

16th July 2008

DIFFICULT ECONOMIC CONDITIONS HIT YEAR-TO-DATE NEW CAR SALES FIGURES

- **Market down 2.3% Year-to-Date**
- **Market down 8.7% in June**
- **VW Golf retains position as Europe's best-selling car**
- **Volkswagen is Europe's top-selling brand**

JATO Dynamics, the world's leading provider of automotive data and intelligence, today reports that after strong sales figures at the beginning of the year, June has continued the recent slowdown in the European car market, with a drop of 8.2% (131,876 units) compared with the same month last year, posting a total sales volume of 1,389,418 units.

"The dip in sales has accelerated in June compared with May and continues the recent downward trend in the market over the past few months. However, the world's leading manufacturers are mitigating the impact of the credit crunch and rising oil prices through continued product innovation, new and exciting models and major advances in fuel economy," says Nasir Shah, Global Business Development Director at JATO.

The slowing market in recent months has begun to impact on year-to-date (YtD) figures of 8,196,762 units which are now 2.3% (or 192,264 units) behind last year's, despite a healthy performance in the first quarter.

Brand Performance

Volkswagen maintains its lead at the top of the European market, heading the sales league in both June and YtD. In June second place was held by Opel/Vauxhall, followed by Renault, Ford and Peugeot. While YtD Ford held second place from Opel/Vauxhall, Renault and Peugeot.

BMW has done well to achieve a 6.1% growth in sales compared YtD, helped by an expanded range of models. Fiat has also performed well (up 2.7%); due to the success of the new 500 and Bravo models, whilst Mercedes achieved YtD figures which exactly mirror those of last year's. Outside of the top ten brands, Jaguar (up 22.5%), Dacia (up 9.8%) and Mini (up 5.7%) all recorded positive figures in June. Daihatsu (up 11.9%) saw growth shoot up as a result of the Cuore/Charade and Sirion models' low fuel consumption and attractive CO₂ ratings.

Top Ten Brands

Make	Jun_08	Jun_07	% Change June	Jun YtD_08	Jun YtD_07	% Change YtD
VOLKSWAGEN	144,385	154,962	-6.8%	833,878	838,811	-0.6%
OPEL/VAUXHALL	118,329	138,151	-14.3%	669,756	719,842	-7.0%
RENAULT	117,212	123,972	-5.5%	637,378	642,806	-0.8%
FORD	116,233	117,122	-0.8%	688,700	699,391	-1.5%
PEUGEOT	97,421	108,679	-10.4%	583,019	604,023	-3.5%
FIAT	87,207	90,996	-4.2%	547,868	533,688	+2.7%
CITROEN	82,004	92,120	-11.0%	483,001	511,545	-5.6%
BMW	69,210	69,445	-0.3%	374,443	352,836	+6.1%
TOYOTA	66,354	81,025	-18.1%	426,774	488,664	-12.7%
MERCEDES	62,138	68,972	-9.9%	376,654	376,521	+0.0%

Top Models

The Volkswagen Golf maintained its outstanding performance, helping the German brand retain the position of Europe's top-selling new car in June with 45,178 units registered (up 12.6%). The Peugeot 207 (39,450 units) continued its strong performance in second place, followed by Renault Clio (37,273 units, up 3.4%), Opel/Vauxhall Corsa (35,985 units), Ford Focus (35,024 units), Opel/Vauxhall Astra (33,169 units), Ford Fiesta (29,666 units), BMW 3-Series (26,848 units), Fiat Punto (26,520 units) and Volkswagen Polo (25,564 units).

YtD the Volkswagen Golf maintains its position as the top selling model (up 17.6%), followed by the Peugeot 207 (up 2.2% YtD).

Top Ten Models

Make & Model	Jun_08	Jun_07	% Change June	Jun YtD_08	Jun YtD_07	% Change YtD
VOLKSWAGEN GOLF	45,178	40,119	+12.6%	254,061	215,977	+17.6%
PEUGEOT 207	39,450	43,266	-8.8%	244,022	238,796	+2.2%
RENAULT CLIO	37,273	36,064	+3.4%	200,453	212,913	-5.9%
OPEL/VAUXHALL CORSA	35,985	38,159	-5.7%	210,876	220,014	-4.2%
FORD FOCUS	35,024	37,248	-6.0%	212,127	229,737	-7.7%
OPEL/VAUXHALL ASTRA	33,169	42,283	-21.6%	194,081	216,150	-10.2%
FORD FIESTA	29,666	31,043	-4.4%	180,464	198,700	-9.2%
BMW SERIES 3	26,848	28,281	-5.1%	141,097	159,046	-11.3%
FIAT PUNTO	26,520	36,633	-27.6%	174,360	223,709	-22.1%
VOLKSWAGEN POLO	25,564	28,372	-9.9%	151,358	151,559	-0.1%

National Trends

The German market remains the largest in Europe, helped by a 1% rise in June. The French market (up 1.5% in June and 4.5% YtD) has continued to grow as a result of environmental incentives on new cars which provide rebates to buyers purchasing new cars with CO₂ emissions of less than 130g/km. The Spanish market experienced a fall of 50,000 units, or 30%.

In some of the developing markets there was some significant growth in the first half of the year, particularly Slovakia (19.6%), the Czech Republic (10.7%) and Poland (12.6%).

Volumes by Market

Country	Jun_08	Jun_07	% Change June	Jun YtD_08	Jun YtD_07	% Change YtD
Austria	30,104	31,324	-3.9%	164,059	164,581	-0.3%
Belgium	50,642	49,977	+1.3%	330,650	308,509	+7.2%
Cyprus	2,109	2,284	-7.7%	11,801	12,102	-2.5%
Czech Republic	17,252	15,961	+8.1%	93,467	84,463	+10.7%
Denmark	5,719	15,194	-62.4%	69,533	78,816	-11.8%
Estonia	2,271	3,031	-25.1%	15,206	16,795	-9.5%
Finland	12,142	11,794	+3.0%	88,084	77,416	+13.8%
France	219,754	216,476	+1.5%	1,128,896	1,080,608	+4.5%
Germany	304,036	301,108	+1.0%	1,633,169	1,576,999	+3.6%
Great Britain	209,190	222,863	-6.1%	1,247,479	1,267,299	-1.6%
Greece	26,783	28,322	-5.4%	158,601	159,472	-0.5%
Hungary	14,619	16,136	-9.4%	82,003	84,615	-3.1%
Iceland	1,991	2,327	-14.4%	7,141	8,487	-15.9%
Ireland	7,907	15,307	-48.3%	124,220	153,042	-18.8%
Italy	185,077	230,609	-19.7%	1,264,637	1,431,554	-11.7%
Latvia	1,756	3,226	-45.6%	11,847	17,320	-31.6%
Lithuania	1,911	2,200	-13.1%	13,416	9,843	+36.3%
Luxembourg	4,679	4,621	+1.3%	29,679	29,252	+1.5%
Norway	9,670	11,083	-12.7%	61,565	65,686	-6.3%
Poland	27,270	25,790	+5.7%	168,414	149,594	+12.6%
Portugal	21,900	23,022	-4.9%	115,334	107,537	+7.3%
Slovakia	7,644	6,973	+9.6%	43,329	36,231	+19.6%
Slovenia	6,250	6,293	-0.7%	39,070	35,137	+11.2%
Spain	115,020	165,797	-30.6%	702,480	843,495	-16.7%
Sweden	23,959	26,462	-9.5%	139,511	152,049	-8.2%
Switzerland	31,531	30,844	+2.2%	153,583	144,048	+6.6%
The Netherlands	48,232	52,270	-7.7%	299,588	294,076	+1.9%
Grand Total	1,389,418	1,521,294	-8.7%	8,196,762	8,389,026	-2.3%

In percentage terms, Denmark (down 62.4%), Ireland (down 48.3%) and Latvia (down 45.6%) recorded significant declines in June, demonstrating worsening market conditions in Europe.

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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 intelligence 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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