

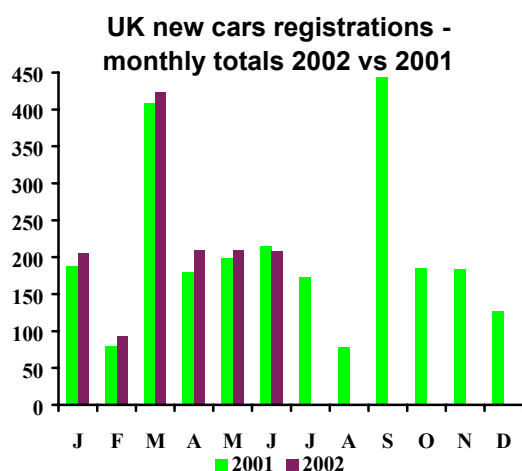
# June 2002 New Car Registrations - Analysis & Comment

New Registrations		June 2002	
		all cars	% chge
Month		207,330	-3.7%
YTD		1,347,693	6.2%
Last three months		624,975	5.2%
12 MMAT		2,537,438	11.6%
Year	2001	2,458,769	10.7%
Forecast	2002	2,400,000	-2.4%
	2003	2,300,000	-4.2%

MMAT - monthly moving annual totals

## Registrations by customer type

June 2002	Private	Fleet	Business
Registrations	96,234	90,103	20,993
Market share	46.4%	43.5%	10.1%
% change	-4.4%	-4.0%	0.8%
YTD 2002	Private	Fleet	Business
Registrations	664,349	557,481	125,863
Market share	49.3%	41.4%	9.3%
% change	7.6%	3.6%	10.8%



## New car demand remains strong

- The first six months of the year show strong growth, up 6.2 per cent, and full year volumes look set to be close to 2001 levels, at around 2.4 million units.
- With an extended three-day Bank Holiday, and World Cup fever affecting demand early in the month, new car sales dipped for the first time since September 2000. The market slipped 3.6 per cent to 207,330 units, from a record 215,325 cars in June 2001, but was still the second highest June total ever.

## Market growth is led by private buyers

- Over the first half of the year all sectors of the market have performed well. In the private sector, registrations have risen by more than 47,000 units.
- Despite overall growth during 2002, June saw a slight dip in private and large fleet volumes. Only the business sector reported a rise, taking its market share to the highest level since January.

## Annual market up over 260,000 units

- Registrations over the first half of 2002 have risen by 78,669 to 1,347,693 units
- Diesel demand continues to grow. Last month 11,000 more diesel cars were registered than in June 2001, with sales reaching 47,766 units and market share rising from 17.1 per cent to 23 per cent.
- Overall, demand for new cars is expected to remain strong during the summer. However the market is expected to cool later in the year, following exceptional growth and a spate of record months in the last few months of 2001.

### Top 10 registrations

June 2002					YTD 2002
12,031	Focus	◀ 1 ▶	Focus	85,282	
9,073	206	◀ 2 ▶	Corsa	55,713	
8,678	Corsa	◀ 3 ▶	206	53,658	
8,064	Astra	◀ 4 ▶	Astra	52,221	
7,050	Clio	◀ 5 ▶	Fiesta	49,728	
6,789	Fiesta	◀ 6 ▶	Clio	47,386	
5,958	Mondeo	◀ 7 ▶	Golf	38,724	
5,410	Vectra	◀ 8 ▶	Mondeo	37,650	
5,373	Golf	◀ 9 ▶	Mégane	35,863	
5,346	Mégane	◀ 10 ▶	Xsara	33,647	

### UK penetration

	June 2002	2001	YTD 2002	2001
UK				
Registrations	49,658	50,544	323,689	313,823
Market share	24.0%	23.5%	24.0%	24.7%
% change	-1.8%	-4.1%	3.1%	-11.5%
Cars built outside UK				
Registrations	157,672	164,781	1,024,004	955,201
Market share	76.0%	76.5%	76.0%	75.3%
% change	-4.3%	17.1%	7.2%	10.9%

### Small cars are on the up

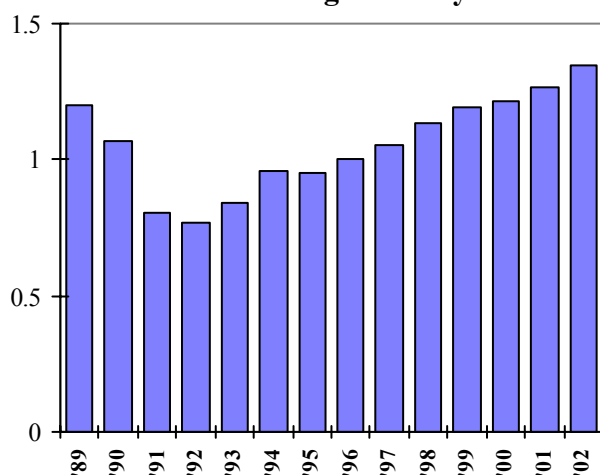
- Ford's Focus once again topped the best sellers' list. June was the 26<sup>th</sup> month in a row with the Focus at number one.
- There was also more growth in the supermini segment. Registrations were up 3.6 per cent with superminis taking four of the top six spots.
- The 4x4 market also improved in June, up 5.9 per cent thanks to models like Honda's CRV and the Nissan X-Trail.

### British-built cars gain market share

- Registrations of British-built cars took 24 per cent of the June market, up from 23.5 per cent in June last year.
- Cars made by MINI, Jaguar, MG Rover, Honda, Peugeot and Lotus all did particularly well in June. UK-built registrations have risen by some 10,000 units over the first six months of the year.

## INDICATOR OF THE MONTH

mns UK New Car Regs January - June



### Six months figures show strength of market

- UK new car registrations rose to 1,347,693 in the first six months of 2002 – the highest ever level reported for the first half of the year.
- The market has shown growth over the past seven years and volumes have been above the 1989 level for each of the past three years.
- This positive start to the year should ensure that total registrations top 2.4 million units in 2002.