

July 17, 2007

EUROPEAN MARKET STRUGGLES IN FIRST HALF OF YEAR

- **Half year figures show market is down by 0.9 per cent**
- **Peugeot 207 remains Europe's top seller**
- **Volkswagen still top of the brand chart**

JATO Dynamics, the world's leading provider of automotive data and intelligence today reports that the European market for new vehicles has posted a 0.9 per cent drop in the first half of 2007 compared to the same period in 2006.

With 79,324 fewer units sold so far in 2007, the total volume of vehicles sold in the period to the end of June totals 8,355,705 units, while June itself witnessed 1.3 per cent drop to 1,497,701 units.

Brand Performance

Volkswagen continues its European sales domination and continues as the top-selling car brand, ahead of the other top five brands during June Opel/Vauxhall (up 2.5%), Renault, Ford and Peugeot.

Year to date, the picture is much the same with Volkswagen again heading the chart, ahead of Opel/Vauxhall, Ford, Renault and Peugeot.

Outside the top five brands, manufacturers showing considerable performance improvement over the same half year period in 2006 include Dacia (up 55.2%), Daihatsu (up 52.5%), Honda (up 15.9%), MINI (up 14.0%), Jeep (up 9.1%), Land Rover (up 8.6%), Volvo (up 7.9%), Chevrolet (up 7.5%), Skoda (up 6.9%), Fiat (up 6.8%), Audi (up 5.2%) and Toyota (up 5.0%).

"Whilst the total figures for 2007 reveal a challenging picture for manufacturers in the Europe markets, it's clear to see from the performances of individual brands that there are still opportunities for growth. As JATO has previously reported it is new

product launches that drive the growth of many brands,” says Nasir Shah, International Sales and Marketing Director for JATO.

Top 10 performing Brands – June 2007

Make	Jun_07	Jun_06	Diff Jun	% Change Jun	Jun YtD_07	Jun YtD_06	Diff YtD	% Change YtD
VOLKSWAGEN	153,063	155,182	-2,119	-1.4%	835,828	869,080	-33,252	-3.8%
OPEL/VAUXHALL	136,886	133,526	+3,360	+2.5%	718,083	730,455	-12,372	-1.7%
FORD	115,530	124,520	-8,990	-7.2%	697,583	698,401	-818	-0.1%
RENAULT	123,517	143,231	-19,714	-13.8%	642,354	737,778	-95,424	-12.9%
PEUGEOT	106,343	111,770	-5,427	-4.9%	601,526	606,022	-4,496	-0.7%
FIAT	89,376	82,205	+7,171	+8.7%	530,345	496,521	+33,824	+6.8%
CITROEN	89,936	83,147	+6,789	+8.2%	508,695	504,814	+3,881	+0.8%
TOYOTA	80,271	86,642	-6,371	-7.4%	487,796	464,619	+23,177	+5.0%
MERCEDES	68,266	68,426	-160	-0.2%	375,334	379,972	-4,638	-1.2%
AUDI	61,666	58,666	+3,000	+5.1%	352,235	334,670	+17,565	+5.2%

Top Models

The still fresh Peugeot 207 has dominated the half year European sales charts with 237,722 units sold, followed by the Ford Focus (229,249 units), Fiat Punto (222,432 units), Opel/Vauxhall Corsa (219,311 units - up 48.9%), Opel/Vauxhall Astra (215,867 units), Volkswagen Golf (215,023 units), Renault Clio (213,272 units), Ford Fiesta (198,516 units - up 1.0%), Volkswagen Passat (162,793 units) and BMW 3-Series (158,799 units - up 4.3%).

The 207 topped the chart in June, closely followed by Astra, Golf (up 4.3%), Corsa (up 41.8%), Focus, Clio, Punto (up 2.5%), Fiesta, Polo (up 14.1%) and Passat.

Top 10 performing Models – June 2007

Make/Model	Jun_07	Jun_06	Diff Jun	% Change Jun	Jun YtD_07	Jun YtD_06	Diff YtD	% Change YtD
PEUGEOT 207	42,187	24,728	+17,459	+70.6%	237,722	50,160	+187,562	+373.9%
FORD FOCUS	36,859	45,511	-8,652	-19.0%	229,249	251,427	-22,178	-8.8%
FIAT PUNTO	35,997	35,129	+868	+2.5%	222,432	228,230	-5,798	-2.5%
OPEL/VAUXHALL CORSA	37,609	26,517	+11,092	+41.8%	219,311	147,238	+72,073	+48.9%
OPEL/VAUXHALL ASTRA	42,161	42,428	-267	-0.6%	215,867	238,394	-22,527	-9.4%
VOLKSWAGEN GOLF	39,405	37,798	+1,607	+4.3%	215,023	219,024	-4,001	-1.8%
RENAULT CLIO	36,411	48,132	-11,721	-24.4%	213,272	242,872	-29,600	-12.2%
FORD FIESTA	30,891	33,820	-2,929	-8.7%	198,516	196,564	+1,952	+1.0%
VOLKSWAGEN PASSAT	28,275	31,550	-3,275	-10.4%	162,793	176,953	-14,160	-8.0%
BMW SERIES 3	28,048	28,493	-445	-1.6%	158,799	152,207	+6,592	+4.3%

"The European market is extremely complex," says Nasir Shah. "Various economic and legislative forces in individual markets have helped to shape the figures for the first half of 2007 and we continue to see wide variances in the fortunes of particular countries. Germany and Italy are two of the major European markets for new cars in Europe, and whilst the German market has been depressed by changes to the taxation system, Italy has benefited from recently introduced scrapping incentives. For reasons such as these, it's dangerous to generalise about the state of the market."

Shah remains positive: "Despite the challenges, JATO is still confident that the industry will judge 2007 a successful year. The growth in central and Eastern Europe is phenomenal, not to mention the other emerging global markets. All things considered, this is an exciting time for motor manufacturers and the opportunities for growth are extensive."

****Where actual data was not available at the time of release, estimated data has been used.****

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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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