



## Press-release

08.04.2014

### March sales show first signs of consolidation

- *Sales of new passenger cars and LCVs in Russia remain stable in March 2014*
- *Among the top ten bestselling models so far, ten models are locally produced*

March 2014 saw sales of new cars and light commercial vehicles in Russia remaining almost the same compared with March 2013, or only 890 sold units less, according to the AEB Automobile Manufacturers Committee (AEB AMC).

Among **the top ten bestselling models** of passenger cars, ten are produced in Russia.

**Joerg Schreiber**, Chairman of the **AEB Automobile Manufacturers Committee** commented:

“One year ago, the Russian car market entered a phase of contraction which, with the exception of December 2013, continued in every single month to follow. The pace of decline had been less pronounced in recent months, indicating that consolidation is around the corner. In March 2013 the market seems to have finally reached this point. The big question now is whether this will be a lasting achievement or not.

Prevailing thinking among market participants is that the recent spike in market demand was driven by one-time effects which will have a reverse impact on customer activity in the 2nd quarter. The order banks generated during that spike however should contribute to a further improving YOY performance of the retail industry in the coming 1-2 months”.

#### Contacts:

Olga Zueva, AEB Automobile Manufacturers Committee Coordinator [olga.zueva@aebrus.ru](mailto:olga.zueva@aebrus.ru), tel. +7 (495) 234 27 64  
Yuliya Sheglova, Project Manager for market researches and statistics [yuliya.sheglova@aebrus.ru](mailto:yuliya.sheglova@aebrus.ru), tel. +7 (495) 234 27 64

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#### Attachments:

1. New car/LCV sales in Russia by brands for January-March 2014/2013 and March 2014/2013
2. New car/LCV sales in Russia by groups for January-March 2014/2013 and March 2014/2013
3. 25 best sold models of cars in Russia for January-March 2014/2013 and March 2014/2013

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Association of European Businesses  
Ul. Krasno proletarskaya 16, bld. 3  
127473 Moscow, Russia

Phone.: +7 (495) 234 27 64  
Fax: +7 (495) 234 28 07

E-mail: [info@aebrus.ru](mailto:info@aebrus.ru)  
[www.aebrus.ru](http://www.aebrus.ru)



## NEW CAR AND LCV<sup>1</sup> SALES IN RUSSIA BY BRANDS FOR

### JANUARY - MARCH 2014/2013 AND MARCH 2014/2013

(Data submitted by the AEB Automobile Manufacturers Committee; retail sales of imported and locally produced vehicles)

BRAND	January-March			March		
	2014	2013	YoY	2014	2013	YoY
Lada	91603	107427	-15%	37060	40480	-8%
Renault*	46252	48030	-4%	16637	17990	-8%
Nissan*	45744	35916	27%	17535	13865	26%
KIA	42289	41724	1%	17787	16571	7%
Hyundai*	41307	40714	1%	16362	15919	3%
Chevrolet	35307	36406	-3%	13439	13841	-3%
Toyota*	35057	29332	20%	14846	14135	5%
VW	34331	35274	-3%	14342	12806	12%
Mitsubishi	21842	19140	14%	10018	9119	10%
Škoda	18892	18619	1%	7764	7673	1%
Opel	18000	19832	-9%	7109	7447	-5%
Ford*	17373	23654	-27%	6817	10239	-33%
GAZ LCV*	14044	16983	-17%	6257	6829	-8%
Daewoo	12858	15898	-19%	4604	3408	35%
Mazda	11610	10625	9%	4863	5112	-5%
Mercedes-Benz	10384	8595	21%	4154	3638	14%
BMW	9700	8818	10%	3804	3562	7%
UAZ*	8466	11351	-25%	3362	4276	-21%
Audi	8286	8278	0%	3758	3753	0%
Honda	6789	4948	37%	2376	2124	12%
Peugeot*	6777	8307	-18%	2580	3066	-16%
Citroën*	6239	5947	5%	2327	2152	8%
SsangYong	5733	7103	-19%	2396	2666	-10%
Suzuki	5130	6033	-15%	1941	2334	-17%
Chery	4951	4157	19%	2105	1605	31%
Land Rover	4903	4500	9%	2114	2174	-3%
Geely	4851	4261	14%	2006	1938	4%
Lifan	4605	4321	7%	1939	2024	-4%
Great Wall	3860	4685	-18%	1526	1840	-17%
Subaru	3723	4009	-7%	1411	1788	-21%
Lexus	3375	3212	5%	1954	1568	25%
VW vans*	3281	3466	-5%	1274	1466	-13%

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Volvo	3242	2908	11%	1697	1512	12%
Infiniti	2338	2819	-17%	1034	1268	-18%
Jeep	1857	845	120%	828	449	84%
FIAT*	1755	1244	41%	767	564	36%
Mercedes-Benz Vans*	1510	835	81%	739	362	104%
FAW*	787	506	56%	251	231	9%
Porsche	710	777	-9%	410	338	21%
Jaguar	406	321	26%	155	129	20%
MINI	400	559	-28%	170	243	-30%
BAW*	354	483	-27%	123	195	-37%
Cadillac	339	378	-10%	162	154	5%
SEAT	309	860	-64%	125	358	-65%
ZAZ	296	930	-68%	82	374	-78%
Changan <sup>3</sup>	195	-	-	145	-	-
Haima	90	83	8%	49	7	600%
smart	72	24	200%	35	12	192%
Bogdan	92	777	-88%	22	215	-90%
Isuzu*	56	23	143%	23	12	92%
Luxgen	42	-	-	15	-	-
TagAZ*	38	64	-41%	10	21	-52%
Chrysler	36	39	-8%	15	16	-6%
Izh	18	251	-93%	3	93	-97%
Dodge	9	51	-82%	3	23	-87%
Foton*	7	6	17%	2	0	-
Alfa Romeo <sup>2</sup>	3	-	-	3	-	-
BYD	0	100	-	0	6	-
Vortex	0	517	-	0	235	-
<b>Total</b>	<b>602 523</b>	<b>616 965</b>	<b>-2%</b>	<b>243 335</b>	<b>244 225</b>	<b>0%</b>

1. LCV sales are included into total brand's sales if exist in the product line of the brand (marked with\*); reported separately for some brands. LCV<3,5t (with several exceptions reaching highest range of 6t). Some updates concerning LCV data may occur.
2. Alfa Romeo sales in Russia are done via CJSC Chrysler Russia starting from March 2014.
3. Changan sales in Russia are done via Vostok-Express LLC.

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## NEW CAR AND LCV<sup>1</sup> SALES IN RUSSIA BY GROUPS FOR JANUARY - MARCH 2014/2013 AND MARCH 2014/2013

(Data submitted by the AEB Automobile Manufacturers Committee; retail sales of imported and locally produced vehicles)

	January-March					March				
	% Share		Volume			% Share		Volume		
	2014	2013	2014	2013	YoY	2014	2013	2014	2013	YoY
AVTOVAZ-RENAULT- NISSAN	30,9	31,5	185937	194192	-4%	29,7	30,1	72266	73603	-2%
AVTOVAZ	15,2	17,4	91603	107427	-15%	15,2	16,6	37060	40480	-8%
RENAULT	7,7	7,8	46252	48030	-4%	6,8	7,4	16637	17990	-8%
NISSAN	7,6	5,8	45744	35916	27%	7,2	5,7	17535	13865	26%
INFINITI	0,4	0,5	2338	2819	-17%	0,4	0,5	1034	1268	-18%
VW Group	10,8	10,8	65099	66497	-2%	11,2	10,7	27263	26056	5%
VOLKSWAGEN cars	5,7	5,7	34331	35274	-3%	5,9	5,2	14342	12806	12%
VOLKSWAGEN vans	0,5	0,6	3281	3466	-5%	0,5	0,6	1274	1466	-13%
AUDI	1,4	1,3	8286	8278	0%	1,5	1,5	3758	3753	0%
SEAT	0,1	0,1	309	860	-64%	0,1	0,1	125	358	-65%
ŠKODA	3,1	3,0	18892	18619	1%	3,2	3,1	7764	7673	1%
GM Group	8,9	9,2	53646	56616	-5%	8,5	8,8	20710	21442	-3%
OPEL	3,0	3,2	18000	19832	-9%	2,9	3,0	7109	7447	-5%
CHEVROLET	5,9	5,9	35307	36406	-3%	5,5	5,7	13439	13841	-3%
CADILLAC	0,1	0,1	339	378	-10%	0,1	0,1	162	154	5%
KIA	7,0	6,8	42289	41724	1%	7,3	6,8	17787	16571	7%
HYUNDAI	6,9	6,6	41307	40714	1%	6,7	6,5	16362	15919	3%
TOYOTA Group	6,4	5,3	38432	32544	18%	6,9	6,4	16800	15703	7%
TOYOTA	5,8	4,8	35057	29332	20%	6,1	5,8	14846	14135	5%
LEXUS	0,6	0,5	3375	3212	5%	0,8	0,6	1954	1568	25%
MITSUBISHI	3,6	3,1	21842	19140	14%	4,1	3,7	10018	9119	10%
FORD	2,9	3,8	17373	23654	-27%	2,8	4,2	6817	10239	-33%
PSA PEUGEOT CITROËN	2,2	2,3	13016	14254	-9%	2,0	2,1	4907	5218	-6%
PEUGEOT	1,1	1,3	6777	8307	-18%	1,1	1,3	2580	3066	-16%
CITROËN	1,0	1,0	6239	5947	5%	1,0	0,9	2327	2152	8%
GAZ LCV	2,3	2,8	14044	16983	-17%	2,6	2,8	6257	6829	-8%
DAEWOO	2,1	2,6	12858	15898	-19%	1,9	1,4	4604	3408	35%
MERCEDES-BENZ	2,0	1,5	11966	9454	27%	2,0	1,6	4928	4012	23%
MERCEDES-BENZ cars	1,7	1,4	10384	8595	21%	1,7	1,5	4154	3638	14%
MERCEDES-BENZ vans	0,3	0,1	1510	835	81%	0,3	0,1	739	362	104%
smart	0,0	0,0	72	24	200%	0,0	0,0	35	12	192%
MAZDA	1,9	1,7	11610	10625	9%	2,0	2,1	4863	5112	-5%
BMW Group	1,7	1,5	10100	9377	8%	1,6	1,6	3974	3805	4%
BMW	1,6	1,4	9700	8818	10%	1,6	1,5	3804	3562	7%
MINI	0,1	0,1	400	559	-28%	0,1	0,1	170	243	-30%
UAZ	1,4	1,8	8466	11351	-25%	1,4	1,8	3362	4276	-21%

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HONDA	1,1	0,8	6789	4948	37%	1,0	0,9	2376	2124	12%
SSANGYONG	1,0	1,2	5733	7103	-19%	1,0	1,1	2396	2666	-10%
JAGUAR LAND ROVER	0,9	0,8	5309	4821	10%	0,9	0,9	2269	2303	-1%
LAND ROVER	0,8	0,7	4903	4500	9%	0,9	0,9	2114	2174	-3%
JAGUAR	0,1	0,1	406	321	26%	0,1	0,1	155	129	20%
SUZUKI	0,9	1,0	5130	6033	-15%	0,8	1,0	1941	2334	-17%
CHERY	0,8	0,7	4951	4157	19%	0,9	0,7	2105	1605	31%
GEELY	0,8	0,7	4851	4261	14%	0,8	0,8	2006	1938	4%
LIFAN	0,8	0,7	4605	4321	7%	0,8	0,8	1939	2024	-4%
GREAT WALL	0,6	0,8	3860	4685	-18%	0,6	0,8	1526	1840	-17%
SUBARU	0,6	0,6	3723	4009	-7%	0,6	0,7	1411	1788	-21%
CHRYSLER Group	0,6	0,4	3660	2179	68%	0,7	0,4	1616	1052	54%
FIAT	0,3	0,2	1755	1244	41%	0,3	0,2	767	564	36%
CHRYSLER	0,0	0,0	36	39	-8%	0,0	0,0	15	16	-6%
JEEP	0,3	0,1	1857	845	120%	0,3	0,2	828	449	84%
DODGE	0,0	0,0	9	51	-82%	0,0	0,0	3	23	-87%
ALFA ROMEO	0,0	-	3	-	-	0,0	-	3	-	-
VOLVO	0,5	0,5	3242	2908	11%	0,7	0,6	1697	1512	12%
FAW	0,1	0,1	787	506	56%	0,1	0,1	251	231	9%
PORSCHE	0,1	0,1	710	777	-9%	0,2	0,1	410	338	21%
BAW	0,1	0,1	354	483	-27%	0,1	0,1	123	195	-37%
ZAZ	0,0	0,2	296	930	-68%	0,0	0,2	82	374	-78%
CHANGAN	0,0	-	195	-	-	0,1	-	145	-	-
BOGDAN	0,0	0,1	92	777	-88%	0,0	0,1	22	215	-90%
HAIMA	0,0	0,0	90	83	8%	0,0	0,0	49	7	600%
ISUZU	0,0	0,0	56	23	143%	0,0	0,0	23	12	92%
LUXGEN	0,0	-	42	-	-	0,0	-	15	-	-
TAGAZ	0,0	0,0	38	64	-41%	0,0	0,0	10	21	-52%
IZH	0,0	0,0	18	251	-93%	0,0	0,0	3	93	-97%
FOTON	0,0	0,0	7	6	17%	0,0	0,0	2	0	-
BYD	-	0,0	0	100	-	-	0,0	0	6	-
VORTEX	-	0,1	0	517	-	-	0,1	0	235	-
<b>Total</b>	<b>100,0</b>	<b>100,0</b>	<b>602 523</b>	<b>616 965</b>	<b>-2%</b>	<b>100,0</b>	<b>100,0</b>	<b>243 335</b>	<b>244 225</b>	<b>0%</b>

Different from the international classification: brands represented on the Russian market by SOLLERS Group; see also above

SOLLERS Group	2,4	3,0	14255	18477	-23%	2,4	2,8	5781	6954	-17%
ISUZU	0,0	0,0	56	23	143%	0,0	0,0	23	12	92%
SSANGYONG	1,0	1,2	5733	7103	-19%	1,0	1,1	2396	2666	-10%
UAZ	1,4	1,8	8466	11351	-25%	1,4	1,8	3362	4276	-21%

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## 25 BEST SOLD MODELS OF CARS IN RUSSIA FOR JANUARY - MARCH 2014/2013 AND MARCH 2014/2013

(Data submitted by the AEB Automobile Manufacturers Committee; retail sales of imported and locally produced vehicles)

#	MODEL	BRAND	January-March				March			
			2014	2013	YoY units	YoY %	2014	2013	YoY units	YoY %
1	Granta	Lada	32493	37169	(4 676)	-13%	12958	14373	(1 415)	-10%
2	Solaris	Hyundai	25444	25388	56	0%	9837	9610	227	2%
3	New Rio	KIA	20926	19781	1 145	6%	9728	8269	1 459	18%
4	Duster	Renault	20547	18345	2 202	12%	7416	7007	409	6%
5	Kalina	Lada	18133	19538	(1 405)	-7%	7683	6371	1 312	21%
6	Polo	VW	15402	15161	241	2%	6461	5474	987	18%
7	Largus	Lada	14602	10170	4 432	44%	6018	3700	2 318	63%
8	Priora	Lada	12961	16533	(3 572)	-22%	5547	6350	(803)	-13%
9	Almera	Nissan	11152	113	11 039	9769%	3678	113	3 565	3155%
10	Niva	Chevrolet	10551	12024	(1 473)	-12%	4304	4413	(109)	-2%
11	Logan	Renault	10546	11784	(1 238)	-11%	3754	4383	(629)	-14%
12	Sandero	Renault	9981	10380	(399)	-4%	3595	3671	(76)	-2%
13	Octavia A7	Skoda	9418	-	-	-	3951	-	-	-
14	Cruze	Chevrolet	9349	10281	(932)	-9%	3078	4079	(1 001)	-25%
15	4x4	Lada	9147	10791	(1 644)	-15%	3685	3796	(111)	-3%
16	ix35	Hyundai	8619	7628	991	13%	3541	3019	522	17%
17	Focus	Ford	8374	16732	(8 358)	-50%	2931	7437	(4 506)	-61%
18	RAV 4	Toyota	8110	6436	1 674	26%	3293	4308	(1 015)	-24%
19	Corolla	Toyota	8011	5296	2 715	51%	3503	2440	1 063	44%
20	Outlander	Mitsubishi	7921	5568	2 353	42%	4584	2575	2 009	78%
21	Astra	Opel	7852	8859	(1 007)	-11%	2656	3187	(531)	-17%
22	X-Trail	Nissan	7741	7153	588	8%	1825	2946	(1 121)	-38%
23	Sportage	KIA	7453	7501	(48)	-1%	2180	2838	(658)	-23%
24	Camry	Toyota	7351	7252	99	1%	2952	2774	178	6%
25	Qashqai	Nissan	6916	9599	(2 683)	-28%	1904	3510	(1 606)	-46%

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 • John Deere Agricultural Holdings, Inc. • KPMG • LEROY MERLIN Russia • MAN Truck & Bus AG • Mercedes-Benz Russia • Merck LLC • Messe Frankfurt Rus, O.O.O  
 • METRO Group • Michelin • MOL Plc • Novartis Group • OBI Russia • Oranta • Pepeliaev Group, LLC • PwC • Procter & Gamble • Raiffeisenbank ZAO • ROCA  
 • Shell Exploration & Production Services (RF) B.V. • Statoil ASA • Stanton Chase International • Stupino Pro LLC • Telenor Russia AS • TMF Russia • Total E&P Russia  
 • Volkswagen Group Rus OOO • Volvo Cars LLC • VSK • YIT Rakennus Representative Office • YOKOHAMA RUSSIA LLC