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CENTRAL AND EASTERN EUROPEAN CAR MARKET CONTINUES SIGNIFICANT GROWTH

- **Central and Eastern European markets showing significant growth**
- **Poland is region's largest market**
- **Dacia Logan is the most in demand model**

JATO Dynamics, the world's leading provider of automotive data and intelligence, has reported that the Central and Eastern European car market continues its significant growth. Sales of new cars in the region increased by 13.4% in the first half of 2007 compared to the same period in 2006, with a total volume of 655,322 units.

Poland has re-established itself as the largest market in the region in the first half of the year, with sales of 149,627 units (up 25.0% on H1 2006). Romania sits close behind at 146,292 units (up 24.6%), and was the largest market in the region during May and June. At 84,737 units the Hungarian market was the third largest in the region, but has fallen 10.3% compared to H1 2006, and is only a few hundred units ahead of the Czech market (84,188 units, up 8.0% YtD).

Latvia (up 52.9% YtD), Lithuania (up 45.7%) and Estonia (up 33.3%) all continue to record remarkable growth, while all other markets in the region have recorded market increases for 2007. Cyprus is particularly notable with its market currently up by 24.4%.

"Central and Eastern Europe is currently the star performer of the overall European car market," says Nasir Shah, Global Business Development Director at JATO. "Although total volumes are not yet at the same level as the Western European markets, the ever-improving economies in the region and the corresponding growth in personal prosperity is driving the growth. I have no doubt that the region will continue to provide manufacturers with enormous sales potential in the coming years."

Market Performance

Country	H1_07	H1_06	% change H1
Croatia	43,131	42,300	+2.0%
Cyprus	12,102	9,732	+24.4%
Czech Republic	84,188	77,946	+8.0%
Estonia	16,791	12,598	+33.3%
Hungary	84,737	94,508	-10.3%
Latvia	17,320	11,328	+52.9%
Lithuania	9,844	6,755	+45.7%
Poland	149,627	119,743	+25.0%
Romania	146,292	117,456	+24.6%
Serbia & Montenegro	22,175	19,737	+12.4%
Slovakia	33,978	32,752	+3.7%
Slovenia	35,137	32,874	+6.9%
Grand Total	655,322	577,729	+13.4%

Brand Performance

Skoda was the region's top-selling car brand in the first half of 2007, ahead of Dacia, Opel (up 13.4% YtD), Renault (up 2.6% YtD) and Volkswagen (up 16.4% YtD).

Given that the total market has recorded significant growth in the period, most of the volume manufacturers have recorded a similar rise in their individual sales performances. Of particular note are Toyota (up 26.2%), Peugeot (up 21.2%), Honda (up 45.2%), Chevrolet (up 22.9%), Kia (up 82.6%), Mercedes (up 30.3%), Mitsubishi (up 40.2%) and Volvo (up 38.5%).

Top Brands

Make			% change				% change	
	Jun_07	Jun_06	Diff Jun	Jun	H1_07	H1_06	Diff H1	H1
SKODA	14,871	15,278	-407	-2.7%	84,014	79,860	+4,154	+5.2%
DACIA	11,425	11,382	+43	+0.4%	52,751	56,126	-3,375	-6.0%
OPEL	9,174	8,242	+932	+11.3%	49,815	43,942	+5,873	+13.4%
RENAULT	8,898	8,638	+260	+3.0%	47,469	46,281	+1,188	+2.6%
VOLKSWAGEN	8,452	7,789	+663	+8.5%	47,241	40,581	+6,660	+16.4%
FORD	7,904	6,586	+1,318	+20.0%	39,730	35,066	+4,664	+13.3%
TOYOTA	7,751	6,198	+1,553	+25.1%	45,134	35,767	+9,367	+26.2%
PEUGEOT	6,767	5,422	+1,345	+24.8%	36,002	29,708	+6,294	+21.2%
FIAT	6,199	4,840	+1,359	+28.1%	28,414	24,774	+3,640	+14.7%
SUZUKI	4,949	4,165	+784	+18.8%	25,744	22,657	+3,087	+13.6%

Model Performance

The Dacia Logan was the top-selling new car in Central and Eastern Europe in the first half of 2007 with 52,750 units sold, ahead of Skoda Fabia (41,227 units), Skoda Octavia (33,483 units, up 7.7%), Opel Astra (16,442 units, up 19.3%) and Ford Focus (14,909 units, up 14.8%).

Top Models

Make & Model	H1_07	H1_06	% change H1
DACIA LOGAN	52,750	56,125	-6.0%
SKODA FABIA	41,227	45,624	-9.6%
SKODA OCTAVIA	33,483	31,076	+7.7%
OPEL ASTRA	16,442	13,777	+19.3%
FORD FOCUS	14,909	12,983	+14.8%
RENAULT CLIO	14,609	17,139	-14.8%
TOYOTA YARIS	14,317	11,064	+29.4%
RENAULT MEGANE	13,407	12,331	+8.7%
FIAT PUNTO	12,299	10,836	+13.5%
OPEL CORSA	12,058	8,032	+50.1%

New Models

New models that performed well in the Central and Eastern European market during the first six months of the year include the Peugeot 207, Kia Cee'd, Skoda Roomster, Toyota Auris, Nissan Qashqai, Fiat Bravo, Ford S-Max, Chevrolet Captiva, and Citroën C4 Picasso/Grand C4 Picasso.

Models showing significantly increased sales volume following a full-model update include the Opel Corsa, Honda CR-V, Hyundai Santa Fe and Mitsubishi Outlander.

Segment Trends

JATO regional segment	H1_07	H1_06	% change H1
EU A - utility/city cars	31,345	30,145	+4.0%
EU B - small	249,207	249,316	-0.0%
EU C1 - lower medium -	133,069	115,063	+15.6%
EU C2 - lower medium +	13,059	9,123	+43.1%
EU D1 - upper medium -	74,417	70,671	+5.3%
EU D2 - upper medium +	15,237	13,115	+16.2%
EU E1 - large and executive	9,245	7,572	+22.1%
EU E2 - luxury	1,645	1,308	+25.8%
EU Mini MPV	49,762	38,237	+30.1%
EU Medium MPV	13,143	2,476	+430.8%
EU Large MPV	3,965	1,817	+118.2%
EU Small SUV	12,136	7,720	+57.2%
EU Medium SUV	27,906	16,259	+71.6%
EU Large SUV	519	240	+116.3%
EU Luxury SUV	9,015	6,053	+48.9%
EU Sports	4,373	2,996	+46.0%
Other	7,279	5,618	+29.6%
Grand Total	655,322	577,729	+13.4%

The B-segment is the largest segment in the region by a considerable margin, with 249,207 sales in H1 2007, representing 38.0% of the overall market. However it is also the only segment not to have recorded a rise in sales over H1 2006, with total sales being at the same level as a year earlier.

The segment is led by the Dacia Logan, Skoda Fabia, Renault Clio, Toyota Yaris (up 29.4%) and Fiat Punto (up 13.5%). Rising stars in the segment include the Opel Corsa (up 50.1%, new model), Peugeot 207 (new model) and Renault Symbol/Thalia (up 41.5% due to increased sales in Romania).

The C1-segment is the second-largest in the region, with 133,069 units sold in H1 2007 (up 15.6%), taking a 20.3% share of the total market. This segment is led by the Opel Astra (up 19.3%), Ford Focus (up 14.8%), Renault Mégane (up 8.7%), Opel Astra Classic and Volkswagen Golf (up 23.6%). New models performing well in the segment include the Kia Cee'd, Toyota Auris, Fiat Bravo and Dodge Caliber. The Honda Civic is also performing well, posting a staggering 70.2% rise in sales YtD.

The D1-segment is the third-largest in the region, with sales of 74,417 units in H1 2007 (up 5.3%), taking 11.4% of the market. The segment is led by the Skoda Octavia (up 7.7%), Volkswagen Passat (up 4.6%), Toyota Avensis (up 18.4%), Peugeot 407 (up 3.4%) and Opel Vectra (up 4.8%).

The remaining significant segments are the Mini-MPV, A- and Medium SUV segments, taking a market share of 16.6% between them.

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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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