlemen's agreement?	43
China	
China's car sales beat expectations, again	44
After slow-fast-slow phase China's car sales train regains momentum in 4th quarter	44
Japan's carmakers hurt by inflamed tensions over East China Sea islands	45
Japanese pains are Volkswagen's gains	46
2.8 million VW Group cars sold in China in 2012, including 189,700 imports	46
GM also grabs its share of recent windfall gains.	
Some western carmakers clearly failed to make most of Japanese handicap	47
Eyes on some of China's slipping domestic carmakers.	47
33,140 - Mercedes S-Class sales in China during 2012	48
2.4 million - SUV-Crossovers sold in China in 2012	48
Ongoing appetite for premium brands, but some perform better than others	49
	40
Mercedes stands out as a laggard	49
Mercedes stands out as a laggard	49
	49
	49
	49
ECTION ONE	49
ECTION ONE precast Overview	
ECTION ONE precast Overview SALES	
ECTION ONE orecast Overview	
ECTION ONE precast Overview SALES	54
ECTION ONE orecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018)	54
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018)	54 55 57
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010)	54 55 57 58
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011)	54 55 57 58
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011)	54 55 57 58 59
ECTION ONE Precast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011)	54 55 57 58 59 60
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011)	54 55 58 59 60 61
ECTION ONE Drecast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Manufacturer (2012/2011)	54 55 57 59 60 61 62
ECTION ONE SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Sector (2012/2011)	54 55 57 58 60 61 62 63
ECTION ONE Precast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Sector (2012/2011) China - Passenger Car Sales by Manufacturer (2012/2011)	54 55 57 59 60 61 62 63 64
ECTION ONE SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Sector (2012/2011) China - Passenger Car Sales by Manufacturer (2012/2011) South Korea - Passenger Car Sales by Manufacturer (2012/2011) India - Passenger Car Sales by Manufacturer (2012/2011)	54 55 57 59 60 61 62 63 64
ECTION ONE Precast Overview SALES Major World Markets - Passenger Car Sales (1996 - 2018) East European Markets - Passenger Car Sales (1996 - 2018) Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010) USA - Passenger Car Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Manufacturer (2012/2011) USA - Light Truck Sales by Segment x Manufacturer (2012/2011) USA - Light Vehicle Sales by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Manufacturer (2012/2011) Japan - Passenger Car Registrations by Sector (2012/2011) China - Passenger Car Sales by Manufacturer (2012/2011) South Korea - Passenger Car Sales by Manufacturer (2012/2011)	54 55 57 59 60 61 62 63 64

	West European Countries - Passenger Car Production (1996 - 2017)	. 71
	USA Light Vehicle Production by Manufacturer (2011/2010)	. 72
	USA Passenger Car Production by Manufacturer (2011/2010)	. 73
	USA Light Truck Production by Manufacturer (2011/2010)	. 73
	Japan - Passenger Car Production by Manufacturer (2011/2010)	. 74
S	ECTION TWO	
Ει	uropean Sales Summary	
	Western Europe - Passenger Car Sales (1980 - 2018)	77
	Western Europe - Passenger Car Sales by Market (2012/2011/2010)	
	Western Europe - Passenger Car Sales by Manufacturer (2012/2011/2010)	
	Western Europe - 2012 Passenger Car Sales by Manufacturer x Market	
	Western Europe - 2011 Passenger Car Sales by Manufacturer x Market	
	European Union 25 + EFTA - Passenger Car Sales by Manufacturer (2012/2011/2010)	
	European Union 25 + EFTA - 2012 Passenger Car Sales by Manufacturer x Market	
	European Union 25 + EFTA - 2012 Lassenger Car Sales by Manufacturer x Market	
	VW Group - Passenger Car Sales by Market (2012/2011/2010)	
	VW Group - Market Share by Market (2012)	
	VW Group - Share of West European Car Market (1980 - 2012)	
	PSA Group - Passenger Car Sales by Market (2012/2011/2010)	
	PSA Group - Market Share by Market (2012)	
	PSA Group - Share of West European Car Market (1980 - 2012)	
	Ford Group - Passenger Car Sales by Market (2012/2011/2010)	
	Ford Group - Market Share by Market (2012)	
	Ford Group - Share of West European Car Market (1980 - 2012)	
	Renault - Passenger Car Sales by Market (2012/2011/2010)	
	Renault - Market Share by Market (2012)	
	Renault - Share of West European Car Market (1980 - 2012)	
	Fiat Group - Passenger Car Sales by Market (2012/2011/2010)	
	Fiat Group - Market Share by Market (2012)	
	Fiat Group - Share of West European Car Market (1980 - 2012)	. 94
	GM Group - Passenger Car Sales by Market (2012/2011/2010)	. 95
	GM Group - Market Share by Market (2012)	. 95
	GM Group - Share of West European Car Market (1980 - 2012)	. 96
	Toyota Group - Passenger Car Sales by Market (2012/2011/2010)	. 97
	Toyota Group - Market Share by Market (2012)	. 97
	Toyota Group - Share of West European Car Market (1980 - 2012)	. 98
	BMW Group - Passenger Car Sales by Market (2012/2011/2010)	. 99
	BMW Group - Market Share by Market (2012)	
	BMW Group - Share of West European Car Market (1980 - 2012)	
	Daimler - Passenger Car Sales by Market (2012/2011/2010)	

Schmidt's 2012/13 AUTO AID

I	Daimler - Market Share by Market (2012)
	Daimler - Share of West European Car Market (1980 - 2012)
	Hyundai Group - Passenger Car Sales by Market (2012/2011/2010)
	Hyundai Group - Market Share by Market (2012)
	Hyundai Group - Share of West European Car Market (1980 - 2012)
1	Nissan - Passenger Car Sales by Market (2012/2011/2010)
1	Nissan - Market Share by Market (2012)
1	Nissan - Share of West European Car Market (1980 - 2012)
I	Honda - Passenger Car Sales by Market (2012/2011/2010)
1	Honda - Market Share by Market (2012)
I	Honda - Share of West European Car Market (1980 - 2012)
1	Mazda - Passenger Car Sales by Market (2012/2011/2010)
1	Mazda - Market Share by Market (2012)
1	Mazda - Share of West European Car Market (1980 - 2012)
7	Western Europe - Korean Carmakers' Sales by Market (2012/2011/2010)
I	Korean Manufacturers - Share of West European Car Market (1980 - 2012)
7	Western Europe - Korean Car Sales by Market (2012)
7	Western Europe - Japanese Carmakers' Sales by Market (2012/2011/2010)
J	apanese Manufacturers - Share of West European Car Market (1980 - 2012)
1	Western Europe - Japanese Car Sales by Market (2012)
	Western Europe - Japanese Car Sales by Manufacturer (2012/2011/2010)
7	Western Europe - Top 20 Best Selling Models (2011/2010)
7	Western Europe - 2011 Top 20 Best Selling Models by Market
7	Western Europe - 2010 Top 20 Best Selling Models by Market
7	Western Europe - Diesel Car Sales (1980 - 2012)
7	Western Europe - Diesel Car Sales by Market (2012/2011/2010)
7	Western Europe - Electric Car Sales by Market (2012)
	Western Europe - Hybrid Car Sales by Market (2012/2011)
	Passenger Cars - Market Sector Classification
1	Western Europe - Passenger Car Sales by Sector (2011/2010)
SE	CTION THREE
	anaan Draduation Cummany
⊏ur	opean Production Summary
7	Western Europe - Net Passenger Car Production versus Sales (1987 - 2017)
7	Western Europe - Net Passenger Car Production (1983 - 2017)
1	Western Europe - Net Passenger Car Production by Country (2011/2010)
1	Western Europe - Net Passenger Car Production by Manufacturer (2011/2010) 130
1	Western Europe - 2011 Passenger Car Production by Manufacturer & Country
1	Western Europe - 2010 Passenger Car Production by Manufacturer & Country
7	Western Europe - Top 30 Produced Models (2011/2010)

SECTION FOUR

European Sales by Market

Austria - Passenger Car Registrations (1980 - 2018)	136
Austria - Passenger Car Registrations by Manufacturer (2012/2011/2010)	137
Austria - Top 30 Best Selling Models (2011/2010)	138
Austria - Passenger Car Registrations by Sector (2011/2010)	139
BeLux - Passenger Car Registrations (1980 - 2018)	141
BeLux - Passenger Car Registrations by Manufacturer (2012/2011/2010)	142
BeLux - Top 30 Best Selling Models (2011/2010)	143
BeLux - Passenger Car Registrations by Sector (2011/2010)	144
Czech Republic - Passenger Car Sales (1991 - 2018)	146
Czech Republic - Passenger Car Sales by Manufacturer (2012/2011/2010)	147
Czech Republic - Top 10 Best Selling Models (2011/2010)	148
Czech Republic - Passenger Car Sales by Sector (2011/2010)	149
Denmark - Passenger Car Registrations (1980 - 2018)	151
Denmark - Passenger Car Registrations by Manufacturer (2012/2011/2010)	152
Denmark - Top 30 Best Selling Models (2011/2010)	153
Denmark - Passenger Car Registrations by Sector (2011/2010)	154
Eire - Passenger Car Registrations (1980 - 2018)	156
Eire - Passenger Car Registrations by Manufacturer (2012/2011/2010)	157
Eire - Top 30 Best Selling Models (2011/2010)	158
Eire - Passenger Car Registrations by Sector (2011/2010)	159
Finland - Passenger Car Registrations (1980 - 2018)	161
Finland - Passenger Car Registrations by Manufacturer (2012/2011/2010)	162
Finland - Top 30 Best Selling Models (2011/2010)	163
Finland - Passenger Car Registrations by Sector (2011/2010)	164
France - Passenger Car Registrations (1980 - 2018)	166
France - Passenger Car Registrations by Manufacturer (2012/2011/2010)	167
France - Top 30 Best Selling Models (2011/2010)	168
France - Passenger Car Registrations by Sector (2011/2010)	169
Germany - Passenger Car Registrations (1980 - 2018)	171
Germany - Passenger Car Registrations by Manufacturer (2012/2011/2010)	172
Germany - Top 30 Best Selling Models (2011/2010)	173
Germany - Passenger Car Registrations by Sector (2011/2010)	174
Greece - Passenger Car Registrations (1980 - 2018).	176
Greece - Passenger Car Registrations by Manufacturer (2012/2011/2010)	177
Greece - Top 30 Best Selling Models (2011/2010).	178
Greece - Passenger Car Registrations by Sector (2011/2010)	179
Hungary - Passenger Car Sales (1991 - 2018).	181
Hungary - Passenger Car Sales by Manufacturer (2012/2011/2010)	182
Hungary - Top 10 Best Selling Models (2011/2010)	
Hungary - Passenger Car Sales by Sector (2011/2010)	184

Schmidt's 2012/13 AUTO AID

Italy - Passenger Car Registrations (1980 - 2018)	186
Italy - Passenger Car Registrations by Manufacturer (2012/2011/2010)	187
Italy - Top 30 Best Selling Models (2011/2010)	188
Italy - Passenger Car Registrations by Sector (2011/2010)	199
Netherlands - Passenger Car Registrations (1980 - 2018)	191
Netherlands - Passenger Car Registrations by Manufacturer (2012/2011/2010)	192
Netherlands - Top 30 Best Selling Models (2011/2010)	193
Netherlands - Passenger Car Registrations by Sector (2011/2010)	194
Norway - Passenger Car Registrations (1980 - 2018)	196
Norway - Passenger Car Registrations by Manufacturer (2012/2011/2010)	197
Norway - Top 30 Best Selling Models (2011/2010)	198
Norway - Passenger Car Registrations by Sector (2011/2010)	199
Poland - Passenger Car Sales (1991 - 2018)	201
Poland - Passenger Car Sales by Manufacturer (2012/2011/2010)	202
Poland - Top 10 Best Selling Models (2011/2010)	203
Poland - Passenger Car Sales by Sector (2011/2010)	204
Portugal - Passenger Car Registrations (1980 - 2018)	206
Portugal - Passenger Car Registrations by Manufacturer (2012/2011/2010)	207
Portugal - Top 30 Best Selling Models (2011/2010)	208
Portugal - Passenger Car Registrations by Sector (2011/2010)	209
Scandinavia - Passenger Car Registrations (1980 - 2018)	211
Scandinavia - Passenger Car Registrations by Manufacturer (2012/2011/2010)	212
Scandinavia - Top 30 Best Selling Models (2011/2010)	213
Scandinavia - Passenger Car Registrations by Sector (2011/2010)	214
Spain - Passenger Car Registrations (1980 - 2018)	216
Spain - Passenger Car Registrations by Manufacturer (2012/2011/2010)	217
Spain - Top 30 Best Selling Models (2011/2010)	218
Spain - Passenger Car Registrations by Sector (2011/2010)	219
Sweden - Passenger Car Registrations (1980 - 2018)	221
Sweden - Passenger Car Registrations by Manufacturer (2012/2011/2010)	222
Sweden - Top 30 Best Selling Models (2011/2010)	223
Sweden - Passenger Car Registrations by Sector (2011/2010)	224
Switzerland - Passenger Car Registrations (1980 - 2018)	226
Switzerland - Passenger Car Registrations by Manufacturer (2012/2011/2010)	227
Switzerland - Top 30 Best Selling Models (2011/2010)	228
Switzerland - Passenger Car Registrations by Sector (2011/2010)	229
United Kingdom - Passenger Car Registrations (1980 - 2018)	231
United Kingdom - Passenger Car Registrations by Manufacturer (2012/2011/2010)	232
United Kingdom - Top 20 Best Selling Models (2011/2010)	233
United Kingdom - Passenger Car Registrations by Sector (2011/2010)	234

SECTION FIVE

European Production by Country

Automotive Production Sites	236 - 254
Austria - Passenger Car/4x4 Production (1980 - 2017)	256
Austria - Passenger Car/4x4 Production by Model (2011/2010)	257
Belgium - Passenger Car Production (1979 - 2017)	259
Belgium - Passenger Car Production by Model (2011/2010)	260
Czech Republic - Passenger Car Production (1990 - 2017)	262
Czech Republic - Passenger Car Production by Model (2011/2010)	263
France - Passenger Car Production (1975 - 2017)	265
France - Passenger Car Production by Model (2011/2010)	266
Germany - Passenger Car Production (1975 - 2017)	268
Germany - Passenger Car Production by Model (2011/2010)	269
Italy - Passenger Car Production (1975 - 2017)	271
Italy - Passenger Car Production by Model (2011/2010)	272
Netherlands - Passenger Car Production (1983 - 2017)	274
Netherlands - Passenger Car Production by Model (2011/2010)	275
Portugal - Passenger Car Production (1996 - 2017)	277
Portugal - Passenger Car Production by Model (2011/2010)	278
Spain - Passenger Car Production (1975 - 2017)	280
Spain - Passenger Car Production by Model (2011/2010)	281
Sweden - Passenger Car Production (1975 - 2017)	283
Sweden - Passenger Car Production by Model (2011/2010)	284
United Kingdom - Passenger Car Production (1975 - 2017)	286
United Kingdom - Passenger Car Production by Model (2011/2010)	287