

November 19, 2007

EUROPEAN CAR MARKET HOLDING FIRM YEAR-TO-DATE

- **Market up 0.8% YtD**
- **Volkswagen biggest selling brand**
- **Golf is top selling model**
- **Premium German brands performing**

The European market for new cars demonstrated significant growth of 5.6% (or 69,183 units) in October 2007 compared to the same month last year, with a total volume of 1,298,704 units. YtD, the total market has increased slightly, with growth of 0.8% (102,541 units) to a total 13,333,615 units.

“Overall, the relatively strong market performance of the last few months is helping to negate the effect of poor registration figures in the early part of the year”, says Nasir Shah, Global Business Director at JATO. “The net result is that the market has remained fairly static compared to last year”.

Brand Performance

Volkswagen was once again Europe’s top-selling car brand in October (up 1.1%), ahead of Renault, Opel/Vauxhall (up 3.1% in October, 1.1% YtD), Ford (up 4.8% in October, 1.4% YtD) and Peugeot (up 0.3% in October). The order of the Top 5 brands YtD is Volkswagen, Opel/Vauxhall, Ford, Renault and Peugeot.

Other notable performances came from Fiat which posted a sales increase in October (by 9.4%) and a YtD increase of 7.6% due to the recently introduced Bravo, 500 and Linea models. Citroën sales increased by 7.6% in October and 2.5% YtD, thanks largely to strong sales of the C4 Picasso, Grand C4 Picasso and C-Crosser. Toyota registrations rose 2.7% on the YtD with a strong performance from the new Auris and growing demand for the Prius.

Another significant aspect to the market is the continued growth of the German premium brands, which has been achieved despite a depressed domestic market. BMW’s market share increased by a significant 22.5% in October and posted increased sales in almost all markets.

“A number of BMW models have performed strongly,” says Shah. “The 1-Series, 3-Series, 5-Series and X5 have all done well, and have contributed to a 3.7% increase in sales YtD. More recently, the introduction of the 1-series coupé, and more efficient powertrains across the model range has further increased the brand’s appeal.”

Mercedes-Benz increased sales by 7.1% in October following the successful introduction of the new C-Class, bringing a YtD sales improvement of 1.5%. Audi sales increased 7.8% in October and 4.1% YtD.

In volume terms, the fastest-growing brands in the first ten months of 2007 are Fiat (up by 57,500 units), Honda (up by over 32,500 units, due to CR-V and Civic), Dacia (up by over 25,000 units) and MINI (up by more than 23,500 units). In percentage growth terms, the fastest growing volume brands over the same period are Dodge (up 136%) due to a much-expanded range including Caliber, Avenger and Nitro, Dacia (up 71.9%) and Daihatsu, which is up 34.2% due to the introduction of the new Materia and the continued success of the revised Sirion.

Top ten brands

Make	Oct_07	Oct_06	% Change Oct	Oct YtD_07	Oct YtD_06	% Change YtD
VOLKSWAGEN	139,923	138,340	+1.1%	1,359,971	1,402,767	-3.1%
RENAULT	107,425	109,033	-1.5%	1,002,345	1,117,944	-10.3%
OPEL/VAUXHALL	100,264	97,217	+3.1%	1,132,832	1,120,806	+1.1%
FORD	100,056	95,494	+4.8%	1,102,259	1,086,720	+1.4%
PEUGEOT	92,952	92,702	+0.3%	940,095	948,048	-0.8%
FIAT	79,713	72,858	+9.4%	819,739	762,183	+7.6%
CITROEN	79,589	73,938	+7.6%	802,629	783,157	+2.5%
TOYOTA	68,467	68,337	+0.2%	763,469	743,316	+2.7%
MERCEDES	62,541	58,380	+7.1%	620,603	611,293	+1.5%
BMW	61,130	49,896	+22.5%	584,679	563,633	+3.7%

Top Models

The Volkswagen Golf was Europe's top-selling new car in October 2007 with 40,370 units sold (up 20.9%), ahead of the Peugeot 207 with 39,230 units sold (up 25.1%), Opel/Vauxhall Corsa with 31,192 units sold (up 37.5%), Renault Clio (31,016 units), Opel/Vauxhall Astra (29,937 units), Ford Focus (29,235 units), Fiat Punto (28,766 units), Ford Fiesta (25,032 units), Volkswagen Passat (24,987 units) and Volkswagen Polo with 24,925 units sold (up 1.5%).

Top ten models

Make & Model	Oct_07	Oct_06	% Change Oct	Oct YtD_07	Oct YtD_06	% Change YtD
VOLKSWAGEN GOLF	40,370	33,384	+20.9%	361,577	351,983	+2.7%
PEUGEOT 207	39,230	31,347	+25.1%	376,090	156,478	+140.3%
OPEL/VAUXHALL CORSA	31,192	22,681	+37.5%	342,105	229,108	+49.3%
RENAULT CLIO	31,016	36,271	-14.5%	326,496	374,415	-12.8%
OPEL/VAUXHALL ASTRA	29,937	32,453	-7.8%	345,112	374,127	-7.8%
FORD FOCUS	29,235	30,698	-4.8%	349,631	379,938	-8.0%
FIAT PUNTO	28,766	30,572	-5.9%	327,565	344,215	-4.8%
FORD FIESTA	25,032	25,187	-0.6%	307,268	304,731	+0.8%
VOLKSWAGEN PASSAT	24,987	28,176	-11.3%	255,298	279,004	-8.5%
VOLKSWAGEN POLO	24,925	24,564	+1.5%	246,039	242,526	+1.4%

YtD, the top sellers were the Peugeot 207, Volkswagen Golf (up 2.7%), Ford Focus, Opel/Vauxhall Astra, Opel/Vauxhall Corsa (up 49.3%), Fiat Punto, Renault Clio, Ford Fiesta (up 0.8%), Volkswagen Passat and BMW 3-Series (up 4.8%).

National Trends

October saw increased sales in most European markets, with only Finland, Germany and Ireland recording lower registrations than in October 2006. YtD, the picture is less positive with Austria, Belgium, Finland, Germany, Hungary, Iceland, Luxembourg and Spain all suffering reduced new car markets.

Country	Oct_07	Oct_06	% Change Oct	Oct YtD_07	Oct YtD_06	% Change YtD
Austria	25,409	25,001	+1.6%	256,952	267,046	-3.8%
Belgium	46,150	41,492	+11.2%	464,749	470,469	-1.2%
Cyprus	1,830	679	+169.5%	19,675	15,049	+30.7%
Czech Republic	16,097	14,018	+14.8%	139,776	130,068	+7.5%
Denmark	12,766	12,441	+2.6%	131,356	131,178	+0.1%
Estonia	2,570	2,253	+14.1%	26,791	21,363	+25.4%
Finland	10,998	11,121	-1.1%	119,709	130,867	-8.5%
France	188,877	173,137	+9.1%	1,712,694	1,691,517	+1.3%
Germany	281,845	293,833	-4.1%	2,622,337	2,838,509	-7.6%
Great Britain	166,797	153,851	+8.4%	2,107,312	2,055,739	+2.5%
Greece	21,083	19,617	+7.5%	249,307	236,356	+5.5%
Hungary	15,248	13,701	+11.3%	144,206	150,761	-4.3%
Iceland	1,279	965	+32.5%	13,727	15,551	-11.7%
Ireland	3,847	4,051	-5.0%	184,681	176,139	+4.8%
Italy	207,500	191,716	+8.2%	2,142,202	2,019,176	+6.1%
Latvia	2,687	2,374	+13.2%	27,860	20,036	+39.0%
Lithuania	2,300	1,448	+58.8%	17,643	11,761	+50.0%
Luxembourg	4,103	4,018	+2.1%	42,255	44,586	-5.2%
Norway	11,646	8,673	+34.3%	109,520	89,387	+22.5%
Poland	23,894	20,875	+14.5%	241,306	196,140	+23.0%
Portugal	15,885	14,234	+11.6%	170,930	166,373	+2.7%
Slovakia	6,640	6,566	+1.1%	58,274	54,992	+6.0%
Slovenia	5,882	4,654	+26.4%	56,071	50,734	+10.5%
Spain	128,975	124,663	+3.5%	1,335,312	1,356,094	-1.5%
Sweden	28,839	24,251	+18.9%	248,344	234,071	+6.1%
Switzerland	23,407	21,136	+10.7%	234,070	222,217	+5.3%
The Netherlands	42,150	38,753	+8.8%	456,556	434,895	+5.0%
Grand Total	1,298,704	1,229,521	+5.6%	13,333,615	13,231,074	+0.8%

-Ends-

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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