

## Table of Contents

### SECTION ONE - Management Summary & Introduction

|   |              |
|---|--------------|
| <b>Managment Summary</b> .....  | <b>11-13</b> |
| <b>Introduction</b> .....   | <b>15</b>    |
| More than half the new cars sold in West Europe today are already diesel powered.....   | 19           |
| Mercedes SLK now also on sale with 204PS 4-cylinder diesel engine .....   | 20           |
| Small cars, sole remaining petrol engine oasis .....  | 20           |
| Now more than ever, small cars are bought chiefly on price .....  | 21           |
| 99% of the Pandas sold in Germany in 2009 were petrol powered. ....   | 21           |
| Decade-long diesel sales streak came to a screeching halt in 2008/2009 .....  | 22           |
| Apart from Greece, every West European car market sees steep and continuous diesel<br>inroads .....   | 22           |
| Diesel comeback stronger than expected .....  | 23           |
| Italy's 9-months 2011 diesel car share jumps to 55.8% from 45.1% exactly a year ago .....   | 24           |
| Italy's 9-months 2011 demand for LPG-fuelled cars slumps 83% .....  | 24           |
| Big diesel comeback gathers momentum .....  | 25           |
| Bullish diesel demand fuelled by latest ultra-low CO2 diesels .....   | 25           |
| Germany's 9-months 2011 sales of diesels in CO2 91g/km to 120g/km segment up 50.4% ..   | 26           |
| Britain's 10-months diesel car share reaches 50.1%.....   | 26           |
| Compared to cutting-edge petrol-electric hybrids, diesels still win hands-down on key initial<br>purchase cost and running cost considerations..... | 27           |
| Inexpensive Basic- and Small-sector cars tipped to take larger slice of future European<br>market.....  | 28           |
| Euro 6 exhaust emission norms will load extra cost penalty on most diesel powered cars ..   | 29           |
| VW Group is understood to use NSC and SCR.....  | 30           |
| Some BMW 3-Series diesels already take Euro 6 hurdle with a mere NSC<br>(NOx storage catalyst) .....  | 31           |
| NSC - How does it work? .....   | 31           |
| BMW's 2011 US diesels rely on SCR for NOx reduction .....   | 32           |
| Peugeot-Citroen, to meet 2014 Euro 6 diesel emissions, opts for Selected Catalytic<br>Reduction.....  | 33           |
| SCR promises to better average fuel-economy of today's Euro 5 diesels .....   | 32           |
| EU proposals to lift minimum diesel fuel tax between 2013 and 2018 .....  | 34           |

## **SECTION TWO - European 2011 Overview**

|   |    |
|---|----|
| Diesel sprinting ahead 2011 .....   | 35 |
| Consumers' favourite 'Green Halo' cars are now oil-powered .....  | 35 |
| 55.2% - West Europe's diesel car share during the 9-months to September this year - a new all-time record .....                     | 35 |
| Upbeat diesel car sales trends now echoed all across Western Europe .....   | 36 |
| Buyers in deep-green markets like Sweden and Norway have turned to latest diesels in droves .....                                   | 37 |
| Diesels make biggest splash in Sweden - so far this year Sweden's diesel share jumped 11.6 percentage points to 60.9% .....         | 37 |
| 10.7 percentage points - This year's nine months gain in Italy's diesel car sales share .....                                       | 37 |
| This year's best kept automotive secret .....   | 39 |
| 50.4% - Germany's nine months sales gain from diesels in CO <sub>2</sub> 91 to 120g/km class - that's a jump to 242,686 units ..... | 39 |
| 1,157 - Hybrids sold in Germany in September - down 24.2% .....   | 39 |
| Diesel future looks bright - getting brighter, not just in Europe .....   | 40 |

## **SECTION THREE - European Details (2005 - 2010)**

|   |         |
|---|---------|
| Western Europe - Diesel car sales penetration by market .....             | 44      |
| Western Europe - Diesel car sales history by market .....                 | 46      |
| Western Europe - Market share of total diesel car sales .....             | 48      |
| Western Europe - Diesel car sales by manufacturer .....                   | 50      |
| Western Europe - Diesel car market share by manufacturer .....            | 52      |
| Germany - Diesel car price comparison .....                               | 53 - 56 |
| Market sector classification .....  | 57      |
| Western Europe - Passenger car sales history by sector .....              | 58      |
| Western Europe - 2010 Passenger car diesel sales by sector .....          | 59      |
| Western Europe - 2010 Passenger car diesel shares by sector .....         | 60      |
| Western Europe - Basic sector diesel sales by manufacturer .....          | 61      |
| Western Europe - Basic sector diesel share by manufacturer .....          | 61      |
| Western Europe - Small sector diesel sales by manufacturer .....          | 62      |
| Western Europe - Small sector diesel share by manufacturer .....          | 63      |
| Western Europe - Lower-medium sector diesel sales by manufacturer .....   | 64      |
| Western Europe - Lower-medium sector diesel share by manufacturer .....   | 65      |
| Western Europe - Upper-medium sector diesel sales by manufacturer .....   | 66      |
| Western Europe - Upper-medium sector diesel share by manufacturer .....   | 67      |
| Western Europe - Near-executive sector diesel sales by manufacturer ..... | 68      |
| Western Europe - Near-executive sector diesel share by manufacturer ..... | 68      |
| Western Europe - Executive sector diesel sales by manufacturer .....      | 69      |
| Western Europe - Executive sector diesel share by manufacturer .....      | 70      |
| Western Europe - Luxury sector diesel sales by manufacturer .....         | 71      |

|   |         |
|---|---------|
| Western Europe - Luxury sector diesel share by manufacturer .....               | 71      |
| Western Europe - People-carrier diesel sales by manufacturer .....              | 72      |
| Western Europe - People-carrier diesel share by manufacturer.....               | 73      |
| Western Europe - Sports-utility diesel sales by manufacturer .....              | 74      |
| Western Europe - Sports-utility diesel share by manufacturer .....              | 75      |
| Western Europe - Top selling diesels by model .....                             | 76      |
| Western Europe - Top selling diesels share by model .....                       | 77      |
| Western Europe - Top selling diesel models by sector .....                      | 78      |
| Western Europe - Diesel passenger car production by country .....               | 79      |
| Western Europe - Diesel passenger car production by manufacturer .....          | 80      |
| Western Europe - Share of diesel passenger car production by manufacturer ..... | 81      |
| Western Europe - Diesel passenger car production by model and sector .....      | 82 - 84 |

## **SECTION FOUR - Sales Forecasts**

|  |    |
|--|----|
| Western Europe - Diesel car sales volume and penetration (1983 - 2016) ..... | 86 |
| Western Europe - Diesel car sales annual changes to 2016.....                | 86 |
| Western Europe - Forecast diesel car sales penetration by market .....       | 87 |
| Western Europe - Forecast diesel car sales by market.....                    | 88 |
| Western Europe - Forecast share of diesel car market .....                   | 89 |
| Western Europe - Forecast diesel car sales by sector .....                   | 90 |
| Western Europe - Basic sector diesel sales forecast.....                     | 91 |
| Western Europe - Small sector diesel sales forecast .....                    | 92 |
| Western Europe - Lower-medium sector diesel sales forecast .....             | 93 |
| Western Europe - Upper-medium sector diesel sales forecast .....             | 94 |
| Western Europe - Near-executive diesel sales forecast .....                  | 95 |
| Western Europe - Executive sector diesel sales forecast .....                | 96 |
| Western Europe - Luxury sector diesel sales forecast .....                   | 97 |
| Western Europe - People carriers sector diesel sales forecast .....          | 98 |
| Western Europe - Sports-utility sector diesel sales forecast .....           | 99 |

## **SECTION FIVE - Market details**

|   |           |
|---|-----------|
| Austria - Diesel car sales volume and penetration (1983 - 2016) ..... | 102       |
| Austria - Diesel car sales annual changes to 2016 .....               | 102       |
| Austria - Comparative pump price history (petrol v. diesel).....      | 103       |
| Austria - Diesel car sales history by manufacturer .....              | 105       |
| Austria - Diesel car market share history by manufacturer .....       | 106       |
| Austria - Top selling diesel models (2005 - 2010) .....               | 107 - 108 |
| Austria - Passenger car sales history by sector .....                 | 109       |
| Austria - Top selling diesel models by sector .....                   | 110       |
| Austria - Forecast diesel car sales by sector to 2016 .....           | 111       |
| BeLux - Diesel car sales volume and penetration (1983 - 2016).....    | 112       |

|   |           |
|---|-----------|
| BeLux - Diesel car sales annual changes to 2016 . . . . .                 | 112       |
| BeLux - Comparative pump price history (petrol v. diesel). . . . .        | 113       |
| BeLux - Diesel car sales history by manufacturer. . . . .                 | 115       |
| BeLux - Diesel car market share history by manufacturer . . . . .         | 116       |
| BeLux - Top selling diesel models (2005 - 2010). . . . .                  | 117 - 118 |
| BeLux - Passenger car sales history by sector . . . . .                   | 119       |
| BeLux - Top selling diesel models by sector . . . . .                     | 120       |
| BeLux - Forecast diesel car sales by sector to 2016 . . . . .             | 121       |
| Denmark - Diesel car sales volume and penetration (1983 - 2016) . . . . . | 122       |
| Denmark - Diesel car sales annual changes to 2016. . . . .                | 122       |
| Denmark - Comparative pump price history (petrol v. diesel) . . . . .     | 123       |
| Denmark - Diesel car sales history by manufacturer . . . . .              | 125       |
| Denmark - Diesel car market share history by manufacturer . . . . .       | 126       |
| Denmark - Top selling diesel models (2005 - 2010) . . . . .               | 127 - 128 |
| Denmark - Passenger car sales history by sector . . . . .                 | 129       |
| Denmark - Top selling diesel models by sector . . . . .                   | 130       |
| Denmark - Forecast diesel car sales by sector to 2016. . . . .            | 131       |
| Eire - Diesel car sales volume and penetration (1983 - 2016). . . . .     | 132       |
| Eire - Diesel car sales annual changes to 2016 . . . . .                  | 132       |
| Eire - Comparative pump price history (petrol v. diesel) . . . . .        | 133       |
| Eire - Diesel car sales history by manufacturer . . . . .                 | 135       |
| Eire - Diesel car market share history by manufacturer . . . . .          | 136       |
| Eire - Top selling diesel models (2005 - 2010). . . . .                   | 137 - 138 |
| Eire - Passenger car sales history by sector . . . . .                    | 139       |
| Eire - Top selling diesel models by sector. . . . .                       | 140       |
| Eire - Forecast diesel car sales by sector to 2016 . . . . .              | 141       |
| Finland - Diesel car sales volume and penetration (1983 - 2016). . . . .  | 142       |
| Finland - Diesel car sales annual changes to 2016 . . . . .               | 142       |
| Finland - Comparative pump price history (petrol v. diesel). . . . .      | 143       |
| Finland - Diesel car sales history by manufacturer. . . . .               | 145       |
| Finland - Diesel car market share history by manufacturer . . . . .       | 146       |
| Finland - Top selling diesel models (2005 - 2010). . . . .                | 147 - 148 |
| Finland - Passenger car sales history by sector . . . . .                 | 149       |
| Finland - Top selling diesel models by sector . . . . .                   | 150       |
| Finland - Forecast diesel car sales by sector to 2016 . . . . .           | 151       |
| France - Diesel car sales volume and penetration (1983 - 2016). . . . .   | 152       |
| France - Diesel car sales annual changes to 2016. . . . .                 | 152       |
| France - Comparative pump price history (petrol v. diesel) . . . . .      | 153       |
| France - Diesel car sales history by manufacturer . . . . .               | 155       |
| France - Diesel car market share history by manufacturer . . . . .        | 156       |
| France - Top selling diesel models (2005 - 2010) . . . . .                | 157 - 158 |
| France - Passenger car sales history by sector. . . . .                   | 159       |
| France - Top selling diesel models by sector. . . . .                     | 160       |
| France - Forecast diesel car sales by sector to 2016 . . . . .            | 161       |

|   |           |
|---|-----------|
| Germany - Diesel car sales volume and penetration (1983 - 2016) . . . . .     | 162       |
| Germany - Diesel car sales annual changes to 2016 . . . . .                   | 162       |
| Germany - Comparative pump price history (petrol v. diesel) . . . . .         | 163       |
| Germany - Diesel car sales history by manufacturer . . . . .                  | 165       |
| Germany - Diesel car market share history by manufacturer . . . . .           | 166       |
| Germany - Top selling diesel models (2005 - 2010) . . . . .                   | 167 - 168 |
| Germany - Passenger car sales history by sector . . . . .                     | 169       |
| Germany - Top selling diesel models by sector . . . . .                       | 170       |
| Germany - Forecast diesel car sales by sector to 2016 . . . . .               | 171       |
| Italy - Diesel car sales volume and penetration (1983 - 2016) . . . . .       | 172       |
| Italy - Diesel car sales annual changes to 2016 . . . . .                     | 172       |
| Italy - Comparative pump price history (petrol v. diesel) . . . . .           | 174       |
| Italy - Diesel car sales history by manufacturer . . . . .                    | 175       |
| Italy - Diesel car market share history by manufacturer . . . . .             | 176       |
| Italy - Top selling diesel models (2005 - 2010) . . . . .                     | 177 - 178 |
| Italy - Passenger car sales history by sector . . . . .                       | 179       |
| Italy - Top selling diesel models by sector . . . . .                         | 180       |
| Italy - Forecast diesel car sales by sector to 2016 . . . . .                 | 181       |
| Netherlands - Diesel car sales volume and penetration (1983 - 2016) . . . . . | 182       |
| Netherlands - Diesel car sales annual changes to 2016 . . . . .               | 182       |
| Netherlands - Comparative pump price history (petrol v. diesel) . . . . .     | 183       |
| Netherlands - Diesel car sales history by manufacturer . . . . .              | 185       |
| Netherlands - Diesel car market share history by manufacturer . . . . .       | 186       |
| Netherlands - Top selling diesel models (2005 - 2010) . . . . .               | 187 - 188 |
| Netherlands - Passenger car sales history by sector . . . . .                 | 189       |
| Netherlands - Top selling diesel models by sector . . . . .                   | 190       |
| Netherlands - Forecast diesel car sales by sector to 2016 . . . . .           | 189       |
| Norway - Diesel car sales volume and penetration (1983 - 2016) . . . . .      | 190       |
| Norway - Diesel car sales annual changes to 2016 . . . . .                    | 192       |
| Norway - Comparative pump price history (petrol v. diesel) . . . . .          | 193       |
| Norway - Diesel car sales history by manufacturer . . . . .                   | 195       |
| Norway - Diesel car market share history by manufacturer . . . . .            | 196       |
| Norway - Top selling diesel models (2005 - 2010) . . . . .                    | 197 - 198 |
| Norway - Passenger car sales history by sector . . . . .                      | 199       |
| Norway - Top selling diesel models by sector . . . . .                        | 201       |
| Norway - Forecast diesel car sales by sector to 2016 . . . . .                | 201       |
| Portugal - Diesel car sales volume and penetration (1983 - 2016) . . . . .    | 202       |
| Portugal - Diesel car sales annual changes to 2016 . . . . .                  | 202       |
| Portugal - Comparative pump price history (petrol v. diesel) . . . . .        | 203       |
| Portugal - Diesel car sales history by manufacturer . . . . .                 | 205       |
| Portugal - Diesel car market share history by manufacturer . . . . .          | 206       |
| Portugal - Top selling diesel models (2005 - 2010) . . . . .                  | 207 - 208 |
| Portugal - Passenger car sales history by sector . . . . .                    | 209       |
| Portugal - Top selling diesel models by sector . . . . .                      | 210       |

|  |           |
|--|-----------|
| Portugal - Forecast diesel car sales by sector to 2016 . . . . .                 | 211       |
| Spain - Diesel car sales volume and penetration (1983 - 2016) . . . . .          | 212       |
| Spain - Diesel car sales annual changes to 2016 . . . . .                        | 212       |
| Spain - Comparative pump price history (petrol v. diesel) . . . . .              | 213       |
| Spain - Diesel car sales history by manufacturer . . . . .                       | 215       |
| Spain - Diesel car market share history by manufacturer . . . . .                | 216       |
| Spain - Top selling diesel models (2005 - 2010) . . . . .                        | 217 - 218 |
| Spain - Passenger car sales history by sector . . . . .                          | 219       |
| Spain - Top selling diesel models by sector . . . . .                            | 220       |
| Spain - Forecast diesel car sales by sector to 2016 . . . . .                    | 221       |
| Sweden - Diesel car sales volume and penetration (1983 - 2016) . . . . .         | 222       |
| Sweden - Diesel car sales annual changes to 2016 . . . . .                       | 222       |
| Sweden - Comparative pump price history (petrol v. diesel) . . . . .             | 223       |
| Sweden - Diesel car sales history by manufacturer . . . . .                      | 225       |
| Sweden - Diesel car market share history by manufacturer . . . . .               | 226       |
| Sweden - Top selling diesel models (2005 - 2010) . . . . .                       | 227 - 228 |
| Sweden - Passenger car sales history by sector . . . . .                         | 229       |
| Sweden - Top selling diesel models by sector . . . . .                           | 230       |
| Sweden - Forecast diesel car sales by sector to 2016 . . . . .                   | 231       |
| Switzerland - Diesel car sales volume and penetration (1983 - 2016) . . . . .    | 232       |
| Switzerland - Diesel car sales annual changes to 2016 . . . . .                  | 232       |
| Switzerland - Comparative pump price history (petrol v. diesel) . . . . .        | 233       |
| Switzerland - Diesel car sales history by manufacturer . . . . .                 | 235       |
| Switzerland - Diesel car market share history by manufacturer . . . . .          | 236       |
| Switzerland - Top selling diesel models (2005 - 2010) . . . . .                  | 237 - 238 |
| Switzerland - Passenger car sales history by sector . . . . .                    | 239       |
| Switzerland - Top selling diesel models by sector . . . . .                      | 240       |
| Switzerland - Forecast diesel car sales by sector to 2016 . . . . .              | 241       |
| United Kingdom - Diesel car sales volume and penetration (1983 - 2016) . . . . . | 242       |
| United Kingdom - Diesel car sales annual changes to 2016 . . . . .               | 242       |
| United Kingdom - Comparative pump price history (petrol v. diesel) . . . . .     | 244       |
| United Kingdom - Diesel car sales history by manufacturer . . . . .              | 245       |
| United Kingdom - Diesel car market share history by manufacturer . . . . .       | 246       |
| United Kingdom - Top selling diesel models (2005 - 2010) . . . . .               | 247 - 248 |
| United Kingdom - Passenger car sales history by sector . . . . .                 | 249       |
| United Kingdom - Top selling diesel models by sector . . . . .                   | 250       |
| United Kingdom - Forecast diesel car sales by sector to 2016 . . . . .           | 251       |