

European market segment analysis for first-half 2019

MINICAR

	H1 2019	H1 2018	change
1. Fiat Panda	105,534	92,156	+14.5%
2. Fiat 500	100,150	110,221	-9.1%
3. Toyota Aygo	51,479	50,713	+1.5%
4. Renault Twingo	44,374	48,030	-7.6%
5. Volkswagen Up	43,732	50,950	-14.2%
6. Kia Picanto	41,497	38,099	+8.9%
7. Hyundai i10	38,375	43,802	-12.4%
8. Peugeot 108	31,349	31,313	+0.1%
9. Opel Karl/Vauxhall Viva	30,030	26,029	+15.4%
10. Citroen C1	28,993	27,866	+4.0%
Segment total	603,925	606,196	-0.4%

COMPACT

	H1 2019	H1 2018	change
1. Volkswagen Golf	206,785	246,666	-16.2%
2. Ford Focus	128,087	117,204	+9.3%
3. Skoda Octavia	118,425	121,761	-2.7%
4. Peugeot 308	78,732	88,642	-11.2%
5. Seat Leon	72,729	80,085	-9.2%
6. Opel/Vauxhall Astra	70,839	88,620	-20.1%
7. Renault Megane	70,122	78,490	-10.7%
8. Toyota Corolla	51,959	9,119	—
9. Kia Ceed	47,340	38,798	+22.0%
10. Fiat Tipo	46,914	62,041	-24.4%
Segment total	1,204,122	1,336,211	-9.9%

COUPE & CONVERTIBLE

	H1 2019	H1 2018	change
1. Smart ForTwo	27,838	27,919	-0.3%
2. Mazda MX-5	7,813	8,543	-8.5%
3. Ford Mustang	5,547	5,335	+4.0%
4. Smart ForTwo ED	4,627	4,292	+7.8%
5. Fiat 124 Spider	2,950	4,385	-32.7%
6. Alpine A110	2,565	639	—
7. Chevrolet Camaro	1,126	942	+19.5%
8. Opel/Vauxhall Cascada	741	1,192	-37.8%
9. Toyota GT 86	534	700	-23.7%
10. Nissan 370Z	311	410	-24.1%
Segment total	54,984	64,438	-14.7%

SMALL MINIVAN

	H1 2019	H1 2018	change
1. Fiat 500L/500L Living	24,112	33,848	-28.8%
2. Hyundai ix20	8,704	13,299	-34.6%
3. Kia Venga	7,122	11,536	-38.3%
4. Kia Soul EV	1,700	3,486	-51.2%
5. Kia Soul	1,183	2,854	-58.5%
6. Opel/Vauxhall Meriva	5	276	-98.2%
7. Ford B-Max	3	3,436	-99.9%
8. Citroen C3 Picasso	1	45	-97.8%
Segment total	42,830	68,780	-37.7%

SMALL

	H1 2019	H1 2018	change
1. Renault Clio	185,517	183,907	+0.9%
2. Volkswagen Polo	146,344	162,799	-10.1%
3. Ford Fiesta	125,795	157,068	-19.9%
4. Peugeot 208	124,730	132,010	-5.5%
5. Opel/Vauxhall Corsa	122,277	116,924	+4.6%
6. Dacia Sandero	121,442	114,779	+5.8%
7. Citroen C3	118,799	116,120	+2.3%
8. Toyota Yaris	116,469	114,990	+1.3%
9. Skoda Fabia	86,485	95,979	9.9%
10. Seat Ibiza	52,031	63,054	-17.5%
Segment total	1,474,490	1,575,068	-6.4%

MIDSIZE

	H1 2019	H1 2018	change
1. Volkswagen Passat	65,646	92,710	-29.2%
2. Skoda Superb	37,842	42,195	-10.3%
3. Opel/Vauxhall Insignia	26,175	41,227	-36.5%
4. Ford Mondeo	20,829	26,546	-21.5%
5. Peugeot 508	17,543	7,127	—
6. Mazda6	11,428	9,350	+22.2%
7. Volkswagen Arteon	9,494	12,744	-25.5%
8. Renault Talisman	8,704	11,892	-26.8%
9. Kia Optima	6,506	8,169	-20.4%
10. Subaru Legacy/Outback	2,884	3,969	-27.3%
Segment total	214,977	279,423	-23.1%

CAR DERIVED VAN

	H1 2019	H1 2018	change
1. VW T5/T6	38,782	37,776	+2.7%
2. VW Caddy	29,742	33,191	-10.4%
3. Peugeot Rifter	27,109	314	—
4. Citroen Berlingo	23,612	18,428	+28.1%
5. Dacia Dokker	23,388	22,742	+2.8%
6. Fiat Ducato	23,106	26,425	-12.6%
7. Ford Transit Custom	18,134	15,206	+19.3%
8. Ford Transit Courier	10,820	8,396	+28.9%
9. Opel/Vauxhall Combo	9,363	320	—
10. Citroen Traveller	7,857	6,639	+18.3%
Segment total	287,192	270,331	+6.2%

COMPACT MINIVAN

	H1 2019	H1 2018	change
1. Renault Scenic/Gr. Scenic	45,748	57,364	-20.2%
2. VW Touran	42,364	54,352	-22.1%
3. Citroen C4 Spacetourer	28,459	47,802	-40.5%
4. Ford C-Max/Grand C-Max	20,950	31,900	-34.3%
5. Dacia Lodgy	15,849	17,945	-11.7%
6. Opel/Vauxhall Zafira	8,341	19,764	-57.8%
7. Toyota Prius+	5,709	4,570	+24.9%
8. Nissan e-NV200/Evalia	1,395	384	—
9. Kia Carens	878	9,794	-91.0%
10. Nissan NV200/Evalia	279	2,010	-86.1%
Segment total	170,037	252,200	-32.6%

Source: ANE analysis of JATO Dynamics figures

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LARGE MINIVAN

	H1 2019	H1 2018	change
1. Mercedes V class	14,443	15,656	-7.7%
2. Seat Alhambra	13,430	14,244	-5.7%
3. VW Sharan	12,553	13,152	-4.6%
4. Ford S-Max	12,188	13,191	-7.6%
5. Mercedes Vito/Viano	10,724	9,931	+8.0%
6. Ford Galaxy	7,871	6,330	+24.3%
7. Renault Espace/Grand Espace	5,619	7,901	-28.9%
8. SsangYong Rodius	258	943	-72.6%
9. Mercedes Vito EV	35	—	—
Segment total	77,121	81,348	-5.2

LARGE SUV & CROSSOVER

	H1 2019	H1 2018	change
1. Toyota Land Cruiser	3,328	3,756	-11.4%
2. SsangYong Rexton	1,195	1,449	-17.5%
3. Mitsubishi Pajero/Montero/Shogun	335	2,177	-84.6%
4. Dodge Durango	304	306	-0.7%
5. Mitsubishi Shogun Sport	261	32	—
Segment total	5,423	7,720	-29.8%

SMALL SUV & CROSSOVER

	H1 2019	H1 2018	change
1. Renault Captur	120,638	120,547	+0.1%
2. Dacia Duster	115,271	96,509	+19.4%
3. Volkswagen T-Roc	113,757	70,545	+61.3%
4. Peugeot 2008	93,284	100,345	-7.0%
5. Citroen C3 Aircross	66,528	56,830	+17.1%
6. Ford EcoSport	65,302	54,780	+19.2%
7. Opel/Vauxhall Crossland X	63,287	52,336	+20.9%
8. Seat Arona	57,848	45,073	+28.3%
9. Opel/Vauxhall Mokka X	53,057	73,463	-27.8%
10. Fiat 500X	52,756	56,421	-6.5%
Segment total	1,114,634	985,874	+13.1%

COMPACT PREMIUM

	H1 2019	H1 2018	change
1. Mercedes A class	100,631	69,940	+43.9%
2. Audi A3	73,012	83,834	-12.9%
3. BMW 1 series	62,448	64,336	-2.9%
4. Mercedes B class	34,076	34,366	-0.8%
5. BMW 2-series AT/GT	29,588	38,896	-23.9%
6. Mercedes CLA	27,256	31,419	-13.2%
7. Volvo V40	25,692	31,898	-19.5%
8. BMW i3	15,573	8,371	+86.0%
9. Mini Clubman	12,043	14,537	-17.2%
10. Alfa Romeo Giulietta	8,899	16,827	-47.1%
Segment total	392,187	399,167	-1.7%

COMPACT SUV & CROSSOVER

	H1 2019	H1 2018	change
1. VW Tiguan	115,943	126,940	-8.7%
2. Nissan Qashqai	115,613	134,503	-14.0%
3. Peugeot 3008	107,508	111,897	-3.9%
4. Hyundai Tucson	72,028	74,881	-3.8%
5. Ford Kuga	70,319	86,849	-19.0%
6. Toyota C-HR	69,245	70,325	-1.5%
7. Kia Sportage	58,988	67,613	-12.8%
8. Renault Kadjar	57,877	58,717	-1.4%
9. Skoda Karoq	53,707	40,121	+33.9%
10. Opel/Vauxhall Grandland X	51,186	38,559	+32.7%
Segment total	1,051,254	1,032,332	+1.8%

LARGE PREMIUM

	H1 2019	H1 2018	change
1. BMW 5 series	47,363	58,658	-19.3%
2. Audi A6	45,263	39,872	+13.5%
3. Mercedes E class	45,202	49,644	-8.9%
4. Volvo S90/V90	20,442	35,907	-43.1%
5. Audi A5	17,700	21,922	-19.3%
6. Mercedes CLS	5,354	3,705	+44.5%
7. Jaguar XF	4,191	4,983	-15.9%
8. Lexus ES	1,739	1	—
9. Maserati Ghibli	935	1,399	-33.2%
10. Lexus GS	129	803	-83.9%
Segment total	188,318	216,894	-13.2%

MIDSIZE SUV & CROSSOVER

	H1 2019	H1 2018	change
1. Skoda Kodiaq	40,646	38,565	+5.4%
2. Peugeot 5008	36,396	44,771	-18.7%
3. Mitsubishi Outlander	26,313	17,951	+46.6%
4. VW Tiguan Allspace	18,812	18,615	+1.1%
5. Seat Tarraco	12,595	1	—
6. Nissan X-Trail	8,745	29,225	-70.1%
7. Renault Koleos	5,411	11,710	-53.8%
8. Kia Sorento	4,849	5,897	-17.8%
9. Ford Edge	4,591	6,533	-29.7%
10. Hyundai Santa Fe	4,412	4,269	+3.3%
Segment total	164,593	179,246	-8.2%

PREMIUM COUPE

	H1 2019	H1 2018	change
1. Mercedes C class	10,573	11,313	-6.5%
2. BMW 2 series	7,219	11,056	-34.7%
3. Mercedes E class	5,821	8,490	-31.4%
4. Porsche 911	4,548	8,700	-47.7%
5. BMW 4 series	4,385	7,655	-42.7%
6. Audi TT	4,343	6,110	-28.9%
7. Audi A5	3,127	5,744	-45.6%
8. Porsche 718 Cayman	1,599	2,658	-39.8%
9. Jaguar F-Type	1,321	1,628	-18.9%
10. Mercedes-AMG GT	666	1,048	-36.5%

Source: ANE analysis of JATO Dynamics figures

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ENTRY PREMIUM

	H1 2019	H1 2018	change
1. Mini*	65,354	70,059	-6.7%
2. Audi A1	45,094	43,428	+3.8%
3. Lancia/Chrysler Ypsilon	34,689	27,162	+27.7%
4. Alfa Romeo Mito	560	6,140	-90.9%
Segment total	145,697	146,789	-0.7%

* Includes hatchback, Cabrio, Roadster, Coupe

PREMIUM COMPACT SUV & CROSSOVER

	H1 2019	H1 2018	change
1. BMW X1	58,495	62,064	-5.8%
2. Audi Q3	47,482	36,749	+29.2%
3. Audi Q2	43,797	46,285	-5.4%
4. Volvo XC40	40,045	15,014	—
5. Mercedes GLA	36,252	34,800	+4.2%
6. Mini Countryman	30,772	28,804	+6.8%
7. BMW X2	24,357	13,816	+76.3%
8. Range Rover Evoque	21,404	22,521	-5.0%
9. Jaguar E-Pace	14,961	14,385	+4.0%
10. Lexus UX	7,370	—	—
Segment total	326,178	276,480	+18.0%

MIDSIZED PREMIUM

	H1 2019	H1 2018	change
1. Mercedes C class	60,475	59,929	+0.9%
2. Audi A4	56,265	75,612	-25.6%
3. BMW 3 series	56,222	57,179	-1.7%
4. Tesla Model 3	37,227	—	—
5. Volvo V60/S60	34,056	27,285	+24.8%
6. BMW 4 series	11,069	15,774	-29.8%
7. Alfa Romeo Giulia	5,740	10,197	-43.7%
8. Jaguar XE	4,752	5,510	-13.8%
9. Lexus IS	1,730	2,883	-40.0%
10. Infiniti Q50	353	769	-54.1%
Segment total	267,903	255,161	+5.0%

PREMIUM LARGE SUV & CROSSOVER

	H1 2019	H1 2018	change
1. BMW X5	21,102	19,217	+9.8%
2. Range Rover Sport	15,691	14,526	+8.0%
3. Volvo XC90	15,028	17,395	-13.6%
4. VW Touareg	12,890	5,419	—
5. Audi Q8	9,619	—	—
6. Audi Q7	8,362	14,272	-41.4%
7. Range Rover	6,736	6,407	+5.1%
8. Mercedes GLE	5,904	12,333	-52.1%
9. Land Rover Discovery	5,246	7,530	-30.3%
10. Porsche Cayenne	4,913	7,774	-36.8%
Segment total	134,208	137,673	-2.5%

UPPER PREMIUM

	H1 2019	H1 2018	change
1. Mercedes S class	5,226	6,783	-23.0%
2. BMW 7 series	5,175	5,579	-7.2%
3. Audi A7	4,521	5,187	-12.8%
4. Porsche Panamera	4,391	6,118	-28.2%
5. Tesla Model S	4,242	7,673	-44.7%
6. BMW 6-series GT	3,162	4,155	-23.9%
7. Audi A8/S8	2,748	3,364	-18.3%
8. Jaguar XJ	408	707	-42.3%
9. BMW 6-series Gran Coupe	178	1,389	-87.2%
10. Lexus LS	141	469	-69.9%
Segment total	30,192	41,424	-27.1%

PREMIUM MEDIUM SUV & CROSSOVER

	H1 2019	H1 2018	change
1. BMW X3	40,240	26,438	+52.2%
2. Volvo XC60	39,579	43,935	-9.9%
3. Mercedes GLC	36,462	51,686	-29.5%
4. Audi Q5	30,925	39,701	-22.1%
5. Land Rover Discovery Sport	17,144	19,099	-10.2%
6. Mercedes GLC Coupe	15,480	15,264	+1.4%
7. Porsche Macan	14,048	12,083	+16.3%
8. Alfa Romeo Stelvio	13,698	16,740	-18.2%
9. Range Rover Velar	13,350	14,400	-7.3%
10. BMW X4	13,151	7,709	+70.6%
Segment total	266,116	271,512	-2.0%

PREMIUM CONVERTIBLE

	H1 2019	H1 2018	change
1. Mercedes C class	8,863	9,176	-3.4%
2. BMW Z4	5,851	100	—
3. Mercedes E class	5,622	6,831	-17.7%
4. BMW 2 series	5,538	7,863	-29.6%
5. BMW 4 series	5,339	7,019	-23.9%
6. Audi A5	3,658	5,953	-38.6%
7. Porsche 911	2,816	4,032	-30.2%
8. Mercedes SLC	2,631	3,522	-25.3%
9. Porsche 718 Boxster	2,066	2,675	-22.8%
10. Audi TT	1,928	1,982	-2.7%
Segment total	47,254	53,912	-12.3%

EXOTIC

	H1 2019	H1 2018	change
1. BMW 8 series	3,368	1	—
2. Bentley Continental GT/GTC	1,278	457	—
3. Ferrari 488	803	1,108	-27.5%
4. Ferrari Portofino	606	107	—
5. Audi R8	517	833	-37.9%
6. Ferrari 812	511	315	+62.2%
7. Aston Martin Vantage	445	10	—
8. Aston Martin DB11	437	602	-27.4%
9. Lamborghini Huracan	387	509	-24.0%
10. Lamborghini Aventador	344	288	+19.4%
Segment total	10,436	6,856	+52.2%

Source: ANE analysis of JATO Dynamics figures