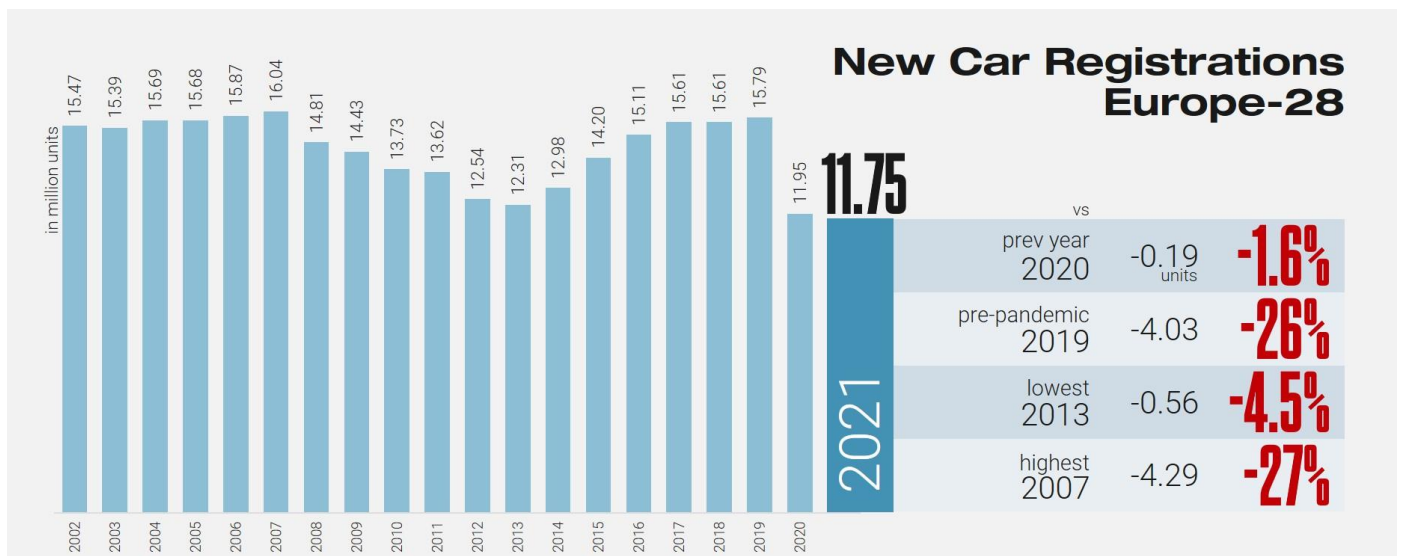


VW's Golf leads Europe in 2021, Peugeot's 2008 is the best-selling SUV, and Tesla's Model 3 tops the EV rankings

26/01/22

- Overall volume was down by 1.7% on top of the already disappointing results in 2020
- Low emissions vehicles achieved new market share record with 19% of total registrations
- Hyundai-Kia and Toyota won the biggest market share compared to pre-pandemic levels
- SUVs reached record market share of 46%
- The Golf topped the market but posted the biggest market share declines across all models
- Strong results for Tesla as the Model 3 secured 17th in the overall rankings

2021 will be remembered as a year of challenges and change for Europe's automotive industry. Data gathered by JATO Dynamics for 28 European markets (EU-25 + UK, Norway, and Switzerland) showed disappointing results for new vehicle registrations, however new leaders have emerged amid the crisis.

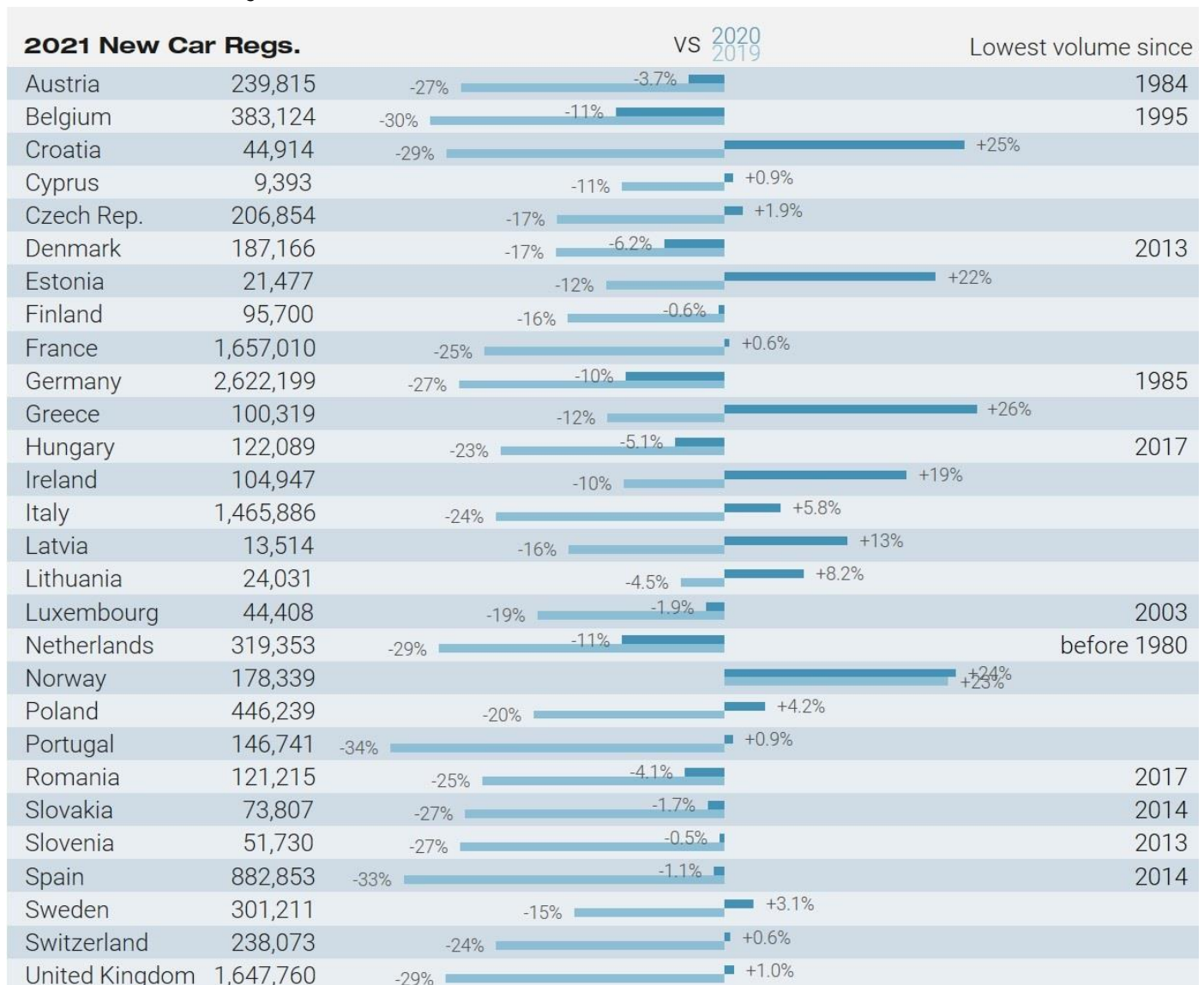


Volume at lowest point since 1985

Last year, total volume was at its lowest level since 1985, with 11.75 million new cars registered. The semiconductor shortage has been even more damaging to the industry than the lockdown restrictions of 2020. Felipe Munoz, Global Analyst at JATO Dynamics, commented: "Crisis after crisis had a negative impact on demand and registrations in the market. The ongoing uncertainty of the COVID-19 pandemic, alongside the prolonged semiconductor shortage created a perfect storm for OEMs last year."

The second wave of the crisis began in July as volume started to fall at a double-digit rate compared with 2020. [In December 2021, registrations in these countries totaled 949,252](#), down by 22% from the same month in 2020, and 25% less than December 2019, just before the pandemic hit the market.

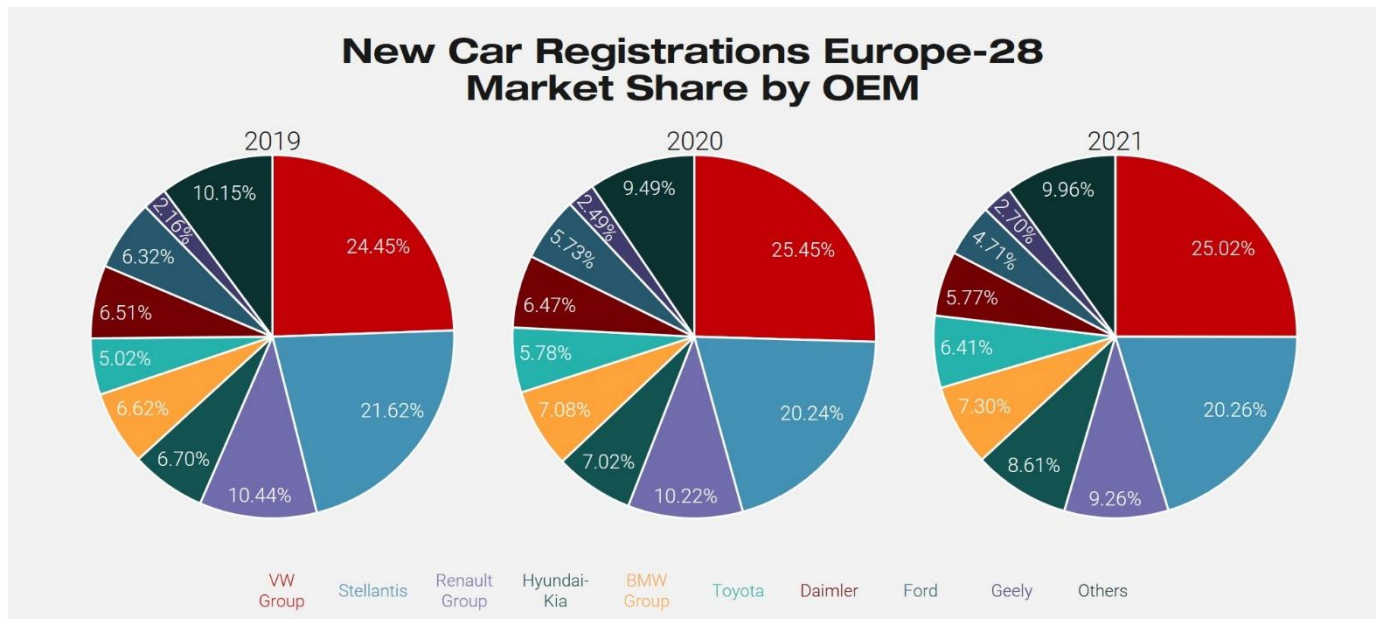
While some key markets were able to maintain the levels seen in 2020, JATO's analysis indicates that the difficulties faced by [the German market have been a major driver of the poor results seen across the EU5](#). Germany saw a significant drop in volume compared with 2020 and its worst results since 1985. It was also the worst year for new car registrations in Austria since 1984, in Belgium since 1995, and in the Netherlands since 1980.



The crisis opened the door for EVs

Despite the poor overall results, the current crisis created an opportunity for low emissions vehicles. Munoz added: “For much of the year, it was easier to buy electric than petrol given the shorter lead times for these vehicles, and thanks to the generous incentives granted by governments.”

Consumers have increasingly turned their attention to pure electric and plug-in hybrid alternatives allowing these vehicles to achieve new volume and market share records. In 2021, the industry registered 2.25 million units making up 19% of the market. While diesels accounted for 21.7% of the market – it is likely that they will be outsold by EVs this year.*



Hyundai-Kia and Toyota win big

While last year brought huge challenges for many OEMs, for others it offered great opportunities. For example, Hyundai-Kia was able to increase its presence in Europe due to its breadth of competitive SUV and EV models. These brands saw their market share increase by almost two points, from 6.7% in 2019, to 8.6% in 2021.

It was also a strong year for Toyota, up by 1.4 points of share, thanks largely to the latest generation of the Toyota Yaris which hit the top 10 in 14 countries. Despite these advances, Tesla, BMW Group, and Volkswagen Group were still able to gain traction over the last two years.

2021 New Car Regs by Segment	vs 2020	vs 2019	Top 3 Best-Selling
City-car 839,787	+7.7%	-29.0%	Fiat/Abarth 500 Fiat Panda Toyota Aygo
Subcompact Car 2,083,853	-7.7%	-30.7%	Peugeot 208 Dacia Sandero Renault Clio
Compact Car 1,805,982	-13.3%	-32.4%	Volkswagen Golf Toyota Corolla Skoda Octavia
Midsize Car 734,366	-6.6%	-29.8%	Tesla Model 3 BMW Series 3 Volkswagen Passat
Executive Car 212,561	-13.5%	-41.3%	BMW Series 5 Mercedes E-Class Audi A6
Luxury Car 31,516	+17.7%	-18.0%	Mercedes S-Class BMW Series 7 Porsche Panamera
MPV 242,347	-35.1%	-65.2%	Honda Jazz Volkswagen Touran Mercedes B-Class
Sport Car 77,027	-16.7%	-46.2%	Porsche 911 BMW Z4 BMW Series 2
Small SUV 2,018,791	+8.7%	-12.0%	Peugeot 2008 Volkswagen T-Roc Renault Captur
Compact SUV 2,339,415	+6.2%	-18.7%	Hyundai Tucson Peugeot 3008 Volkswagen Tiguan
Midsize SUV 716,355	+42.6%	+23.0%	Volvo XC60 BMW X3 Volkswagen ID.4
Large SUV 239,706	+4.2%	-4.6%	BMW X5 Mercedes GLE Volvo XC90
Luxury SUV 28,430	+4.6%	-6.3%	Mercedes G-Class LR Range Rover BMW X7
Van 362,254	-22.6%	-38.6%	Fiat Ducato Volkswagen Caddy Citroen Berlingo

SUVs continue to gain traction

Despite ongoing availability issues at dealerships, European consumers continued to shift from traditional vehicles such as hatchbacks, sedans and MPVs, to SUVs. These vehicles have continued to perform well thanks to the arrival of new electrified models. Last year, registrations of SUVs totaled 5.34 million units, up by 11% when compared to 2020, and down by 12% compared to 2019. The market share of these vehicles jumped from 38.2% in 2019, and 40.3% in 2020, to 45.5% last year. This is the highest ever market share for SUVs in Europe and closes the gap on the 52.3% recorded in the USA.

Last year Volkswagen Group was the leading seller of SUVs in the region, as one in four registered vehicles were made by the German manufacturer. Compared with 2019, SUV volume only dropped marginally (-2%) whereas Volkswagen's closest competitor Stellantis, saw its volume decrease by 24%. Volkswagen was in fact the biggest winner of market share between 2019 and 2021, followed by Hyundai-Kia and Daimler. In contrast, Stellantis posted the highest market share drop, followed by Renault Group and Nissan Group.

The SUV ranking by model was led by the Peugeot 2008, outselling the Renault Captur which led the market in 2020. The 2008 saw the largest market share growth of any SUV between 2019 and 2021, excluding models that were not available two years ago. It was not however the only SUV to post double-digit growth since 2019: the Volkswagen T-Cross, Volvo XC40, Toyota RAV4, Kia Niro, and Nissan Juke, also climbed the rankings.

The Volkswagen Golf leads again, but for how long?

The overall rankings by model saw several significant changes but confirmed the Volkswagen Golf as the most popular new car in Europe. The compact narrowly held on to the top spot despite facing major challenges in terms of production and increasing internal competition.

Last year, the Golf gained 205,408 new registrations – less than 10,000 units ahead of the Peugeot 208 in second position. With a 28% drop in volume compared with 2020, and 50% compared with 2019, it is clear that the Golf's competitors are closing in fast. The German compact has led the European market since 2008, but the increasing popularity of the small and compact SUVs, along with more internal competition, affected its performance. In 2008 its market share in Europe was 3.16% however last year this dropped to 1.75%.

The waning popularity of the Golf is due to its lack of an available electrified model. As more and more consumers look to switch to EVs they are instead opting for the ID.3, Europe's third best-selling BEV in 2021.

Top 25 Most-Registered Brands & Models. Europe-28 2021

Top 25 Brands					Top 25 Models				
			vs 2020	vs 2019			vs 2020	vs 2019	
1	Volkswagen	1,273,892	-5.6%	-28.1%	1	Volkswagen Golf	205,408	-27.9%	-50.0%
2	Peugeot	727,973	-3.1%	-25.4%	2	Peugeot 208	196,869	-1.1%	-12.4%
3	Toyota	706,056	+9.6%	-4.1%	3	Dacia Sandero	196,792	+16.9%	-12.4%
4	BMW	681,252	+1.2%	-17.8%	4	Renault Clio	196,243	-21.1%	-38.5%
5	Renault	676,651	-17.2%	-36.1%	5	Peugeot 2008	194,653	+24.4%	+16.5%
6	Mercedes	640,385	-14.2%	-29.9%	6	Volkswagen T-Roc	186,644	+17.1%	-10.4%
7	Audi	596,260	-0.5%	-19.7%	7	Toyota Yaris	182,590	+1.3%	-14.3%
8	Skoda	585,361	-8.6%	-22.7%	8	Opel/Vauxhall Corsa	180,643	-8.7%	-18.5%
9	Ford	553,658	-19.2%	-44.6%	9	Fiat/Abarth 500	174,739	+24.0%	-1.0%
10	Hyundai	510,810	+21.4%	-8.6%	10	Citroen C3	159,302	+7.0%	-25.2%
11	Kia	500,805	+19.6%	+0.2%	11	Renault Captur	158,580	-11.0%	-29.3%
12	Opel/Vauxhall	488,383	0.0%	-40.3%	12	Volkswagen Polo	152,617	-9.7%	-40.5%
13	Fiat	452,512	-1.2%	-26.3%	13	Hyundai Tucson	149,170	+64.3%	+6.4%
14	Citroen	451,006	-2.0%	-30.9%	14	Toyota Corolla	146,604	+6.8%	+9.7%
15	Dacia	406,646	+1.2%	-30.1%	15	Dacia Duster	145,753	+4.4%	-34.2%
16	Seat	327,954	-8.8%	-34.0%	16	Skoda Octavia	143,268	-21.9%	-35.9%
17	Volvo	288,402	+0.4%	-15.3%	17	Tesla Model 3	141,429	+64.0%	+48.8%
18	Nissan	247,241	-14.0%	-36.9%	18	Peugeot 3008	140,015	+11.9%	-28.4%
19	Suzuki	195,856	+14.2%	-25.7%	19	Volkswagen Tiguan	133,558	-9.5%	-39.9%
20	Mini	176,007	+1.9%	-18.9%	20	Ford Puma	132,887	+12.3%	new
21	Tesla	167,969	+70.9%	+51.0%	21	Fiat Panda	132,227	-8.7%	-28.3%
22	Mazda	154,498	+3.7%	-39.2%	22	Volkswagen T-Cross	127,956	+11.7%	+27.1%
23	Jeep	128,807	+6.9%	-20.9%	23	Volvo XC40	120,234	+9.5%	+42.5%
24	Land Rover	103,427	-7.8%	-29.4%	24	Mercedes A-Class	117,233	-25.7%	-41.3%
25	Porsche	77,775	+5.9%	-2.3%	25	BMW Series 3	116,250	-1.9%	-4.9%



The Tesla Model 3 keeps climbing

Tesla's market share doubled between 2019 and 2021. Last year, the American manufacturer registered more new vehicles than other brands such as Land Rover or Jeep – both leaders in the SUV market. Between 2020 and 2021, it was able to outsell Mazda, Mitsubishi, and came close to overtaking Mini.

Thanks to the success of the Model 3, Tesla's volume soared from 29,300 units in 2018 to almost 168,000 last year. The Model 3 was not only Europe's best-selling electric car but secured a place in the top 20 of the overall model rankings. More units of the Model 3 were registered than the Peugeot 3008, Volkswagen Tiguan, and Fiat Panda. It made the top 10 in 5 countries: Austria (10th), Germany (10th), Norway (1st), Switzerland (1st) and the UK (2nd position).

Follow [this link](#) for full year figures by brand, model and segment.

* Full details of BEV and PHEV registrations will be covered in a coming release.



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About JATO

JATO Dynamics, founded in 1984, now has representation in over 51 countries around the world. We provide precision under pressure, providing the world's most timely, accurate and up-to-date automotive information on vehicle specifications, pricing, sales and registrations for over 30 years. We offer more than just data, as we've watched the world change, and consumer mindsets alter with it we have been able to offer insights that help inform the industry. We're able to react to short-term market movements, plan for long-term developments and ultimately to meet the needs of our clients. Visit JATO at www.jato.com for more information.

