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EUROPEAN CAR MARKET CONTINUES SLOW ROAD TO RECOVERY WITH 15.7% IMPROVEMENT SINCE JANUARY

- **Market down 10.3% at mid-point of 2009**
- **BUT a 15.7% improvement since beginning of year**
- **Golf remains Europe's top seller**
- **VW still Europe's best-selling brand**

JATO Dynamics, the world's leading provider of automotive data and intelligence, has released its monthly European new car market analysis for June and the 'H1' period of 2009. Overall, the new car market has continued to improve over the first six months of the year although the figures are still significantly down on 2008. At the end of June the market was down 10.3% YtD, a 15.7% improvement on the January figure of 26.0% demonstrating a slow but progressive improvement each month.

Unsurprisingly, the Volkswagen Golf continues to dominate the sales charts with sales up 32.8% on the same month last year and Volkswagen remains the biggest selling brand in Europe.

"Mid-way through the year is a perfect point to take stock of the overall market and to look for established trends rather than short-term peaks and troughs in the market", says David Di Girolamo, Head of JATO Consult. "With localised scrappage incentives now working consistently to improve sales, we can see steady and progressive improvements in new car registrations. It's impossible to be conclusive, but with the continued roll out of incentive schemes and the possibility of some renewed consumer confidence, it would seem likely that by the end of the year the European car market could more or less recover to 2008 levels."

Model Performance

The Golf has dominated in five of the six months during the H1 period of 2009, with only the second placed Ford Fiesta having borrowed its crown for a single month. The top four places have not changed in June with Peugeot 207 and Opel/Vauxhall Corsa holding their positions. The lower half of the chart has seen an amount of re-shuffling, with the Peugeot 308 a new entry in 10th position at the expense of the Volkswagen Polo which has now dropped out of the top ten performers as the old model is discontinued and the new Polo is introduced.

Top 10 Models

Make & Model	Jun_09	Jun_08	% Change Jun	Jun YtD_09	Jun YtD_08	% Change YtD
VOLKSWAGEN GOLF	59,628	44,912	+32.8%	286,243	254,023	+12.7%
FORD FIESTA	43,338	30,394	+42.6%	243,340	181,285	+34.2%
PEUGEOT 207	37,361	39,584	-5.6%	193,778	244,078	-20.6%
OPEL/VAUXHALL CORSA	34,540	36,442	-5.2%	181,751	211,578	-14.1%
RENAULT CLIO	32,314	37,571	-14.0%	144,512	200,768	-28.0%
FIAT PUNTO	32,269	26,502	+21.8%	170,641	174,612	-2.3%
FORD FOCUS	31,744	35,082	-9.5%	160,800	212,144	-24.2%
FIAT PANDA	30,346	21,178	+43.3%	159,976	122,563	+30.5%
OPEL/VAUXHALL ASTRA	28,903	32,700	-11.6%	137,832	193,666	-28.8%
PEUGEOT 308	23,786	23,927	-0.6%	118,654	124,052	-4.4%

Brand Performance

Volkswagen was once again Europe's top-selling car brand in June, up 12.9% over last year and up a marginal 0.7% YtD. Ford is in second position, while Renault has improved considerably from sixth to take third place. Opel/Vauxhall and Fiat round off the top five places.

Top 10 Brands

Make	Jun_09	Jun_08	% Change Jun	Jun YtD_09	Jun YtD_08	% Change YtD
VOLKSWAGEN	165,636	146,692	+12.9%	842,787	836,921	+0.7%
FORD	126,919	118,889	+6.8%	666,548	691,698	-3.6%
RENAULT	112,714	117,528	-4.1%	520,763	637,846	-18.4%
OPEL/VAUXHALL	109,140	118,266	-7.7%	557,739	670,149	-16.8%
FIAT	100,446	88,852	+13.0%	542,115	550,070	-1.4%
PEUGEOT	100,418	96,902	+3.6%	502,721	583,109	-13.8%
CITROEN	90,837	84,385	+7.6%	440,243	485,990	-9.4%
MERCEDES	64,174	62,024	+3.5%	301,283	376,761	-20.0%
TOYOTA	63,621	65,719	-3.2%	361,066	426,651	-15.4%
AUDI	63,027	58,965	+6.9%	327,037	341,767	-4.3%

National Trends

Germany once again proves to be the leading market in June, up 40.5% on last year and 26.1% YtD. France, Poland and Slovakia are the only other markets to be up YtD. However, many countries across Europe are progressively reducing their market deficits, and as such the overall volumes have improved by 2.8% since last month.

Sales by Market

Country	Jun_09	Jun_08	% Change Jun	Jun YtD_09	Jun YtD_08	% Change YtD
Austria	36,091	34,713	+4.0%	166,017	168,668	-1.6%
Belgium	43,736	50,689	-13.7%	273,205	330,697	-17.4%
Cyprus	1,366	2,109	-35.2%	8,478	11,801	-28.2%
Czech Republic	16,404	17,246	-4.9%	85,549	93,765	-8.8%
Denmark	9,025	15,386	-41.3%	51,334	85,469	-39.9%
Estonia	982	2,271	-56.8%	5,725	15,206	-62.4%
Finland	7,877	12,142	-35.1%	51,943	88,084	-41.0%
France	235,137	219,754	+7.0%	1,131,315	1,128,896	+0.2%
Germany	427,111	304,036	+40.5%	2,059,405	1,633,169	+26.1%
Great Britain	176,264	209,190	-15.7%	924,955	1,247,479	-25.9%
Greece	23,167	26,499	-12.6%	112,508	158,317	-28.9%
Hungary	5,945	14,619	-59.3%	39,613	82,003	-51.7%
Iceland	725	1,991	-63.6%	1,275	7,141	-82.1%
Ireland	4,828	7,884	-38.8%	46,858	123,991	-62.2%
Italy	209,975	187,210	+12.2%	1,132,462	1,270,122	-10.8%
Latvia	592	1,756	-66.3%	3,083	11,847	-74.0%
Lithuania	889	1,911	-53.5%	4,312	13,416	-67.9%
Luxembourg	4,028	4,902	-17.8%	24,393	29,904	-18.4%
Norway	7,581	9,670	-21.6%	41,747	61,565	-32.2%
Poland*	27,787	27,507	+1.0%	169,817	168,645	+0.7%
Portugal*	12,195	20,979	-41.9%	69,277	114,393	-39.4%
Slovakia	11,103	8,337	+33.2%	45,737	44,118	+3.7%
Slovenia	5,180	6,250	-17.1%	29,446	39,070	-24.6%
Spain	96,668	115,017	-16.0%	432,986	702,239	-38.3%
Sweden	22,393	23,959	-6.5%	102,794	137,884	-25.4%
Switzerland*	27,017	28,861	-6.4%	133,619	150,913	-11.5%
The Netherlands	35,582	47,952	-25.8%	220,884	298,879	-26.1%
Grand Total	1,449,648	1,402,840	+3.3%	7,368,737	8,217,681	-10.3%

* denotes estimated data for June 2009

The above data is provided by JATO Consult, the company's bespoke consulting service which offers customers access to its unique data and provides solutions and advice to meet a wide range of automotive business challenges. For more information visit www.jato.com, or email consult@jato.com.

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Editorial note: JATO Dynamics background

JATO was founded in 1984 and provides the world's most timely, accurate and up-to-date information on vehicle specifications and pricing, sales and registrations, news and incentives. The company has representation in over 40 countries, providing unique local market expertise. The JATO client base includes all of the world's volume vehicle manufacturers, giving them the ability to react to short-term market movements, plan for long-term developments and ultimately to meet consumers' needs. JATO's data has also been adapted for consumer use in motoring web portals where customers can see the advantages and disadvantages of a specified model against any other while major leasing companies use JATO data to drive the vehicle quotation process. Visit JATO at www.jato.com

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