

JATO CONSULT CO₂ REPORT EXTRACT

This report continues JATO's focus on the average CO₂ emissions of new cars in Europe, and the effect of market trends and product actions.

Introduction

This is the 2012 update to JATO's on-going study of the new car market in Europe, focusing on the official CO₂ emissions of the cars sold and registered. The automotive industry has come under intense environmental scrutiny in recent years, with immense pressure applied by legislators, media, customers and stakeholders.

Signs of change

Actions by both the car industry and national governments are driving customers towards a lower CO₂ future.

The Report

The European Commission has been influential in drawing attention to, and setting targets for the reduction of CO₂ emissions from new vehicles across the continent. European Legislation has set legal targets which the major motor manufacturers must meet, phasing these targets in during the years 2012 through 2015.

With the first year of the implementation of targets now complete, this report investigates how individual markets, manufacturer groups and brands have reduced their volume-weighted average CO₂ emissions, whether they have met their 2012 targets, and how far they are from meeting the 2015 targets defined in the regulation. It also includes analysis by segment, and identifies trends in fuel types and vehicle weights.



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The 23 markets, of which 20 are EU member states, covered in this study are, Austria, Belgium, Croatia, Czech Republic, Denmark, Finland, France, Germany, Great Britain, Greece, Hungary, Ireland, Italy, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland and The Netherlands.

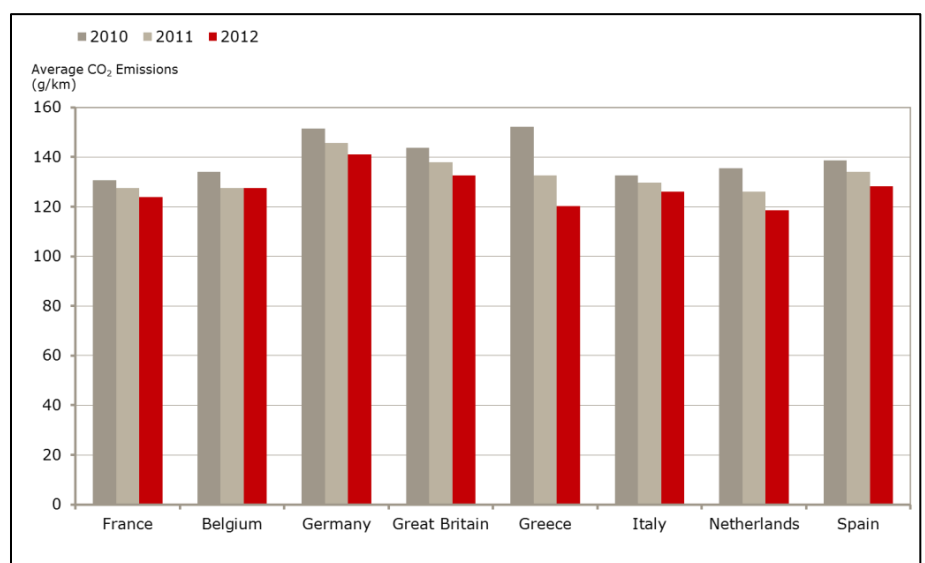
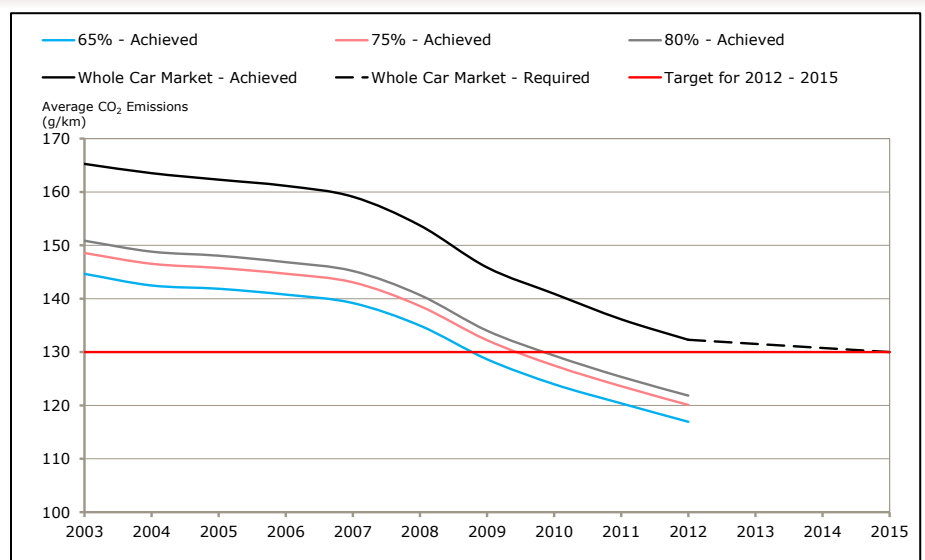
National governments have introduced vehicle taxation strategies based on CO₂ emissions, raising the consumer's interest in low-emission vehicles.

JATO has studied the volumes-weighted average CO₂ emissions of new cars registered since 2003 in these European markets. Building on JATO's global intelligence and experience the following questions will be addressed:

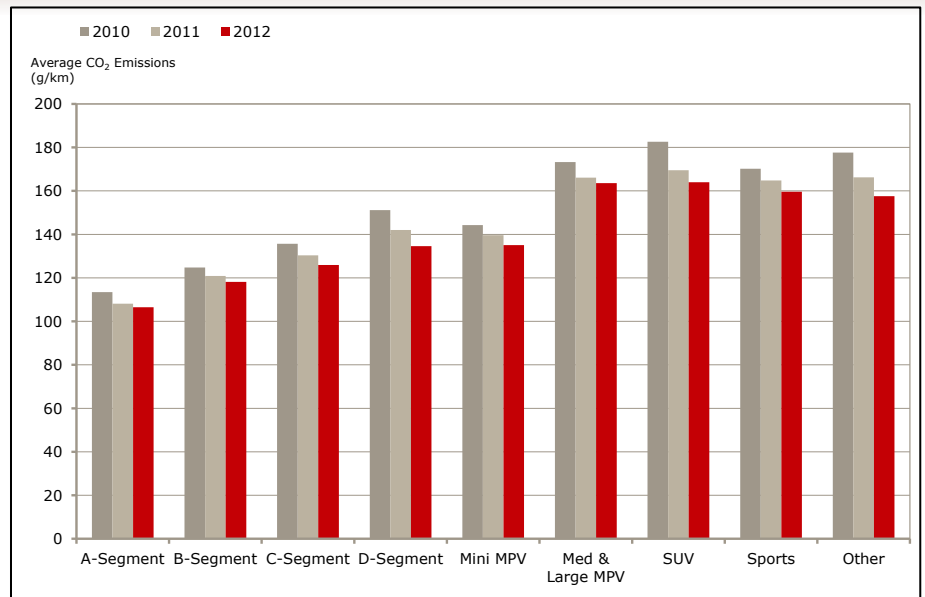
- How successful have CO₂ taxation strategies been?
- How have different manufacturers fared in the quest to reduce average CO₂ emissions?
- Have the EU targets for 2012 been met, and how much progress is required to meet the targets for 2015?

Extracts from the Report

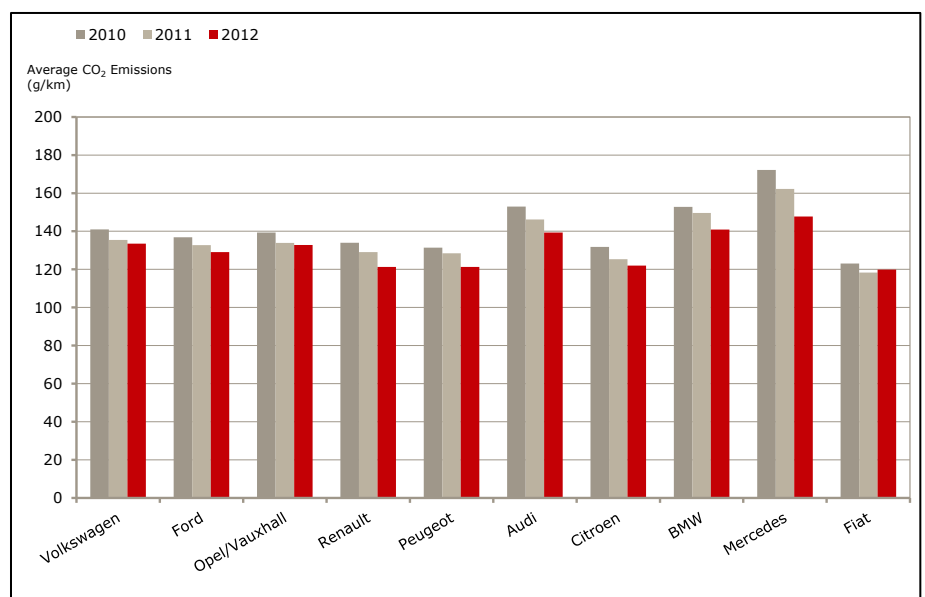
- The European new car market continues to be affected by economic uncertainty across the continent. A combination of increasing fuel prices, taxation strategies and vehicle developments continue to drive down average new vehicle emissions to 132.3g/km in 2012.
- The 2014 target of 80% of the market achieving average emissions of no more than 130g/km was achieved in 2010.
- Each manufacturer's target for CO₂ emissions is proportional to the average kerb weight of its cars. Hence reducing a car's weight to reduce its emissions also reduces the target. Electrification, which includes the addition of a heavy battery pack, could lead to a higher target as well as lower emissions.
- Vehicles with CO₂ emissions below 50g/km are encouraged by the EU regulation, accounting for 3.5 cars in the results for 2012 and 2013, 2.5 cars for 2014 and 1.5 cars for 2015. From 2016 these "super-credits" are removed.
- Greece has recorded the greatest drop in average CO₂ emissions from 2011 to 2012, after a ban on diesel passenger cars in the country's largest cities was lifted.



- The E2 Luxury segment recorded the greatest reduction in CO₂ emissions in 2012. Most of this is due to improvements made to the diesel versions of the Mercedes-Benz S-Class and BMW 7-Series.
- The SUV segment has recorded the greatest reduction in average CO₂ emissions since 2003, helped by the increased availability and take-up of two-wheel-drive versions.
- Due to its low diesel penetration, the A-segment has recorded more rapid reductions in average CO₂ emissions in 2009-2011 as manufacturers have put increased effort into reducing the emissions from petrol engines.
- Fiat is still the leader of the Top 25 brands in terms of CO₂ emissions. However the success of the Freemont large crossover model means the brand's average emissions increased from 2011 to 2012.
- This increase from Fiat, and also from some other brands, highlights the difficult balancing act manufacturers face, with larger cars being more profitable, but also having higher CO₂ emissions
- The market share for zero-emission electric-powered vehicles increased from 2011 to 2012, but these vehicles still accounted for only 0.15% of the new car market. Plug-in hybrid vehicles accounted for a further 0.08% of the new car market.



- The most improved model compared to 2011 is Bentley Continental GT/GTC, following the introduction of the new, more-efficient second-generation model.
- Bentley is also the most improved brand, improving its average emissions by more than 100g/km compared to 2011.
- The Peugeot 208 was the best non-hybrid model outside the A-segment, and was also the lowest CO₂ model among the Top 20 best-selling models in 2012.
- The car model, excluding plug-in models, with the lowest average CO₂ emissions in Europe was the hybrid Lexus CT200h.



Methodology

JATO researches new car specifications for all makes at individual version level in 47 countries worldwide, and new car volumes in over 50 countries worldwide. For many countries JATO matches the volumes to individual versions within its specifications databases. This matching is the basis for JATO's market-leading Specs-into-Model-Mix databases, which allow volumes analysis to be carried out on hundreds of specification items, including official CO₂ emissions.

The report is based on the data contained within JATO's Specs-into-Model-Mix databases.

“Our innovative spirit constantly drives the development of new solutions which add value to information for our customers”

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