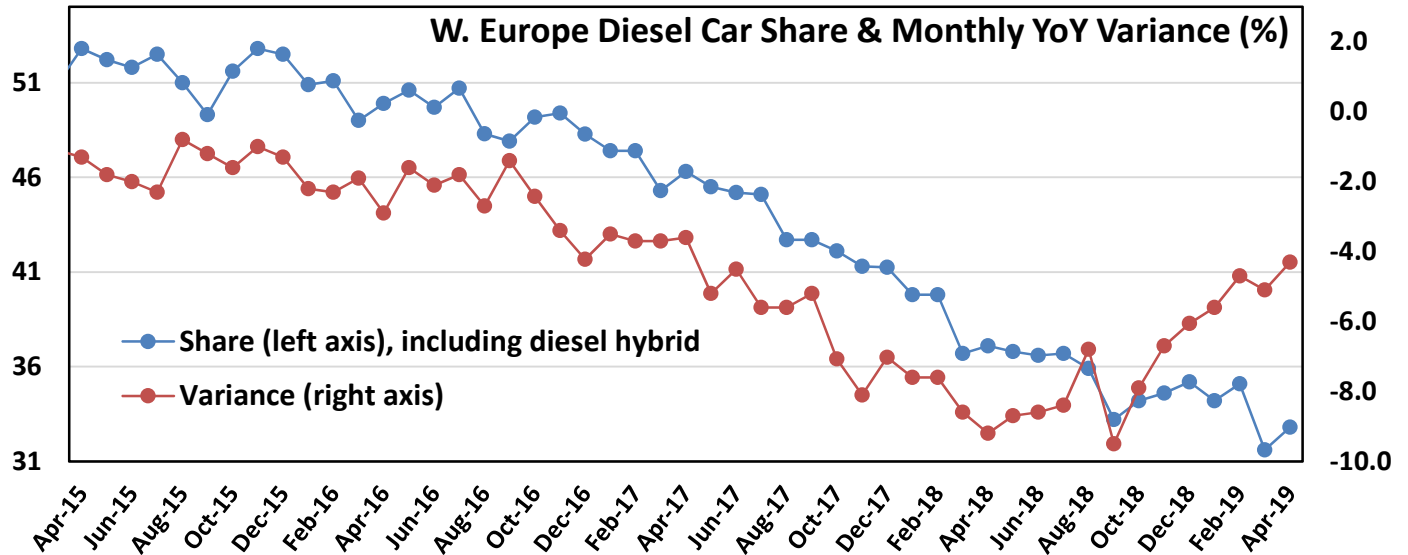
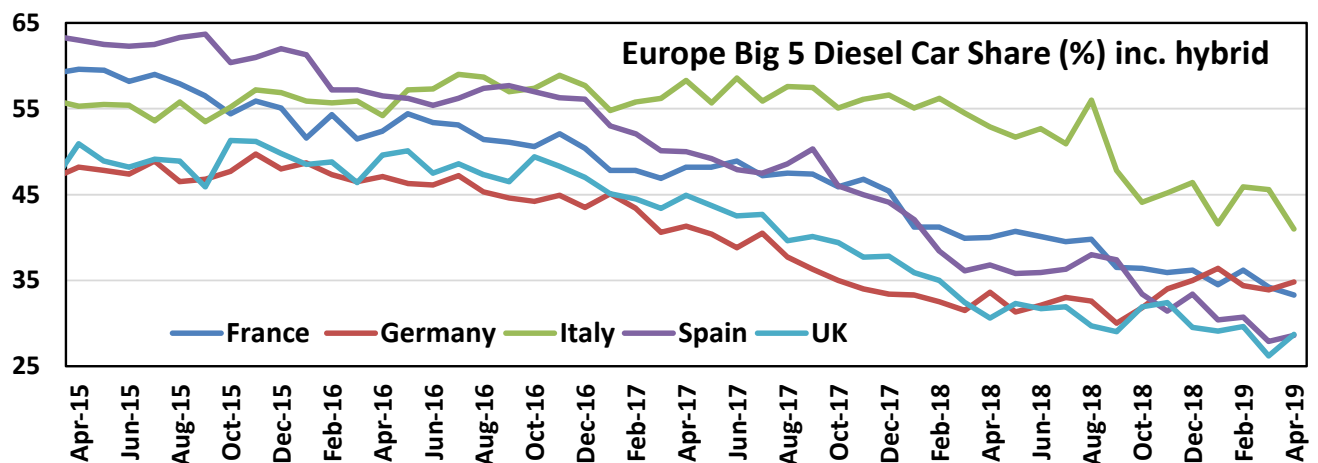


Western European Diesel Car Market

There was Resilience in the Region's Diesel Car Market in April



- With all markets apart from Greece having reported at the time of writing, we can say that there was a small month-on-month increase in diesel's share of car sales in the region. March's Western Europe market (including diesel mild hybrid) is confirmed at 31.6%, very close to the figure we reported in last month's update. April came in at 32.8% with Germany in particular demonstrating solidity in diesel demand, being up YoY at 34.8% (the VDA April non-hybrid figure was 33.5%). The year-on-year rate of decline came in at 4.3pp, the lowest figure since April 2017. Reasons for this, aside from diesel becoming retrenched in the segments where it is most suitable, and removed from those where it is not, aren't entirely clear. The advent of EU6d-TEMP vehicles for sale has unlocked tax advantages for business users in some markets and publicity about their level of 'cleanliness' may also be a help. However, we doubt that many buyers of diesel cars are aware of the latter to any degree; the negative news about diesel still outweighs the positive. Another input is the UK influence. Running below the regional diesel share, it skewed the March figure down, but with a much smaller UK car market in April, its impact was lower.



Western European Diesel Car Market

Diesel Share of New Car Sales (%)

	Apr-19	Apr-18	YoY	YTD Apr-19	YTD Apr-18	YoY
Austria	39.6	40.0	-0.4	39.7	41.4	-1.7
Belgium	31.0	34.0	-3.0	30.2	36.7	-6.5
Denmark	26.1	32.8	-6.7	26.2	35.0	-8.8
Finland	20.3	24.5	-4.2	22.5	24.6	-2.1
France	33.3	40.0	-6.7	34.5	40.5	-6.0
Germany	34.8	33.6	1.2	34.8	32.7	2.1
Greece*	20.0	31.0	-11.0	26.5	36.7	-10.2
Ireland	43.0	54.7	-11.7	47.5	55.9	-8.4
Italy	41.0	52.9	-11.9	43.6	54.7	-11.1
Luxembourg	41.1	45.5	-4.4	43.8	47.6	-3.8
Netherlands	8.0	13.7	-5.7	9.0	15.1	-6.1
Norway	18.3	19.3	-1.0	14.9	18.8	-3.9
Portugal	39.5	51.3	-11.8	40.7	53.5	-12.8
Spain	28.6	36.8	-8.2	29.3	38.2	-8.9
Sweden	38.4	39.3	-0.9	37.0	41.3	-4.3
Switzerland	26.2	28.3	-2.1	28.0	30.7	-2.7
UK	28.7	30.6	-1.9	27.5	32.9	-5.4
W. Europe	32.8	37.1	-4.3	33.1	38.1	-5.0

Diesel Car Sales Volume ('000s)

	Apr-19	Apr-18	YoY	YTD Apr-19	YTD Apr-18	YoY
Austria	12.697	12.7	0.0	44.8	50.6	-5.8
Belgium	16.588	18.6	-2.0	63.2	80.8	-17.6
Denmark	4.221	6.2	-1.9	21.6	26.5	-4.9
Finland	1.978	2.7	-0.7	8.7	11.2	-2.4
France	62.631	74.6	-12.0	254.4	300.4	-46.0
Germany	108.060	105.5	2.5	414.3	390.0	24.3
Greece*	2.358	3.4	-1.0	9.7	13.2	-3.5
Ireland	3.832	4.4	-0.6	34.7	44.6	-9.9
Italy	71.437	90.9	-19.5	310.2	408.5	-98.3
Luxembourg	2.330	2.4	-0.1	9.0	9.4	-0.3
Netherlands	2.654	4.7	-2.1	13.6	25.8	-12.3
Norway	2.114	2.7	-0.6	7.5	9.0	-1.5
Portugal	8.331	10.9	-2.6	32.7	45.0	-12.3
Spain	34.123	40.2	-6.0	129.0	173.0	-44.0
Sweden	11.613	13.4	-1.8	38.5	50.2	-11.7
Switzerland	7.494	7.5	0.0	28.2	30.4	-2.2
UK	46.218	51.4	-5.2	237.1	291.6	-54.6
W. Europe	398.7	452.3	-53.6	1,657.3	1,960.3	-303.0

* Estimated for April 2019

Oxford, 17th May 2019

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