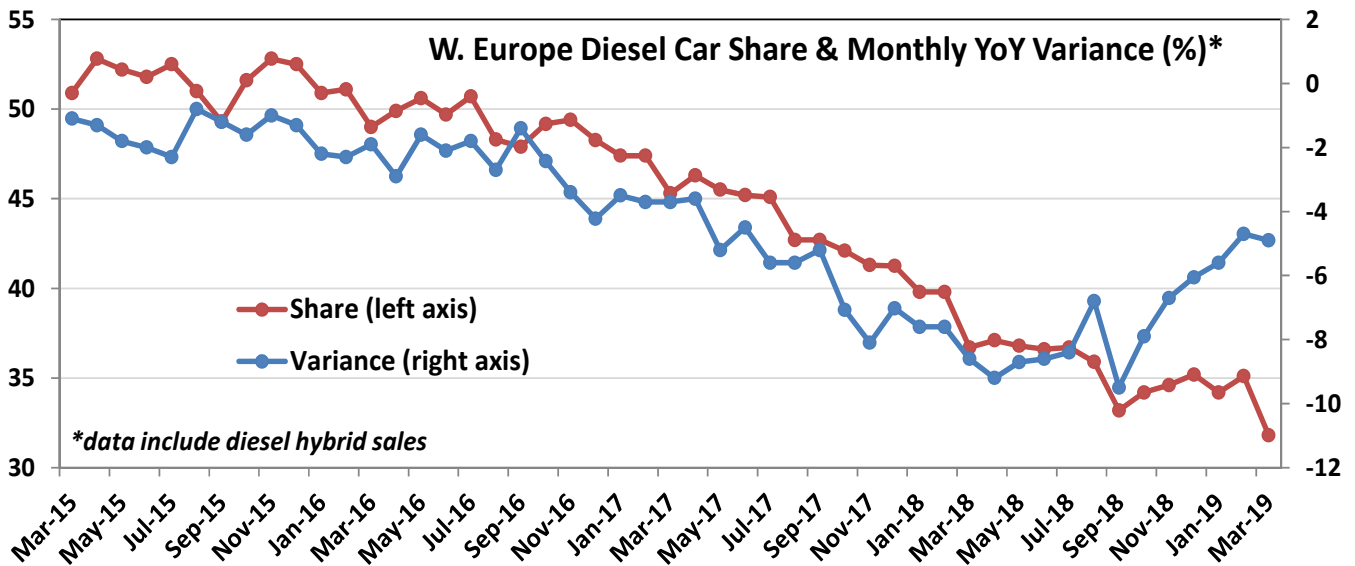
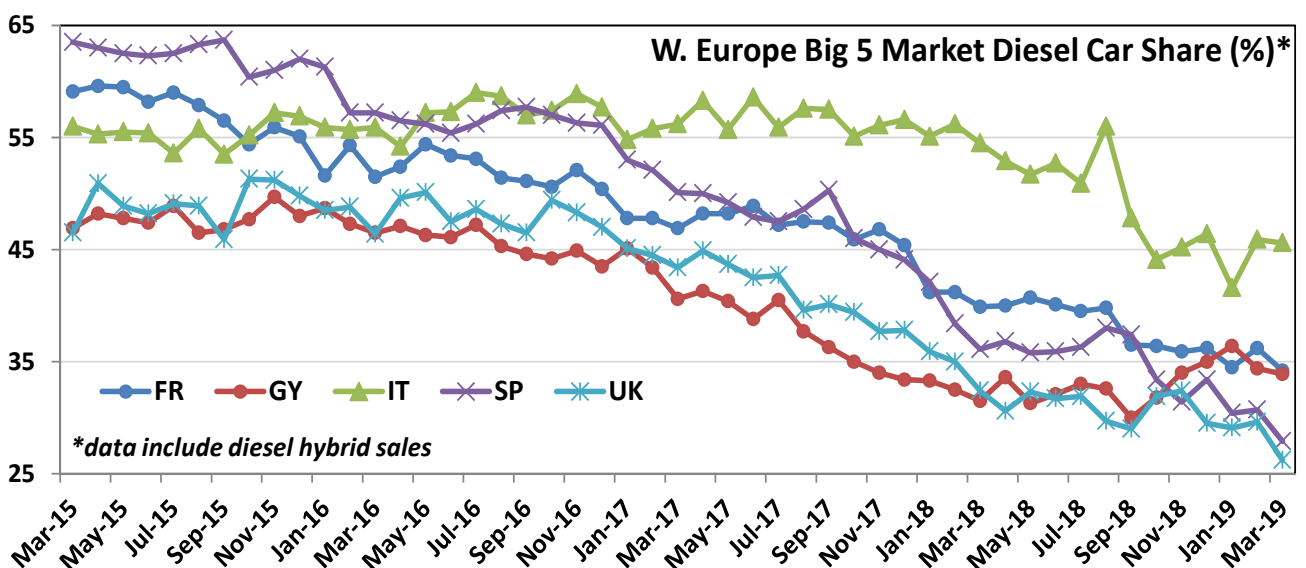


Western European Diesel Car Market

March's Diesel Car was the Weakest so far, but Remains on Trend



- With a few markets yet to report, March's diesel car market, at a provisional 31.7%, appears weak. March (& September) markets are distorted by the bulge in UK registrations in those months. With the UK diesel share currently below the regional average, this tends to drag down the aggregate figures. Spain is also seeing diesel market weakness as a programmed increase in diesel fuel prices starts to bite. However, where we haven't seen such direct influences, as in France and Germany, diesel sales are quite robust, though still gradually declining. The chart below illustrates the situation for the Big 5 markets. The figures used in the charts above & below include sales of hybridised diesel cars but for Germany in particular the KBA diesel figure (which doesn't include hybrids) is different. We show a March share of 33.9% while the KBA figure is 32.4%. Some of the difference can be attributed to Mercedes-Benz diesel MHEVs, now entering the market in significant numbers. These are, to all intents & purposes, diesel cars.



Western European Diesel Car Market

Diesel Share of New Car Sales (%)

	Mar-19	Mar-18	YoY	YTD Mar-19	YTD Mar-18	YoY
Austria	38.1	39.9	-1.8	39.7	41.9	-2.2
Belgium*	27.5	35.9	-8.4	29.7	37.6	-7.9
Denmark	26.6	34.6	-8.0	26.3	35.7	-9.4
Finland	22.4	23.5	-1.1	23.2	24.7	-1.5
France	34.2	39.9	-5.7	34.9	40.6	-5.7
Germany	33.9	31.5	2.4	34.8	32.4	2.4
Greece*	29.0	37.0	-8.0	31.3	39.1	-7.8
Ireland	45.6	53.1	-7.5	48.1	56.1	-8.0
Italy	45.6	54.5	-8.9	44.5	55.2	-10.7
Luxembourg	42.2	46.7	-4.5	44.8	48.3	-3.5
Netherlands	7.7	13.9	-6.2	9.3	15.5	-6.2
Norway	10.5	16.0	-5.5	13.9	18.6	-4.7
Portugal*	49.0	52.8	-3.8	51.0	54.3	-3.3
Spain	27.9	36.1	-8.2	29.5	38.6	-9.1
Sweden	34.6	41.1	-6.5	36.5	41.9	-5.4
Switzerland	25.0	29.4	-4.4	28.7	31.5	-2.8
UK	26.2	32.4	-6.2	27.3	33.5	-6.2
W. Europe	31.7	36.7	-5.0	33.4	38.4	-5.0

Diesel Car Sales Volume ('000s)

	Mar-19	Mar-18	YoY	YTD Mar-19	YTD Mar-18	YoY
Austria	12.2	14.1	-1.9	32.1	37.9	-5.8
Belgium*	15.1	21.0	-5.9	46.3	62.2	-16.0
Denmark	7.0	6.9	0.1	17.5	20.4	-2.9
Finland	2.1	2.8	-0.7	6.7	8.5	-1.8
France	77.2	91.9	-14.6	192.4	225.4	-33.0
Germany	117.1	109.4	7.7	306.3	284.7	21.6
Greece*	2.6	4.3	-1.7	7.4	9.8	-2.4
Ireland	7.6	9.4	-1.8	30.8	40.3	-9.4
Italy	88.3	116.8	-28.5	239.1	317.3	-78.2
Luxembourg	2.4	2.5	-0.1	6.6	6.9	-0.3
Netherlands	3.0	5.8	-2.8	10.9	21.2	-10.3
Norway	1.9	2.3	-0.4	5.4	6.3	-0.9
Portugal*	12.2	14.6	-2.4	30.3	34.1	-3.8
Spain	34.2	46.3	-12.1	93.9	132.7	-38.7
Sweden	10.5	15.3	-4.8	27.0	36.6	-9.7
Switzerland	7.2	8.3	-1.1	20.6	22.9	-2.3
UK	120.0	153.6	-33.6	191.4	240.7	-49.3
W. Europe	520.8	625.4	-104.6	1,264.8	1,507.8	-243.1

* Estimated for March 2019

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