THE FRENCH AUTOMOTIVE INDUSTRY
ANALYSIS AND STATISTICS

2006 EDITION

Comité des Constructeurs Français d'Automobiles

CONTENTS

01 Editorial:
To keep our industry healthy, we have to remain competitive in our market, which is Europe,
Manuel J. Gomez, Chairman, CCFA

ANALYSIS AND HIGHLIGHTS
04 World
12 Europe
21 France

STATISTICS
46 World
49 Europe
56 France

"TO KEEP OUR INDUSTRY HEALTHY, WE HAVE TO REMAIN COMPETITIVE IN OUR MARKET, WHICH IS EUROPE."

Manuel J. Gomez
Chairman, CCFA

+50%
GROWTH IN PRODUCTION BY FRENCH AUTOMOBILE MANUFACTURERS SINCE 1997
(SEE PAGE 4)

6 MILLION
VEHICLES PRODUCED BY FRENCH AUTOMOBILE MANUFACTURERS IN 2005
(SEE PAGES 22 AND 56 TO 59)

53 PLANTS
OPERATED BY FRENCH AUTOMOBILE MANUFACTURERS WORLDWIDE
(SEE PAGE 21)

Mr. Gomez, how would you describe 2005, in an environment shaped by slower sales in Europe and an increase in raw materials prices?

Manuel J. Gomez: There were both positive and negative aspects. In the European market, which comprises both the 17 "older" countries and the new entrants, demand was flat in the 17-country Europe. With 14.5 million new passenger cars registered, the outlook has not changed since 1999 and is unlikely to improve in the future. The new entrants offer some potential, but volumes remain low, at 750,000 passenger cars in 2005. That's a decline of 9% from 2004 and equal to 5% of the Western Europe market (or less than half the Spanish market last year). Another negative, or at least uncertain, factor was the increase in raw materials prices, which raised manufacturer costs by several hundred million euros. At a time when higher fuel prices were already significantly increasing the household transportation budget, it was difficult to pass on these increased costs in sticker prices. The last negative factor was the cost of implementing Euro 4 emissions standards.

What about the positive aspects?

M.G.: The market's growth prospects now lie far from the traditional spheres of influence of the established automobile manufacturers. This is positive because the global market expanded by more than 4% in 2005, while the European Union, the United States and Japan remained practically stable. In fact, business outside Europe represented 28% of French manufacturers' unit sales in 2005, a percentage that will continue to grow in the future. The domestic manufacturing base is still intact, however, producing 3.5 million units in 2005, including 3.2 million by French makes. Another positive factor concerns light commercial vehicles, one-third of which are French, versus only a quarter of passenger cars. I would also point out the benefits of competition, which offers a highly stimulating environment in which French manufacturers can express their creative talent—in a wide variety of body styles and technological solutions, environmental performance, safety features, fast-paced new model launch cycles, etc.

"FOR LEGISLATION THAT REFLECTS THE SPECIFIC CHARACTERISTICS OF THE AUTOMOTIVE INDUSTRY AND ITS MARKET."

3 OUT OF 4
VEHICLES PRODUCED BY FRENCH AUTOMOBILE MANUFACTURERS ARE SOLD OUTSIDE FRANCE
(SEE PAGE 23)

10%
OF FRENCH PEOPLE IN EMPLOYMENT WORK IN THE AUTOMOTIVE INDUSTRY (DIRECT AND INDIRECT JOBS)
(SEE PAGE 44)

1 OUT OF 4
VEHICLES SOLD IN THE ENLARGED EUROPEAN UNION IS A FRENCH MAKE
(SEE PAGES 13 AND 17 TO 19)

You mentioned the cost associated with stricter standards. Is compliance a particular burden for French automobile manufacturers?

M.G.: It's time to stop making statements that are divorced from economic reality. I'm talking about pollution, where the greatest progress has been made by the road transportation industry, though it's considered by many to be the worst offender. Cars are cleaner than ever. The industry is healthy too, but to keep it that way, we have to remain competitive in our market, which is Europe. Unfortunately, our industry suffers from exceptionally heavy taxation, politically correct environmentalism, and a myriad of regulations that are stricter in Europe than the rest of the world. Clearly, you have to wonder whether the environmental benefits are worth the regulatory burden when you realize that in France, where most cars are small or mid-sized, new vehicles are already practically emission-free. That means the playing field with non-European countries isn't level. We would therefore like to have a more consistent regulatory framework, with legislation that is more aligned with the specific nature of the automotive industry, and more adapted to the characteristics of a globalized marketplace.

What are you thinking about in particular?

M.G.: Since 1970, we've had eight different environmental directives, each one legislating a 50% reduction in emissions compared with the previous level. And every time, automobile manufacturers have met the new standards, because they're in the business of turning challenges into opportunities. But not all of the manufacturers are competing on equal terms. France is primarily a market of small and mid-sized vehicles, which have to meet the same regulatory requirements as larger vehicles. In other words, the French automobile industry is more adversely affected than others. As a result, it makes no sense to try and exceed the Euro 5 standards applicable in 2009. By then, gasoline and diesel-powered vehicles will be virtually emission-free, and trying to cut emissions any further would impose an undue burden for an almost imperceptible gain. Automobiles are extremely complex products governed by strict rules, in terms of design, purchase, use and recycling. All of these rules must remain compatible not only with production demands, but also with sticker prices. Because if the costs cannot be passed on to the consumer, they weigh on margins across the industry. We are therefore calling for legislation that reflects the specific characteristics of the automobile industry and its market.

"OVERTAXING AUTOMOBILES IS COUNTER-PRODUCTIVE."

88% OF PASSENGERS AND 81% OF GOODS TRAVEL BY ROAD FOR DESTINATIONS WITHIN FRANCE
(SEE PAGE 41)

– 14% DECLINE IN AVERAGE CO_2 EMISSIONS FROM NEW PASSENGER CARS OVER TEN YEARS
(SEE PAGE 70)

+43% INCREASE IN INSEE'S MOTOR FUEL PRICE INDEX BETWEEN 1998 AND 2005
(SEE PAGES 35 AND 69)

That's a call that also concerns mobility, an extremely hot topic these days.

M.G.: The average number of kilometers driven by French drivers has declined slightly, bringing about a corresponding decrease in fuel consumption and emissions. But for destinations within France, the automobile is still the primary means of transporting goods (81%) and passengers (88%). Despite all the anti-automobile policies, these percentages show that the automobile is still preferred as the most effective means of transportation, even in urban areas. That's because cars provide an irreplaceable service, not only because of their intrinsic benefits—carrying capacity, availability, door-to-door convenience—but also because they are the only means of transportation capable of responding to the growing number of increasingly complex journeys demanded by today's lifestyles. Overtaxing automobiles is obviously counter-productive; cars and commercial vehicles play a critical role in the economy, are working tools in their own right and even help to improve productivity. I might add that while the average number of kilometers driven is declining, the number of car trips is continuing to grow despite a modest contraction in 2005. Mobility is changing, not declining. That's why we have to look at all the parameters and ask ourselves if there really is a viable alternative to cars. Rail systems, for example, are supposed to be very environmentally friendly, but they could never fulfill the entire range of mobility needs, not to mention freight transportation needs.

Given the current situation, could you tell us about the outlook for 2006?

M.G.: First of all, I'd like to point out that French automobile manufacturers produce more vehicles in France than are purchased here, at 3.2 million units, compared to 2.5 million new vehicles sold. It's a delicate ratio, however, that depends on French products remaining competitive. But the French automobile industry is laboring under a heavy burden. When it comes to taxes, the government's imagination knows no bounds. Auto industry taxes, for example, including the TIPP tax on petroleum products, bring in €41 billion a year, or one sixth of the government's total tax revenues. More generally, the automobile industry, which is France's largest, provides 2.5 million jobs. It's therefore tempting to say that you shouldn't kill the goose that lays the golden eggs. Against this backdrop, French automobile manufacturers are preparing to do battle in a market where demand is slightly weaker (down 1.6% in the first six months of 2006). The focus is clearly on 2007, which will also be a milestone in terms of environmental performance due to the very strong growth in demand for vehicles emitting less than 120 grams of CO_2 per kilometer. In addition, since 2002, the replacement of older models by a growing number of low-carbon vehicles, combined with the high cost of fuel and the greater respect for speed limits, has helped to stabilize road transportation energy consumption, without reducing mobility. In this regard, it would be useful to reactivate research programs such as CARS 21[1]. In the meantime, the French automotive industry just wants to go about its business in peace.

MANUEL J. GOMEZ

(1) Working group comprising 20 members, including the chairmen of Volkswagen, Ford Europe, AB Volvo, Fiat and Renault, created by the European Commission to enhance the competitiveness of the EU automotive industry. The group submitted its report on December 12, 2005.

NINTH CONSECUTIVE YEAR OF GROWTH FOR FRENCH AUTOMOBILE MANUFACTURERS IN 2005

+50%
GROWTH IN GLOBAL PRODUCTION BY FRENCH AUTOMOBILE MANUFACTURERS SINCE 1997

In 2005, worldwide production by French automobile manufacturers continued to expand, rising a slight 0.4% to over 6 million vehicles. The increase since 1997 has been significant, reaching 50% over the eight-year period, or an additional 2 million vehicles.

French automobile manufacturers achieved these results by leveraging both their domestic manufacturing sites and their facilities in other countries. Substantial investment in France and a much higher utilization rate saw output raised by 680,000 vehicles. Automobile manufacturers also reorganized and expanded their plants in the rest of the world and built new ones, lifting output by more than 1.3 million vehicles.

In France, sales grew by nearly 300,000 vehicles between 1997 and 2005, despite tougher competition and a selective sales strategy. Western Europe excluding France accounted for an increase in sales of more than 500,000 units over the same period. The international development strategy outside Western Europe is producing results, and this region has since 2004 accounted for the highest growth, with sales over the period increasing by 1 million units, of which 160,000 in 2003, 265,000 in 2004 and 163,000 in 2005.

KEY DATA

In thousands	1997	2004	2005	% change 2005/2004	% change 2005/1997
World production of French manufacturers	4,046	6,033	6,056	0.4%	49.7%
Passenger cars	3,472	5,168	5,178	0.2%	49.1%
Light commercial vehicles	507	813	824	1.4%	62.3%
Total light vehicles	3,979	5,981	6,002	0.3%	50.8%
Heavy trucks (at constant scope)	36	52	55	4.3%	52.8%
Production of French manufacturers in France	2,525	3,293	3,206	–2.6%	27.0%
Passenger cars	2,235	2,892	2,804	–3.1%	25.5%
Light commercial vehicles	258	361	362	0.1%	40.3%
Total light vehicles	2,493	3,253	3,165	–2.7%	27.0%
Heavy trucks	30	40	41	1.5%	37.2%
French automotive exports	2,822	4,269	4,316	1.1%	52.9%
Passenger cars	2,526	3,820	3,841	0.6%	52.1%
Light commercial vehicles	276	416	439	5.7%	59.2%
Total light vehicles	2,802	4,235	4,281	1.1%	52.8%
Heavy trucks	20	34	35	4.7%	78.8%
Automotive exports outside Europe (17 countries)	659	1,510	1,673	10.8%	154.0%
Passenger cars	563	1,366	1,511	10.6%	168.6%
Light commercial vehicles	88	129	145	12.5%	63.8%
Total light vehicles	651	1,495	1,656	10.8%	154.3%
Heavy trucks	8	16	18	12.1%	128.5%
Registrations in France	2,068	2,474	2,548	3.0%	23.2%
Passenger cars	1,713	2,014	2,068	2.7%	20.7%
Light commercial vehicles	313	408	420	2.8%	34.3%
Total light vehicles	2,026	2,422	2,488	2.7%	22.8%
Heavy trucks	39.3	47.2	55.3	17.2%	40.8%
Coaches and buses	3.1	4.2	4.8	13.3%	52.8%
French-make automobile registrations in Europe (17 countries)	3,300	4,219	4,107	–2.6%	24.5%
Passenger cars	2,841	3,525	3,405	–3.4%	19.9%
Light commercial vehicles	432	658	665	1.1%	54.1%
Total light vehicles	3,273	4,183	4,070	–2.7%	24.4%
Heavy trucks	27	36	37	3.0%	35.5%

MARKET SHARE OF FRENCH MAKES (NEW LIGHT VEHICLES)

	2004	2005	% change 2005/2004
France	60.5%	58.5%	–2.0 points
Europe (excluding France)	19.4%	18.7%	–0.7 points
All Europe	25.4%	24.7%	–0.7 points

MARKET SHARE OF FRENCH MAKES (NEW HEAVY TRUCKS)

	2004	2005	% change 2005/2004
Europe	11.3%	10.9%	–0.4 points

FRENCH PRODUCTION (PSA PEUGEOT CITROËN, RENAULT-DACIA-SAMSUNG AND RENAULT TRUCKS)

	2004	2005	% change 2005/2004
Passenger cars	11.6%	11.3%	–0.3 points
Commercial vehicles	4.3%	4.3%	0.0 points
Total	9.4%	9.1%	–0.2 points

FRENCH AUTOMOTIVE EXTERNAL TRADE

In € billions	2004	2005	% change 2005/2004
Exports	54.0	52.6	–2.6%
Imports	41.3	42.6	+5.6%
Balance	12.7	9.0	–29.2%

KEY FIGURES, FRENCH MANUFACTURERS (PSA PEUGEOT CITROËN + RENAULT)

In € billions	2004	2005	% change 2005/2004
Sales	96.4	97.6	+1.3%
Capital expenditure	5.8	5.9	+2.2%
Employees (in thousands)	335	338	+0.8%

AUTOMOTIVE INDUSTRY CONTRIBUTION TO FOREIGN TRADE GOODS BALANCE

	2004	2005	% change 2005/2004
Exports	15.8%	14.8%	–1.0 points
Imports	11.6%	11.2%	–0.4 points

JOBS RELATED TO THE AUTOMOTIVE INDUSTRY

(in thousands of people)	2005
Automotive industry, direct	298
As a % of the manufacturing and energy industry	10%
Total (direct and indirect)	2,461
As a % of the employed working population	10%

After growing by more than 5% in 2004, the global economy slowed down in 2005, although expansion was nonetheless above 4%. As in previous years, growth in emerging economies in Latin America, Asia and Eastern Europe outpaced growth among OECD members, including the United States (more than 3%), Japan (close to 3%) and the EU-15 (less than 2%).
This economic environment saw the global automotive market grow by more than 4% to over 65 million vehicles. Automotive markets in Western Europe were stable, remaining at high levels thanks to the excellent results reported by commercial vehicles. French automobile manufacturers, who are very active in this region, saw their sales decline due to stiffer competition and a selective sales strategy.

High demand for cars drove overall growth in Eastern Europe. French automobile manufacturers are expanding both their marketing and production operations in the region, whose markets are forecast to enjoy further growth.
Led by China, India, Indonesia, Thailand, Taiwan and Iran, Asia enjoyed sustained growth and saw its automotive markets expand strongly. French manufacturers were able to increase their sales in the region.
In Latin America, the continuing economic upturn was reflected in significantly higher sales by French manufacturers, particularly in Brazil and Argentina

WORLD MOTOR VEHICLE PRODUCTION

66.5 MILLION WORLD MOTOR VEHICLE PRODUCTION IN 2005

Global motor vehicle production rose a further 3.1% to more than 66 million units, an increase of 2 million units on 2004.

North American production was stable with growth of 0.4%, while Western European output slid 2.0%. The strong growth in Romania, the Czech Republic and Slovenia stabilized broader European vehicle output.

China continued to contribute significantly—nearly 500,000 additional units, or 25% of global growth. The Asia/Pacific region saw production expand by 6%, or 1.5 million additional units, making up 75% of the increase in world motor vehicle production. In Asia apart from China, the growth in production ranged from 80,000 to 300,000 additional units in Indonesia, Malaysia, India, Thailand, South Korea and Japan.

After increasing by more than 20% in 2004, production in Latin America, excluding Mexico, was a healthy 12%, for an additional 300,000 units, led by Argentina and Brazil.

WORLD MOTOR VEHICLE PRODUCTION	Passenger cars				Commercial vehicles				Total production		% change
	2004 Thousands	%	2005 Thousands	%	2004 Thousands	%	2005 Thousands	%	2004 Thousands	2005 Thousands	2005/2004
Europe	17,830	40.0	17,636	38.3	3,005	15.1	3,165	15.5	20,835	20,801	–0.2
of which:											
Western Europe	14,665	32.9	14,178	30.8	2,186	11.0	2,262	11.1	16,851	16,440	–2.4
Germany	5,192	11.7	5,350	11.6	378	1.9	408	2.0	5,570	5,758	3.4
Belgium	857	1.9	896	1.9	43	0.2	33	0.2	900	929	3.2
Spain	2,403	5.4	2,098	4.6	610	3.1	654	3.2	3,012	2,753	–8.6
France	3,227	7.2	3,113	6.8	439	2.2	436	2.1	3,666	3,549	–3.2
Italy	834	1.9	726	1.6	309	1.5	313	1,5	1,142	1,038	–9.1
United Kingdom	1,647	3.7	1 596	3.5	209	1.0	207	1,0	1,857	1,803	–2.9
Sweden	290	0.7	289	0.6	50	0.3	50	0.2	340	339	–0.5
Central and Eastern Europe	2,718	6.1	3,004	6.5	442	2.2	478	2,3	3,160	3,482	10.2
Turkey	447	1.0	454	1.0	376	1.9	425	2.1	823	879	6.8
North and South America	8,567	19.2	8,957	19.5	10,380	52.1	10,368	50.7	18,947	19,324	2.0
of which:											
NAFTA(1)	6,468	14.5	6,667	14.5	9,810	49.2	9,672	47.3	16,278	16,340	0.4
South America	2,098	4.7	2,290	5.0	571	2.9	695	3.4	2,669	2,985	11.8
Asia/Pacific	17,870	40.1	19,096	41.5	6,422	32.2	6,721	32.9	24,292	25,817	6.3
of which:											
Japon	8,720	19.6	9,016	19.6	1,791	9.0	1,783	8.7	10,512	10,799	2.7
China	2,480	5.6	3,078	6.7	2,754	13.8	2,630	12.9	5,234	5,708	9.0
South Korea	3,123	7.0	3,357	7.3	347	1.7	342	1.7	3,469	3,699	6.6
Africa	288	0.6	320	0.7	135	0.7	203	1.0	423	522	23.6
TOTAL	**44,554**	**100.0**	**46,009**	**100.0**	**19,942**	**100.0**	**20,457**	**100.0**	**64,496**	**66,465**	**3.1**
Change 2005/2004	+3.3%				+2.6%				+3.1%		

Double counting is eliminated in regional totals.
(1) NAFTA: Canada, the United States and Mexico.

Source: CCFA, OICA.

Unlike previous years, the 3.3% increase in passenger car output slightly outpaced the 2.6% rise in commercial vehicle production. A 1% decline in passenger car production in Europe was more than offset by increases of nearly 5% in North and South America and 7% in the Asia/Pacific region. Output of commercial vehicles, including light trucks, remained stable in North and South America, while rising by 5% in Europe, and nearly 5% in the Asia/Pacific region, despite a decline in China.

Although overall production climbed in nearly all Asian and Latin American countries, trends varied in Western Europe, with a further 9% decline in Italy, a 9% fall in Spain and a 3% decrease in France and the United Kingdom contrasting with growth of 3% in Belgium and Germany

WORLDWIDE AUTOMOBILE MANUFACTURER RANKINGS

9.1%

SHARE OF FRENCH AUTOMOBILE MANUFACTURERS IN WORLD MOTOR VEHICLE PRODUCTION IN 2005

Led by sustained organic growth, PSA Peugeot Citroën produced nearly 3.4 million vehicles and is now positioned as the world's eighth largest automobile manufacturer.

Renault, which benefited from organic growth and acquisitions, increased its production to more than 2.6 million units. It is the world's tenth-ranked automobile manufacturer.

Production by French automobile manufacturers accounted for 9.1% of global output, slightly lower than the record 9.8% reported in 2001, but significantly higher than the 7.3% recorded in 1997.

Manufacturer	Rank	Total production	Passenger cars	Commercial vehicles (1)	Heavy trucks (1)	Coaches and buses (1)
		Thousands	Thousands	Thousands	Thousands	Thousands
General Motors (Opel-Vauxhall-GM Daewoo)	1	9,098	5,657	3,383	47	11
Toyota	2	7,338	6,157	943	186	52
Ford (Jaguar-Volvo cars)	3	6,498	3,514	2,904	79	–
Volkswagen Group	4	5,211	4,979	194	33	5
DaimlerChrysler (including Evobus and Fuso)	5	4,816	1,965	2,354	436	61
Nissan	6	3,494	2,697	651	140	6
Honda	7	3,436	3,324	49	63	–
PSA Peugeot Citroën	8	3,375	2,983	393	–	–
Hyundai-Kia	9	3,091	2,727	127	138	100
Renault-Dacia-Samsung	10	2,617	2,195	422	–	–
Suzuki-Maruti	11	2,072	1,723	349	–	–
Fiat-Iveco-Irisbus (2)	12	2,038	1,540	395	82	22
Mitsubishi	13	1,331	998	329	4	–
BMW (including Mini)	14	1,323	1,323	–	–	–
Mazda	15	1,288	1,092	193	2	–
Daihatsu	16	1,011	803	195	13	–
Avtovaz	17	721	721	–	–	–
Dongfeng (excluding Citroën)	18	593	–	403	180	10
Fuji (Subaru)	19	592	508	84	–	–
Beijing AIG (excluding Hyundai- Isuzu)	20	559	–	559	–	–
FAW Group (excluding VW, Toyota, Mazda)	21	539	59	397	74	9
SAIC-Sangyong (excluding GM & VW)	22	518	132	378	–	9
Isuzu	23	511	–	226	282	3
Chana Automobile Liability	24	422	–	422	-	–
Tata (Telco)	25	419	163	130	115	11
Harbin Hafei Automotive	26	225	–	225	–	–
Volvo-Renault Trucks-Mack	27	215	–	9	196	10
Gaz	28	215	52	163	–	–
Chery Auto	29	186	186	–	–	–
Anhui Jianghuai Auto	30	167	–	155	–	12
Paccar-Daf	31	150	–	–	150	–
Zhejiang Geely	32	150	–	150	–	–
Mahindra&Mahindra	33	126	–	126	–	–
Navistar	34	122	–	–	108	14
Changhe Aircraft Industrie	35	116	–	116	–	–
Nanjing Auto	36	111	111	–	–	–
Jinbei Auto Holding	37	110	–	110	–	–
Porsche	38	98	98	–	–	–
Hino	39	97	–	5	87	5
MAN-ERF-NEOMAN Bus	40	76	–	–	70	6
UAZ	41	69	29	40	–	–
Great Wall Motor	42	68	68	–	–	–
Kamaz	43	62	30	–	32	–
Scania	44	60	–	–	53	6
Soueast Auto Industrial	45	59	–	59	–	–
Ijmach-Avto	46	50	43	7	–	–
Nissan Diesel	47	41	–	1	39	2
MG Rover	48	29	29	0	–	–
Total above manufacturers		65,513	45,907	16,644	2,608	354
Other (China, India, Russia, Poland, Turkey, etc.)		952				
TOTAL PRODUCTION		**66,465**				

(1) Non-standard weight limits.
(2) Not all of Irisbus production is included in Fiat-Iveco's consolidated production.

Source: OICA, CCFA

Buoyant growth in output in Asia favored manufacturers in this region. In contrast, stable production in North America and a decline in the EU-25 affected American manufacturers more adversely than European manufacturers, who were able to leverage their more numerous overseas facilities.

While General Motors, which now includes GM Daewoo, maintained its top ranking, Toyota tightened its grip on the No. 2 spot taken from Ford in 2004. Both of the American manufacturers recorded a like-for-like decline in production in 2005. The other Asian manufacturers, including Nissan, Honda, Suzuki-Maruti and Mazda, further raised their output.

Trends varied among European manufacturers. Production fell by 4% at Fiat and by 1% at PSA Peugeot Citroën, while remaining stable at DaimlerChrysler on a like-for-like basis (excluding Fuso). Output was up 2% at Volkswagen and Renault-Dacia-Samsung (like-for-like) and nearly 6% at BMW.

EXPORTS BY MAJOR AUTOMOTIVE COUNTRY

47%
SHARE OF EXPORTED VEHICLES IN JAPANESE PRODUCTION IN 2005

World vehicle exports increased by 2% to more than 28 million units in 2005, at a slightly lower rate than world production, which rose 3%.
While all regions reported growth in 2004, export performances varied greatly in 2005. After increasing by 11% in 2004, exports by the United States and Canada fell a sharp 13% to less than 1.6 million units. Exports by EU countries contracted by 1%, while those by Japan—the world's leading exporter—increased by 2% to more than 5 million units. EU-15 exports outside its borders climbed 4.5% to 4.7 million units. South Korea's exports grew by 9%, with the other exporting countries reporting a 10% jump.

EXPORTS

	Passenger cars				Commercial vehicles				Total		Change
	2004 Thousands	%	2005 Thousands	%	2004 Thousands	%	2005 Thousands	%	2004 Thousands	2005 Thousands	2005/2004 %
Germany	3,667	15	3,795	16	258	6	285	6	3,924	4,081	+4.0
Spain	1,968	8	1,705	7	513	12	542	12	2,481	2,247	–9.4
France (1)	3,820	16	3,841	16	449	11	478	11	4,269	4,319	+1.2
Italy	378	2	273	1	218	5	225	5	596	498	–16.5
United Kingdom	1,173	5	1,186	5	128	3	130	3	1,301	1,316	+1.2
Sweden (1)	519	2	493	2	132	3	136	3	651	628	–3.5
EU-15 outside EU (2)	4,099	17	4,263	18	408	10	444	10	4,506	4,707	+4.5
USA-Canada	1,422	6	1,168	5	372	9	387	9	1,794	1,555	–13.3
South Korea	2,277	10	2,457	10	103	2	130	3	2,380	2,586	+8.7
Japan	4,214	18	4,363	18	744	18	690	16	4,958	5,053	+1.9
Other exporting countries	4,273	18	4,590	19	1,206	29	1,440	32	5,479	6,029	+10.0
Total world exports	**23,710**	**100**	**23,871**	**100**	**4,122**	**100**	**4,442**	**100**	**27,832**	**28,313**	**+ 1.7**
Change 2005/2004	+0.7%				+7.8%				+1.7%		

(1) Based on worldwide production of national manufacturers.
(2) Estimates.

Source: OICA, CCFA.

In Europe, the decline in overall exports was partially offset by higher exports outside the EU-15, which rose 4.5% to 4.7 million units, amounting to a third of total EU-15 auto sales, compared to less than 30% in 2003.
South Korean exports climbed significantly for the third year in a row, rising 9% to 2.6 million units, after a 31% increase in 2004. They represented more than 9% of world exports.
Manufacturers based in the United States and Canada continued to focus on their domestic markets. Their exports totaled 1.6 million units, equivalent to 11% of their production.
Exports rose in most of the other automotive countries, including Romania, the Czech Republic and Turkey in Europe, Mexico, Argentina and Brazil in North and South America, and Australia, China and Indonesia in the Asia/Pacific region.
The slower growth in passenger car exports compared to commercial vehicle exports was mainly due to surplus growth of world passenger car output—particularly in countries and regions that produce for the domestic market, such as China and the NAFTA region, which encompasses the United States, Canada and Mexico—and to significant declines in certain European countries, such as Spain and Italy, which have traditionally been heavy exporters.

THE GLOBAL AUTOMOTIVE MARKET

31%
NAFTA SHARE OF GLOBAL SALES IN 2005

New vehicle registrations rose 4% to more than 65 million in 2005, breaking the 60 million mark for the second year in a row. Although sales rose in all regions, growth rates were low in the leading industrialized countries, where the vehicle ownership rate has reached maturity. In contrast, Eastern Europe, Asia (excluding South Korea and Japan), South America and Africa experienced strong increases.
In the United States, high consumer spending and marketing incentives sustained sales, which remained close to record levels.
In Western Europe, commercial vehicle registrations climbed 4%, while the passenger car market remained stable. Sales contracted 4% in the United Kingdom and 1% in Italy and rose 2% in Germany, 3% in France and 4% in Spain, where they reached a record high.
Sales in Japan, which were already low, were stable, while sales in South Korea recovered 5% after declining significantly for two years in a row.
Other countries, particularly China, Indonesia, Iran, Malaysia and Thailand, therefore contributed significantly to growth in the Asia/Pacific region, with a 13% increase in sales. With sales in 2005 well above 5 million units, China's automotive market should soon be bigger than Japan's.

In South America, automobile ownership continued to spread and markets expanded nearly 16%, driven by growth of 29% in Argentina and 9% in Brazil.

WORLD MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2004 Thousands	%	2005 Thousands	%	2004 Thousands	%	2005 Thousands	%	2004 Thousands	2005 Thousands	2005/2004 %
Europe	17,657	42.5	17,851	41.1	3,068	14.6	3,223	14.7	20,725	21,074	+1.7
of which:											
Western Europe	14,511	34.9	14,487	33.3	2,291	10.9	2,375	10.9	16,803	16,861	+0.3
Central and Eastern Europe	3,145	7.6	3,365	7.7	777	3.7	848	3.9	3,922	4,213	+7.4
North and South America	11,161	26.8	11,643	26.8	11,534	54.8	11,720	53.6	22,696	23,362	+2.9
of which:											
NAFTA (1)	9,067	21.8	9,223	21.2	10,930	51.9	11,018	50.4	19,997	20,241	+1.2
USA	7,506	18.1	7,667	17.6	9,793	46.5	9,777	44.7	17,299	17,444	+0.8
South America	2,094	5.0	2,419	5.6	605	2.9	702	3.2	2,699	3,121	+15.6
Asia/Pacific	12,139	29.2	13,216	30.4	6,145	29.2	6,585	30.1	18,284	19,801	+8.3
of which:											
South Korea	885	2.1	944	2.2	245	1.2	244	1.1	1,129	1,189	+5.3
Japan	4,768	11.5	4,748	10.9	1,085	5.2	1,104	5.0	5,853	5,852	–0.0
Other	6,487	15.6	7,523	17.3	4,815	22.9	5,237	23.9	11,302	12,760	+12.9
Africa	617	1.5	743	1.7	293	1.4	349	1.6	910	1,092	+20.1
TOTAL	**41,574**	**100.0**	**43,453**	**100.0**	**21,041**	**100.0**	**21,877**	**100.0**	**62,614**	**65,330**	**+4.3**
Change 2005/2004	4.5%				4.0%				4,.3%		

(1) NAFTA: Canada, the United States and Mexico.

Source: CCFA.

The passenger car reigns supreme in Europe, which absorbs 41% of new cars sold worldwide. North America prefers light commercial vehicles, with NAFTA (the United States, Canada and Mexico) accounting for more than 50% of registrations in 2005. The Asia/Pacific region also prefers commercial vehicles, but to a lesser degree; sales to this region amounted to 30%.

TRENDS IN PRODUCTION AND TRADE AMONG THE THREE LEADING GLOBAL AUTOMOTIVE REGIONS

18.2 MILLION VEHICLES PRODUCED IN THE EU-25 IN 2005, THE WORLD'S LARGEST AUTOMOTIVE REGION

The EU-25 remained an open market in 2005, with exports continuing to expand, especially to the Commonwealth of Independent States and Turkey.
The United States and Canada is the second largest producing region; however, to meet demand in the world's leading market, increasingly large numbers of automobiles are imported, especially light commercial vehicles.
In Japan, the diversification of markets for the domestic automotive industry (Europe and Asia) largely offset the decline in exports to North America. Imports still account for less than 5% of total registrations.

PASSENGER CARS

	European Union [1]		USA and Canada [3]		Japon	
Production	thousands	Index (100=1990)	thousands	Index (100=1990)	thousands	Index (100=1990)
1970	9,876	78	7,474	105	3,179	33
1980	10,166	80	7,196	101	7,038	72
1990	12,726	100	7,150	100	9,753	100
2000	14,779	116	7,092	99	8,359	86
2005	15,781	124	5,677	79	9,016	92
Imports [2]	thousands	% of total production	thousands	% of total production	thousands	% of total production
1970	148	1%	1,464	20%	19	1%
1980	800	8%	2,713	38%	46	1%
1990	1,495	12%	3,029	42%	186	2%
2000	2,629	18%	2,225	31%	268	3%
2005	2,580	16%	2,479	44%	247	3%
Exports [2]	thousands	% of total production	thousands	% of total production	thousands	% of total production
1970	2,397	24%	49	1%	726	23%
1980	1,973	19%	107	1%	3,947	56%
1990	1,732	14%	288	4%	4,482	46%
2000	2,715	18%	1,130	16%	3,796	45%
2005	3,240	21%	1,168	2%	4,363	48%

COMMERCIAL VEHICLES

	European Union [1]		USA and Canada [3]		Japan	
Production	thousands	Index (100=1990)	thousands	Index (100=1990)	thousands	Index (100=1990)
1970	1,180	74	1,734	38	2,110	60
1980	1,600	100	2,138	47	4,005	113
1990	1,598	100	4,553	100	3,539	100
2000	2,327	146	8,669	190	1,782	50
2005	2,396	150	8,993	197	1,783	50
Imports [2]	thousands	% of total production	thousands	% of total production	thousands	% of total production
1970			47	3%	0	0%
1980	101	6%	125	6%	1	0%
1990	258	16%	399	9%	1	0%
2000	242	10%	915	11%	8	0%
2005	290	12%	1,358	15%	3	0%
Exports [2]	thousands	% of total production	thousands	% of total production	thousands	% of total production
1970			64	4%	361	17%
1980	362	23%	114	5%	2,020	50%
1990	179	11%	32	1%	1,349	38%
2000	248	11%	339	4%	659	37%
2005	400	17%	387	4%	690	39%

(1) The number of countries included in the "European Union" corresponds to the number of member countries in the year in question.
(2) Intra-European Union trade not included.
(3) Source: Ward's Automotive Reports as of 1999.

Source: Eurostat, CCFA since 1991.

Trends in the three leading global automotive markets have contrasted sharply since 1990.
In the European Union, vehicle production has grown by 27%, while trade, which was already high, has continued to expand and is now posting a slight surplus.
Output has risen by 25% in the United States and Canada over the period, thanks to the success of light commercial vehicles. Imports, already high in 1990, remained so for the same reason. Exports have quintupled since 1990, but still account for just 11% of production, compared with 20% for the European Union and 47% for Japan.
Vehicle production has plunged more than 20% since 1990 in Japan, mainly due to the lackluster domestic market and a 13% decline in exports as a result of competition from Japanese transplants abroad.

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

US$847 BILLION GLOBAL TRADE IN AUTOMOTIVE PRODUCTS IN 2004, ACCORDING TO THE WTO

According to the World Trade Organization, worldwide trade in automotive products grew a strong 16% to US$847 billion in 2004, following growth of 16% in 2003. Trade in automotive products accounted for 9.5% of global goods exports and 12.9% of global manufactured product exports.

Trade in automotive products within regions stood at more than US$570 billion, or more than two-thirds of global trade in these products. Trade within the EU-25 accounted for US$345 billion, equivalent to around 60% of trade within regions. France sold automotive products worth US$67 billion abroad, representing close to 8% of world exports.

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

In US$ billions — Exports (FOB) - Imports (CIF) to/from leading global automotive markets

ZONES	World			USA and Canada			européan Union [1]			Japan			Other		
COUNTRIES	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance
USA															
1990	32.6	78.5	–46.0	19.5	27.7	–8.2	2.9	11.5	–8.6	1.5	30.1	–28.6	8.6	9.2	–0.5
2000	67.2	170.2	–103.0	38.2	58.8	–20.5	6.3	28.9	–22.6	2.7	44.5	–41.8	19.9	38.0	–18.1
2004	76.4	197.0	–120.6	42.2	61.8	–19.6	9.8	41.9	–32.1	1.5	45.7	–44.3	22.9	47.6	–24.7
Canada															
1990	28.4	24.6	3.8	27.8	18.9	8.9	0.1	1.0	–0.9	0.1	3.5	–3.4	0.5	1.3	–0,.8
2000	60.7	46.3	14.4	59.2	37.6	21.6	0.3	1.7	–1.4	0.1	3.5	–3.4	1.1	3.6	–2.4
2004	63.7	52.9	10.8	62.0	41.3	20.7	0.5	2.8	–2.4	0.0	3.8	–3.7	1.2	5.0	–3.8
European Union [1]															
1990	159.5	138.1	21.4	12.4	2.3	10.1	109.4	103.7	5.7	5.2	12.6	–7.4	32.5	19.5	13.0
2000	270.1	231,4	38.7	27.4	5.6	21.9	186.7	186.7	0.0	5.9	14.8	–8.9	50.1	24.3	25.8
2004	470.8	397.4	73.4	45.4	8.8	36.5	344.9	344.9	0.0	8.6	20.8	–12.1	71.9	23.0	49.0
Germany [2]															
1990	68.8	30.3	38.6	8.9	0.9	8.0	39.6	20.2	19.4	4.2	5.2	–1.0	16.1	4.0	12.1
2000	92.2	42.2	49.9	16.6	1.8	14.8	51.0	26.3	24.7	3.9	3.4	0.5	20.6	10.8	9.8
2004	153.1	69.0	84.1												
France [2]															
1990	26.2	21.6	4.6	1.1	0.4	0.7	19.3	18.5	0.8	0.2	0,9	–0.7	5.6	1.8	3.7
2000	39.9	30.5	9.4	0.9	0.4	0.5	31.7	26.3	5.5	0.2	1.2	–1.0	7.0	2.6	4.4
2004	67.2	51.3	15.8												
United Kingdom [2]															
1990	14.1	22.8	–8.7	1.6	0,4	1.2	9.6	18.4	–8.8	0.4	2.5	–2.1	2.5	1.5	1.1
2000	25.6	36.1	–10.5	3.9	1.3	2.7	17.8	29.7	–11.9	0.5	3.0	–2.6	3.4	2.1	1.3
2004	28.3	51.9	–23.6												
Italy [2]															
1990	13.0	18.1	–5.1	0.9	0.1	0.8	9.4	16.8	–7.4	0.2	0.1	0.1	2.6	1.1	1.5
2000	18.4	25.3	–7.0	0.9	0.2	0.7	13.3	20.3	–7.1	0.3	1.5	–1.3	4.0	3.3	0.7
2004	26.3	40.8	–14.5												
Spain [2]															
1990	11.7	10.1	1.6												
2000	28.1	26.3	1.8												
2004	46.4	44.9	1.5												
Japan															
1990	66.2	7.3	58.9	34.0	0.9	33.1	11.0	5.8	5.2				21.2	0.6	20.7
2000	88.1	10,0	78.1	47.2	2.3	44.9	13.2	6.0	7.2				27.7	1.6	26.1
2004	115.7	12.8	102.9	48.9	1.5	47.4	21.2	8.3	12.9				45.6	3.1	42.6
South Korea															
1990	2.3	0.9	1.4	1.6	0.2	1.4	0.2	0.2	0.0	0.1	0.5	–0.4	0.5	0.1	0.4
2000	15.2	1.8	13.4	6.2	0.3	5.9	3.0	0.4	2.7	0.2	0.7	–0.5	5.8	0.4	5.4
2004	32.3	3.5	28.9	12.6	0.4	12.1	7.4	1.5	5.9	0.4	1.0	–0.7	12.0	0.5	11.5

(1) For comparison, 15 EU countries have been included since 1993 and 25 since 2004.
The "Other" column includes all countries outside the three major markets.
(2) Since 2001, CCFA has based its estimates of imports and exports for European Union countries on local customs statistics.

Source: GATT/WTO.

The euro's and won's rise against the dollar, which began in 2002, and the yen's rise against the dollar in 2003 are two of the factors underlying the continued sharp growth in global trade of automotive products in 2004. EU-25 exports within the EU increased 16% to US$345 billion. Expressed in euros, that amounts to 5%. Japan's exports were up 13% to US$116 billion. Expressed in yen, that amounts to 5%.

Germany remained the leading exporter of automotive products in 2004, with exports of US$153 billion, representing a market share of more than 18%.

Japan ranked second worldwide, with exports totaling US$116 billion, of which more than 40% to North America. With imports underdeveloped, the country reported a trade surplus of US$103 billion.

The United States remained the world's largest importer of automotive products, which totaled US$197 billion, for a deficit of US$120 billion, or US$10 billion per month.

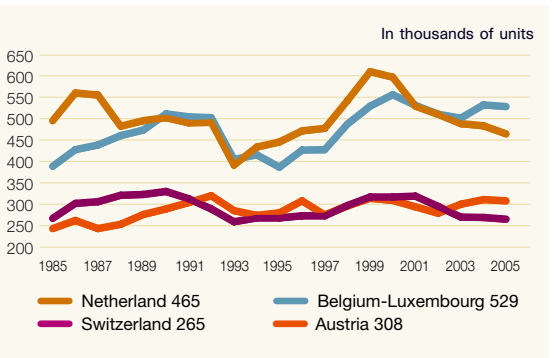
EU-25 automotive product exports amounted to US$471 billion. Trade within the EU accounted for nearly three-quarters of the total, or US$345 billion.

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

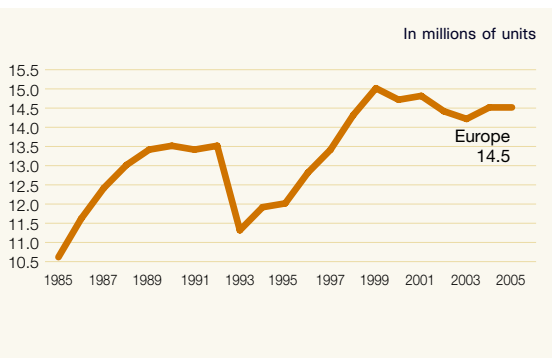
14.5 MILLION NEW PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE IN 2005

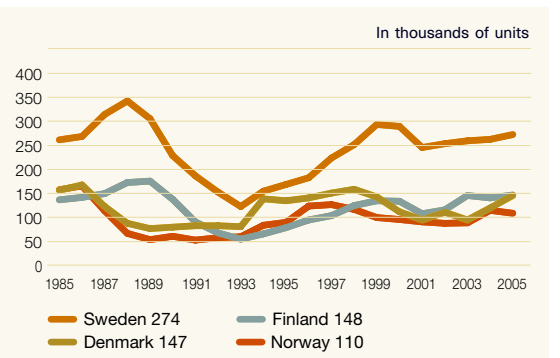
For the eighth consecutive year, new passenger car registrations in Western Europe exceeded 14 million units. They were relatively stable at 14.5 million units, down just 0.2%.
Trends varied by country, both in the leading automotive markets and the other automotive countries. Markets expanded in some leading automotive countries—with Germany remaining low, Spain setting a new record and France staying close to the long-term average—and contracted in others, including Italy, which was close to the long-term average, and the United Kingdom, which nonetheless remained high. Both increases and decreases were reported by the other countries, with markets in Ireland and Denmark enjoying the most significant growth, up 11% and 21% respectively.

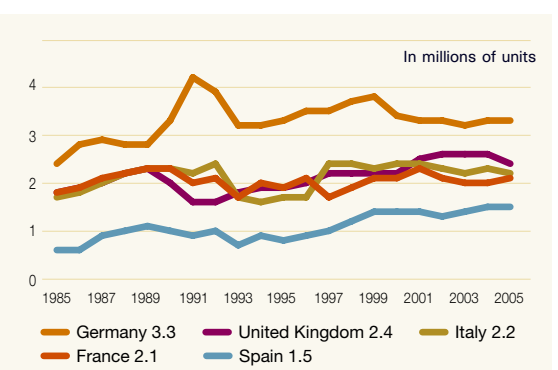
The European market covers 17 countries (the 15 European Union countries plus Switzerland and Norway). Economic conditions and trends are very similar in all these countries.
Beginning in 1990, the market includes the former East Germany. Lower oil prices and the expansion of the European Union drove strong growth in the automotive market between 1986 and 1989. This period was followed by several years during which new car registrations held firm at a high level. Demand plummeted in 1993, leading to a 16% drop in registrations. It has subsequently picked up steadily, with registrations exceeding 14 million units since 1998.

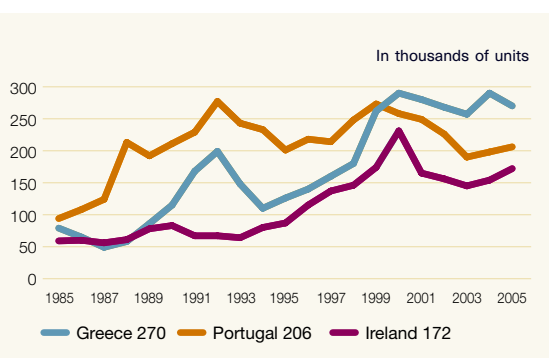


New passenger car registrations in Europe









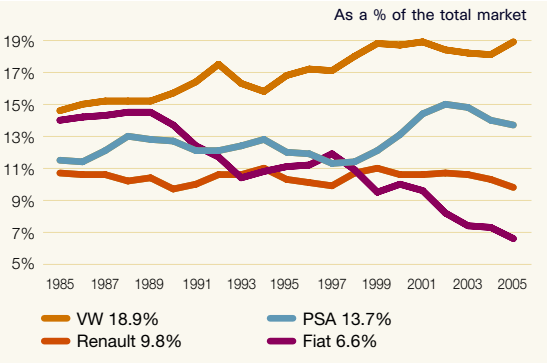
NEW PASSENGER CAR REGISTRATIONS BY GROUP

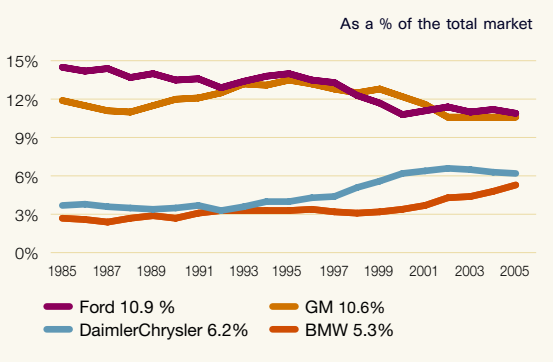
1 OUT OF 4 NEW PASSENGER CARS SOLD IN WESTERN EUROPE IS A FRENCH MAKE

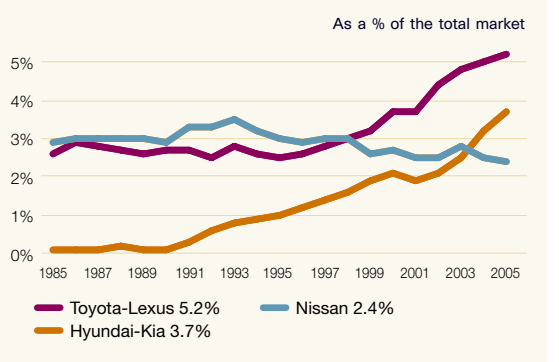
Although French automobile manufacturers saw their market share fall to 23.5% in 2005, 2 points lower than 2002, this was still much higher than 1997's 21.2%. The shrinkage can be attributed to tougher competition from European broadline manufacturers, the fast growth of Asian automakers—who are benefiting from the strong euro—and the selective sales strategy of French manufacturers.
Six major automakers manufacturing a full line of vehicles each held more than 6% of the European market.

The Volkswagen Group, with four main makes, has maintained its position since 1999, accounting for more than 18% of the market.
The market share of the two French automobile manufacturers fell 0.8 points to an aggregate 23.5%. The increase since 1997 is 2.3 points.
Ford's market share has been 11% since 2000, while General Motors' market share has been just 10.6% since 2002. In the mid-1990s, they both exceeded 13%.
Fiat continued to lose market share, which fell to 6.6% in 2005, compared with nearly 12% in 1997.
The DaimlerChrysler Group consolidated the growth momentum initiated in 1997 with the diversification of its model line. Its market share amounted to 6.2%.
The BMW Group, including the Mini make, continued to expand, with market share reaching 5.3%. Unlike 2004, it has now surpassed Toyota, whose market share has increased steadily since 1995 and was 5.2% in 2005.
Hyundai-Kia continued to increase its market share, which stood at 3.7% in 2005.

European market shares of the leading automobile manufacturers [1]







(1) Based on 2005 scope of consolidation.
See page 51 for descriptions of each automobile manufacturer.

33 AND 60 RESPECTIVELY, NUMBER OF MODELS AND BODY STYLES OFFERED BY FRENCH MANUFACTURERS

RANGE ANALYSIS

MAIN NEW PASSENGER CAR REGISTRATION IN EUROPE

Manufacturers and makes	Economy and low range	Low-mid range	High-mid range	Premium range	4WD, light vans, other
PSA Peugeot Citroën					
CITROËN	C1, C2, C3	Xsara, C4	C5	C8, C6	Berlingo, Jumper (Dispatch), Jumpy (Relay)
PEUGEOT	107, 1007, 206, 207	307	407	807, 607	Partner, Expert, Boxer
RENAULT Group					
RENAULT	Twingo, Clio, Modus	Mégane	Laguna	Espace, Vel Satis	Kangoo, Trafic, Master
DACIA	Logan				
BMW					
BMW			1 Series	3 Series, 5 Series, 6 Series, 7 Series , Z4	X3, X5
MINI	Mini				
DAIHATSU	Cuore, Sirion, YRV				Terios
DAIMLERCHRYSLER					
CHRYSLER-JEEP		PT Cruiser		(Grand) Voyager, Crossfire, 300C, Sebring	Wrangler, (Grand) Cherokee
MERCEDES		A, B-Class Vaneo		C, E, S, SL, CLK, SLK-Class	G, ML-Class Vito, Viano, Sprinter
SMART	Fortwo, Roadster	Forfour			
FIAT					
ALFA ROMEO		147	156, 159, Brera, GT	166	
FIAT	Seicento, Panda, Punto, Idea	Stilo, Multipla, Barchetta	Croma	Ulysse	Doblò, Scudo, Ducato
LANCIA	Y, Musa			Thesis, Phedra	
FORD Europe					
FORD	Ka, Fiesta, Fusion	Focus	Mondeo	Galaxy	Tourneo, Transit, T. Connect
JAGUAR				S-Type, X-Type, XJ, XK	
LAND ROVER					Freelander, Discovery, Defender, Range Rover
VOLVO			S40, V50	S60, S80, V70 , C70	XC70, XC90
GM Europe					
CHEVROLET-DAEWOO	Matiz, Kalos	Rezzo	Evanda, Lacetti, Nubira	Corvette	
OPEL	Agila, Corsa, Meriva	Astra, Zafira, Tigra	Vectra	Signum	Vivaro, Combo, Movano
SAAB				9-3, 9-5	
HONDA	Jazz	Civic, FR-V, S2000	Accord		CR-V, HR-V
HYUNDAI					
HYUNDAI	Atos, Getz	Accent, Elantra, Coupe, Matrix	Sonata	H-1, Trajet	Santa Fe, Terracan, Tucson
KIA	Picanto	Carens, Cerato, Rio	Magentis	Carnival	Sorento, Sportage
LADA		111, 112			Niva
MAZDA	2	3, 5, MX5	6	MPV, RX8	
MITSUBISHI	Colt	Spacestar		Grandis	Pajero, Outlander
NISSAN	Micra, Note	Almera	Primera	350Z	Primastar, Interstar, Murano, Patrol, Pathfinder, Terrano, X-Trail
PORSCHE				911, Boxster	Cayenne
SSANGYONG				Rodius	Korando, Kyron, Rexton
SUBARU	Justy		Impreza, Legacy		Forester
SUZUKI	Swift, Wagon-R, Ignis	Liana			Jimny, (G.) Vitara
TOYOTA	Aygo, Yaris	Corolla, MR	Avensis, Prius, Celica	Lexus, Previa	Lexus, Land Cruiser, Hi-ace, RAV4
VOLKSWAGEN Group					
AUDI	A2	A3, S3	A4, S4, TT	A6, S6, A8	Allroad, Q7
SEAT	Ibiza	Cordoba, Leon, Altea	Toledo	Alhambra	
SKODA		Fabia	Octavia	Superb	
VOLKSWAGEN	Fox, Polo	Golf, Bora, New Beetle, Touran	Passat	Sharan, Phaeton	Transporter, Caddy, Touareg

Source: CCFA.

MODEL BREAKDOWN AND RANKING

4 OUT OF 7
FOUR OF THE SEVEN BEST-SELLING MODELS IN EUROPE IN 2005 WERE FRENCH MAKES

Four of Europe's seven top-selling models in 2005 were French makes, compared with just two of the top ten in 1997.

Their broad, appealing range of models has enabled French automobile manufacturers to rebuild market share in Western Europe (up 2.3 points since 1997). Although market share in France remains stable compared with 1997, it was up 2 points in other European markets, in an increasingly competitive environment.

Since 1998, registrations of French makes in Europe excluding France have totaled between 2.05 and 2.45 million units per year, versus less than 1.9 million units per year throughout the rest of the 1990s. With sales of more than 2.2 millions units in 2005, the region is the main market for French automobile manufacturers, ahead of France (1.2 million units) and the rest of the world.

NEW PASSENGER CAR EUROPEAN MARKET SHARE, BY RANGE AND TYPE IN 2005

As a % of new registrations by country	Low range	Low-mid range	High-mid range	Premium range	Other (4WD, minibus)
Germany	23	36	14	16	10
Austria	25	39	14	12	11
Belgium	29	34	13	13	11
Denmark	33	30	25	5	6
Spain	30	48	15	8	0
Finland	13	41	27	11	8
France	39	35	11	6	9
Greece	37	34	12	5	11
Ireland	19	41	22	9	9
Italy	55	26	7	6	7
Luxembourg	23	33	13	17	13
Netherlands	32	35	16	9	8
Portugal	38	41	11	7	3
United kingdom	31	35	14	12	8
Sweden	13	26	23	30	8
European Union (15 countries)	33	35	13	11	8
Norway	12	35	27	10	16
Switzerland	25	30	16	14	15
TOTAL 17 COUNTRIES	**33**	**35**	**13**	**11**	**8**

	Sedans	Station wagons	Coupes	Convertibles	MPVs	Other
Germany	46	20	1	4	20	8
Austria	49	17	1	2	22	10
Belgium	51	15	1	3	23	7
Denmark	56	26	0	1	14	4
Spain	73	6	1	1	19	0
Finland	50	31	0	0	11	8
France	59	7	1	2	25	6
Greece	76	1	1	2	9	12
Ireland	76	3	1	1	9	9
Italy	62	11	1	2	18	6
Luxembourg	52	13	2	2	19	13
Netherlands	50	19	0	2	23	7
Portugal	61	23	1	2	12	2
United Kingdom	64	8	2	4	14	8
Sweden	39	42	0	1	10	8
European Union (15 countries)	58	13	1	3	19	7
Norway	39	33	0	1	12	15
Switzerland	40	20	2	4	20	14
TOTAL 17 COUNTRIES	**57**	**13**	**1**	**3**	**19**	**7**

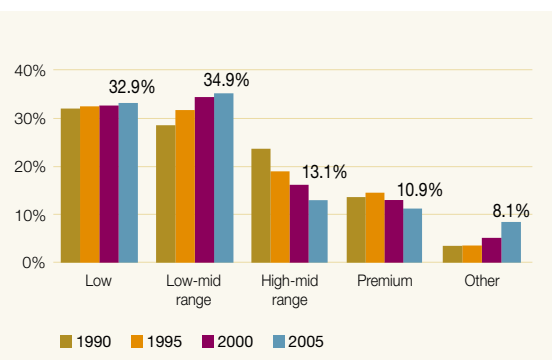
Source: CCFA.

RANKING OF THE 15 LEADING MODELS IN 2005

Model	Rank	Share
Renault Mégane	1	4.3%
Volkswagen Golf	2	3.9%
Ford Focus	3	3.7%
Opel Astra	4	3.1%
Peugeot 206	5	2.7%
Peugeot 307	6	2.5%
Renault Clio	7	2.2%
Ford Fiesta	8	2.2%
Opel Corsa	9	1.9%
Volkswagen Polo	10	1.8%
Audi A4	11	1.7%
Citroën C3	12	1.7%
Toyota Corolla	13	1.7%
Volkswagen Passat	14	1.7%
BMW 3-Series	15	1.6%
Peugeot 407		1.4%
Citroën C4		1.3%
Citroën Xsara		1.2%
Renault Modus		1.1%
Citroën C2		0.8%
Renault Laguna		0.7%
Citroën C5		0.6%

Source: CCFA.

New passenger car registrations by range in 17-country Europe



In Europe, two-thirds of new passenger cars are in the low and low-mid range.
Since the early 1990s, car buyers have been trading down from the high-mid range to the low-mid range segment, which offers more MPVs.
The market share of sedans, although still dominant, continued to decline in favor of station wagons, MPVs, convertibles and light vans.
However, each European country retains its own features. Southern Europe continues to prefer low and low-mid range vehicles, while premium cars and station wagons remain the most popular choice in Northern Europe.

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS

50%

SHARE OF DIESEL VEHICLES IN THE EUROPEAN NEW PASSENGER CAR MARKET IN 2005

On average, the proportion of new diesel-powered cars as a percentage of total registrations in Europe has grown by more than 3 percentage points a year since 1997. It stood at 49% in 2005, compared with 22% in 1997.

Of the 7.2 million new diesel units registered in Europe, 1.9 million were French makes, representing a market share of 27%, versus 29% in 2000.

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS IN EUROPE, 2005

	Average cylinder capacity	Average horsepower	4WD	Diesel
	cc³	kW	%	%
Germany	1,844	90	8.0	42.2
Austria	1,776	80	12.5	64.9
Belgium	1,721	77	5.1	72.6
Denmark	1,654	78	2.5	24.1
Spain	1,726	80	0.9	67.8
Finland	1,816	90	8.7	17.0
France	1,695	76	6.3	69.1
Greece	1,541		10.3	1.6
Ireland	1,604	76	6.4	21.5
Italy	1,579	72	7.8	58.5
Luxembourg	1,963	96	10.1	75.4
Netherlands	1,720	82	5.4	26.7
Portugal	1,524	72	2.4	63.8
United Kingdom	1,771	87	8.9	36.8
Sweden	1,990	103	12.7	9.7
European Union (15 countries)	1,732	82	7.0	49.9
Norway	1,762	86	21.3	39.3
Switzerland	1,992	104	22.1	28.4
TOTAL 17 COUNTRIES	**1,737**	**83**	**7.5**	**49.4**

Source: CCFA.

In Europe, average cylinder capacity and horsepower of passenger car engines vary considerably from one country to another, reflecting each one's economic, tax and geographic conditions. Horsepower continued to climb slowly but steadily in 2005, while cylinder capacity was unchanged due to downsizing.

The market share of four-wheel drive vehicles increased in all countries and stood at 7.5% throughout the European market. The per capita rate of ownership varies widely from one country to the next depending on national market characteristics. Market share is very high in Switzerland, Norway and Austria, where mountainous terrain has fueled sales of these vehicles.

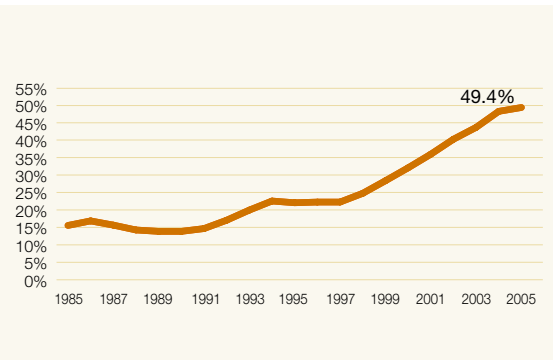
The market share of diesel vehicles in Europe is largely influenced by local regulations and tax rules.

In a stable European market, diesel sales rose 2%, lifting market share to 49%. Two out of three new cars sold in Austria, Belgium, Spain, Luxembourg, Portugal and France were diesels. The share of diesels in new car registrations in Germany and Italy is now 42% and 58% respectively.

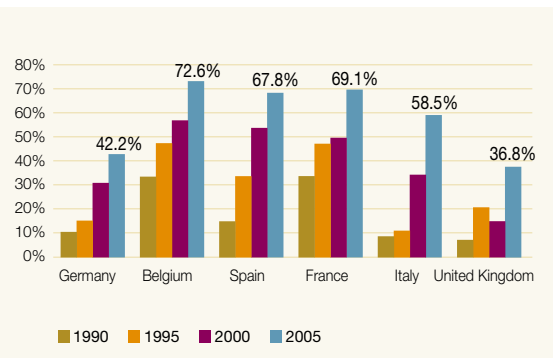
The proportion of new diesel-powered cars as a percentage of total registrations in Europe continued to grow and in 2005 more than one out of four cars on the road was diesel-powered.

European diesel passenger car market

As a % of total registrations



Diesel market share by country



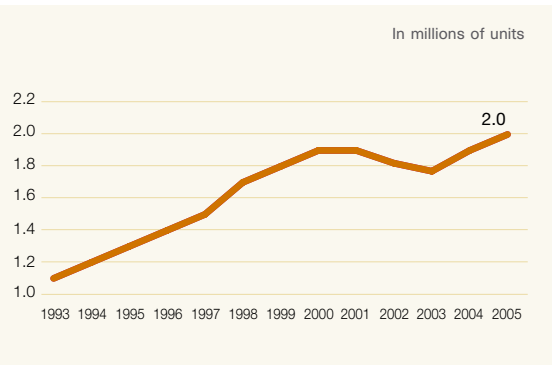
LIGHT COMMERCIAL VEHICLES IN EUROPE

1 OUT OF 3 NEW LIGHT COMMERCIAL VEHICLES SOLD IN WESTERN EUROPE IS A FRENCH MAKE

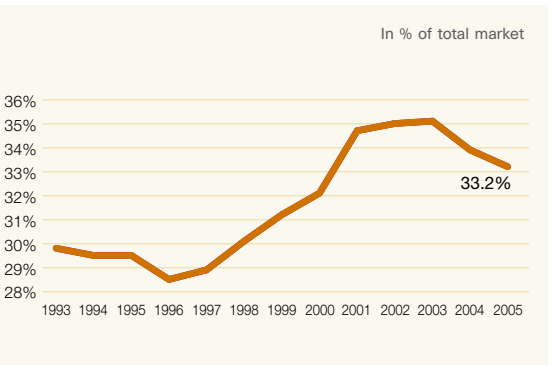
After three years at 35%, French manufacturers' share of the new light commercial vehicle market in Europe declined for the second year in a row, to 33%, down 1.9 percentage points compared with 2003. However, their attractive, renewed lineup has generated a 4.6-point gain since 1996, in a European market that has grown 45%.

In a market that expanded by 3.1% in 2005, French manufacturers saw their market share rise 1.1% to more than 660,000 units. Although registrations remained stable in France, up just 0.4%, they continued to increase in Europe outside France, climbing 1.7%.

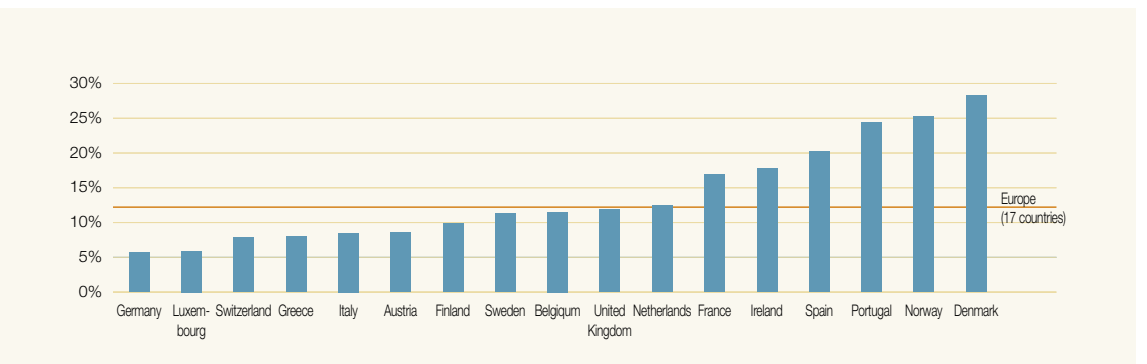
Light commercial vehicle registrations in Europe (17 countries)



French market share



Share of light commercial vehicles in registrations of light vehicles (passenger cars and light commercial vehicles) in 2005



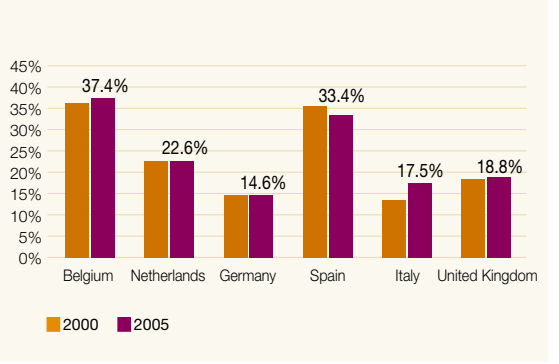
Light commercial vehicles are defined as vehicles whose gross weight rating is less than five tonnes. Designed to carry goods, they are offered in a variety of categories, including utility vehicles derived from passenger cars, light vans, light trucks, large vans, pickups and four-wheel drive vehicles. Since tax conditions are not the same in all European countries, the share of light commercial vehicles in total light vehicles ranged from 5% in Luxembourg and Germany to more than 25% in Portugal, Norway and Denmark in 2005.

Sales of these vehicles have been stimulated by model renewals and the fact that they offer an appropriate response to business transportation and mobility needs.

In 2005, 2 million light commercial vehicles were registered in Europe, compared with 1.1 million in 1993.

The market share of French manufacturers exceeded 33% in Spain and Belgium in 2005. It was 15% and 18% respectively in Germany and Italy, countries with their own light commercial vehicle manufacturers, versus less than 15% in 2000.

Market share of French manufacturers in major European countries



THE EUROPEAN HEAVY TRUCK MARKET AND PRODUCTION

1 OUT OF 9 NEW HEAVY TRUCKS SOLD IN WESTERN EUROPE IS A FRENCH MAKE

After peaking in 2000, the European heavy truck market shrank for three years in a row, before returning to growth in 2004, driven by an upturn in capital spending begun in 2003. The market grew for the second year in a row in 2005, climbing 7% to more than 340,000 units, although it was down 3% compared with 2000. Overall, it was up 69% in comparison with 1993, a gloomy year for heavy trucks. European heavy truck production rose by nearly 5% to 453,000 units, reflecting an increase in domestic markets and higher exports of heavy trucks outside the EU-15, in particular to Eastern Europe and Asia.

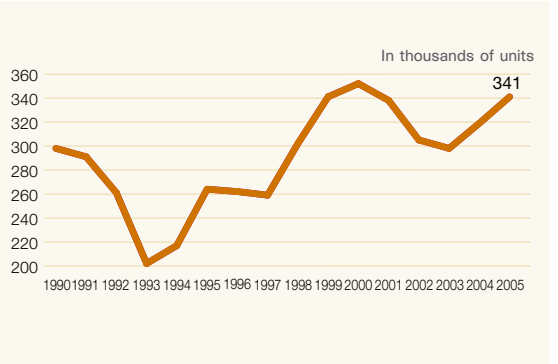
THE EUROPEAN HEAVY TRUCK MARKET AND PRODUCTION

In thousands of units	2004	2005	Change
New heavy truck registrations			
5.1t to 15.9t	86	88	3.1%
Over 16t	234	253	8.3%
Total	**319**	**341**	**6.9%**
European heavy truck production			
5.1t to 15.9t	108	113	5.1%
Over 16t	324	339	4.6%
Total	**432**	**453**	**4.7%**

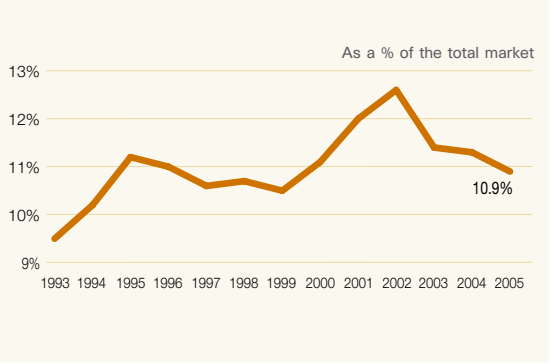
Source: CCFA.

In Europe, after feeling the effects of the recession between 2001 and 2003, the heavy truck market experienced strong 7% growth in 2004 and 2005, thanks in part to the upturn in spending and in world trade that began in second-half 2003. 2006 will be shaped by the introduction of the new Euro 4 emission standards on October 1.
Heavy truck investment cycles are relatively long. The peak in 2000 was 75% higher than the low point in 1993, representing 150,000 more vehicles.
Demand remained focused on the 16t-and-over segment, which accounted for 74% of total registrations, including both trucks and road tractors.
Against this economic backdrop, Renault Trucks saw registrations rise 3% in 2005. Market share was consolidated at nearly 11%, above its level in the late 1990s. After the Midlum line was renewed in the early 2000s, the launch of the Magnum should further strengthen its market share.
Renault Trucks' international expansion continued and its market share in Europe outside France was consolidated at 6.5% in 2005, compared with just 5% in 1996.

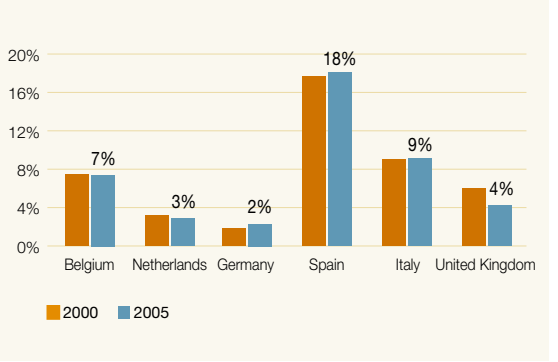
European heavy truck registrations



Renault Trucks market share in Europe



Renault Trucks market share in the main European countries



FRENCH AUTOMOBILE MANUFACTURERS IN THE NEW EUROPEAN UNION MEMBER STATES

29%

SHARE OF FRENCH MANUFACTURERS IN THE NEW LIGHT VEHICLE MARKET IN THE MAIN NEW EU MEMBER STATES

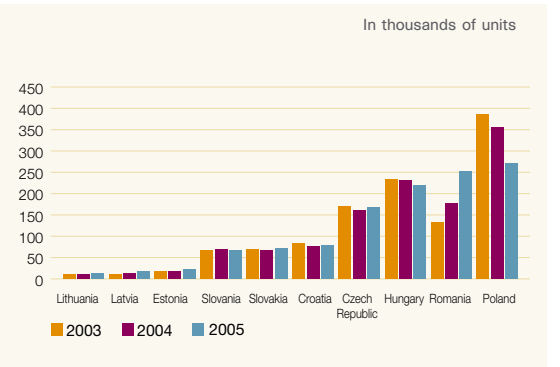
Ten new countries joined the European Union on May 1, 2004, shifting its center of gravity eastward and bringing new markets such as the Community of Independent States (CIS) and the Balkans closer.
French manufacturers have had a marketing presence in the region for a number of years. They also operate local production plants: PSA Peugeot Citroën in Slovakia and, in partnership with Toyota, in the Czech Republic, and Renault in Slovenia, Romania through the acquisition of Dacia, and Russia. These plants will enable the two manufacturers to meet demand in these countries, which is forecast to grow given the low number of vehicles per capita compared with France or Germany.

MARKET AND VEHICLE PRODUCTION IN THE MAIN CENTRAL AND EASTERN EUROPEAN COUNTRIES: NEW EUROPEAN UNION MEMBER COUNTRIES [1], CROATIA AND ROMANIA

In thousands of units	2004	2005	Change
Vehicle production			
Passenger cars	1,476	1,777	20.4%
Light commercial vehicles	115	144	25.6%
Heavy trucks	5.9	5.0	–15.3%
New vehicle registrations			
Passenger cars	1,040	1,035	–0.4%
Light commercial vehicles	139	145	4.5%
Heavy trucks	36.6	38.6	5.2%

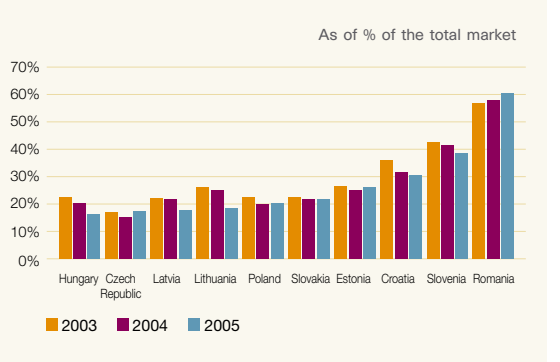
(1) Excluding Malta and Cyprus. *Source: CCFA, OICA.*

New light vehicle registrations (up to 5t)

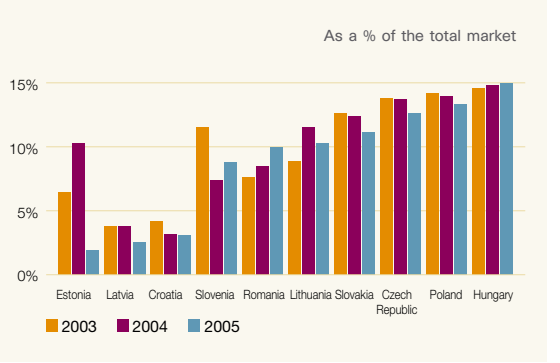


Although the EU-15 is dominated by replacement demand, this is not the case of new and future member states and neighboring countries, where the potential for first-time car ownership is significantly higher.
In 2005, Central and Easter European countries (CEEC) produced more than 1.9 million vehicles, roughly corresponding to their domestic demand, which is set to rise. (Domestic demand is calculated by adding overall new vehicle registrations and used vehicle imports together.)
French manufacturers already hold a share of these seven markets that is equivalent to their share of the EU-15 market. In 2005, it was 29% in light vehicles and more than 11% in heavy trucks.

French manufacturer share in the new light vehicle market



French manufacturer share in the new heavy truck market



THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

2.2 MILLION PEOPLE EMPLOYED IN THE AUTOMOTIVE INDUSTRY IN THE EU-2005 SIN 2003

The EU-25 automotive industry employed 2.2 million people in 2003 in companies with more than 20 employees. Value added per employee ranged from €25,000 in the five main new member states (Hungary, Poland, Czech Republic, Slovakia and Slovenia) to more than €70,000 in Germany, and was more than €60,000 in France and Belgium.

Per capita personnel costs ranged from €10,000 in the five main new member states to €44,000 in France and €58,000 in Germany

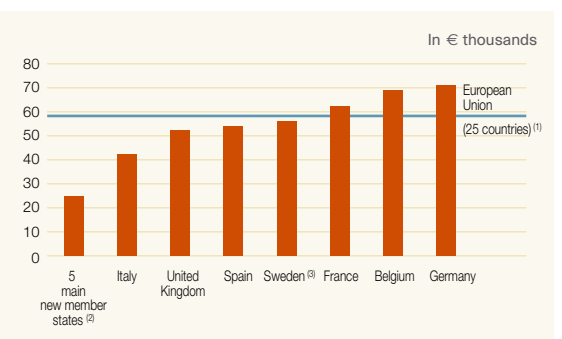
THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION IN 2003

(Companies with more than 20 employees)	Unit	EU-25 (1)	Germany	France	Five main new member states (2)	UK	Spain	Italy	Sweden (3)	Belgium
People employed	thousands	2,166	868	288	244	217	164	164	74	49
Automobile manufacturing	thousands	1,131	526	172	89	95	77	59	50	32
Body and trailer manufacturing	thousands	169	41	29	–	27	14	16	4	7
Automotive equipment manufacturing	thousands	866	301	87	154	95	73	88	20	11
Sales	€millions	733,916	280,604	194,823	33,721	62,319	53,246	46,687	20,552	16,891
Production	€millions	662,425	236,155	190,897	32,920	53,531	47,890	41,249	20,185	16,027
Production/sales	%	9.03	84.2	98.0	97.6	85.9	89.9	88.4	98.2	94.9
Value added (to factor costs)	€millions	126,207	61,655	17,958	6,099	11,371	8,868	6,907	4,122	3,399
VA/Production	%	19.1	26.1	9.4	18.5	21.2	18.5	16.7	20.4	21.2
VA per employee	€thousands	58,3	71.1	62.4	25.0	52.3	54.0	42.2	56.1	69.0
	Base 100 Five main new member states	233	284	249	100	209	216	168	224	275
Goods and services purchased	€millions	611,852	220,138	176,629	28,332	50,577	45,480	40,190	17,515	13,575
Purchases as a % of output	%	92.4	93.2	92.5	86.1	94.5	95.0	97.4	86.8	84.7
Personnel costs	€millions	94,314	50,713	12,617	2,314	8,584	5,528	5,485	3,277	2,341
Personnel costs per employee	€thousands	43.6	58.5	43.8	9.5	39.5	33.6	33.5	44.6	47.5
	Base 100 Five main new member states	459	615	462	100	416	354	353	469	500
Operating cash flow	€millions	31,894	10,942	5,341	3,786	2,786	3,339	1,422	844	1,059
Operating cash flow/VA	%	25.3	17.7	29.7	62.1	24.5	37.7	20.6	20.5	31.1

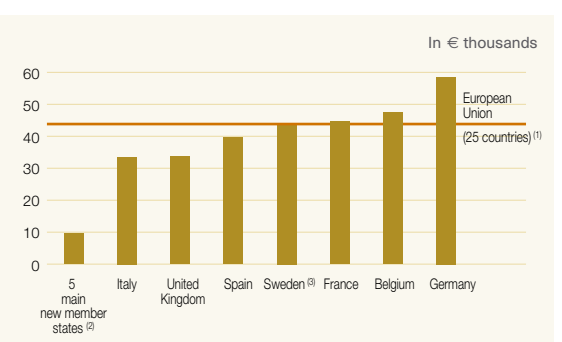
(1) EU-25 excluding Greece and Luxembourg.
(2) Five main new member states: Czech Republic, Hungary, Poland, Slovakia and Slovenia. Body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
(3) 2002 data.

Sources: Eurostat and CCFA estimates.

Value added per employee



Personnel costs per employee



A key sector of the European economy, the automotive industry encompasses:
- Vehicle manufacturers.
- Body and trailer manufacturers.
- Automotive equipment manufacturers.

The data in the above chart have been obtained from surveys of national companies and have been adjusted for consistency by Eurostat. Due to difficulties in collecting statistics at both the national and European level, only data up to 2003 were available.

In 2003, the European automotive industry employed 2.2 million people, including 1.1 million in vehicle manufacturing, or 52% of the total. Together, Germany and France accounted for more than half of the employees in the industry, or 40% and 13% respectively. More than 10% of employees worked in the five main new member states: Czech Republic, Hungary, Poland, Slovakia and Slovenia.

The automotive industry differed significantly from country to country in terms of structure and wages.

In Germany and France, the percentage of employees in the industry involved in automobile manufacturing was around 60%, compared with less than 40% in the five main new member countries and Italy. Two-thirds of employees in the industry were involved in vehicle manufacturing in Sweden and Belgium.

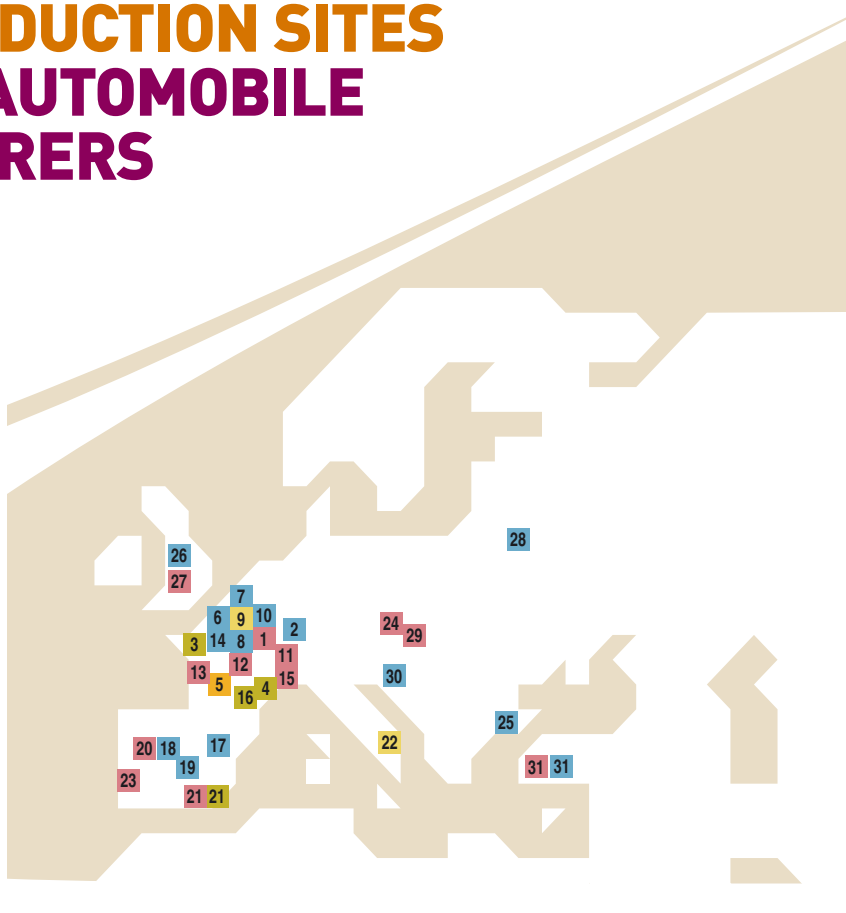
Personnel costs per employee varied from €10,000 in the five main new member states to €59,000 in Germany, nearly 6 times higher. In Romania, an EU candidate country, the automotive industry employed more than 60,000 people in 2003. Personnel costs per employee stood at €3,100 and value added per employee at €4,200.

53
NUMBER OF FRENCH MANUFACTURERS' PRODUCTION AND ASSEMBLY PLANTS WORLDWIDE, INCLUDING 3 UNDER CONSTRUCTION

GLOBAL PRODUCTION SITES OF FRENCH AUTOMOBILE MANUFACTURERS

Europe

FRANCE
(1) Aulnay
(2) Batilly
(3) Blainville
(4) Bourg-en-Bresse
(5) Cerizay
(6) Dieppe
(7) Douai
(8) Flins
(9) Hordain
(10) Maubeuge
(11) Mulhouse
(12) Poissy
(13) Rennes
(14) Sandouville
(15) Sochaux
(16) Vénissieux
SPAIN
(17) Barcelona (Nissan)
(18) Palencia
(19) Valladolid
(20) Vigo
(21) Villaverde
ITALY
(22) Val di Sangro
PORTUGAL
(23) Mangualde
CZECH REPUBLIC
(24) Kolin
ROMANIA
(25) Pitesti (Dacia)
UNITED KINGDOM
(26) Luton (General-Motors)
(27) Ryton
RUSSIA
(28) Moscow
SLOVAKIA
(29) Trnava
SLOVENIA
(30) Novo Mesto
TURKEY
(31) Bursa (Tofas-Fiat) (2007)



North and South America

ARGENTINA
(32) Buenos Aires
(33) Santa Isabel
BRAZIL
(34) Curitiba
(35) Porto Real
COLOMBIA
(36) Medellin
MEXICO
(37) Aguascalientes (Nissan)

Africa

EGYPT
(38) Cairo
MOROCCO
(39) Casablanca
NIGERIA
(40) Kaduna

Asia

CHINA
(41) Wuhan
SOUTH KOREA
(42) Busan (Renault Samsung Motors)
INDIA
(43) Nahsik (2007)
INDONESIA
(44) Jakarta
IRAN
(45) Tehran (2006)
MALAYSIA
(46) Gurun
(47) Kuala Lumpur
THAILAND
(48) Lardkrabang

PSA Peugeot Citroën | Renault | Sevel | Groupe Henri Heuliez | Renault Trucks

GLOBAL PRODUCTION OF FRENCH MANUFACTURERS

6.1 MILLION VEHICLES PRODUCED BY FRENCH AUTOMOBILE MANUFACTURERS WORLDWIDE IN 2005

In 2005, French automobile manufacturers produced 6.1 million vehicles, including the Renault Trafic 2, up 0.4%. Since 1996, growth in production has amounted to 60%, thanks to expansion in Europe outside France and, more recently, outside Europe.

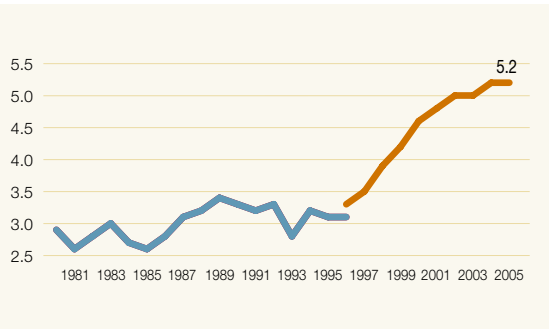
Passenger car production rose a slight 0.2% to nearly 5.2 million units. Commercial vehicle production increased more significantly, with light commercial vehicles up 1.4% to more than 820,000 units and heavy trucks up 4.3% to 54,500 units.

PRODUCTION AND ASSEMBLY SITES IN 2005

Manufacturer Make	Model	Launched	Production or assembly sites in 2005
PSA PEUGEOT CITROËN			
Peugeot	107	2005	**Kolin** (Czech Republic)
Peugeot	1007	2005	**Poissy**
Peugeot	206	1998	**Mulhouse, Poissy, Ryton** (UK), Argentina, **Porto Real** (Br), China, Iran, Indonesia, Malaysia
Peugeot	207	2006	**Poissy, Villaverde** (S),
Peugeot	307	2001	**Mulhouse, Sochaux,** Argentina, China
Peugeot	405	1987	Iran, Egypt
Peugeot	406	1995	Egypt, Nigeria
Peugeot	407	2004	**Rennes-la-Janais**
Peugeot	607	2000	**Sochaux**
Peugeot	807	2002	**Hordain**
Peugeot	Partner	1996	**Vigo** (S), Mangualde (P), Turkey, Argentina, Morocco
Peugeot	Expert	1995	**Hordain**
Peugeot	J9	1965	Turkey
Peugeot	Boxer	1994	**Val di Sangro** (I), **Porto Real** (Br)
Citroën	C1	2005	**Kolin** (Czech Republic)
Citroën	C2	2003	**Aulnay**
Citroën	C3	2002	**Aulnay, Villaverde** (S), **Porto Real** (Br)
Citroën	Xsara	1997	**Vigo** (S), **Porto Real** (Br), China
Citroën	ZX	1991	China
Citroën	C4	2004	**Mulhouse,** China
Citroën	Xantia	1993	Iran
Citroën	C5	2001	**Rennes-la-Janais**
Citroën	C6	2006	**Rennes-la-Janais**
Citroën	C8	2002	**Hordain**
Citroën	C15	1984	**Vigo** (S)
Citroën	Berlingo	1996	**Vigo** (S), Mangualde (P), Argentina, Morocco
Citroën	Jumpy	1995	**Hordain**
Citroën	Jumper	1994	**Val di Sangro** (I), **Porto Real** (Br)
RENAULT GROUP			
Renault	Twingo	1993	**Flins,** Colombia
Renault	Clio	1998/2005	**Flins,Turkey, Novo Mesto** (Sl), **Brazil,** Dieppe, Argentina, Colombia, Mexico
Renault	Modus	2004	**Valladolid** (S)
Renault	Mégane	1995/2002	**Douai, Palencia** (S), **Turkey, Brazil,** Dieppe, Argentina, Colombia
Renault	Laguna	2001	**Sandouville**
Renault	Vel Satis	2002	**Sandouville**
Renault	Espace	2002	**Sandouville**
Renault	Kangoo	1997	**Maubeuge,** Morocco, Argentina, Malaysia
Renault	Master/Mascott	1997/1999	**Batilly, Brazil**
Renault	Trafic II	2001	**Luton** (UK, GM), **Barcelona** (S, Nissan)
Dacia	SuperNova Solenza	2003	**Pitesti** (Romania)
Dacia	Logan	2004	**Pitesti** (Romania), Russia, Morocco, Colombia
Dacia	Pick-ups, small vans	–	**Pitesti** (Romania)
RSM	SM3	2002	**Busan** (South Korea)
RSM	SM5	2000	**Busan** (South Korea)
RSM	SM7	2004	**Busan** (South Korea)

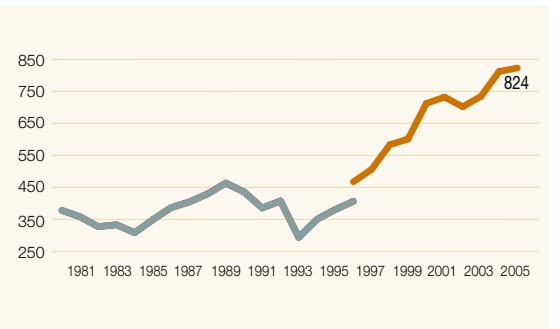
New passenger cars

In millions of units



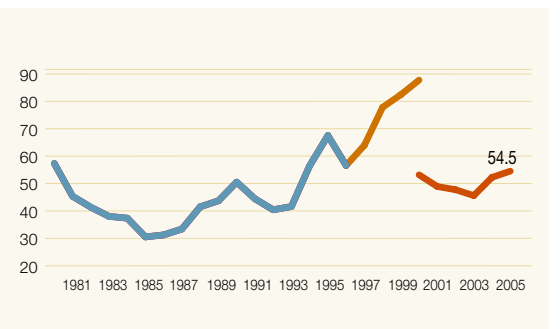
New light commercial vehicles (to 5t)

In thousands of units



New heavy trucks (over 5t)

In thousands of units



In 1996, French automobile manufacturers changed the method of reporting their output. Production figures now represent the number of vehicles assembled at a given rollout location, while the concept of knocked down (KD) units has been abandoned. This production now takes into account the Renault Trafic 2, assembled by GM Europe in the United Kingdom and by Nissan in Spain.
In addition, the scopes of consolidation have changed (see notes on page 56).

MARKETS FOR NEW FRENCH VEHICLES

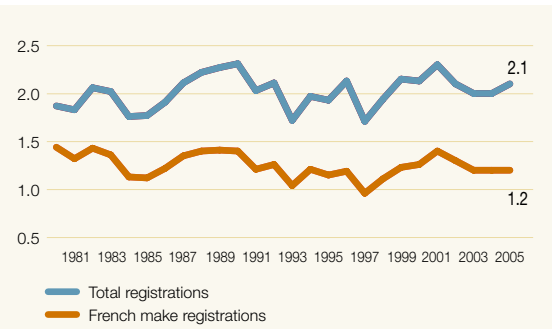
3 OUT OF 4 VEHICLES PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

In 2005, the stability of domestic sales for French automobile manufacturers was offset by expanded export sales outside Europe, to Latin America and Asia, and the integration of Dacia figures.
Export markets represented three-quarters of the French automobile manufacturers' sales, compared with two-thirds between 1999 and 2001 and less than 60% in 1990.

VEHICLE REGISTRATIONS IN FRANCE

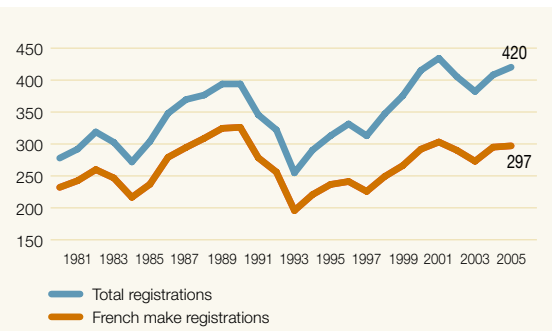
New passenger cars

In millions of units



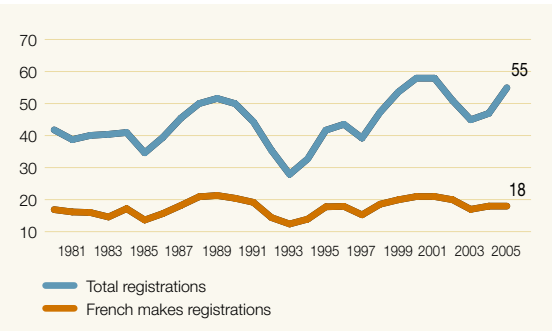
New light commercial vehicles (to 5t)

In thousands of units



New heavy trucks (over 5t)

In thousands of units

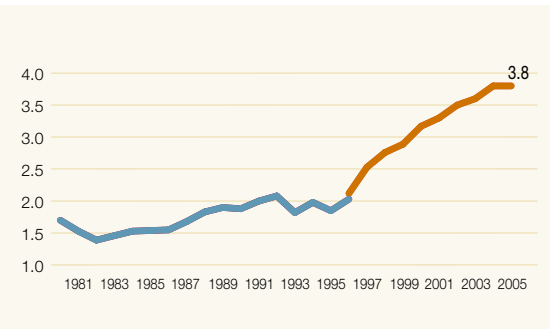


The decline in French-make vehicle registrations in France that began in 2002 slowed in 2005, after a period of steady growth between 1997 and 2001. Efficient, competitively-priced new models have allowed French manufacturers to win back market share in relation to 1997 despite their selective sales strategy, wider opening of the market and heightened competition.

EXPORTS

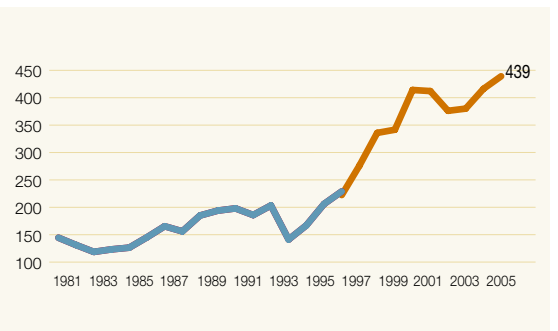
New passenger cars

In millions of units



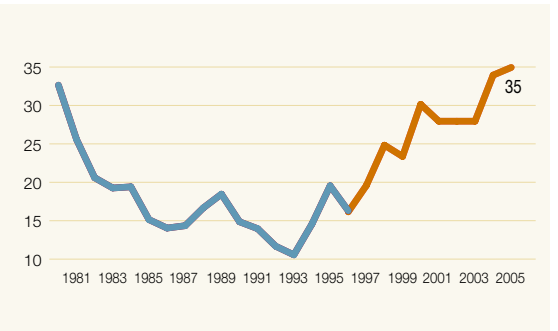
New light commercial vehicles (to 5t)

In thousands of units



New heavy trucks (over 5t)

In thousands of units



Passenger car exports rose 1% to 3.8 million units (an increase of 81% on 1996), while light commercial vehicle exports (excluding the Renault Trafic 2) rose 6% (or 1% like-for-like) to 440,000 units (an increase of 98% on 1996). Heavy truck exports were up 5% to 35,100 units (an increase of 117% on 1996).
These figures do not include local makes owned by French manufacturers, such as Renault Samsung Motors, which further highlights the successful internationalization of French manufacturers.

DIESEL PASSENGER CARS

14.3 MILLION
NUMBER OF DIESEL PASSENGER CARS ON THE ROAD IN FRANCE

Diesel passenger car registrations exceeded registrations of vehicles running on other fuels for the fifth year in a row in France, accounting for 69% of the total in 2005.
More than 48% of passenger cars on the road at January 1, 2006 were diesel-powered.
French production of diesel vehicles stood at more than 2.3 million units in 2005, representing 45% of total production.

DIESEL PASSENGER CARS

	1990	1995	2000	2003	2004	2005	% change 2005/2004 (%)
Production							
In units	804,007	1,036,796	1,648,448	2,229,221	2,420,571	2,328,108	–3.8
World production of French manufacturers				5,045,192	5,168,330	5,177,852	
As a % of total production	24.4%	34.0%	35.8%	44.2%	46.8%	45.0%	
Exports							
In units	292,061	472,087	975,038	1,388,553	1,609,952	1,500,989	–6.8
As a % of total exports	15.5%	25.5%	33.7%	38.2%	42.2%	39.1%	
Registrations							
In units	762,054	897,698	1,046,485	1,353,914	1,392,925	1,429,037	+2.6
As a % of total registrations	33.0%	46.5%	49.0%	67.4%	69.2%	69.1%	
VEHICLES IN USE							
In units	**3,775,000**	**6,938,000**	**9,980,000**	**12,729,000**	**13,590,000**	**14,348,000**	**+5.6**
As a % of total cars in use	**16.0%**	**27.6%**	**35.6%**	**43.1%**	**45.5%**	**47.7%**	

Source: CCFA.

MAIN NEW DIESEL PASSENGER CAR RANKINGS IN 2005

Diesel model	Rank	Registrations In units	Diesel market share %
Renault Mégane	1	155,710	10.9
Peugeot 307	2	85,655	6.0
Renault Clio	3	83,634	5.9
Peugeot 206	4	73,029	5.1
Peugeot 407	5	59,840	4.2
Citroën C4	6	46,635	3.3
Citroën C3	7	45,596	3.2
Ford Focus	8	43,790	3.1
Citroën Xsara	9	36,587	2.6
Volkswagen Golf	10	36,173	2.5

Source: CCFA.

In 2005, France regained its positions as the world's top market for diesel engines with 1,429,000 new passenger car registrations, ahead of Germany with 1.4 million units. The new, quieter, more efficient diesel engines are winning popular acclaim. Diesel vehicles continued to gain market share in Europe, reaching 49%. The decline in diesel vehicle production and exports, after eight years of strong growth, reflects lower French manufacturer market share, a continued focus on sales outside Europe, where diesel is less popular, and the launch of the Renault-Dacia Logan, offered initially only with a gasoline engine.

REGISTRATIONS IN FRANCE BY MODEL, RANGE AND BODY MODULE

25%
OF NEW PASSENGER CAR REGISTRATIONS IN FRANCE IN 2005 WERE MPVS

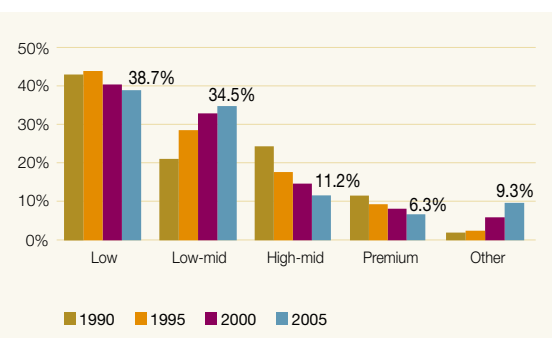
In a competitive market, French manufacturers regularly refresh their offer with new models, restylings and a growing array of versions (MPVs, station wagons, convertibles, coupes) focusing on multi-purpose applications and enhanced active and passive safety.
In 2006, the launches of new models like the Citroën Picasso and the Peugeot 207, the restyling of the Renault Mégane and the introduction of the new BMW-PSA gasoline engine and a diesel-powered version of the Dacia Logan should enable French manufacturers to remain competitive in an aggressive market.

REGISTRATIONS IN FRANCE BY RANGE AND BODY MODULE

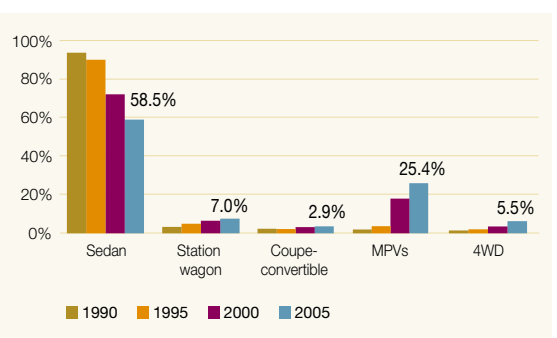
	1990		1995		2000		2002		2004		2005	
	Units	%	Units	%	Units	%	Units	%	Units	%	Units	%
Range												
Low	986,532	42.7	840,880	43.6	855,161	40.1	765,401	38.1	770,003	38.2	800,429	38.7
Low-mid	477,631	20.7	544,062	28.2	695,146	32.6	692,165	34.4	709,456	35.2	713,898	34.5
High-mid	555,053	24.0	334,457	17.3	303,028	14.2	228,462	11.4	210,898	10.5	230,904	11.2
Premium	256,381	11.1	173,370	9.0	163,293	7.7	163,233	8.1	148,011	7.4	131,017	6.3
Other	33,533	1.5	37,735	2.0	117,256	5.5	159,985	8.0	175,341	8.7	191,541	9.3
TOTAL	**2,309,130**	**100.0**	**1,930,504**	**100.0**	**2,133,884**	**100.0**	**2,009,246**	**100.0**	**2,013,709**	**100.0**	**2,067,789**	**100.0**
Body module												
Sedan	2,155,724	93.4	1,731,191	89.7	1,527,676	71.6	1,300,495	64.7	1,201,594	59.7	1,209,830	58.5
Station wagon	61,418	2.7	78,278	4.1	119,739	5.6	146,588	7.3	137,606	6.8	144,485	7.0
Coupe-convertible	36,269	1.6	30,067	1.6	50,527	2.4	53,714	2.7	67,527	3.4	59,382	2.9
MPVs	28,682	1.2	58,376	3.0	369,434	17.3	409,325	20.4	494,463	24.6	525,487	25.4
including compact MPVs	–	–	–	–	*241,190*	*11.3*	*244,669*	*12.2*	*292,597*	*14.5*	*284,310*	*13.7*
4WD	17,129	0.7	25,684	1.3	57,116	2.7	87,598	4.4	98,744	4.9	113,406	5.5
Other	9,908	0.4	6,908	0.4	9,392	0.4	11,526	0.6	13,775	0.7	15,199	0.7
TOTAL	**2,309,130**	**100.0**	**1,930,504**	**100.0**	**2,133,884**	**100.0**	**2,009,246**	**100.0**	**2,013,709**	**100.0**	**2,067,789**	**100.0**

Source: CCFA.

Market shares by range



Market shares by body module



MAIN NEW PASSENGER CAR MODEL RANKINGS IN 2005

	Rank	Regis-trations	Market share
		Units	%
Renault Mégane	1	188,373	9.1
Renault Clio	2	132,982	6.4
Peugeot 206	3	119,907	5.8
Peugeot 307	4	113,484	5.5
Citroën C3	5	79,259	3.8
Peugeot 407	6	68,130	3.3
Citroën C4	7	63,798	3.1
Renault Modus	8	61,877	3.0
Ford Focus	9	48,930	2.4
Renault Twingo	10	45,594	2.2
Citroën Xsara	11	42,756	2.1
Volkswagen Golf	12	41,802	2.0
Renault Laguna	13	40,140	1.9
Ford Fiesta	14	29,911	1.4
Volkswagen Polo	15	29,651	1.4
Opel Astra	16	27,691	1.3
Citroën C2	17	27,555	1.3
Toyota Yaris	18	26,451	1.3
Citroën C5	19	25,521	1.2
Renault Kangoo	20	24,192	1.2
Opel Zafira	21	24,182	1.2
Volkswagen Touran	22	23,750	1.1
Toyota Corolla	23	23,219	1.1
Opel Meriva	24	20,862	1.0
Opel Corsa	25	20,588	1.0

Source: CCFA.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

72,000
NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS IN 2005

New vehicle registrations in the four French overseas departments of Guadeloupe, French Guiana, Martinique and Réunion began expanding more recently than in mainland France, ranging between 60,000 and 75,000 units a year since 1998.

Given the geographic environment, commercial vehicles over 5 tonnes account for a smaller proportion of registrations in overseas departments (1.3% in 2005) than in mainland France (2.4%). In contrast, the proportion of light commercial vehicles is higher.

French manufacturers' market share is similar to mainland France. However, it is lower for light vehicles because of the stronger presence of Japanese manufacturers.

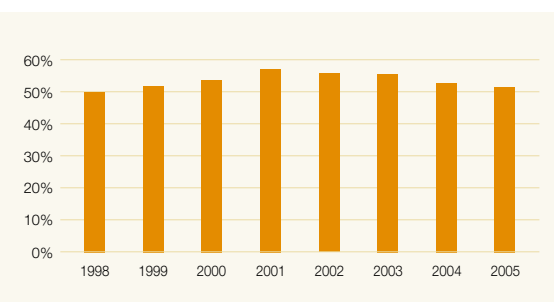
NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

	2000	2002	2003	2004	2005	Change 2005/2000	Change 2005/2004
New passenger cars							
Guadeloupe	13,691	12,278	14,264	13,926	14,359	4.9%	3.1%
French Guiana	4,031	4,167	4,001	4,087	4,085	1.3%	0.0%
Martinique	14,424	13,491	13,564	13,613	14,749	2.3%	8.3%
Réunion	21,463	22,231	22,750	22,570	25,142	17.1%	11.4%
Total French overseas departments	**53,609**	**52,167**	**54,579**	**54,196**	**58,335**	**8.8%**	**7.6%**
New light commercial vehicles (to 5t)							
Guadeloupe	2,685	2,375	2,535	2,518	2,772	3.2%	10.1%
French Guiana	1,143	1,153	1,151	1,287	1,169	2.3%	–9.2%
Martinique	2,368	2,191	2,255	2,546	2,732	15.4%	7.3%
Réunion	5,200	5,054	5,010	5,457	6,021	15.8%	10.3%
Total French overseas departments	**11,396**	**10,773**	**10,951**	**11,808**	**12,694**	**11.4%**	**7.5%**
Trucks, coaches and buses over 5t							
Guadeloupe	146	195	180	174	196	34.2%	12.6%
French Guiana	66	57	65	97	99	50.0%	2.1%
Martinique	187	177	171	201	183	–2.1%	–9.0%
Réunion	362	343	409	400	464	28.2%	16.0%
Total French overseas departments	**761**	**772**	**825**	**872**	**942**	**23.8%**	**8.0%**

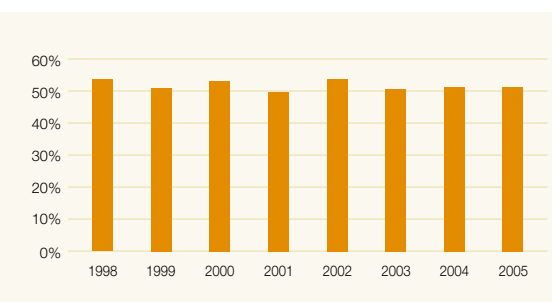
Source: CCFA.

FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

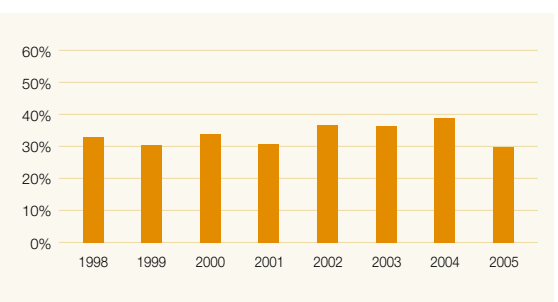
New passenger cars



New light commercial vehicles



New coaches, buses and trucks



FRENCH MANUFACTURERS IN 2005

351,000 PEOPLE EMPLOYED BY FRENCH AUTOMOBILE MANUFACTURERS WORLDWIDE

PSA PEUGEOT CITROËN: www.psa.fr

PSA Peugeot Citroën extended its solid track record of growth in the number of vehicles sold thanks to the 8% increase in its sales outside Western Europe, which accounted for 30.4% of the total in 2005, compared with 24.9% in 2003. The Group consolidated its position as Europe's second largest manufacturer of passenger cars and light commercial vehicles. This performance was achieved in spite of high raw material costs and an increasingly competitive European market, thanks to the good fit between Peugeot and Citroën products, new models that proved very popular (Citroën C1, Peugeot 107, the restyled Peugeot 307 and the Peugeot 407 coupe), the cost-saving platform strategy and a program to improve manufacturing productivity.
The Group pursued its commitment to international expansion, based mainly on long-term, targeted cooperation initiatives with other automobile manufacturers, such as the production in Turkey with Fiat-Tofas of a small light commercial vehicle and the supply with Mitsubishi of four-wheel drives in 2005, and investment in a second assembly plant in China with Dongfeng Motor in 2006. The construction of a second production facility at Trnava in Slovakia was also announced.
The Group's strengthened capabilities and expanded product lineup (Citroën C6, Peugeot 207) should drive a return to growth in sales in Western Europe in second-half 2006 while it pursues further expansion outside Europe.

RENAULT: www.renault.com

2005 was a year of transition for Renault, which confirmed its position as Europe's leading light vehicle make. The Mégane II family continued to lead sales in Europe and the Clio III, launched in September, was named Car of the Year 2006. In addition, Renault's financial results were boosted by interests in Nissan and AB Volvo.
The internationalization strategy was pursued. Following the presentation of the Logan in June 2004, agreements were signed to produce it in Colombia, Morocco and Russia, where production has already begun, as well as in India and Iran. Renault Samsung Motors is gearing up to produce a new four-wheel drive in Busan, in close cooperation with Nissan and Renault. Cooperation with Nissan in the alliance has been strengthened, with the first shared engines and the first shared gearbox launched. The Cléon plant will produce the diesel version of the engine.
2006 will be remembered as a turning point for the Group, with the announcement of the "Renault Commitment 2009" growth plan. As part of an unprecedented product offensive, Renault will launch 26 new vehicles through end-2009, in a bid to increase sales by 800,000 units between 2005 and 2009. The plan encompasses three major commitments: product and service quality, profitability and growth.

RENAULT TRUCKS: www.renault-trucks.com

In 2001, Renault's truck operations (Renault V.I. and Mack) were merged with those of AB Volvo, in which Renault is now the principal shareholder. The US operations (Mack) were deconsolidated from Renault V.I., which was renamed Renault Trucks. Renault Trucks has more than 14,000 employees, including more than 1,000 in research and development. In addition to industrial cooperation, synergies among the three makes have generated significant savings, in particular in the area of purchasing.
In 2005, Renault Trucks consolidated its market share in Europe and continued its international expansion. Its international sales rose a strong 25%, after soaring 42% in 2004, accounting for 19% of total sales.
Renault Trucks has signed an agreement with GAZ (RusPromAuto), granting it a Renault dCi 11 engine manufacturing license, and one with Nissan, for the distribution of Nissan vehicles through the Renault Trucks network, complementing the Master and Mascott ranges. In addition, Renault Trucks acquired Acmat, a company specialized in military vehicles, and expanded its Sherpa tactical truck range with three new vehicles.
The completion of the product renewal cycle in 2006 should drive future growth.

HEULIEZ: www.heuliez.com

The Henri Heuliez Group expanded its partnership operations with other manufacturers during the year. Body-in-white process and stamped part production capabilities were extended and production of Peugeot 206 CC body modules was successfully initiated. In 2005, the expansion of the business was driven in particular by the assembly of a coupe-convertible for Opel.

FRENCH MANUFACTURERS IN 2005

	Unit	PSA Peugeot Citroën	Renault
Sales	€ millions	56,267	41,338
Capital expenditure	€ millions	2,873	2,945
Net income	€ millions	990	3,367
Employees (at December 31)		208,500	126,584

	Unit	Automobile division: Peugeot and Citroën	Automotive equipment: Faurecia	Transportation: Gefco	Financing: PSA Finance	Other and eliminations	Automobile division	Finance division
Sales	€ millions	44,940	8,510	1,157	1,380	280	39,458	1,880
Operating income	€ millions	916	267	145	607	5	858	465
Capital expenditure	€ millions	2,370	423	49	11	20	2,879	66
Employees (at December 31)		140,050	54,950	9,370	2,370	1,750	123,527	3,057

Source: PSA Peugeot Citroën and Renault annual reports.

COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

45%

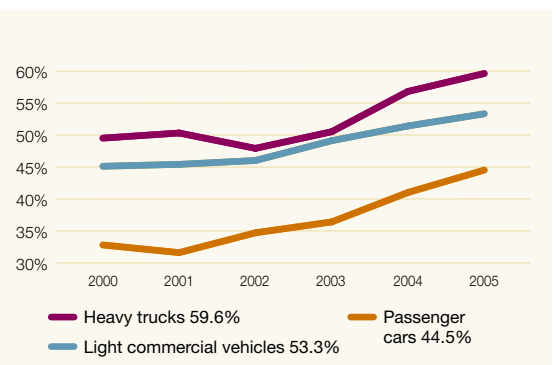
THE NON-EURO ZONE SHARE OF EXTERNAL MARKETS FOR FRENCH AUTOMOBILE MANUFACTURERS IN 2005, UP 11 PERCENTAGE POINTS OVER 2000

In an aggressively competitive global market, French automobile manufacturers must be competitive, able to handle factors such as the strong euro, which has hampered French exporters since 2002, and the comparatively larger opening of the base market, which can further hinder international expansion.

Competitiveness is defined as an industry's ability to withstand competition and expand in markets. It is relative, in that it is determined in comparison with the other market operators.
The French automotive industry must therefore be able to perform on a par with its European, American, Japanese and South Korean competitors if it is to continue growing.
In addition to problems related to the competitiveness of the economy or industry as a whole, there are competitive factors specific to the French automotive industry, resulting from the properties of the automobile and of the global automobile industry.
One competitive factor that significantly affects the French automotive industry, which exports a large, increasing proportion of its production outside the euro zone, is exchange rates, which can substantially impact trade.

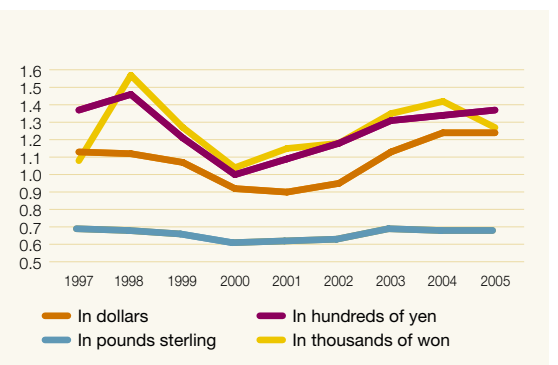
Since early 2002, the euro's rise has adversely affected French exports, forcing automobile manufacturers to bolster their marketing and production initiatives to continue to expand their outlets outside the euro zone.
Other factors are related to the opening of the domestic and external markets. Generally speaking, the domestic market—known as the base market—is a solid platform from which to pursue growth in external markets through international development and innovation. The French automotive industry's base market is France and in particular Europe. It is open to competition, and non-European manufacturers saw their already significant share grow strongly in 2005. In other automotive countries, market access is more difficult and local manufacturers therefore have a wider base as a foundation for their international development.

Share of the non-euro zone (12 countries) in external markets for French automobile manufacturers



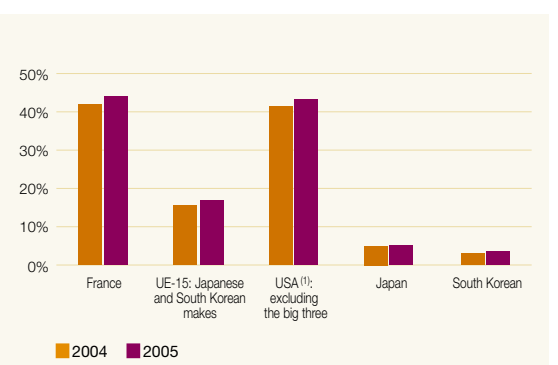
Source: CCFA.

Euro exchange rate



Source: IMF.

Share of foreign makes in passenger car markets in 2005



(1) USA: market share based on light vehicles. The big three are General Motors, Ford and Chrysler (excluding European makes).

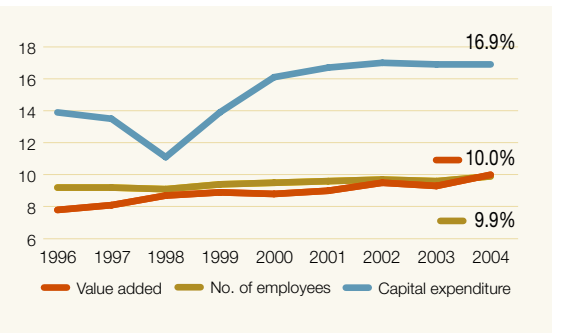
FRENCH AUTOMOTIVE INDUSTRY ECONOMIC DATA

17%

AUTOMOTIVE INDUSTRY SHARE IN CAPITAL SPENDING BY THE FRENCH MANUFACTURING AND ENERGY SECTOR IN 2004, ACCORDING TO SESSI

In 2004, the automotive industry accounted for 10% of the value added of France's manufacturing and energy sector.
The workforce made up nearly 10% of people employed in the sector.
The automotive industry uses a wide variety of technologies, requiring significant investment that accounted for 17% of capital expenditure by the manufacturing and energy sector in 2004.

The automotive industry's contribution to the manufacturing and energy sector



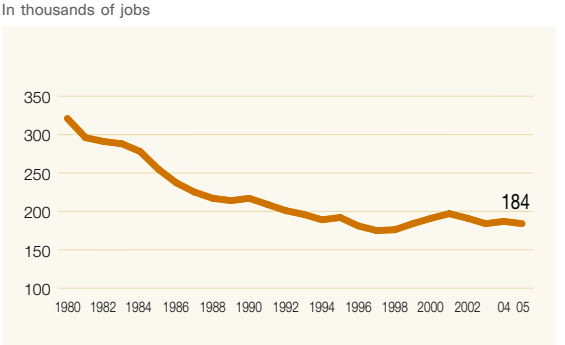
Every year, the statistics office of the French State Secretariat for Industry (SESSI) conducts surveys of French companies, providing a primary source of information about French industry. The automotive industry covers motor vehicle manufacturing; motor vehicle, caravan and recreational vehicle body manufacturing; and upstream manufacturing of automotive equipment. However, the statistics do not encompass all automotive industry suppliers. Products such as automobile seats, tires and glass are classified under other categories (see page 43).

MOTOR VEHICLE MANUFACTURING

Between 1996 and 2005, following the strong increase in production, value added (excluding VAT) per employee surged more than 20% in constant euros.
In order to develop new models and optimize production capacity, capital expenditure amounted to nearly 4% of sales, or €3.3 billion.
Export sales continued to increase, reaching 61% in 2005, versus 38% in 1990.

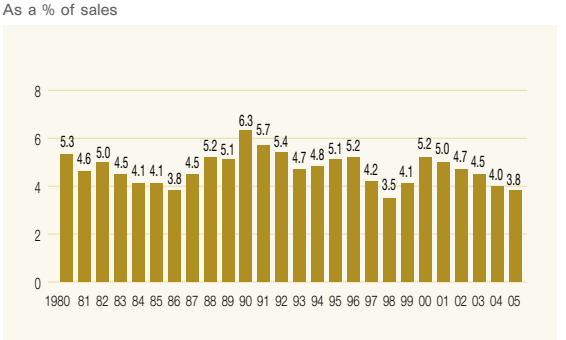
Automobile manufacturing employees [1]

In thousands of jobs



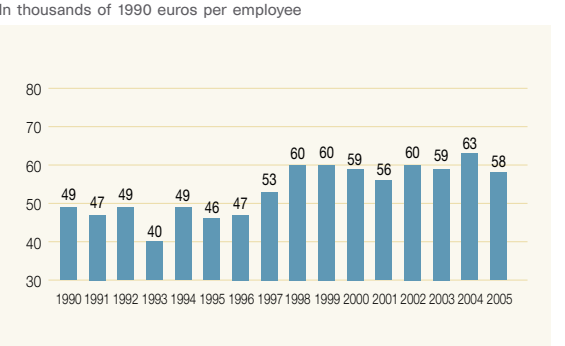
Capital expenditure by the automobile manufacturing industry [1]

As a % of sales



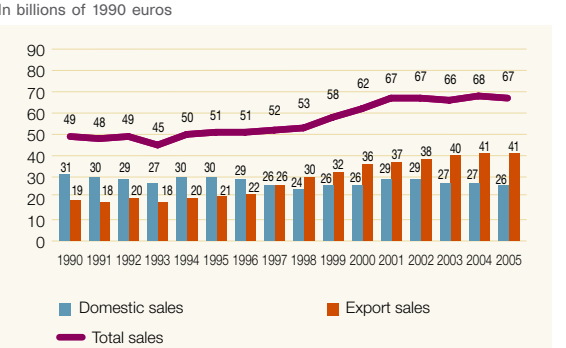
Value added produced by the automobile manufacturing industry [1]

In thousands of 1990 euros per employee



Domestic and export sales by the automobile manufacturing industry [1]

In billions of 1990 euros



(1) CCFA estimates for 2005. See also pages 66 and 67.

AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING

€4.3 BILLION FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT EXPENDITURE IN 2003

In 2003, the French automotive industry led all other industries in France in terms of corporate research and development spending, as it has since 1999. Its expenditure was close to €4.3 billion, accounting for 16% of total corporate research and development expenditure.

Between 1998 and 2003, gross domestic expenditure on research and development by the automotive industry rose by 52%. In 2003, it represented 20% of the industry's gross value added.

The automobile leverages a wide variety of technologies and therefore requires significant research initiatives to ensure its reliability throughout its lifetime, user safety and environmental protection.

The automotive industry's research and development budgets exceeded those of the pharmaceutical industry (€4 billion), the radio, television and communication equipment and components industry (€3.3 billion) and the aviation and space industry (€3.3 billion).

GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2003

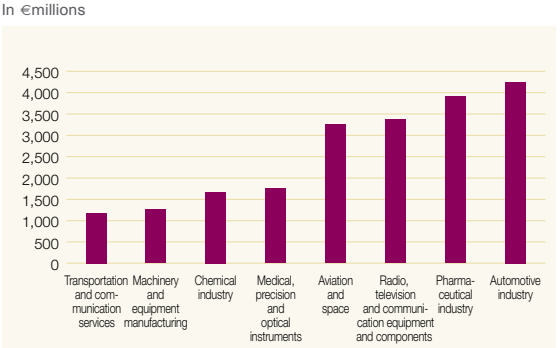
	Gross domestic expenditure on corporate research and developpment	Gross external expenditure on research and developpment	Total		Of which public funding [3]	
	in € millions	in € millions	in € millions	in %	in € millions	in %
Automotive industry	3,192	1,058	4,250	15.7	15	0.6
Pharmaceutical industry	2,993	958	3,952	14.6	44	1.8
Radio, television and communication equipment and components	2,763	575	3,338	12.4	341	14.0
Aviation and space	2,267	1,011	3,278	12.1	1,044	42.7
Medical, precision and optical instruments	1,420	319	1,740	6.4	397	16.2
Chemical industry	1,357	256	1,613	6.0	75	3.1
Machinery and equipment manufacturing	1,049	231	1,280	4.7	257	10.5
Transportation and communication services	842	257	1,099	4.1	7	0.3
IT services	907	62	969	3.6	55	2.3
Energy and extraction of energy products	723	201	924	3.4	14	0.6
Machinery and electrical equipment manufacturing	810	91	901	3.3	9	0.4
Other research segments	3,323	346	3,669	13.6	190	7.8
TOTAL	**21,646**	**5,365**	**27,011**	**100.0**	**2,444**	**100.0**

(1) Excluding research tax credit.

Source: French Ministry of Education and Research (MENESR-DEP B3).

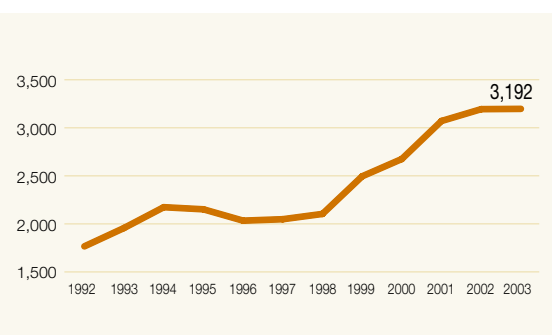
Total corporate research and development expenditure in France in 2003 in the main research segments

In €millions



Automotive industry research and development spending since 1992

In €millions



The research-related statistics office of the Ministry of Education carries out surveys on research and development (R&D) spending by companies and in the wider public sphere. The total R&D budget is broken down into domestic spending, which covers work performed in France, regardless of the origin of funding, and external spending, corresponding to work performed by other companies or public research organizations. A portion of the latter work may be performed outside France (25.7% of the €5.5 billion in 2001).

Since 1999, the leading R&D segment in France is the automotive industry. In addition, it drives others, such as plastics and electronics. In 2003, 17% of domestic R&D spending in the automotive industry was performed by subsidiaries in which foreign companies had a controlling interest of 50% or more.

In 2003, the automotive industry comprised 30,000 full-time equivalent research positions, including 12,200 researchers, up 36% from 1998 (89% for researchers). According to the French National Industrial Property Institute (INPI), 1,500 vehicle-related patents were filed in 2004 , versus 1,200 in 2001, representing close to 9% of all patents filed (not including non-classified). Renault and Peugeot Citroën Automobiles SA respectively filed the first and third largest number of patents with INPI in 2005. Faurecia was in fourteenth place.

MOTOR VEHICLE EXPORTS BY FRENCH AUTOMOBILE MANUFACTURERS IN 2005

4.3 MILLION NUMBER OF VEHICLES EXPORTED BY FRENCH MANUFACTURERS IN 2005

After ten years of growth (89% between 1995 and 2004), exports by French manufacturers contracted by more than 2% on a like-for-like basis in 2005. When Dacia vehicles are included, they rose 1% to more than 4.3 million units.

Most of this expansion occurred outside Europe, as exports to the continent shrank 1% to just over 3.2 million units. Exports to markets outside Europe climbed 7% to more than 1 million units, an increase of 160% over 1999's figure of 415,000 units. In 2005, exports to North and South America and China grew substantially.

North and South America accounted for 8.1% of total exports, thanks to the recovery in the Argentinean and Brazilian markets. Asia accounted for 12.2% of exports, with continued growth to Iran (more than 300,000 units, compared with 47,000 in 2000) and China (144,000 units, versus 55,000 in 2000). Exports to Africa fell 9%, after a 38% jump in 2004

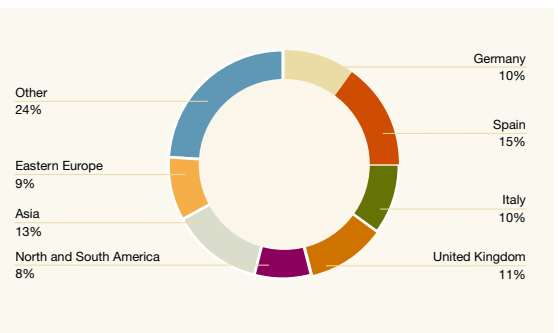
FRENCH MOTOR VEHICLE EXPORTS IN 2005 (1)

	Passenger cars				Commercial vehicles				Total exports		Change
	2004 thousands	%	2005 thousands	%	2004 thousands	%	2005 thousands	%	2004 thousands	2005 thousands	2005/2004 %
Europe	2,879	75.4	2,836	73.8	380	84.6	402	84.7	3,259	3,238	–1
of which:											
EU-25	2,581	67.6	2,424	63.1	323	72.0	326	68.7	2,904	2,750	–5
Germany	325	8.5	366	9.5	44	9.7	41	8.6	369	407	+10
Austria	51	1.3	49	1.3	5	1.2	6	1.3	56	55	–3
Belgium-Luxembourg	179	4.7	172	4.5	21	4.6	25	5.2	199	196	–2
Spain	582	15.2	577	15.0	62	13.8	71	15.0	644	649	+1
Italy	428	11.2	377	9.8	31	6.9	30	6.3	460	407	–11
Netherlands	120	3.1	100	2.6	17	3.8	12	2.5	137	111	–19
Poland	64	1.7	48	1.2	10	2.2	9	1.9	74	57	–23
Portugal	66	1.7	67	1.7	27	5.9	25	5.4	93	92	–1
United Kingdom	472	12.4	414	10.8	64	14.2	65	13.6	536	478	–11
Switzerland	41	1.1	41	1.1	5	1.1	6	1.3	46	47	+4
Turkey	141	3.7	142	3.7	22	4.8	18	3.8	162	160	–1
North and South America	289	7.6	315	8.2	27	6.1	33	7.0	316	348	+10
of which:											
Argentina	54	1.4	70	1.8	10	2.3	15	3.2	65	85	+32
Brazil	127	3.3	144	3.7	6	1.3	8	1.6	133	152	+14
Africa	110	2.9	103	2.7	28	6.2	23	4.8	138	126	–9
Asia	462	12.1	513	13.3	11	2.5	12	2.5	473	525	+11
of which:											
China	91	2.4	144	3.7	0	0.0	0	0.0	92	144	+57
Iran	293	7.7	304	7.9	4	1.0	4	0.9	297	308	+4
Israel	19	0.5	19	0.5	1	0.2	1	0.2	19	19	+1
Japan	19	0.5	16	0.4	0	0.1	0	0.0	19	16	–15
Pacific	16	0.4	17	0.4	2	0.4	2	0.4	18	19	+2
TOTAL	**3,820**	**100.0**	**3,841**	**100.0**	**449**	**100.0**	**475**	**100.0**	**4,269**	**4,316**	**+1**
Change 2005/2004	+1%				+6%				+1%		

(1) Dacia exports are included from 2005.

Source: CCFA.

Main passenger car export markets in 2005



Europe remained the primary export market for French vehicles. The region accounted for 74% of passenger car exports, down from 88% in 1999 following the expansion of French automobile manufacturers in Latin America and Asia.

Within Europe, exports of passenger cars to the EU-25 declined by 6%, in an environment shaped by tougher competition, a stronger euro, the selective sales strategy deployed by French automobile manufacturers, and competition from imported vehicles in new member countries.

Europe accounted for 85% of commercial vehicle exports, the same as in 2000, with exports to Eastern Europe (excluding new EU members) continuing to increase. As was the case for passenger cars, commercial vehicle exports to Asia and North and South America grew, although exports to Africa contracted.

Spain, the United Kingdom, Italy and Germany were the leading markets for French makes.

The manufacturers' biggest selling passenger cars and commercial vehicles outside France were:

- **Peugeot 206: 528,094 vehicles.**
- **Renault Mégane: 596,458 vehicles.**
- **Citroën C3: 203,006 vehicles.**

FRENCH AUTOMOTIVE FOREIGN TRADE

15%
SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS IN 2005

With the French trade balance worsening, due in part to higher energy costs and the stronger euro, French automotive exports shrank 3% in 2005 after 11 years of continuous growth. Imports, on the other hand, continued to climb, increasing by 5%. Although the automotive industry's trade surplus contracted to €8.2 billion after reaching a record high in 2004, the segment remains one of the biggest contributors to the French trade balance. After three years at €7.5 billion, the new passenger car trade surplus shrank to €5.5 billion, on par with its 2001 level. Due to strong domestic demand for commercial vehicles, the light commercial vehicle segment posted a deficit of €300 million and the heavy truck segment, a deficit of €600 million.

In € billions	New passenger car	New light commercial vehicles	New heavy trucks	Parts and engines	Total automotive manufac-turing	Used Vehicles	Total automobile sector	Total French goods exports [1]	Automotive, in %
Exports (FOB)									
2004	27.4	2.8	2.8	19.4	52.4	1.6	54.0	341.0	15.8%
2005	26.2	2.6	2.7	19.5	51.0	1.6	52.6	354.9	14.8%
% change 2005/2004	–4.6	–7.5	–4.6	+0.9	–2.7	–0.2	–2.6	+4.1	
Imports (CIF)									
2004	19.8	2.7	3.1	15.0	40.6	0.6	41.3	355.9	11.6%
2005	20.7	3.0	3.3	15.9	42.8	0.8	43.6	388.8	11.2%
% change 2005/2004	+4.2	+11.6	+6.2	+5.7	+5.4	+18.3	+5.6	+9.2	
Balance									
2004	+7.6	+0.2	–0.3	+4.3	+11.8	+0.9	+12.7	–14.9	
2005	+5.5	– 0.3	–0.6	+3.6	+8.2	+0.8	+9.0	–33.8	
Coverage rate [2]									
2004	138	107	90	129	129	244	131	96	
2005	127	89	81	123	119	205	121	91	

(1) Including military equipment.
(2) Exports/imports x 100.
FOB (Free-on-board): transaction value including freight and insurance up to the border of the exporting country.
CIF (Cost, insurance, freight): transaction value including freight and insurance up to the border of the importing country.

Source: Customs data processed by CCFA. National accounts, base 2000.

The automotive industry's share of all goods exports has increased significantly since 1997, reaching 14.8% in 2005, versus 12% in 1997. Automotive industry imports accounted for 11.2% of all goods imports, compared with 9% in 1997, when there was a recession in the French new vehicle market.
The trade balance for passenger cars has improved significantly over the past nine years, from a deficit of €350 million in 1996 to healthy surpluses today. The 2005 surplus was €5.5 billion. The decline compared to 2005 reflects a decrease in new passenger car production in France and higher imports.

The commercial vehicle deficit stood at €900 million. After growing more than 25% in 2004, exports of light commercial vehicles fell 7.5% to €2.6 billion, while exports of heavy trucks slid 4.6% to €2.7 billion. Increased imports also contributed to the widening of the deficit.
Trade in parts and engines continued to expand, although at a slower pace than in 2004, with a 6% rise in imports and a 1% increase in exports. The trade surplus contracted to €3.6 billion, continuing the downward trend that has followed the record high set in 2000.

FRENCH AUTOMOTIVE FOREIGN TRADE

€8.2 BILLION FRENCH AUTOMOTIVE MANUFACTURING SURPLUS IN 2005

After exceeding €10 billion for four years in a row, France's automotive manufacturing surplus (excluding used vehicles) contracted to €8.2 billion, which was evenly distributed between trade with other EU-15 countries and trade with the rest of the world.

The EU-25 accounted for 90% of the decline in the overall trade surplus, as French manufacturers lost market share and registrations continued to fall in new member countries.

As in the past, surpluses exceeding €1 billion with the United Kingdom (€2.8 billion), Italy (€1.6 billion), and Belgium and Luxembourg (€2.2 billion) largely offset deficits with Germany (€5.5 billion), Japan and South Korea.

AUTOMOTIVE MANUFACTURING FOREIGN TRADE BALANCE

In € billions	1985	1990	2000 (1)	2001	2002	2003	2004	2005
Combined	4.57	4.13	9.84	10.33	10.62	11.00	11.80	8.21
Intra-EC (12 countries)	0.29	0.45						
Intra-EU (15 countries)			5.80	5.89	6.67	6.82	6.68	4.11
Intra-EU (25 countries)						7.72	7.67	4.42
of which:								
Germany	–1.62	–2.20	–3.75	–5.96	–4.77	–4.13	–5.06	–5.54
Austria			0.33	0.29	0.39	0.47	0.60	0.43
Belgium-Luxembourg	0.26	0.68	0.35	0.77	1.23	1.98	2.37	2.23
Denmark		0.12	0.23	0.32	0.36	0.25	0.34	0.34
Spain	–0.55	– 0.14	1.55	2.08	0.86	0.94	0.55	0.46
Finland			0.17	0.17	0.20	0.23	0.24	0.23
Italy	0.59	0.13	0.58	1.15	1.96	2.09	2.11	1.56
Netherlands	0.34	0.57	1.54	1.07	1.19	0.87	0.54	0.37
Poland							0.34	0.15
Portugal	0.12	– 0.12	0.50	0.54	0.48	0.26	0.34	0.51
Czech Republic							–0.03	–0.21
United Kingdom	0.98	1.21	3.56	4.51	3.87	3.09	3.70	2.81
Slovenia							0.20	0.05
Sweden			0.14	0.27	0.26	0.27	0.25	0.07
Outside EC (12 countries)	4.27	3.69						
Outside EU (15 countries)			4.04	4.44	3.95	4.18	5.13	4.10
Outside EU (25 countries)						3.28	4.13	3.79
of which:								
Austria	0.15	0.22						
Finland		0.10						
Norway		0.06	0.13	0.16	0.17	0.18	0.21	0.20
Poland			0.25	0.31	0.42	0.46		
Czech Republic			–0.01	0.01	–0.04	–0.01		
Slovenia			0.15	0.12	–0.07	0.03		
Sweden		0.05						
Switzerland	0.27	0.50	0.59	0.70	0.67	0.63	0.60	0.57
Turkey		0.17	0.55	–0.08	–0.11	0.13	0.36	0.13
Yugoslavia	0.03	0.07						
Canada	0.12	0.15	–0.02	–0.03	–0.02	–0.02	–0.02	0.02
United States	0.81	0.41	0.46	0.52	0.46	0.33	0.35	0.41
Mexico	0.00	–0.01	0.03	0.00	0.10	0.11	0.12	0.13
Argentina		0.06	0.38	0.20	0.03	0.05	0.16	0.17
Brazil		0.07	0.25	0.23	0.16	0.08	0.18	0.19
Algeria	0.56	0.47	0.29	0.40	0.46	0.50	0.55	0.52
Morocco		0.18	0.12	0.11	0.15	0.13	0.12	0.17
Nigeria		0.14	0.15	0.18	0.13	0.10	0.07	0.08
Tunisia		0.11	0.17	0.21	0.21	0.09	0.11	0.08
Saudi Arabia		0.06	0.06	0.03	0.05	0.04	0.05	0.06
China		0.05	0.09	0.09	0.11	0.13	0.24	0.26
South Korea		0.02	–0.22	–0.24	–0.28	–0.31	–0.44	–0.47
Iran		0.10	0.15	0.41	0.62	0.95	1.30	0.92
Japan	–0.43	–0.63	–1.04	–1.16	–1.47	–1.59	–1.71	–1.67

(1) French overseas departments are included in the scope of French Customs as of 1996. *Source: Customs, CCFA.*

After exceeding €5.5 billion every year since 1997, the trade surplus with the EU-15 fell sharply in 2005 to €4.1 billion, due to stiffer competition and loss of market share stemming from the selective sales strategy deployed by French manufacturers. Trade surpluses with the United Kingdom and Italy narrowed—from €3.7 billion to €2.8 billion and from €2.1 billion to €1.6 billion respectively—while the trade deficit with Germany widened by €500 million to €5.5 billion.

With the ten new member countries, the automotive manufacturing trade surplus stood at €300 million, versus €1 billion in 2004. Market declines, a strong euro and heavy imports of used vehicles were the main factors adversely affecting the trade balance.

Outside the EU-25, the automotive manufacturing trade surplus held up better, sliding just €300 million to €3.8 billion. Apart from Iran, where the percentage of local content has increased, the trade balance with countries outside the EU-25 improved slightly in 2005. After years of steadily wider deficits with Japan and South Korea, 2005 saw their combined trade surplus stabilize at €2.1 billion.

AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT

25%
SHARE OF COMMERCIAL SECTOR IN AUTOMOTIVE INDUSTRY PURCHASES FROM OTHER INDUSTRIES

In 2005, automotive industry production, which includes automobiles and automotive equipment (excluding electrical and electronic equipment), totaled more than €90 billion, constituting a 64% increase since 1996. Value added represented nearly 17% of output, or €15 billion. Total purchases, or intermediate consumption, amounted to €75 billion.

Purchases have more than quadrupled since 1980 and are made from a number of industries. Purchases from the commercial sector accounted for 16% of total automotive industry purchases in 2004, representing one-quarter of purchases from other industries. The capital-intensive automotive segment's gross fixed capital formation (GFCF) amounted to nearly €5 billion in 2004, representing an investment rate (GVCF/VA) of 28%, compared to 19% for industry as a whole.

While total purchases were up 1.1% on 2004, volume value declined 1.6%, due mainly to higher raw material costs.

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		1990	1995	2000	2003	2004 (1)	2005 (1)
Purchases from other industries	%	–	–	**59.9**	**64.9**	**66.7**	–
Consumer goods industries	%	–	–	2.7	3.6	3.7	–
of which: Apparel, leather	%	–	–	0.3	0.4	0.4	–
Household equipment	%	–	–	2.2	3.0	3.0	–
Capital goods industries	%	–	–	9.1	10.4	10.8	–
of which: Mechanical equipment	%	–	–	6.0	6.8	7.1	–
Electrical and electronic equipment	%	–	–	2.9	3.4	3.5	–
Ships, aircraft and railway rolling stock	%	–	–	0.1	0.1	0.1	–
Intermediate goods industries	%	–	–	32.3	33.8	34.7	–
of which: Metallurgy and metalworking	%	–	–	16.1	16.2	16.6	–
Chemicals, rubber, plastics	%	–	–	8.9	10.2	10.6	–
Electrical and electronic components	%	–	–	4.1	3.7	3.8	–
Mineral products	%	–	–	1.4	1.7	1.7	–
Textiles	%	–	–	1.3	1.4	1.5	–
Energy	%	–	–	1.2	1.2	1.3	–
of which: Electricity, gas and water supply	%	–	–	0.6	0.7	0.7	–
Fuels and motor fuels	%	–	–	0.5	0.5	0.6	–
Construction	%	–	–	0.1	0.2	0.2	–
Transportation	%	–	–	0.5	0.6	0.6	–
Financial services	%	–	–	0.8	0.8	0.9	–
of which: Financial intermediation	%	–	–	0.6	0.5	0.6	–
Insurance and auxiliary activities	%	–	–	0.2	0.3	0.3	–
Real estate activities	%	–	–	0.3	0.3	0.3	–
of which: Property leasing	%	–	–	0.3	0.3	0.3	–
Corporate services	%	–	–	11.3	11.8	12.0	–
of which: Consultancy and support	%	–	–	3.9	3.7	3.8	–
Operating services	%	–	–	3.2	3.5	3.4	–
Research and development	%	–	–	4.0	4.3	4.5	–
Post and telecommunications	%	–	–	0.3	0.3	0.3	–
Other commercial sector industries	%	–	–	1.6	2.1	2.1	–
All commercial sector purchases	%	–	–	14.5	15.6	16.0	–
Purchases within the industry	%	–	–	**40.1**	**35.1**	**33.3**	–
Total production at base prices	in € billions	**49.7**	**55.3**	**85.8**	**89.1**	**92.0**	**90.5**
In % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
Total purchases (2)	in € billions	**39.0**	**44.2**	**69.8**	**72.9**	**74.6**	**75.5**
In % of production at base prices	%	78.4	79.9	81.3	81.9	81.1	83.4
Value added by the industry	in € billions	**10.8**	**11.1**	**16.0**	**16.2**	**17.4**	**15.1**
In % of production at base prices	%	21.6	20.1	18.7	18.1	18.9	16.6
Operating cash flow	in € billions	–	**2.5**	**6.3**	**5.0**	**6.0**	–
In % of value added (margin rate)	%	–	23.0	39.6	31.0	34.4	–
Gross fixed capital formation (GFCF)	in € billions	–	–	**5.1**	**4.3**	**4.9**	–
In % of value added (investment rate)	%	–	–	31.8	26.7	28.2	–

(1) Data for 2004 are to be confirmed and data for 2005 are provisional. *Source: INSEE – National accounts (base 2000).*
(2) Total purchases (intermediate consumption) refers to the value of good and services transformed or consumed fully during the production process. It does not include the depreciation of fixed production assets, which is recorded in uses of capital employed.

Total industry purchases in 2004 were split one-third within the industry and two-thirds from other industries. Intermediate goods accounted for more than a third of purchases, including metallurgy. The metalworking industry remained the leading supplier, accounting for 17% of total purchases.

The commercial sector accounted for 16% of purchases. The most requested corporate services were research and development (4%), consultancy and support (4%), and operating services (3%). Purchases of capital goods (mechanical, electrical and electronic equipment) accounted for 11% of total purchases.

AUTOMOBILE PRICE INDICES

12.9%
INCREASE IN INSEE'S 2005 MOTOR FUEL PRICE INDEX

The new passenger car price index rose 1.3% in 2005, or 0.5 percentage points less than inflation. Since 1995, prices have decreased more than 12% in real terms.

Fuel prices continued to climb after resuming their rise in 2003. The new motor fuel price index was up 12.9% and was more than 15% higher than the 2000 level.

The repair and maintenance price index (excluding parts and accessories) increased by more than 4%, as in previous years. After remaining relatively stable for a number of years, the parts and accessories price index rose by nearly 3% for the second year in a row and was 10% higher than in 1998.

The indices for the different methods of passenger transportation were close to their 1995 levels in 2004 in real terms. In 2005, however, trends varied. The index for personal vehicles (purchase and use of personal vehicles) rose by 3% to above its 2000 level, while the air passenger transportation index fell sharply for the second year a row, nearing the lows recorded in 1996 and 2000. For the past few years, growth in the rail passenger transportation index has slightly outpaced inflation, while the road passenger transportation index has been slightly below it.

YEAR-ON-YEAR AUTOMOBILE PRICE CHANGES

	Consumer prices	New car prices	Prices of parts, accessories, repairs and maintenance	Fuel prices
1985	5.8%	6.7%	6.6%	10.2%
1986	2.6%	7.4%	6.1%	–15.0%
1987	3.1%	3.3%	11.7%	1.4%
1988	2.7%	1.1%	6.1%	–0.1%
1989	3.6%	3.3%	4.6%	7.7%
1990	3.4%	0.6%	5.1%	3.8%
1991	3.2%	2.3%	5,8%	0.3%
1992	2.4%	1.3%	5.6%	–2.0%
1993	2.1%	2.3%	4.7%	3.7%
1994	1.7%	–0.1%	3.3%	3.6%
1995	1.7%	1.2%	3.2%	4.1%
1996	2.0%	–0.1%	3.4%	7.3%
1997	1.2%	–2.6%	0.9%	3.8%
1998	0.7%	1.0%	0.5%	–3.1%
1999	0.5%	–1.6%	0.8%	4.4%
2000	1.7%	–0.1%	0.8%	18.5%
2001	1.7%	0.7%	2.0%	–4.8%
2002	1.9%	1.1%	3.2%	–2.8%
2003	2.1%	1.3%	2.7%	2.4%
2004	2.1%	1.7%	3.8%	7.8%
2005	**1.8%**	**1.3%**	**3.1%**	**12.9%**

Source: INSEE, CCFA calculations.

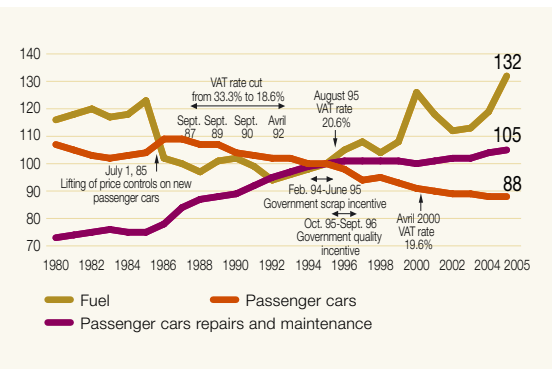
The above chart shows year-on-year changes in the following indices:
- **Consumer prices.**
- **New car prices.**
- **Prices of parts, accessories, repairs and maintenance.**
- **Fuel prices.**

The new car price index compares the prices of passenger cars with similar technical characteristics, to factor out price rises resulting from quality and equipment improvements. Allowance is made for periodic rebates.

To calculate the actual change in the key components of the cost of owning a car, the indices have been adjusted to take account of changes in the consumer price index. When price controls were lifted in 1985, the cost of a new passenger car rose in real terms. Subsequently, the successive cuts in VAT rates on new passenger cars, from 33.3% to 18.6% between 1987 and 1992, led to a reduction in new car prices in real terms. Since then, car prices have continued to decline steadily in real terms due to competition and to scrap incentives between 1994 and 1996. A two-point increase in the VAT rate in August 1995 temporarily slowed the downward movement.

New passenger car, fuel, parts, accessories, maintenance and repair price indices, adjusted for inflation

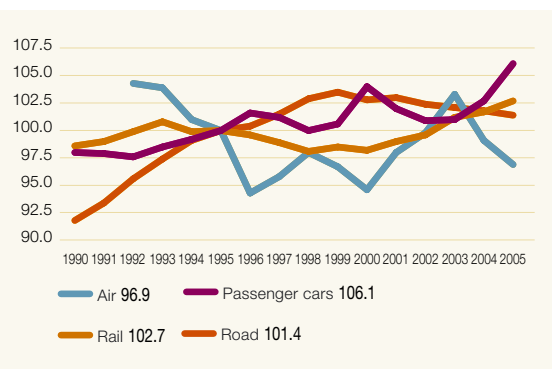
1995 = base 100



Source: INSEE, CCFA presentation.

Passenger transportation method price indices, adjusted for inflation

1995 = base 100



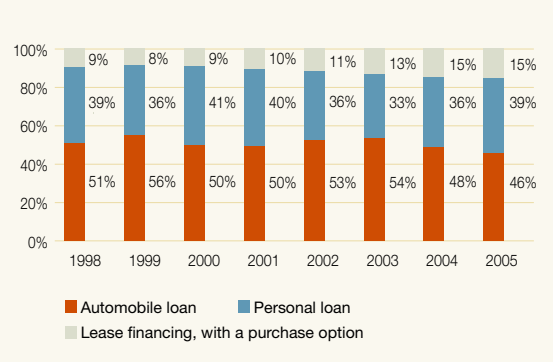
Actual repair and maintenance costs have risen steadily since 1985, along with the increase in required technology investments and the improved qualifications of mechanics. Costs stabilized between 1996 and 2000 as declining component costs were offset by increased labor costs. The index has been rising again since 2002, as was the trend between 1985 and 1996.

RETAIL FINANCING

65%
OF NEW CARS PURCHASED BY CONSUMERS IN FRANCE WERE BOUGHT ON CREDIT

In 2005, 65% of new cars purchased by consumers were bought on credit, compared with less than 60% in 2001-2002. Of these, nearly half were financed with automobile or conventional loans, ahead of personal loans (39%) and lease financing with a purchase option (15%, compared with 8 to 9% in the late 1990s).
Automobile loans are supported by solutions combining financing, insurance, maintenance and/or support.

Proportion of new cars purchased by consumers on credit or with lease financing

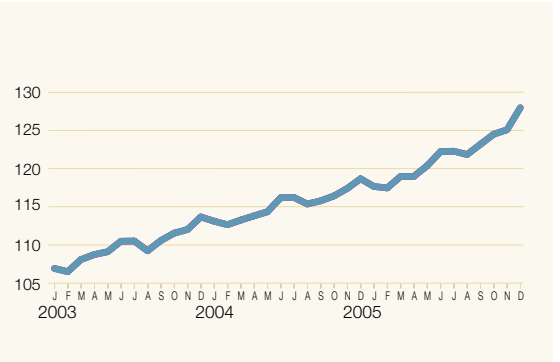


Source: ASF, CCFA.

Buyers of new and used cars have the choice of paying cash or purchasing the vehicle on credit.
There are three types of financing on offer:
• Automobile or conventional loans provided either by the finance subsidiaries of the manufacturers and importers, or by the subsidiaries of financial or banking groups, which are independent from the manufacturers.
• Leasing with a purchase option. The lessee has the use of the vehicle and pays rent over the term of the lease, which may be as long as 60 months, i.e. 5 years. The purchase option may be exercised during the lease period or on expiration of the lease.
• Personal or bank loans.
Data obtained from a variety of sources (industry associations, registration statistics, surveys) are used to estimate the percentage of new cars purchased on credit.
In a more lackluster economic environment, with continued high unemployment and slower growth in purchasing power, consumer loan growth in 2005 was driven by lower interest rates, longer loan periods and strong demand for loans to purchase household furnishings and equipment, which paralleled the increase in housing loans. After year-on-year growth of less than 5% each year between end-December 2002 and end-December 2004, consumer loans were up nearly 8% at end-December 2005, marking a return to growth rates close to those recorded at the end of the 1990s.

Loans by consumer-credit institutions

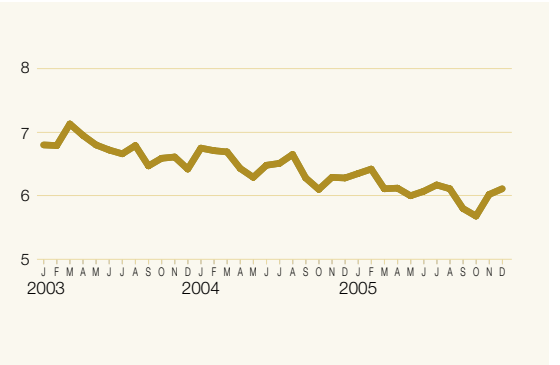
In € billions



Source: Banque de France.

Interest on loans, excluding overdrafts

Interest rate in %



Source: Banque de France.

USED PASSENGER CARS

18%
OF VEHICLES CHANGED HANDS IN 2005

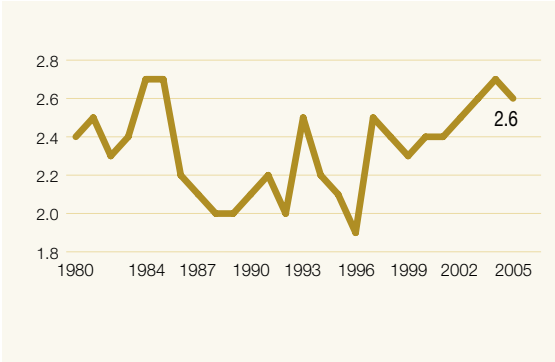
For the sixth consecutive year, used car registrations exceeded five million, reaching 5,383,000 units in 2005.
Every year, two or three used cars are purchased for every new car. Used cars represent 18% of the passenger car fleet.
Used car purchases accounted for 60% of total purchases, versus 51% in 1991.
The average duration of ownership is over four years

USED PASSENGER CARS

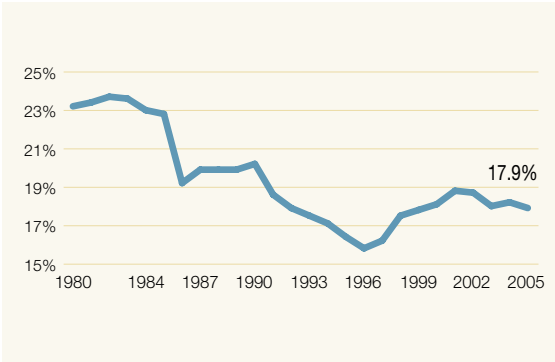
	Unit	1980	1990	2000	2001	2002	2003	2004	2005
REGISTRATIONS									
New cars	thousands	1,873	2,309	2,134	2,255	2,145	2,009	2,014	2,068
Used cars	thousands	4,441	4,759	5,082	5,396	5,457	5,322	5,444	5,383
Ratio used/new		2.4	2.1	2.4	2.4	2.5	2.6	2.7	2.6
Cars less than 5 years old	% used		52	40	41	42	42	41	40
of which:									
– Cars less than 1 year old	% used		12	12	12	12	11	10	10
– Cars less than 1 year old	% new		25	29	30	30	29	28	25
Cars more than 5 years old	% used		48	60	59	58	58	59	60
Total at December 31	thousands	19,130	23,550	28,060	28,700	29,160	29,560	29,900	30,100
Ratio used/total	%	23.2	20.2	18.1	18.8	18.7	18.0	18.2	17.9

Source: CCFA.

Used/new car ratio



Used/total car ratio



Passenger cars are durable goods that consumers purchase, use, maintain and eventually sell in the second-hand market.
Used cars are purchased and sold through dealers or directly between consumers. Those less than five years old are usually sold through dealers.
Representing between four and six million transactions a year, the used car market fluctuates less than the new car market. In 2005, new passenger car registrations rose 3% to 2.07 million units, while used car registrations dipped 1% to 5.4 million units. The used/new car ratio slipped by 0.1 percentage points to 2.6.
Transactions involving vehicles more than five years old rose due to the aging of the passenger car fleet and to increasing multi-car ownership in France. The share of such transactions thus increased from 48% in 1990 to 60% in 2005. Excellent levels of new car registrations between 1998 and 2002 automatically increased the percentage of cars less than five years old from 40% to 42% between 2000 and 2003.
Used cars less than one year old may be considered as new, since they are often registered by automobile dealers as demonstrator or leased vehicles and then sold in the retail market. They represented just over 520,000 registrations, or 25% of the new car market.

CONSUMER SPENDING ON PRIVATE VEHICLES

€129 BILLION SPENT BY CONSUMERS ON AUTOMOBILES AND MOTORCYCLES IN 2005, ACCORDING TO INSEE

Since 2002, the economic environment has been less conducive to consumer spending than in previous years. Total purchasing power edged up 1.1% in 2005, compared with 2.2% in 2004, 0.9% in 2003 and over 3% between 1998 and 2002. In addition, continued high unemployment coupled with higher fuel prices dampened consumer confidence. However, spending continued to grow as savings declined.

As a result, spending on automobiles rose 3.8% to €39 billion in 2005. Higher prices pushed spending on fuel and lubricants up 10.3% to €34 billion, or nearly as much as new and used car purchases. Spending on automotive insurance continued to expand, to €5.7 billion, against €3.7 billion in 1999.

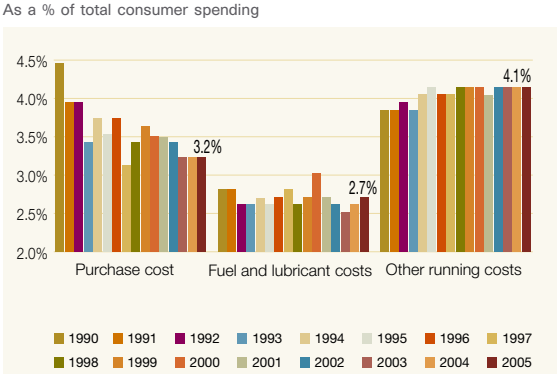
CONSUMER SPENDING ON PRIVATE VEHICLES

Amount and as a % of total consumer spending for the year	Unit		1990		1995		2004 (1)		2005 (1)	% change 2005/2004
Purchase cost	€ billions	31.9	4.4%	29.7	3.5%	37.7	3.2%	39.2	3.2%	+3.8%
– New and used cars		29.6	4.1%	27.3	3.2%	34.0	2.8%	35.1	2.8%	+3.3%
of which new cars		24.7	3.4%	21.8	2.6%	23.3	1.9%	24.3	2.0%	+4.7%
– Caravans, motorcycles, bicycles		2.3	0.3%	2.4	0.3%	3.7	0.3%	4.0	0.3%	+8.2%
Running costs	€ billions	47.9	6.6%	57.5	6.8%	79.6	6.7%	84.2	6.8%	+5.7%
– Parts and accessories		12.3	1.7%	16.1	1.9%	23.6	2.0%	24.3	2.0%	+2.9%
– Fuel and lubricants		20.3	2.8%	22.5	2.6%	30.6	2.6%	33.7	2.7%	+10.3%
– Automobile maintenance and repairs		111.1	1.5%	13.3	1.6%	17.3	1.5%	17.9	1.4%	+3.4%
– Tolls, parking fees, rental, driving lessons		4.1	0.6%	5.6	0.7%	8.1	0.7%	8.2	0.7%	+1.3%
Insurance	€ billions	4.1	0.6%	3,9	0.5%	5.5	0.5%	5.7	0.5%	+4.4%
Total consumer spending on private vehicles		83.8	11.6%	91.0	10.7%	122.8	10.3%	129.0	10.4%	+5.0%
Public transportation	€ billions	110.3	1.4%	11.1	1.3%	18.3	1.5%	19.5	1.6%	+6.2%
TOTAL CONSUMER SPENDING FOR THE YEAR	€ billions	723	100%	849	100%	1,193	100%	1,241	100%	+4.0%
Number of households (mainland France)	thousands	21,633		22,906		25,555		25,831		+1.1%
Spending on private vehicles per household	euros	3,874		3,974		4,806		4,995		+3.9%
Spending on private vehicles per vehicle-owning household	euros	5,065		5,069		5,970		6,151		+3.0%

(1) Provisional data that may be readjusted over three years. *Source: INSEE Consumer Spending, 2005 – 2000 base.*

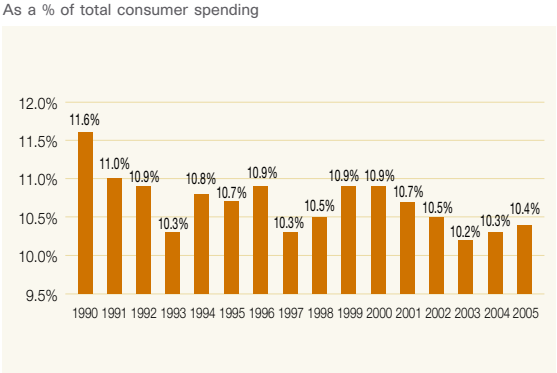
Percentage of household budget allocated to owning a car, 1990 to 2005

As a % of total consumer spending



Total automobile-related expenditure

As a % of total consumer spending



In 2005, French spending on personal transportation (primarily private vehicles) rose by 5.0% to €129 billion, an amount that represented 87% of all consumer spending on personal and public transportation combined.

Consumer spending on cars, relative to total consumer spending, is expressed as the percentage of household budget allocated to owning a car. Since the beginning of the 1990s, this percentage has ranged between 10% and 11.6%.

Spending on car purchases tends to fluctuate widely, a fact that largely explains most of the changes in the percentage of the household budget allocated to owning a car. In 2005, the portion of the budget allocated to car purchases was 3.2%, stable in relation to the previous year. It was very close to the 1997 level, its lowest in the period that began in 1990.

The cost of maintaining and repairing vehicles and of parts and accessories has increased in recent years, but it has not returned to the peak recorded in 1995, when it represented 3.5% of total consumer spending.

CAR OWNERSHIP

35%
PROPORTION OF HOUSEHOLDS OWNING TWO OR MORE CARS

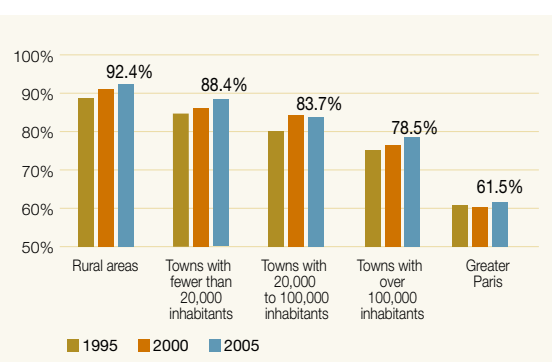
As in previous years, the proportion of households owning at least one vehicle has remained stable at 80%, while the proportion of households owning two or more cars has grown steadily, accounting for 35% of the total in 2005, compared with 26% in 1990 and 16% in 1980.
Women are the main drivers of 41% of the car fleet.

CAR OWNERSHIP (PERCENTAGE OF HOUSEHOLDS OWNING AT LEAST ONE CAR)

In percent	1980	1985	1990	1995	2000	2005
By socio-professional category						
Farmers	87.3	92.4	95.9	98.9	91.1	100.0
Farm workers	72.6	72.4	74.7	–	–	–
Tradesmen, craftsmen, business owners	91.1	94.3	95.2	89.4	90.6	91.2
Self-employed professionals, executives	93.6	95.0	94.4	85.5	84.6	83.7
Middle management	90.2	92.4	93.3	88.7	90.8	87.6
White collar workers	75.4	75.7	78.3	75.9	77.5	80.9
Blue collar workers	80.4	85.1	87.2	89.7	88.7	89.1
Service employees	57.9	51,5	59.3	–	–	–
Other working population	91.2	84.8	90.2	–	–	–
Non-working population	39.6	48.9	54.6	65.8	70.9	72.8
of which retired persons	–	–	59.4	70.9	76.0	76.2
Based on area of residence						
Rural areas	71.7	77.8	82.1	88.6	91.1	92.4
Towns with fewer than 20,000 inhabitants	69.6	75.0	76.6	84.7	86.1	88.4
Towns with 20,000 to 100,000 inhabitants	72.3	73.9	77.3	80.0	84.2	83.7
Towns with over 100,000 inhabitants	69.5	73.5	74.2	75.1	76.6	78.5
Greater Paris	69.3	71.7	77.0	60.8	60.4	61.5
Paris intra-muros	48.8	48.5	47.3			
Based on location of residence						
Town center	–	–	–	67.6	69.4	69.2
Suburb	–	–	–	79.3	80.5	80.9
Semi-rural area	–	–	–	88.5	89.8	91.2
Rural area	–	–	–	85.3	90.4	92.6
Age of household head						
Under 25	–	–	–	51.2	49.3	63.3
25-34	–	–	–	85.1	82.4	82.3
35-44	–	–	–	86.7	86.3	87.5
45-54	–	–	–	87.5	87.4	86.1
55-64	–	–	–	84.9	87.0	86.7
Over 65	–	–	–	61.9	69.0	70.8
COMBINED	**69.3**	**73.4**	**76.5**	**78.4**	**80.3**	**81.2**
Vehicles of which women are the main drivers	–	–	–	–	40.4	40.7

Source: INSEE up to 1993, Sofres as of 1994.

Car ownership based on area of residence
Rural areas



The car ownership rate is the proportion of households that own at least one vehicle, expressed as a percentage.
Car ownership is largely dependent on the household's revenues, the age of the head of the household, the socio-professional category, where they live and the number of people in the household.
- **Car ownership is very high among households in rural and semi-rural areas, i.e. rural areas located close to towns.**
- **In town centers and in towns with over 100,000 inhabitants, the car ownership rate has not declined.**
- **The rate of car ownership among older households is increasing.**
- **Rural households and households in cities with a population of fewer than 20,000 people are more likely to own two or more vehicles.**

PERSONAL VEHICLES IN USE

76% AND 55%
RESPECTIVE PERCENTAGES OF VEHICLES USED DAILY–OR NEAR DAILY–FOR COMMUTING

More than two-thirds of the private vehicle fleet are French makes.
Fifty-one percent are fueled by gasoline and 49% are diesel-powered.
The average kilometers on the odometer continued to rise in 2005, reaching 100,000 kilometers, i.e. 30,000 kilometers more than in 1990.

VEHICLE FLEET (OWNED, LEASED OR LOANED)

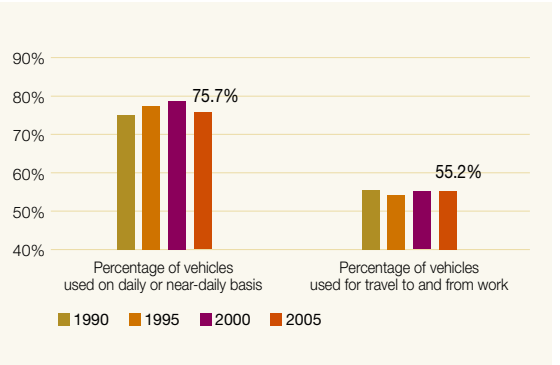
	Unit	1980	1990	1995	2000	2005
Total fleet	**million**	**16.7**	**23.0**	**25.1**	**27.4**	**31.0**
Average vehicle age	years	5.8	5.8	6.6	7.3	7.7
Breakdown by make						
Renault	%	36.2	33.3	33.3	33.3	30.2
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4
Foreign makes	%	16.7	28.4	30.5	31.4	33.2
Breakdown by power category for tax purposes						
2–3 hp (1)	%	12.3	3.4	1.6	0.7	–
4–5 hp	%	23.2	38.4	38.9	40.5	43.3
6–7 hp	%	47.0	47.1	48.6	50.0	46.6
8 hp and above	%	17.5	12.8	10.9	8.8	10.1
Breakdown by vehicle range						
Low range	%	–	39.4	43.4	45.1	44.5
Low-mid range	%	–	20.8	24.3	27.3	32.2
High-mid range	%	–	26.0	22.2	19.9	16.2
Premium range	%	–	8.7	7.0	7.0	5.7
Other	%	–	5.1	3.2	0.8	1.4
Percentage of vehicles purchased new	**%**	**55.7**	**50.4**	**45.2**	**43.9**	**40.1**
Breakdown by type of fuel used						
Premium unleaded	%	–	15.5	38.4	49.1	
Premium leaded – AVSR (anti-valve seat recession additive)	%	–	62.9	28.8	11.9	51.1
Regular gasoline	%	–	4.1	1.3	–	
LPG–CNG	%	–	0.1	0.0	0.7	
Diesel	%	–	17.4	30.9	38.1	48.9
Average kilometers on odometer	**Km**	**–**	**69,500**	**84,080**	**93,140**	**99,460**
Percentage of vehicles used on daily or near-daily basis	%	–	75.1	77.4	78,7	75,7
Percentage of vehicles used for travel to and from work	%	–	55.4	54.3	55,1	55,2

(1) Starting in 2003, 2 to 3 hp vehicles are included in the 4 to 5 hp category.

Source: Sofres survey data processed by CCFA and Inrets.

An annual Sofres survey gives a clear picture of the cars owned or available to households in France.
Most of these vehicles are passenger cars, but light commercial vehicles account for about 5% of the total fleet, whose numbers are still increasing.
After rising throughout the 1990s, the average age of a vehicle tended to stabilize between 2000 and 2002 as the economic environment improved. It is now rising again, reaching 7.7 years in 2005.
The most common power ratings were in the 4 to 7 hp categories. Low and low-mid range cars have become more popular in recent years, representing respectively 45% and 32% of the total fleet in 2005, to the detriment of high mid-range models, whose share is 16%.

Vehicle use



AUTOMOBILE TRAFFIC

88%
OF INLAND TRANSPORTATION TOOK PLACE BY ROAD IN 2005

81%
OF INLAND GROUND TRANSPORTATION OF GOODS TOOK PLACE BY ROAD HAULAGE IN 2005

Automobile traffic increased by an annual average of 2.6% between 1980 and 2000, and by a mild 0.5% on average since 2001. In 2005, the slowdown in economic growth, coupled with ongoing high fuel prices, drove automobile traffic down 0.7% to its 2003 level.

The average number of kilometers covered per year by passenger cars has fluctuated between 13,000 and 14,500 kilometers since 1990 and was down for the fourth year in a row in 2005.

Owing to the decrease in automobile traffic and in consumption per vehicle, road vehicle fuel consumption contracted 1% in 2005, taking it to just above the 2000 level.

Fuel consumption, which includes the consumption of foreign vehicles in France, was supported by growth in transit traffic of heavy trucks. However, their contribution was less significant than in 2004.

TRAFFIC STATISTICS

	Unit	1980	1990	2000	2004	2005	% change 2005/1980	% average annual 2005/1980	% average annual 2005/2004
Annual average no. of vehicles	**thousands of vehicles**	**21,791**	**28,109**	**33,452**	**35,834**	**36,169**	**+66**	**+2.0**	**+0.9**
Passenger cars		18,603	23,280	27,770	29,730	30,000	+61	+1.9	+0.9
of which: gasoline		17,793	19,760	18,150	16,571	16,031	–10	–0.4	–3.3
diesel		810	3,520	9,620	13,160	13,969	+1,625	+12.1	+6.2
Light commercial vehicles (LCV)		2,650	4,223	5,055	5,465	5,530	+109	+3.0	+1.2
of which: gasoline		1,994	2,279	1,299	1,058	997	–50	–2.7	–5.8
diesel		656	1,944	3,756	4,408	4,534	+591	+8.0	+2.9
Heavy trucks (> 5t)		481	538	547	557	556	+16	+0.6	–0.1
Coaches and buses		57	69	80	82	83	+45	+1.5	+0.6
Average kilometers per year	thousands of km								
Passenger cars		12.8	13.6	13.8	13.6	13.3	+4	+0.1	–2.3
of which: gasoline		12.2	12.1	11.1	10.5	10.2	–16	–0.7	–2.5
diesel		25.8	22.2	18.9	17.4	16.7	–35	–1.7	–4.0
Light commercial vehicles (LCV)		14.5	15.9	15.9	16.4	16.5	+13	+0.5	+0.2
of which: gasoline		12.4	11.6	8.5	8.4	8.2	–34	–1.6	–2.3
diesel		20.1	20.6	18.4	18.3	18.3	–9	–0.4	–0.4
Heavy trucks (> 5t)		35.6	36.2	48.4	49.3	48.9	+37	+1.3	–0.8
Coaches and buses		31.6	31.0	29.7	29.9	30.6	–3	–0.1	+2.4
Consumption per vehicle	liters/100 km								
Passenger cars: gasoline		9.40	8.70	8.07	7.70	7.67	–18	–0.8	–0.4
Passenger cars: diesel		8.60	6.90	6.67	6.48	6.43	–25	–1.2	–0.8
LCV: gasoline		10.00	9.20	9.51	9.11	9.08	–9	–0.4	–0.4
LCV: diesel		12.40	10.50	9.72	9.49	9.45	–24	–1.1	–0.5
Heavy trucks: diesel		34.90	34.40	37.69	36.53	36.54	+5	+0.2	+0.0
Buses and coaches: diesel		40.00	42.70	32.60	31.48	31.39	–22	–1.0	–0.3
Fuel consumption (all road transportation)	millions of liters								
Gasoline		24,696	25,292	18,954	15,898	15,005	–39	–2.0	–5.6
Diesel		11,532	19,438	32,355	36,453	36,794	+219	+4.8	+0.9
TOTAL TRAFFIC	**billions of veh./km**	**320**	**436**	**526**	**560**	**556**	**+74**	**+2.2**	**–0.7**
of which: passenger cars and light commercial vehicles		290	403	463	493	489	+69	+2.1	–0.9
ROAD TRAFFIC									
Passenger car users	billions of pass./km	452.5	585.6	699.6	736.9	727.4	+61	+1.9	–1.3
Coach and bus users	billions of pass./km	36.0	41.3	43.0	44.0	44.1	+23	+0.8	+0.2
Goods transportation	billions of t/km	116.8	193.9	266.5	295.6	299.7	+157	+3.8	+1.4

Source: Transportation Accounts, INSEE DAEI/SES.

Automobile traffic is estimated by comparing vehicle counts on national, regional, local and urban roads with the average number of kilometers covered per year by the vehicles in use and fuel consumption data.

In 2005, the number of vehicles on the road rose by 0.9%. The percentage of light vehicles with diesel engines further increased, to 52%.

Road vehicle fuel consumption shrank 1% in 2005. The increase in the number of vehicles on the road was amply offset by a decline in average unit consumption—due to changes in driving behavior and auto improvements—and in the average number of kilometers driven per year.

According to the *Observatoire de l'Energie,* energy consumption for road transportation was less than 43 million tonnes of oil equivalent in 2005, or more than 15% of total primary energy consumption in France.

VEHICLE SALES AND REPAIRS

€86 BILLION 2005 FRENCH MOTOR VEHICLE REVENUE, INCLUDING VAT, ACCORDING TO INSEE

In France, motor vehicles are sold and repaired through dealership networks, totaling 16,000 outlets, including around 11,000 for French makes.
Motor vehicle sales generated revenue of €86 billion in 2005, an increase of 3.9% that reflects the rise in new vehicle registrations.

VEHICLE SALE AND REPAIR REVENUES IN € BILLIONS, INCLUDING VAT

Activity	2000	2001	2002	2003	2004	2005	Change 2005/2004
Automobile sales	71.7	76.9	77.9	77.7	83.3	86.5	3.9%
Automobile maintenance and repairs	16.2	17.1	18.1	18.6	19.7	20.3	3.0%
Retail automotive equipment sales	4.9	4.9	5.0	5.2	5.3	5,4	2.0%
Motorcycle sales and repairs	3.4	3.6	3.6	3.7	3.9	4.0	3.7%
Retail fuel sales	10.2	10.5	10.8	11.2	11.6	12.5	7.5%
TOTAL	**106.4**	**113.0**	**115.3**	**116.5**	**123.7**	**128.7**	**4.0%**

Source: INSEE - Trade accounts: The results are provisional.

VEHICLE SALES NETWORKS IN FRANCE

Make	Primary dealerships
Light vehicles at January 1, 2005	
Renault	755
Peugeot	451
Citroën	348
French makes	1,554
Ford	345
Opel	302
Fiat	225
Volkswagen	367
BMW	188
Mercedes-Benz	151
Japanese makes	1,189
South Korean makes	374
Other makes	1,586
TOTAL	**6,281**

Sources: CNPA, CCFA.

Make	Primary dealerships	Secondary dealerships (agents)
Heavy trucks		
Renault Trucks	147	339
Volvo Trucks	12	118
Mercedes-Benz	82	74
Iveco	50	77
Scania	48	57
DAF Trucks	32	42
MAN	28	59
TOTAL	**399**	**766**

Source: CNPA, Le commerce et la réparation de véhicules industriels en France, *March 2006 edition, and CCFA.*

Vehicles require special care throughout their service life. This care includes continuous supervision whenever and wherever necessary with optimum servicing and, as necessary, repairs to maintain the vehicle's initial qualities.
Vehicle manufacturers and official dealers and repair specialists thus work closely to provide maintenance and repairs. They also cooperate to ensure warranty service, driver safety, environmental protection, spare parts availability and information about technical improvements.
To ensure a link between sales and customer support, dealer networks are based on carefully selected distributors and repair specialists capable of meeting make and product requirements.

AUTOMOTIVE OEMS AND SUPPLIERS

NO. 1

THE FRENCH AUTOMOTIVE INDUSTRY IS THE LARGEST CUSTOMER OF SEVERAL MAJOR INDUSTRIAL SECTORS, SUCH AS PLASTICS, INDUSTRIAL RUBBER AND INDUSTRIAL METALWORKING SERVICES

French automobile manufacturing stimulates the growth of suppliers and the French economy as a whole. The industry drives the OEM and supplier sectors, such as plastics, industrial rubber, casting and industrial metalworking services.

The French automobile manufacturing sector ranks fifth in the world and second in Europe, while the French OEM industry in the broad sense ranks fourth in the world and second in Europe.

JOBS CREATED BY AUTOMOBILE MANUFACTURING IN SUPPLIER SECTORS IN 2002

Activity	Workforce (including temporary workers)
Industrial metalworking services	65,000
Bearings	6,000
Casting	20,000
Rubber	17,000
Plastics	42,000
OEMs	130,000
Tires	27,000
Glass	3,000
Other (batteries, radios)	5,000
TOTAL	**315,000**

Source: SESSI.

A variety of participants of different size, business and rank contribute to automobile manufacturing. A wide array of partnership solutions are also deployed, as shown by studies conducted by the Service des Etudes et des Statistiques Industrielles (SESSI) on the automotive supplier chain. The automotive industry comprises automobile manufacturing and suppliers.

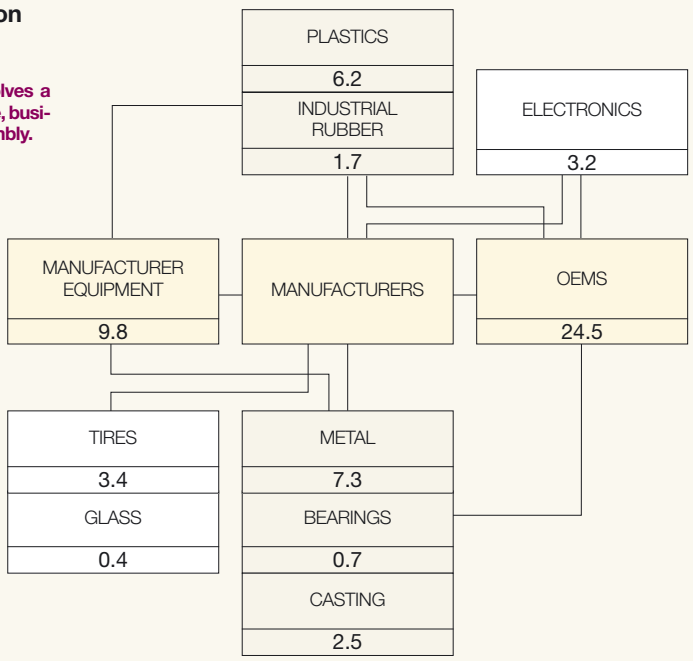
In recent years, outsourcing has meant increasing reliance on suppliers whose services represent a large and growing proportion of the total cost of vehicle manufacture.

According to SESSI, the French automotive industry, which leverages the French industrial base, made purchases of nearly €59 billion from its suppliers in France in 2004. It accounts for more than half of the engineered plastics parts business, and around half of industrial rubber markets, the casting business, and industrial metalworking services, which include cutting, stamping, industrial mechanics, machining, forging, drop forging, die forging, and metal coatings. When expressed in jobs, these purchases highlight the automotive industry's significant contribution to industry and the French economy.

FRENCH SUPPLIER CHAIN ACCORDING TO SESSI

Invoicing totaled €58.9 billion in 2004

Any equipment system project involves a variety of participants of different size, business and rank, from design to assembly.

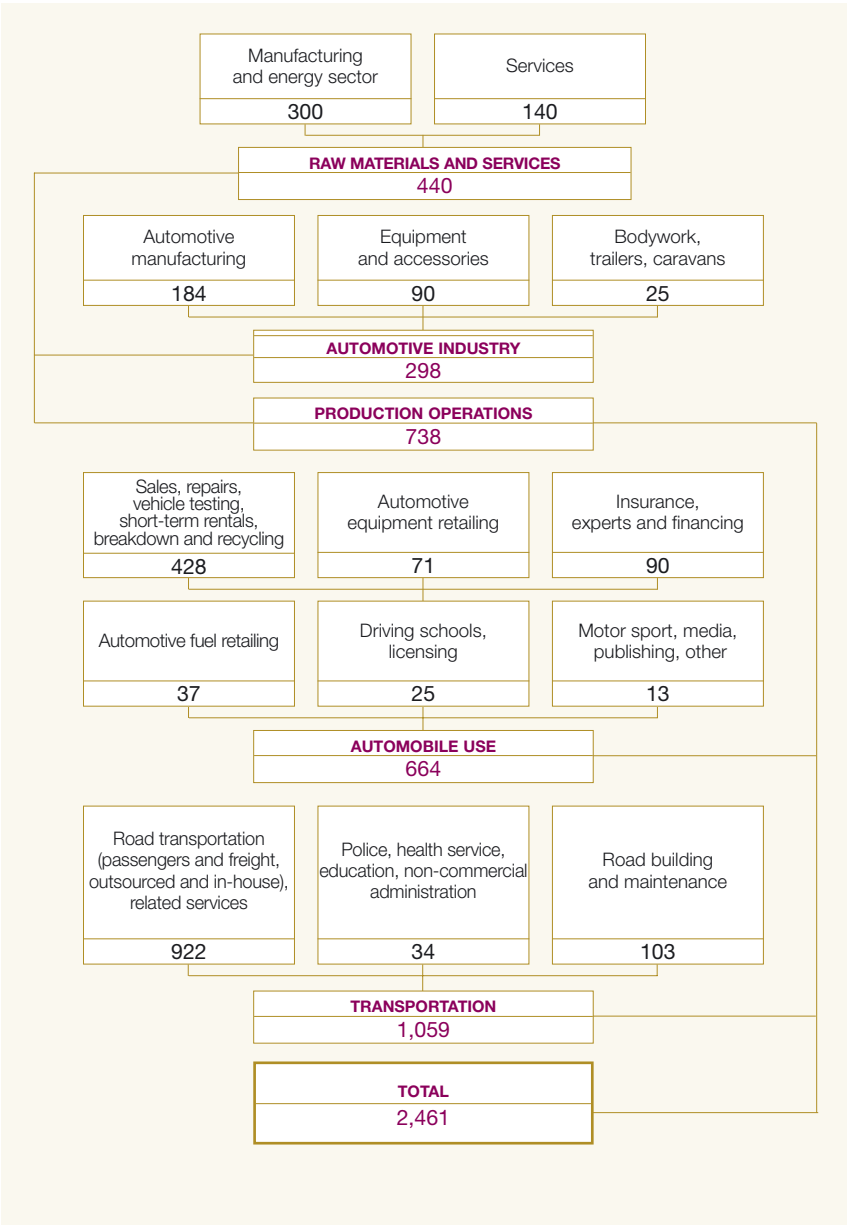


EMPLOYMENT

10%
OF FRENCH PEOPLE IN EMPLOYMENT WORK IN THE AUTOMOTIVE INDUSTRY (DIRECT AND INDIRECT JOBS)

In the broadest sense, automobiles provided work for close to 2.5 million people, representing 10% of France's employed working population, in 2005. The automotive industry alone directly employed 298,000 people, representing 10% of all employment in the manufacturing and energy sector.

Jobs related directly or indirectly to the automobile industry in 2005
In thousand employees



Sources: CCFA, CNPA, SESSI, INSEE, SESP, URF and USIRF.

The driving force behind industrial output in France over the past several years, the automotive industry and its suppliers directly and indirectly employed 740,000 people.
Vehicle usage provided jobs for more than 660,000 people, particularly in the areas of vehicle-related services (sales, repairs, automotive equipment retailing), fuel and recycling (oil recovery and car breakers).
The road transportation (passenger and freight) sector and its related infrastructure employed more than 1 million people. These jobs cover both outsourced and in-house transportation operations.
In the past, most jobs in the automotive industry (including automotive equipment) were located in the Greater Paris area. The industry has since become more decentralized, but one-sixth of employees are still based in the Paris region.
The other main automotive regions are Nord-Pas-de-Calais (nearly 12%), Franche-Comté (more than 10%), Upper and Lower Normandy (nearly 10%), Rhône-Alpes and Lorraine (8% each), and Alsace (nearly 7%).

Statistics 2006 Edition

Comité des Constructeurs Français d'Automobiles

PRODUCTION

Each country's production figures are based on nationally reported data.
Double counting is eliminated in regional totals.

PASSENGER CAR

In units	1980	1990	2000	2001 (2)	2002	2003	2004	2005
EUROPE	**11,983,548**	**15,231,409**	**17,407,047**	**17,373,368**	**17,237,095**	**17,236,606**	**17,829,721**	**17,636,131**
WESTERN EUROPE	10,401,320	13,061,853	14,778,879	14,938,604	14,741,442	14,602,409	14,664,891	14,178,455
Germany	3,520,934	4,660,657	5,131,918	5,301,189	5,123,238	5,145,403	5,192,101	5,350,187
Belgium	882,001	1,160,412	912,233	1,058,656	936,903	791,703	857,119	895,788
Spain	1,028,813	1,679,301	2,366,359	2,211,172	2,266,902	2,399,374	2,402,501	2,098,168
France (1)	**2,938,581**	**3,294,815**	**2,879,810**	**3,181,549**	**3,292,797**	**3,220,329**	**3,227,416**	**3,112,961**
Italy	1,445,221	1,874,672	1,422,284	1,271,780	1,125,769	1,026,454	833,578	725,528
Netherlands	80,779	121,300	215,085	189,261	182,368	163,080	187,600	115,121
Portugal	61,000	60,221	178,509	177,357	182,573	165,576	150,781	137,602
United Kingdom	923,744	1,295,611	1,641,452	1,492,365	1,629,934	1,657,558	1,647,246	1,596,296
Sweden	235,320	335,853	259,959	251,035	237,975	280,394	290,383	288,659
CENTRAL AND EASTERN EUROPE	1,582,228	2,002,000	2,330,692	2,259,421	2,291,455	2,340,081	2,717,678	3,004,013
Turkey	31,529	167,556	297,476	175,343	204,198	294,116	447,152	453,663
NORTH AND SOUTH AMERICA	**8,663,060**	**8,450,862**	**10,022,089**	**8,876,330**	**9,019,507**	**8,267,040**	**8,566,853**	**8,956,858**
NAFTA	7,526,658	7,747,823	8,371,806	7,154,687	7,347,916	6,624,692	6,468,454	6,667,310
of which: Canada	846,777	1,072,281	1,550,500	1,274,853	1,369,042	1,340,175	1,335,516	1,356,198
United States	6,376,825	6,077,449	5,542,217	4,879,119	5,018,777	4,510,469	4,229,625	4,321,272
Mexico	303,056	598,093	1,279,089	1,000,715	960,097	774,048	903,313	989,840
SOUTH AMERICA	1,136,402	703,039	1,650,283	1,721,643	1,671,591	1,642,348	2,098,399	2,289,548
of which: Argentina	218,516	81,107	238,921	169,580	111,340	109,364	171,400	182,761
Brazil	977,697	663,097	1,351,998	1,501,586	1,520,285	1,505,139	1,862,780	2,009,494
ASIA-PACIFIC	**8,796,971**	**11,910,333**	**13,573,073**	**13,325,542**	**14,852,099**	**16,197,676**	**17,870,039**	**19,096,260**
of which: South Korea	55,000	986,751	2,602,008	2,471,444	2,651,273	2,767,716	3,122,600	3,357,094
India	30,538	176,015	517,957	654,557	703,948	907,968	1,178,354	1,264,000
Japan	7,038,108	9,947,972	8,359,434	8,117,563	8,618,354	8,478,328	8,720,385	9,016,375
AFRICA	**277,058**	**209,603**	**213,444**	**250,648**	**249,693**	**267,344**	**287,655**	**319,598**
of which: South Africa	277,058	209,603	230,577	270,538	276,499	291,249	300,963	324,875
TOTAL	**29,720,637**	**35,802,207**	**41,215,653**	**39,825,888**	**41,358,394**	**41,968,666**	**44,554,268**	**46,008,847**

COMMERCIAL VEHICLES

In units	1980	1990	2000	2001 (2)	2002	2003	2004	2005
EUROPE	**2,563,596**	**2,688,509**	**2,783,468**	**2,670,196**	**2,585,346**	**2,763,680**	**3,004,979**	**3,165,337**
WESTERN EUROPE	1,663,080	1,671,915	2,326,653	2,280,328	2,129,663	2,175,843	2,186,349	2,261,877
Germany	357,619	315,895	394,697	390,488	346,071	361,226	377,853	407,523
Belgium	47,029	91,784	121,061	128,601	120,286	112,680	43,154	33,177
Spain	152,846	374,049	666,515	638,716	588,337	630,452	609,673	654,332
France (1)	**439,852**	**474,178**	**468,551**	**446,869**	**409,073**	**399,737**	**438,574**	**436,047**
Italy	166,635	246,178	316,031	307,916	301,312	295,177	308,527	312,824
Netherlands	32,102	29,832	52,234	49,682	48,923	52,201	59,903	65,627
Portugal	58,000	77,466	68,215	62,362	68,259	73,785	75,947	81,533
United Kingdom	389,170	270,133	172,442	192,873	193,084	188,871	209,293	206,753
Sweden	63,080	74,415	41,384	38,112	38,218	42,638	49,887	49,919
CENTRAL AND EASTERN EUROPE	900,516	975,000	323,203	294,526	313,316	348,599	442,374	478,031
Turkey	19,352	41,594	133,471	95,342	142,367	239,238	376,256	425,429
NORTH AND SOUTH AMERICA	**2,599,948**	**5,032,605**	**9,761,798**	**9,037,355**	**9,698,189**	**10,013,272**	**10,380,452**	**10,367,633**
NAFTA	2,349,318	4,775,818	9,325,214	8,643,752	9,365,773	9,618,588	9,809,628	9,672,368
of which: Canada	527,522	850,566	1,411,136	1,257,889	1,260,395	1,212,687	1,376,020	1,332,165
United States	1,634,846	3,702,787	7,257,640	6,545,570	7,260,805	7,604,502	7,759,762	7,659,640
Mexico	186,950	222,465	656,438	840,293	844,573	801,399	673,846	680,563
SOUTH AMERICA	250,630	256,787	436,584	393,603	332,416	394,684	570,824	695,265
of which: Argentina	63,153	5,337	100,711	65,978	48,061	59,812	89,002	136,994
Brazil	187,477	251,450	329,519	315,651	271,245	322,652	454,447	518,806
ASIA-PACIFIC	**4,344,363**	**4,492,406**	**4,497,938**	**4,628,880**	**5,223,951**	**5,789,018**	**6,421,509**	**6,720,927**
of which: South Korea	65,012	334,879	512,990	474,885	496,311	410,154	346,864	342,256
India	83,379	186,640	283,403	160,054	190,848	253,555	332,803	362,755
Japan	4,004,776	3,538,824	1,781,362	1,659,628	1,638,961	1,807,890	1,791,133	1,782,924
AFRICA	**127,698**	**125,174**	**115,305**	**142,606**	**128,438**	**128,589**	**135,012**	**202,664**
of which: South Africa	127,698	125,174	126,787	136,498	127,942	130,086	154,739	200,396
TOTAL	**9,675,970**	**12,399,000**	**17,158,509**	**16,479,037**	**17,635,924**	**18,694,559**	**19,941,952**	**20,456,561**

(1) As of 1996, figures are based on the number of vehicles assembled in France by French manufacturers.
(2) As of 2001, some passenger cars were reclassified as commercial vehicles.
Source: CCFA, OICA.

PRODUCTION

WORLD MOTOR VEHICLE PRODUCTION BY MANUFACTURER AND ECONOMIC AREA, 2005

In thousands Economic area/manufacturer	North America (NAFTA)	South America	European Union 15 countries	Other European countries and Turkey	Japan	South Korea	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**3,492**	**1,577**	**11,501**	**1,889**	**130**	**118**	**1,150**	**19,858**
BMW	125		1,154				44	1,323
Fiat-Iveco-Irisbus (1)		506	1,028	444			60	2,038
MAN			73	3				76
DaimlerChrysler	2,980	74	1,517	14	130		101	4,816
Porsche			98					98
PSA Peugeot Citroën		162	2,776	47			390	3,375
Renault-Dacia-Samsung	15	128	1,803	541		118	12	2,617
MG Rover			29					29
Scania	1	17	42					60
Volkswagen	301	680	2,848	840			543	5,211
Volvo	70	10	134	1				215
American manufacturers	**8,373**	**1,050**	**3,882**	**533**	**0**	**647**	**1,382**	**15,868**
Ford	3,315	377	2,170	276			360	6,498
General Motors (GM Daewoo)	4,844	674	1,655	257		647	1,022	9,098
Navistar	122							122
Paccar	92		58					150
Japanese manufacturers	**4,491**	**235**	**1,224**	**311**	**10,666**	**0**	**4,284**	**21,211**
Daihatsu			7		725		280	1,011
Fuji Heavy (Subaru)	122				469			592
Hino				0	97			97
Honda	1,384	64	186	12	1,262		529	3,436
Isuzu	5	24		3	210		268	511
Mazda	75	8			865		340	1,288
Mitsubishi	88	19	68		665		491	1,331
Nissan	1,199		509		1,451		336	3,494
Nissan Diesel					41			41
Suzuki-Maruti			10	136	1,091		836	2,072
Toyota	1,618	120	445	160	3,790		1,205	7,338
South Korean manufacturers	**0**	**11**	**0**	**122**	**0**	**2,925**	**171**	**3,229**
Hyundai-Kia		11		122		2,789	169	3,091
Ssangyong						136	2	138
All manufacturers	**16,340**	**2,985**	**16,440**	**4,361**	**10,799**	**3,699**	**11,841**	**66,465**
As a % of total production								
European manufacturers	**18%**	**8%**	**58%**	**10%**	**1%**	**1%**	**6%**	**100%**
BMW	9%		87%				3%	100%
Fiat-Iveco-Irisbus (1)		25%	50%	22%			3%	100%
MAN			96%	4%				100%
DaimlerChrysler	62%	2%	31%	0%	3%		2%	100%
Porsche			100%					100%
PSA Peugeot Citroën		5%	82%	1%			12%	100%
Renault-Dacia-Samsung	1%	5%	69%	21%		5%	0%	100%
MG Rover			100%					100%
Scania	1%	29%	71%					100%
Volkswagen	6%	13%	55%	16%			10%	100%
Volvo	33%	5%	62%	0%				100%
American manufacturers	**53%**	**7%**	**24%**	**3%**	**0%**	**4%**	**9%**	**100%**
Ford	51%	6%	33%	4%			6%	100%
General Motors (GM Daewoo)	53%	7%	18%	3%		7%	11%	100%
Navistar	100%							100%
Paccar	62%		38%					100%
Japanese manufacturers	**21%**	**1%**	**6%**	**1%**	**50%**	**0%**	**20%**	**100%**
Daihatsu			1%		72%		28%	100%
Fuji Heavy (Subaru)	21%				79%			100%
Hino				0%	100%			100%
Honda	40%	2%	5%	0%	37%		15%	100%
Isuzu	1%	5%		1%	41%		52%	100%
Mazda	6%	1%			67%		26%	100%
Mitsubishi	7%	1%	5%		50%		37%	100%
Nissan	34%		15%		42%		10%	100%
Nissan Diesel					100%			100%
Suzuki-Maruti			0%	7%	53%		40%	100%
Toyota	22%	2%	6%	2%	52%		16%	100%
South Korean manufacturers	**0%**	**0%**	**0%**	**4%**	**0%**	**91%**	**5%**	**100%**
Hyundai-Kia		0%		4%		90%	5%	100%
Ssangyong						98%	2%	100%
All manufacturers	**25%**	**4%**	**25%**	**7%**	**16%**	**6%**	**18%**	**100%**

(1) Not all of Irisbus production is included in Fiat-Iveco's consolidated production.

Source: CCFA, OICA

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	2,426,187	3,349,788	3,378,343	3,341,718	3,252,898	3,236,938	3,266,825	3,319,259
Austria	227,548	288,618	309,427	293,528	279,493	300,121	311,292	307,915
Belgium	399,240	473,506	515,204	488,683	467,569	458,796	484,757	480,088
Denmark	73,774	80,654	112,688	96,173	111,581	96,083	121,491	146,881
Spain	504,051	988,270	1,381,515	1,437,833	1,331,864	1,383,098	1,517,286	1,528,877
Finland	103,167	139,095	134,646	109,487	116,877	147,222	142,439	147,949
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,254,732**	**2,145,071**	**2,009,246**	**2,013,709**	**2,067,789**
Greece	35,700	115,480	290,222	280,214	268,489	257,293	289,691	269,728
Ireland	93,563	82,584	230,989	164,730	156,112	145,223	154,136	171,741
Italy	1,717,432	2,307,055	2,415,600	2,431,332	2,270,444	2,247,365	2,263,693	2,237,272
Luxembourg	21,500	38,422	41,896	42,833	43,403	43,620	48,234	48,517
Norway	95,550	61,901	97,376	91,916	88,721	89,921	115,645	109,907
Netherlands	450,076	502,732	597,640	530,237	510,718	488,845	483,750	465,160
Portugal	58,357	210,924	257,834	255,215	226,092	189,792	197,584	206,488
United Kingdom	1,513,761	2,008,934	2,221,670	2,458,769	2,563,631	2,579,050	2,567,269	2,439,717
Sweden	192,588	229,941	290,529	246,581	254,589	261,206	264,246	274,301
Switzerland	279,764	329,899	316,519	316,641	295,065	270,309	269,385	264,941
European Union (15 countries)	**9,690,146**	**13,125,133**	**14,312,087**	**14,432,065**	**13,998,831**	**13,843,898**	**14,126,402**	**14,111,682**
Europe (17 countries)	**10,065,460**	**13,516,933**	**14,725,982**	**14,840,622**	**14,382,617**	**14,204,128**	**14,511,432**	**14,486,530**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**2,314,000**	**2,271,259**	**2,645,927**	**3,145,116**	**3,364,753**
Canada	948,967	886,217	849,132	868,135	934,057	864,949	819,413	842,322
United States	8,760,937	9,300,678	8,846,625	8,422,625	8,103,229	7,636,539	7,505,932	7,667,066
Mexico	286,000	353,000	603,010	670,444	722,537	691,819	741,617	714,047
Argentina	215,177	77,306	224,950	125,504	59,080	105,550	223,466	290,648
Brazil	793,028	532,791	1,188,818	1,301,393	1,233,708	1,211,572	1,316,697	1,440,696
South Korea	45,972	626,126	1,057,620	1,072,376	1,241,331	1,024,543	884,532	944,451
Japan	2,854,185	5,102,659	4,259,771	4,289,710	4,441,336	4,460,032	4,768,097	4,748,482
Turkey	31,000	215,000	456,696	135,282	94,898	227,276	451,209	438,597
WORLD	**28,500,000**	**34,825,967**	**38,689,767**	**38,587,826**	**38,601,084**	**39,391,218**	**41,573,665**	**43,453,191**

Source: CCFA.

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	175,687	203,389	314,804	296,601	270,567	264,745	283,401	295,627
Austria	21,821	29,211	36,457	32,535	29,864	34,195	39,507	37,678
Belgium	34,478	46,670	66,125	72,969	60,266	62,363	70,093	75,083
Denmark	19,469	23,031	38,108	36,326	36,822	37,403	51,210	64,293
Spain	105,934	249,185	335,684	325,625	305,900	333,107	374,058	430,611
Finland	17,699	32,154	18,128	18,150	18,328	18,829	22,096	19,955
France	**323,291**	**446,983**	**477,204**	**496,263**	**460,937**	**431,446**	**459,851**	**480,122**
Greece	53,500	30,075	25,015	22,832	20,296	20,710	26,284	25,538
Ireland	11,905	28,087	46,261	42,895	38,328	34,477	34,416	41,965
Italy	122,293	159,322	268,057	268,524	307,597	237,844	254,712	246,894
Luxembourg	1,300	2,961	4,642	5,185	5,028	4,772	3,834	4,605
Norway	15,135	23,035	35,618	37,458	28,523	31,327	38,408	42,681
Netherlands	47,926	68,791	114,354	101,449	95,526	90,977	101,455	80,771
Portugal	46,967	71,904	161,045	106,251	84,731	73,362	76,611	71,982
United Kingdom	274,143	293,473	301,523	316,084	324,742	366,106	392,225	388,410
Sweden	19,684	33,133	38,474	35,266	34,576	34,278	37,371	41,807
Switzerland	22,418	28,165	29,345	31,583	26,769	23,809	25,651	26,702
European Union (15 countries)	**1,276,097**	**1,718,369**	**2,245,881**	**2,176,955**	**2,093,508**	**2,044,614**	**2,227,124**	**2,305,341**
Europe (17 countries)	**1,313,650**	**1,769,569**	**2,310,844**	**2,245,996**	**2,148,800**	**2,099,750**	**2,291,183**	**2,374,724**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**481,924**	**519,875**	**628,479**	**776,898**	**848,368**
Canada	335,827	416,041	736,951	729,343	797,766	760,061	755,390	787,820
United States	2,476,777	4,845,360	8,965,048	9,049,753	9,035,423	9,356,961	9,792,641	9,777,263
Mexico	166,000	198,000	302,944	273,695	297,026	311,704	381,628	452,600
Argentina	59,881	17,481	81,995	51,198	23,265	50,090	88,495	112,042
Brazil	187,233	180,000	302,288	300,668	244,911	217,038	262,078	273,948
South Korea	58,502	328,151	372,840	386,289	397,955	324,269	244,832	244,332
Japan	2,161,305	2,674,834	1,703,114	1,616,861	1,350,739	1,368,211	1,085,219	1,103,552
Turkey	19,000	43,015	137,573	51,733	64,153	134,123	241,192	276,615
WORLD	**9,150,000**	**13,410,615**	**18,723,143**	**18,706,755**	**19,178,318**	**19,928,000**	**21,040,669**	**21,876,703**

Source: CCFA.

PRODUCTION

PASSENGER CAR PRODUCTION BY ENGINE TYPE, CYLINDER CAPACITY AND COUNTRY

	Gasoline and other, except diesel and electric							Diesel						Electric
In units	TOTAL	1,000 and –	1,001 to 1,500	1,501 to 2,000	2,001 to 2,500	2,501 and +	Not determined	TOTAL	1,500 and –	1,501 to 2,000	2,001 to 2,500	2,501 and +	Not determined	
Germany														
1990	3,998,650	3,747	779,288	2,521,197	338,965	355,453	–	662,007	11,986	504,025	117,413	28,583	–	–
2004	2,790,211	32,674	479,333	1,310,621	263,694	703,889	–	2,401,890	159,447	1,605,098	387,519	249,826	–	–
2005	**2,793,220**	**27,180**	**444,532**	**1,371,659**	**214,736**	**735,113**	**–**	**2,556,967**	**145,589**	**1,872,352**	**279,045**	**259,981**	**–**	**–**
Belgium														
1990	1,003,028	–	207,398	727,812	65,542	2,276	–	157,384	2,764	126,394	28,226	–	–	–
2004	462,807	8,301	71,367	221,299	157,846	3,994	–	394,312	2,840	347,734	43,738	–	–	–
2005	**433,382**	**1,566**	**52,031**	**245,754**	**130,353**	**3,678**	**–**	**461,727**	**11,169**	**397,407**	**53,151**	**–**	**–**	**–**
Spain														
1990	1,529,080	25,908	329,437	12,739	–	–	1,160,996	150,221	18,753	42,155	–	–	89,313	–
2004	2,153,908	7,799	326,982	309,639	13,481	8,189	1,487,818	294,833	72,144	87,407	160	–	135,122	–
2005	**1,700,253**		**211,968**	**256,116**	**–**	**7,346**	**1,224,823**	**481,923**	**183,069**	**188,539**	**26,613**	**2,331**	**81,371**	**–**
France														
1990	2,490,808	259,104	1,315,307	853,195	21,266	41,936	–	804,007	50,851	547,002	206,154	–	–	–
2004	2,747,734	39,556	1,297,655	1,368,384	25,778	15,519	842	2,420,571	996,036	1,310,136	105,374	9,022	3	25
2005	**2,849,744**	**92,528**	**1,282,385**	**1,365,143**	**33,513**	**21,118**	**55,057**	**2,328,108**	**905,006**	**1,324,650**	**81,932**	**16,520**	**–**	**–**
Italy														
1990	1,756,118	685,385	644,895	402,929	38	20,614	2,257	118,427	25,299	75,891	17,169	–	68	127
2004	434,145	–	311,074	98,514	6,590	17,967	–	399,433	168,289	215,238	15,906	–	–	–
2005	**327,042**	**–**	**237,422**	**66,406**	**7,753**	**15,461**	**–**	**398,486**	**195,711**	**196,059**	**6,716**	**–**	**–**	**–**
United Kingdom														
1990	1,173,660	56,860	489,355	449,008	–	68,744	109,693	121,951	–	93,644	8,610	–	19,697	–
2004	1,182,319	15,471	350,279	597,703	106,711	112,141	14	462,376	102,658	289,104	40,514	30,100	–	–
2005	**1,129,504**	**6,111**	**346,340**	**564,011**	**81,747**	**131,287**	**8**	**464,597**	**123,058**	**216,984**	**62,986**	**61,569**	**–**	**–**

DIESEL PASSENGER CAR PRODUCTION BY MAKE AND COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
French manufacturers								
Citroën	33,996	213,010	453,604	507,177	557,364	550,382	578,528	546,021
Peugeot	133,332	334,469	593,349	673,593	705,481	737,299	775,861	805,490
PSA Peugeot Citroën (1)	167,328	547,479	1,046,953	1,180,770	1,262,845	1,287,681	1,354,389	1,351,511
Renault	69,335	256,528	601,495	730,934	823,963	937,656	1,059,944	966,687
Dacia					0	3,884	3,681	9,824
Renault Samsung Motors						0	2,557	86
Renault-Dacia-Samsung					823,963	941,540	1,066,182	976,597
TOTAL (2)	**236,663**	**804,007**	**1,648,448**	**1,911,704**	**2,086,808**	**2,229,221**	**2,420,571**	**2,328,108**
Total gasoline + diesel	2,938,581	3,294,815	4,598,617	4,803,519	4,958,765	5,045,070	5,168,330	5,177,852
of which diesel	8.1%	24.4%	35.8%	39.8%	42.1%	44.2%	46.8%	45.0%
Germany								
Mercedes (2)	216,053	141,547	278,772	347,750	375,081	379,390	371,100	365,403
Opel	32,742	76,441	288,651	297,528	287,257	312,695	351,370	361,112
Volkswagen/Audi/Seat	211,199	325,767	847,652	968,789	916,343	999,622	1,092,674	1,112,321
Ford	5,344	90,117	179,130	196,486	241,390	290,952	304,714	372,133
BMW	33,520	28,135	194,794	212,869	220,560	233,551	282,032	345,998
TOTAL	**465,788**	**662,007**	**1,788,999**	**2,023,422**	**2,040,631**	**2,216,210**	**2,401,890**	**2,556,967**
Total gasoline + diesel	3,520,934	4,660,657	5,131,918	5,299,704	5,123,238	5,145,403	5,192,101	5,344,098
of which diesel	13.2%	14.2%	34.9%	38.2%	39.8%	43.1%	46.3%	47.8%
Italy								
Alfa Romeo	3,851	11,176	77,532	89,532	96,398	116,376	109,782	92,589
Fiat	76,513	87,985	223,889	183,668	173,744	211,307	235,355	267,801
Lancia		17,679	40,891	32,229	20,202	25,812	49,930	37,932
TOTAL (2)	**80,364**	**117,137**	**342,312**	**305,429**	**290,344**	**353,495**	**395,067**	**398,486**
Total gasoline + diesel	1,445,221	1,874,672	1,422,243	1,271,712	1,125,736	1,026,454	833,578	705,167
of which diesel	5.6%	6.2%	24.1%	24.0%	25.8%	34.4%	47.4%	56.5%

(1) Including Talbot up to 1985.
(2) Including others.

Source: CCFA.

PRODUCTION

LIGHT COMMERCIAL VEHICLE AND TRUCK PRODUCTION BY WEIGHT, MANUFACTURER AND COUNTRY IN 2005, EXCLUDING COACHES AND BUSES

In units Manufacturers and countries	GVWR (1) 3.5t to 5t	GVWR +5t to –16t	GVWR 16t and + and road tractors all weights	GVWR 3.5t and +	GVWR +5t
Renault	113,475			113,475	–
Renault Trucks	9,460	13,065	27,700	50,225	40,765
Scania			9,391	9,391	9,391
Etalmobil	24	3		27	3
Total France	**122,959**	**13,068**	**37,091**	**173,118**	**50,159**
DaimlerChrysler	100,234	32,124	77,035	209,393	109,159
MAN			46,475	46,475	46,475
Iveco Magirus			16,267	16,267	16,267
Volkswagen	30,145			30,145	–
Multicar	1,105			1,105	–
Total Germany	**131,484**	**32,124**	**139,777**	**303,385**	**171,901**
MAN-OAF-Steyr		16,145	6,422	22,567	22,567
Total Austria		**16,145**	**6,422**	**22,567**	**22,567**
Ford				0	–
Volvo Trucks		2,824	27,542	30,366	30,366
Other			13	13	13
Total Belgium	**0**	**2,824**	**27,555**	**30,379**	**30,379**
Iveco	43,008	32,016	7,276	82,300	39,292
Other	7			7	0
Total Italy	**43,015**	**32,016**	**7,276**	**82,307**	**39,292**
Ford	7,828			7,828	–
Leyland Trucks (DAF)		9,646	6,631	16,277	16,277
Foden (DAF)			732	732	732
Dennis DSV		16	900	916	916
LDV	7,878			7,878	–
Total United Kingdom	**15,706**	**9,662**	**8,263**	**33,631**	**17,925**
Volvo Trucks			17,903	17,903	17,903
Scania			7,794	7,794	7,794
Total Sweden			**25,697**	**25,697**	**25,697**
DAF			40,528	40,528	40,528
Scania			21,757	21,757	21,757
Other			935	935	935
Total Netherlands			**63,220**	**63,220**	**63,220**
Iveco	25,922	4,345	15,409	45,676	19,754
Nissan Motor Iberica	12,779			12,779	–
Renault Trucks			7,963	7,963	7,963
Total Spain	**38,701**	**4,345**	**23,372**	**66,418**	**27,717**
Light commercial vehicles					
DaimlerChrysler (including FUSO)	105,838	35,076	77,035	217,949	112,111
Iveco	68,930	36,361	38,952	144,243	75,313
MAN	0	16,145	52,897	69,042	69,042
Renault Trucks	9,460	13,065	35,663	58,188	48,728
DAF	0	9,646	47,891	57,537	57,537
Volvo Trucks	0	2,824	45,445	48,269	48,269
Scania	0	0	38,942	38,942	38,942
Light commercial vehicles over 3.5 tonnes					
Renault	113,475	–	–	113,475	–
Volkswagen	30,145	–	–	30,145	–
Nissan	12,779	–	–	12,779	–
Ford	7,828	–	–	7,828	–
Other	11,654	333	2,259	14,246	2,592
TOTAL EUROPEAN UNION (15 COUNTRIES)	**360,109**	**113,450**	**339,084**	**812,643**	**452,534**

(1) GVWR: gross vehicle weight rating.

Source: CCFA.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY AUTOMOBILE MANUFACTURER IN EUROPE

In thousands of units and as a % of total registrations	1985	1990	2000	2001	2002	2003	2004	2005
PSA Peugeot Citroën	1,225	1,719	1,930	2,142	2,163	2,105	2,036	1,985
	11.5%	12.7%	13.1%	14.4%	15.0%	14.8%	14.0%	13.7%
Renault Group	1,135	1,315	1,559	1,576	1,540	1,505	1,489	1,420
	10.7%	9.7%	10.6%	10.6%	10.7%	10.6%	10.3%	9.8%
Fiat Group	1,487	1,854	1,477	1,424	1,177	1,056	1,058	951
	14.0%	13.7%	10.0%	9.6%	8.2%	7.4%	7.3%	6.6%
Ford Group	1,542	1,818	1,590	1,650	1,636	1,563	1,625	1,578
	14.5%	13.5%	10.8%	11.1%	11.4%	11.0%	11.2%	10.9%
General Motors	1,261	1,617	1,799	1,723	1,525	1,505	1,533	1,539
	11.9%	12.0%	12.2%	11.6%	10.6%	10.6%	10.6%	10.6%
Volkswagen Group	1,553	2,120	2,755	2,800	2,649	2,584	2,622	2,743
	14.6%	15.7%	18.7%	18.9%	18.4%	18.2%	18.1%	18.9%
DaimlerChrysler	396	474	909	945	947	922	911	903
	3.7%	3.5%	6.2%	6.4%	6.6%	6.5%	6.3%	6.2%
BMW Group	290	364	499	546	618	627	698	761
	2.7%	2.7%	3.4%	3.7%	4.3%	4.4%	4.8%	5.3%
MG-Rover	411	362	198	161	142	136	113	46
	3.9%	2.7%	1.3%	1.1%	1.0%	1.0%	0.8%	0.3%
Nissan	306	395	392	366	353	398	366	342
	2.9%	2.9%	2.7%	2.5%	2.5%	2.8%	2.5%	2.4%
Toyota-Lexus	273	363	540	551	627	675	725	760
	2.6%	2.7%	3.7%	3.7%	4.4%	4.8%	5.0%	5.2%
Other Japanese makes	563	831	737	626	666	728	816	853
	5.3%	6.1%	5.0%	4.2%	4.6%	5.1%	5.6%	5.9%
Hyundai-Kia	7	18	303	287	297	352	462	530
	0.1%	0.1%	2.1%	1.9%	2.1%	2.5%	3.2%	3.7%
Other makes	162	265	50	43	42	49	58	75
	1.5%	2.0%	0.3%	0.3%	0.3%	0.3%	0.4%	0.5%
TOTAL EUROPE (17 COUNTRIES)	10,611	13,517	14,738	14,841	14,383	14,204	14,511	14,487
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		0.9%	–2.1%	0.7%	–3.1%	–1.2%	2.2%	–0.2%

N.B.: As of 1991, Germany includes the former East Germany.
Automobile manufacturers include the following makes:
PSA Peugeot Citroën = Peugeot + Citroën + Talbot.
Renault Group = Renault + Dacia.
Fiat Group = Alfa Romeo + Fiat + Iveco + Lancia + Ferrari + other.
Ford = Ford Europe + Ford USA + Jaguar + Volvo + Land Rover + other Ford.
General Motors = Opel + Vauxhall + Saab + GM Daewoo + Chevrolet + Pontiac + other.
Volkswagen Group = Volkswagen + Audi + Seat + Skoda + Bentley + Lamborghini.
DaimlerChrysler = Mercedes-Benz + Chrysler + Jeep + Smart + other.
BMW Group = BMW + Mini + Rolls-Royce.
Other Japanese makes: Mazda, Mitsubishi, Subaru, Suzuki, etc.
These scopes are defined on the basis of their situation in 2005.

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY AUTOMOBILE MANUFACTURER IN EUROPE

In thousands of units and as a % of total registrations	1985	1990	2000	2001	2002	2003	2004	2005
PSA Peugeot Citroën	186	251	349	364	348	355	368	370
	16.9%	16.5%	18.1%	19.4%	19.2%	20.0%	18.9%	18.4%
Renault Group	175	278	272	288	288	268	290	296
	15.8%	18.3%	14.1%	15.3%	15.8%	15.1%	14.9%	14.7%
Fiat Group	114	156	262	269	280	237	251	256
	10.3%	10.3%	13.6%	14.3%	15.4%	13.3%	12.9%	12.8%
Ford Group	137	211	206	216	191	211	235	242
	12.4%	13.9%	10.7%	11.5%	10.5%	11.9%	12.1%	12.1%
General Motors	55	81	92	92	118	129	140	146
	5.0%	5.3%	4.8%	4.9%	6.5%	7.3%	7.2%	7.3%
Volkswagen Group	113	134	202	171	149	130	162	189
	10.2%	8.9%	10.5%	9.1%	8.2%	7.3%	8.3%	9.4%
DaimlerChrysler	65	77	176	178	165	152	164	158
	5.9%	5.1%	9.1%	9.5%	9.1%	8.5%	8.4%	7.9%
Nissan	61	105	100	77	68	81	99	101
	5.5%	6.9%	5.2%	4.1%	3.7%	4.6%	5.1%	5.1%
Toyota-Lexus	58	75	66	57	58	61	63	62
	5.2%	4.9%	3.4%	3.0%	3.2%	3.4%	3.3%	3.1%
Other Japanese makes	75	78	120	96	88	87	90	86
	6.8%	5.2%	6.2%	5.1%	4.8%	4.9%	4.6%	4.3%
Hyundai-Kia	1	0	44	35	30	31	38	48
	0.1%	0.0%	2.3%	1.9%	1.6%	1.7%	2.0%	2.4%
Other makes	64	69	42	37	35	35	43	52
	5.8%	4.6%	2.2%	2.0%	1.9%	2.0%	2.2%	2.6%
TOTAL EUROPE (17 COUNTRIES)	1,104	1,516	1,931	1,879	1,818	1,775	1,943	2,004
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		–2.6%	5.6%	–2.7%	–3.3%	–2.4%	9.5%	3.1%

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY AND AUTOMOBILE MANUFACTURER, 2005

In thousands of units and as a % of total registrations	TOTAL	PSA Peugeot Citroën	Citroën	Peugeot	Renault Group	Fiat Group	Volkswagen Group	Ford Group	General Motors	BMW-Mini	Daimler-Chrysler	Japanese makes	South Korean makes
Germany	3,319	189	71	118	169	61	1,030	292	375	291	400	388	103
	100%	5.7%	2.2%	3.6%	5.1%	1.8%	31.0%	8.8%	11.3%	8.8%	12.0%	11.7%	3.1%
Austria	308	29	12	17	19	17	95	24	31	14	15	48	16
	100%	9.5%	4.0%	5.4%	6.2%	5.5%	30.8%	7.9%	10.0%	4.4%	4.9%	15.5%	5.1%
Belgium	480	101	48	53	52	15	90	44	57	27	24	52	15
	100%	21.0%	10.0%	11.0%	10.8%	3.2%	18.8%	9.2%	11.9%	5.7%	5.0%	10.9%	3.0%
Denmark	147	27	11	15	4	6	29	13	12	2	2	39	14
	100%	18.1%	7.7%	10.4%	2.6%	4.1%	19.8%	9.0%	7.9%	1.6%	1.2%	26.3%	9.3%
Spain	1,529	313	163	150	191	51	333	167	162	47	56	132	70
	100%	20.5%	10.7%	9.8%	12.5%	3.3%	21.8%	10.9%	10.6%	3.1%	3.7%	8.7%	4.6%
Finland	148	15	7	9	7	6	26	22	10	3	7	45	6
	100%	10.5%	4.5%	5.9%	4.8%	4.3%	17.7%	14.6%	7.0%	1.9%	4.4%	30.3%	4.2%
France	2,068	633	271	362	534	65	228	124	118	53	76	179	49
	100%	30.6%	13.1%	17.5%	25.8%	3.1%	11.0%	6.0%	5.7%	2.6%	3.7%	8.7%	2.4%
Greece	270	25	13	11	10	13	46	23	29	8	14	67	34
	100%	9.1%	4.9%	4.2%	3.8%	4.9%	16.9%	8.5%	10.7%	2.9%	5.0%	24.7%	12.7%
Ireland	172	13	4	9	11	3	28	25	16	7	5	53	9
	100%	7.7%	2.4%	5.3%	6.4%	1.7%	16.2%	14.7%	9.3%	4.0%	3.1%	30.9%	5.5%
Italy	2,237	225	129	96	143	627	251	198	208	92	133	268	82
	100%	10.1%	5.8%	4.3%	6.4%	28.0%	11.2%	8.9%	9.3%	4.1%	5.9%	12.0%	3.7%
Luxembourg	49	7	4	4	6	2	11	4	3	4	3	5	3
	100%	15.2%	7.2%	8.0%	12.7%	3.6%	22.9%	8.4%	5.3%	7.8%	7.1%	9.4%	6.7%
Netherlands	465	62	22	40	40	19	79	58	57	17	17	79	34
	100%	13.4%	4.8%	8.6%	8.6%	4.0%	17.1%	12.6%	12.3%	3.6%	3.7%	17.1%	7.2%
Portugal	206	37	16	21	29	7	35	18	28	9	11	27	5
	100%	17.8%	7.6%	10.2%	13.8%	3.4%	16.8%	8.7%	13.5%	4.2%	5.5%	13.3%	2.4%
United Kingdom	2,440	244	100	144	175	43	336	458	363	157	107	434	78
	100%	10.0%	4.1%	5.9%	7.2%	1.8%	13.8%	18.8%	14.9%	6.4%	4.4%	17.8%	3.2%
Sweden	274	29	11	18	13	1	48	71	35	10	10	43	13
	100%	10.7%	4.1%	6.5%	4.6%	0.5%	17.4%	26.0%	12.6%	3.8%	3.6%	15.7%	4.7%
European Union (15 countries)	14,112	1,950	883	1,068	1,401	937	2,665	1,542	1,504	740	880	1,860	531
	100%	13.8%	6.3%	7.6%	9.9%	6.6%	18.9%	10.9%	10.7%	5.2%	6.2%	13.2%	3.8%
Norway	110	10	3	7	3	0	25	13	10	4	4	36	5
	100%	8.7%	2.7%	6.0%	2.6%	0.2%	23.0%	12.0%	9.0%	3.8%	3.8%	32.6%	4.2%
Switzerland	265	25	11	14	16	13	53	22	25	17	20	59	13
	100%	9.5%	4.3%	5.2%	6.1%	4.9%	19.9%	8.4%	9.5%	6.2%	7.4%	22.3%	4.8%
EUROPE (17 countries)	14,487	1,985	897	1,088	1,420	951	2,743	1,578	1,539	761	903	1,955	548
	100%	13.7%	6.2%	7.5%	9.8%	6.6%	18.9%	10.9%	10.6%	5.3%	6.2%	13.5%	3.8%
Estonia	20	3	1	1	2	0	3	1	1	0	1	7	1
	100%	13.3%	6.7%	6.6%	8.7%	0.6%	13.9%	7.5%	6.3%	1.8%	4.3%	35.6%	7.5%
Hungary	199	16	6	9	15	6	40	19	35	1	1	61	4
	100%	8.0%	3.2%	4.8%	7.5%	2.9%	20.3%	9.4%	17.5%	0.7%	0.7%	30.8%	2.0%
Latvia	17	1	1	1	1	0	2	1	2	0	1	6	2
	100%	7.6%	3.4%	4.2%	7.3%	1.0%	13.0%	8.4%	9.2%	2.0%	5.8%	34.5%	9.7%
Lithuania	10	1	0	0	1	0	3	1	1	0	0	3	1
	100%	8.3%	4.0%	4.3%	8.7%	1.2%	23.9%	7.2%	8.7%	2.2%	3.3%	28.8%	5.5%
Poland	236	28	13	15	19	25	49	22	31	2	4	49	7
	100%	12.0%	5.6%	6.4%	7.9%	10.6%	20.7%	9.1%	13.2%	0.7%	1.7%	20.6%	3.1%
Czech republic	152	12	5	7	13	3	78	9	7	2	2	13	10
	100%	8.0%	3.4%	4.7%	8.6%	2.2%	51.1%	5.8%	4.4%	1.2%	1.2%	8.8%	6.5%
Slovakia	57	7	3	4	5	2	24	3	5	1	1	8	2
	100%	12.0%	5.1%	6.9%	8.3%	3.5%	41.7%	5.1%	8.3%	1.2%	1.6%	14.0%	3.7%
Slovenia	59	8	4	4	13	3	12	3	8	1	1	6	4
	100%	14.3%	7.1%	7.2%	22.2%	4.7%	19.6%	5.2%	13.1%	2.3%	1.7%	10.6%	6.2%
Total 8 new European Union countries	749	76	34	42	68	39	210	59	89	8	11	153	31
	100%	10.2%	4.5%	5.7%	9.1%	5.3%	28.0%	7.8%	11.8%	1.1%	1.5%	20.4%	4.1%
EUROPE (25 countries)	15,236	2,061	931	1,130	1,489	990	2,953	1,637	1,628	769	915	2,108	579
	100%	13.5%	6.1%	7.4%	9.8%	6.5%	19.4%	10.7%	10.7%	5.0%	6.0%	13.8%	3.8%

Automobile manufacturers include the following makes:
PSA Peugeot Citroën = Peugeot + Citroën.
Renault Group = Renault + Dacia.
Fiat Group = Alfa Romeo + Fiat + Lancia + Ferrari + Maserati + other.
Ford Group = Ford Europe + Ford US + Jaguar + Land Rover + Volvo + Aston Martin + other.
General Motors = Opel + Vauxhall + Saab + GM Daewoo + Chevrolet + Pontiac + other.
Volkswagen Group = Volkswagen + Audi + Seat + Skoda + Bentley + Lamborghini.
DaimlerChrysler = Mercedes + Chrysler + Jeep + Smart + other.
BMW Group = BMW + Mini + Rolls-Royce.
Japanese makes: Mazda, Mitsubishi, Nissan, Subaru, Suzuki, Toyota, etc.
South Korean makes: Hyundai-Kia and Ssangyong.

REGISTRATIONS

NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY

In units and as a % of total registrations	1980	1990	2000	2001	2002	2003	2004	2005
Germany	**193,841**	**327,046**	**1,023,997**	**1,153,015**	**1,231,880**	**1,292,437**	**1,429,737**	**1,401,479**
	8.0%	9.8%	30.3%	34.5%	37.9%	39.9%	43.8%	42.2%
Austria	**7,425**	**74,197**	**191,402**	**192,789**	**194,550**	**214,618**	**220,249**	**199,908**
	3.3%	25.7%	61.9%	65.7%	69.6%	71.5%	70.8%	64.9%
Belgium	**54,897**	**154,804**	**290,301**	**305,831**	**300,444**	**312,742**	**339,578**	**348,630**
	13.8%	32.7%	56.3%	62.6%	64.3%	68.2%	70.1%	72.6%
Denmark	**2,352**	**3,305**	**14,898**	**17,082**	**22,470**	**21,834**	**29,147**	**35,356**
	3.2%	4.1%	13.2%	17.8%	20.1%	22.7%	24.0%	24.1%
Spain	**–**	**140,740**	**734,256**	**754,472**	**762,672**	**841,667**	**992,067**	**1,036,789**
		14.2%	53.1%	52.5%	57.3%	60.9%	65.4%	67.8%
Finland	**–**	**7,215**	**–**	**28,164**	**18,175**	**22,339**	**22,065**	**25,110**
		5.2%		25.7%	15.6%	15.2%	15.5%	17.0%
France	**186,050**	**762,054**	**1,046,485**	**1,267,761**	**1,354,933**	**1,353,914**	**1,392,925**	**1,429,037**
	9.9%	33.0%	49.0%	56.2%	63.2%	67.4%	69.2%	69.1%
Greece	**–**	**60**	**2,006**	**2,299**	**2,439**	**3,963**	**8,371**	**4,189**
		0.1%	0.7%	0.8%	0.9%	1.5%	2.9%	1.6%
Ireland	**–**	**12,413**	**23,259**	**21,207**	**25,664**	**24,979**	**28,207**	**36,953**
		15.0%	10.1%	12.9%	16.4%	17.2%	18.3%	21.5%
Italy	**138,562**	**179,779**	**812,203**	**884,567**	**988,253**	**1,094,385**	**1,322,561**	**1,308,548**
	8.1%	7.8%	33.6%	36.5%	43.5%	48.7%	58.4%	58.5%
Luxembourg	**–**	**8,206**	**21,110**	**24,916**	**26,880**	**28,742**	**34,977**	**36,561**
		21.4%	50.4%	58.2%	61.9%	65.9%	72.5%	75.4%
Norway	**–**	**1,581**	**8,761**	**12,180**	**15,498**	**20,906**	**32,542**	**43,146**
		2.6%	9.0%	13.3%	17.5%	23.2%	28.1%	39.3%
Netherlands	**30,450**	**54,738**	**134,426**	**121,336**	**110,159**	**110,401**	**118,890**	**123,990**
	6.8%	10.9%	22.5%	22.9%	21.6%	22.6%	24.6%	26.7%
Portugal	**–**	**10,426**	**62,417**	**67,139**	**78,141**	**85,229**	**111,782**	**131,731**
		4.9%	24.2%	27.0%	34.6%	44.9%	56.6%	63.8%
United Kingdom	**5,850**	**128,160**	**313,149**	**437,355**	**602,623**	**704,670**	**835,198**	**897,887**
	0.4%	6.4%	14.1%	17.8%	23.5%	27.3%	32.5%	36.8%
Sweden	**–**	**1,335**	**18,325**	**13,687**	**17,736**	**20,206**	**21,141**	**26,527**
		0.6%	6.3%	5.6%	7.0%	7.7%	8.0%	9.7%
Switzerland	**–**	**9,998**	**29,466**	**42,453**	**53,167**	**58,565**	**69,976**	**75,247**
		3.0%	9.3%	13.4%	18.0%	21.7%	26.0%	28.4%
EUROPE (17 countries)	**619,427**	**1,866,021**	**4,726,461**	**5,346,253**	**5,805,684**	**6,211,597**	**7,009,413**	**7,161,088**
% diesel in Europe	7.1%	13.9%	32.1%	36.0%	40.3%	43.7%	48.3%	49.4%
Year-on-year change		+0.7%	+10.7%	+ 13.1%	+8.6%	+7.0%	+12.8%	+2.2%

NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	2,527,580	3,475,172	3,590,633	3,548,017	3,446,050	3,423,293	3,461,914	3,521,631
Austria	243,021	310,157	336,670	317,635	301,898	325,687	340,349	336,793
Belgium	429,849	525,996	569,294	549,277	517,628	511,156	544,232	542,760
Denmark	89,485	100,303	145,780	127,650	143,873	128,931	167,795	204,957
Spain	592,093	1,218,091	1,680,761	1,725,555	1,600,999	1,679,173	1,851,502	1,916,080
Finland	115,741	166,602	149,702	124,576	132,296	162,735	160,812	164,160
France	**2,151,089**	**2,702,925**	**2,548,850**	**2,688,604**	**2,549,990**	**2,390,865**	**2,422,159**	**2,487,854**
Greece	80,824	144,960	313,230	300,817	287,288	275,547	312,714	293,102
Ireland	102,203	106,720	272,463	203,434	190,933	176,117	184,448	208,814
Italy	1,826,702	2,464,050	2,641,117	2,657,292	2,534,966	2,446,637	2,478,480	2,444,339
Luxembourg	22,514	40,285	44,979	46,643	47,347	47,093	50,933	51,581
Norway	106,945	82,483	129,003	125,736	113,374	117,199	149,534	146,928
Netherlands	483,574	555,812	694,210	614,475	591,851	566,356	570,946	531,392
Portugal	96,954	275,160	410,670	354,116	305,585	259,014	268,964	273,262
United Kingdom	1,725,803	2,256,662	2,466,833	2,718,580	2,835,427	2,888,958	2,903,236	2,770,153
Sweden	204,626	256,303	322,383	275,614	283,438	289,692	295,677	309,399
Switzerland	297,855	352,652	340,640	342,011	317,592	290,481	290,963	287,369
European Union (1)	9,358,799	14,523,790	16,187,575	16,252,285	15,769,569	15,571,254	16,014,161	16,056,277
EUROPE (17 countries)	**11,096,858**	**15,034,333**	**16,657,218**	**16,720,032**	**16,200,535**	**15,978,934**	**16,454,658**	**16,490,574**

(1) European Union: 9 countries in 1980; 10 countries in 1985; 12 countries between 1990 and 1994; 15 countries since 1995.

REGISTRATIONS

NEW LIGHT COMMERCIAL VEHICLE (LESS THAN 5T) REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	101,393	125,384	212,290	206,299	193,152	186,355	195,089	202,372
Austria	15,473	21,539	27,243	24,107	22,405	25,566	29,057	28,878
Belgium	30,609	52,490	54,090	60,594	50,059	52,360	59,475	62,672
Denmark	15,711	19,649	33,092	31,477	32,292	32,848	46,304	58,076
Spain	88,042	229,821	299,246	287,722	269,135	296,075	334,216	387,203
Finland	12,574	27,507	15,056	15,089	15,419	15,513	18,373	16,211
France	**277,887**	**393,795**	**414,966**	**433,872**	**404,919**	**381,619**	**408,450**	**420,065**
Greece	45,124	29,480	23,008	20,603	18,799	18,254	23,023	23,374
Ireland	8,640	24,136	41,474	38,704	34,821	30,894	30,312	37,073
Italy	109,270	156,995	225,517	225,960	264,522	199,272	214,787	207,067
Luxembourg	1,014	1,863	3,083	3,810	3,944	3,473	2,699	3,064
Norway	11,395	20,582	31,627	33,820	24,653	27,278	33,889	37,021
Netherlands	33,498	53,080	96,570	84,238	81,133	77,511	87,196	66,232
Portugal	38,597	64,236	152,836	98,901	79,493	69,222	71,380	66,774
United Kingdom	212,042	247,728	245,163	259,811	271,796	309,908	335,967	330,436
Sweden	12,038	26,362	31,854	29,033	28,849	28,486	31,431	35,098
Switzerland	18,091	22,753	24,121	25,370	22,527	20,172	21,578	22,428
European Union (1)	790,064	1,398,657	1,875,488	1,820,220	1,770,738	1,727,356	1,887,759	1,944,595
EUROPE (17 countries)	**1,031,398**	**1,517,400**	**1,931,236**	**1,879,410**	**1,817,918**	**1,774,806**	**1,943,226**	**2,004,044**

NEW HEAVY TRUCK (OVER 5T) REGISTRATIONS BY COUNTRY, EXCLUDING COACHES AND BUSES

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	59,061	73,770	96,830	84,758	72,230	73,342	83,597	88,364
Austria	5,642	7,222	8,508	7,897	6,792	7,923	9,591	8,235
Belgium	8,604	10,690	11,061	11,624	9,355	9,275	9,831	11,657
Denmark	3,179	3,539	4,597	4,515	4,031	4,166	4,557	5,902
Spain	23,208	30,432	33,700	34,905	34,031	34,087	36,556	39,753
Finland	4,497	4,218	3,072	2,836	2,619	3,034	3,435	3,492
France	**41,846**	**50,028**	**57,918**	**57,700**	**51,417**	**45,465**	**47,188**	**55,281**
Greece	1,178	497	1,633	1,575	1,344	1,666	1,873	1,589
Ireland	3,511	2,748	4,666	4,130	3,447	3,455	3,764	4,621
Italy		31,973	38,388	37,622	39,136	35,066	35,664	35,313
Luxembourg	690	1,136	1,451	1,239	1,000	1,180	1,016	1,394
Norway	3,056	2,106	3,564	3,183	3,354	3,548	3,935	4,952
Netherlands	13,346	14,804	16,835	16,372	13,703	12,595	13,334	13,405
Portugal	8,370	7,186	7,403	6,606	4,741	3,409	4,681	4,588
United Kingdom	57,489	45,794	51,864	52,451	48,849	51,484	51,774	53,344
Sweden	6,703	5,998	5,549	5,251	4,832	4,943	5,060	5,688
Switzerland	3,955	4,832	4,733	5,686	3,768	3,139	3,519	3,817
European Union (1)	187,726	272,597	343,475	329,481	297,527	291,090	311,921	332,626
EUROPE (17 countries)	**244,335**	**296,973**	**351,772**	**338,350**	**304,649**	**297,777**	**319,375**	**341,395**

NEW COACH AND BUS (OVER 5T) REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2001	2002	2003	2004	2005
Germany	6,058	4,235	5,684	5,544	5,185	5,048	4,715	4,891
Austria	676	450	706	531	667	706	859	565
Belgium	585	580	974	751	852	728	787	754
Denmark	579	311	419	334	499	389	349	315
Spain	1,511	2,376	2,738	2,998	2,734	2,945	3,286	3,655
Finland	625	429		225	290	282	288	252
France	**3,558**	**3,160**	**4,320**	**4,691**	**4,601**	**4,362**	**4,213**	**4,776**
Greece		625	374	654	153	790	1,388	575
Ireland		24	121	61	60	128	340	271
Italy		3,825	4,152	4,942	3,939	3,506	4,261	4,514
Luxembourg	53	57	108	136	84	119	119	147
Norway	684	380	427	455	516	501	584	708
Netherlands	1,082	1,069	949	839	690	871	925	1,134
Portugal		482	806	744	497	731	550	620
United Kingdom	5,792	3,324	4,496	3,822	4,097	4,714	4,484	4,630
Sweden	943	863	1,071	982	895	849	880	1,021
Switzerland	371	580	491	527	474	498	554	457
European Union (1)	17,707	20,068	26,918	27,254	25,243	26,168	27,444	28,120
EUROPE (17 countries)	**22,517**	**22,770**	**27,836**	**28,236**	**26,233**	**27,167**	**28,582**	**29,285**

(1) European Union: 9 countries in 1980; 10 countries in 1985; 12 countries between 1990 and 1994; 15 countries since 1995.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS IN EUROPE

In units	2000	2001	2002	2003	2004	2005
Estonia	10,600	12,700	14,474	15,602	16,436	19,640
Hungary	133,233	148,502	172,604	208,426	207,055	198,982
Latvia	7,300	7,684	7,829	8,713	11,217	16,602
Lithuania	6,158	7,165	8,142	7,543	9,493	10,467
Poland	478,752	327,251	308,158	358,432	318,111	235,522
Czech Republic	148,592	151,941	147,630	152,981	143,622	151,699
Slovakia	55,090	69,663	65,318	59,742	57,430	57,125
Slovenia	67,665	60,581	58,849	59,548	62,002	59,324
Total 8 new European Union countries	**907,400**	**785,500**	**783,004**	**870,987**	**825,366**	**749,361**
Romania	64,432	72,449	89,023	106,765	145,130	215,554

LIGHT COMMERCIAL VEHICLE (LESS THAN 5T) REGISTRATIONS IN EUROPE

In units	2000	2001	2002	2003	2004	2005
Estonia	1,500	1,900	2,122	2,607	2,429	2,944
Hungary	26,686	25,290	28,833	24,978	23,595	20,479
Latvia	900	850	1,123	1,064	1,437	1,753
Lithuania	1,270	1,640	1,474	1,680	2,347	3,371
Poland	33,653	22,971	20,736	25,769	37,025	35,985
Czech Republic	14,786	14,701	13,970	14,566	17,288	16,024
Slovakia	5,812	6,799	5,634	9,318	10,204	14,428
Slovenia	6,274	5,709	6,174	6,676	7,034	6,897
Total 8 new European Union countries	**90,900**	**79,800**	**80,066**	**86,658**	**101,359**	**101,881**
Romania	14,789	16,398	20,230	25,435	31,012	35,842

NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE

In units	2000	2001	2002	2003	2004	2005
Estonia	12,100	14,600	16,596	18,209	18,865	22,584
Hungary	159,919	173,792	201,437	233,404	230,650	219,461
Latvia	8,200	8,534	8,952	9,777	12,654	18,355
Lithuania	7,428	8,805	9,616	9,223	11,840	13,838
Poland	512,405	350,222	328,894	384,201	355,136	271,507
Czech Republic	163,378	166,642	161,600	167,547	160,910	167,723
Slovakia	60,902	76,462	70,952	69,060	67,634	71,553
Slovenia	73,939	66,290	65,023	66,224	69,036	66,221
Total 8 new European Union countries	**998,300**	**865,300**	**863,070**	**957,645**	**926,725**	**851,242**
Romania	79,221	88,847	109,253	132,200	176,142	251,396

NEW HEAVY TRUCK, COACH AND BUS (OVER 5T) REGISTRATIONS IN EUROPE

In units	2000	2001	2002	2003	2004	2005
Estonia	400	400	516	465	631	927
Hungary	2,900	3,500	4,200	4,100	4,600	4,400
Latvia	1,000	1,072	1,054	948	1,095	1,284
Lithuania	1,000	1,500	1,071	1,437	1,714	2,297
Poland	7,464	6,424	6,805	8,523	11,865	11,079
Czech Republic	6,400	6,900	7,200	6,700	7,324	8,200
Slovakia	1,796	2,427	2,549	2,802	3,105	3,754
Slovenia	1,876	2,115	1,864	1,276	1,567	1,635
Total 8 new European Union countries	**22,800**	**24,400**	**25,300**	**26,300**	**31,900**	**33,500**
Romania	3,113	3,001	2,849	3,055	4,809	5,019

WORLD PRODUCTION OF FRENCH MANUFACTURERS

In 1998, French manufacturers began reporting their production as the number of vehicles assembled at the rollout location. The concept of KD and CKD units has been abandoned. Aggregate data for 1996 and detailed data for 1997 have been restated using the new definitions.

WORLD VEHICLE PRODUCTION BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	536,415	783,224	1,168,470	1,229,983	1,314,958	1,386,563	1,349,064	1,379,082
Peugeot	734,461	1,369,359	1,708,968	1,905,986	1,947,281	1,923,805	2,056,181	1,996,284
PSA Peugeot Citroën (1)	**1,647,221**	**2,152,583**	**2,877,438**	**3,135,969**	**3,262,239**	**3,310,368**	**3,405,245**	**3,375,366**
Renault	1,659,099	1,571,264	2,356,616	2,253,982	2,169,710	2,194,796	2,296,050	2,219,945
Renault Trafic II				17,941	48,356	76,793	95,699	106,414
Dacia	–	–	55,183	52,283	57,376	72,655	94,698	172,021
Renault Samsung Motors	–	–	14,517	68,679	116,963	117,629	80,906	118,438
Renault-Dacia-Samsung (2)	**1,659,099**	**1,571,264**	**2,426,316**	**2,392,885**	**2,392,405**	**2,461,873**	**2,567,353**	**2,616,818**
CBM	105							
Renault Trucks (3)	54,086	60,263	96,040	57,218	55,666	52,355	60,676	63,961
of which Mack Trucks	–	15,423	34,562	–	–	–	–	–
Etalmobil (Sovam)	113	75	44	58	43	39	40	27
Unic	17,809							
Heuliez (4)	–	231	391	–	–	–	–	–
Irisbus-Renault (4)	–	–	2,547	–	–	–	–	–
TOTAL	**3,378,433**	**3,784,416**	**5,402,776**	**5,586,130**	**5,710,353**	**5,824,635**	**6,033,314**	**6,056,172**
KD and CKD units	616,466	287,512						

WORLD COMMERCIAL VEHICLE PRODUCTION (ALL WEIGHTS, INCLUDING COACHES, BUSES AND ROAD TRACTORS) BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	49,034	93,259	192,238	190,000	185,461	197,858	203,472	205,376
Peugeot	127,428	81,439	186,917	187,664	182,655	177,869	197,063	187,300
PSA Peugeot Citroën (1)	**200,979**	**174,698**	**379,155**	**377,664**	**368,116**	**375,727**	**400,535**	**392,676**
Renault	166,760	254,334	312,801	318,427	265,947	256,689	285,482	295,371
Renault Trafic II				17,941	48,356	76,793	95,699	106,414
Dacia	–	–	12,580	10,840	12,942	18,931	22,552	19,871
Renault-Dacia-Samsung (2)	**166,760**	**254,334**	**325,381**	**347,208**	**327,245**	**352,413**	**403,733**	**421,656**
CBM	105							
Renault Trucks (3)	54,086	60,263	96,040	57,218	55,666	52,355	60,676	63,961
of which Mack Trucks	–	15,423	34,562	–	–	–	–	–
Etalmobil (Sovam)	113	75	44	58	43	39	40	27
Unic	17,809							
Heuliez (4)	–	231	391	–	–	–	–	–
Irisbus-Renault (4)	–	–	2,547	–	–	–	–	–
TOTAL	**439,852**	**489,601**	**803,558**	**782,148**	**751,070**	**780,534**	**864,984**	**878,320**
KD and CKD units	68,587	79,271						

(1) Including Talbot up to 1985.
(2) Renault acquired Dacia in 1999 and Samsung Motors'assets in September 2000. The Renault Trafic II is manufactured by IBC, a General Motors subsidiary in the United Kingdom, and by Nissan in Spain.
(3) Mack was included in Renault V.I. between 1990 and 2000. In 2001, Renault and AB Volvo pooled their truck operations. Renault V.I. was renamed Renault Trucks
(4) On January 1, 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

VEHICLE PRODUCTION IN FRANCE BY FRENCH AND FOREIGN AUTOMOBILE MANUFACTURERS

In units	1980	1990	2000	2001	2002	2003	2004	2005
Foreign manufacturers								
Bugatti								5
Fiat	–	–	10,377	6,945	9,063	14,730	13,433	8,304
Heuliez-Opel							14,904	37,390
Lancia	–	–	2,265	1,852	5,232	10,192	7,594	5,713
Smart	–	–	101,365	119,853	122,943	128,339	95,666	77,015
Toyota	–	–	0	62,156	136,972	183,732	203,713	180,643
Passenger cars	**–**	**–**	**114,007**	**190,806**	**274,210**	**336,993**	**335,310**	**309,070**
Light commercial vehicles (Fiat)	**–**	**–**	**39,428**	**39,374**	**30,396**	**23,039**	**24,302**	**20,680**
Heavy trucks (Scania)	**–**	**–**	**10,710**	**8,254**	**8,917**	**9,663**	**9,987**	**9,391**
Irisbus-Heuliez	–	–	–	423	442	429	409	291
Irisbus	–	–	–	2,628	1,705	1,494	1,970	2,869
Evobus	–	–	535	521	442	470	613	527
Coaches and buses	**–**	**–**	**535**	**3,572**	**2,589**	**2,393**	**2,992**	**3,687**
Total foreign makes	**–**	**–**	**164,680**	**242,006**	**316,112**	**372,088**	**372,591**	**342,828**
French manufacturers								
Total French makes	**–**	**–**	**3,183,681**	**3,386,412**	**3,385,758**	**3,247,978**	**3,293,399**	**3,206,180**
French and foreign automobile manufacturers								
TOTAL	**–**	**–**	**3,348,361**	**3,628,418**	**3,701,870**	**3,620,066**	**3,665,990**	**3,549,008**

Source: CCFA.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

PASSENGER CAR PRODUCTION (BUILT-UP UNITS) BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	536,366	689,965	976,232	1,039,983	1,129,497	1,188,705	1,145,592	1,173,706
Peugeot	607,033	1,287,920	1,522,051	1,718,322	1,764,626	1,745,936	1,859,118	1,808,984
PSA Peugeot Citroën (1)	**1,446,242**	**1,977,885**	**2,498,283**	**2,758,305**	**2,894,123**	**2,934,641**	**3,004,710**	**2,982,690**
Renault	1,492,339	1,316,930	2,043,815	1,935,555	1,903,763	1,938,107	2,010,568	1,924,574
Dacia	–	–	42,603	41,443	44,434	53,724	72,146	152,150
Renault Samsung Motors	–	–	14,517	68,679	116,963	117,629	80,906	118,438
Renault-Dacia-Samsung (1)	**1,492,339**	**1,316,930**	**2,100,935**	**2,045,677**	**2,065,160**	**2,109,460**	**2,163,620**	**2,195,162**
TOTAL	**2,938,581**	**3,294,815**	**4,599,218**	**4,803,982**	**4,959,283**	**5,044,101**	**5,168,330**	**5,177,852**
KD and CKD units	467,879	208,241	–	–	–	–	–	–
of which production in France	–	–	2,765,803	2,990,743	3,018,587	2,883,336	2,892,106	2,803,891
Citroën	–	–	504,323	558,073	579,034	597,930	594,896	605,988
Peugeot	–	–	1,094,756	1,254,296	1,304,259	1,208,461	1,213,362	1,155,292
PSA Peugeot Citroën (1)	**–**	**–**	**1,599,079**	**1,812,369**	**1,883,293**	**1,806,391**	**1,808,258**	**1,761,280**
Renault	–	–	1,166,724	1,178,374	1,135,294	1,076,945	1,083,848	1,042,611
Renault-Dacia-Samsung (1)	**–**	**–**	**1,166,724**	**1,178,374**	**1,135,294**	**1,076,945**	**1,083,848**	**1,042,611**

(1) See footnotes on page 56.

PASSENGER CAR PRODUCTION BY MODEL, 2005

In units	Make and model	World production	Production in France	Production outside France
PSA Peugeot Citroën		**2,982,690**	**1,761,280**	**1,221,410**
Citroën		**1,173,706**	**605,988**	**567,718**
	C1	34,592		34,592
	C2	115,727	115,727	
	C3	276,871	145,908	130,963
	C4	239,707	239,707	
	ZX	97,632		97,632
	XSARA	191,779		191,779
	XANTIA	13,968		13,968
	C5	80,915	80,915	
	C6	733	733	
	C8	22,998	22,998	
	BERLINGO	98,784		98,784
Peugeot		**1,808,984**	**1,155,292**	**653,692**
	1007	73,827	73,827	
	107	34,564		34,564
	206	640,430	323,752	316,678
	207	1,007	973	34
	307	507,000	451,117	55,883
	405	169,680		169,680
	406	2,568		2,568
	407	258,795	258,795	
	607	18,771	18,771	
	807	28,057	28,057	
	PARTNER	74,285		74,285
Renault-Dacia-Samsung		**2,195,162**	**1,042,611**	**1,152,551**
Renault		**1,924,574**	**1,042,611**	**881,963**
	TWINGO	90,674	80,034	10,640
	CLIO	555,556	255,635	299,921
	MODUS	164,741		164,741
	LOGAN	19,079		19,079
	MEGANE	801,496	421,860	379,636
	LAGUNA	112,365	112,365	
	VEL SATIS	7,609	7,609	
	ESPACE	50,521	50,521	
	KANGOO	122,533	114,587	7,946
Dacia		**152,150**	**0**	**152,150**
	SUPERNOVA	5,694		5,694
	LOGAN	146,456		146,456
Renault Samsung Motors		**118,438**	**0**	**118,438**
	SM3	30,082		30,082
	SM5	63,271		63,271
	SM7	25,085		25,085
TOTAL		**5,177,852**	**2,803,891**	**2,373,961**

Source: CCFA.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

LIGHT COMMERCIAL VEHICLE (UP TO 5T) PRODUCTION BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	49,034	93,259	192,238	190,000	185,461	197,858	203,472	205,376
Peugeot	127,428	81,439	186,917	187,664	182,655	177,869	197,063	187,300
PSA Peugeot Citroën (1)	**200,979**	**174,698**	**379,155**	**377,664**	**368,116**	**375,727**	**400,535**	**392,676**
Renault	166,760	254,334	312,801	318,427	265,947	256,689	285,482	295,371
Renault Trafic II				17,941	48,356	76,793	95,699	106,414
Dacia	–	–	12,580	10,840	12,942	18,931	22,552	19,871
Renault-Dacia-Samsung (1)	**166,760**	**254,334**	**325,381**	**347,208**	**327,245**	**352,413**	**403,733**	**421,656**
Renault Trucks (1)	**11,632**	**7,464**	**8,321**	**8,335**	**7,944**	**6,762**	**8,430**	**9,460**
Other	86	71	42	38	42	37	37	24
TOTAL	**379,457**	**436,567**	**712,899**	**733,245**	**703,347**	**734,939**	**812,735**	**823,816**
KD and CKD units	68,587	79,271	–	–	–	–	–	–
of which production in France	–	–	370,538	355,969	328,593	328,256	361,137	361,521
Citroën	–	–	53,561	46,376	44,189	51,168	56,709	58,223
Peugeot	–	–	67,629	67,022	66,789	64,111	69,312	68,166
PSA Peugeot Citroën (1)	**–**	**–**	**121,190**	**113,398**	**110,978**	**115,279**	**126,021**	**126,389**
Renault	–	–	240,985	234,198	209,629	206,178	226,649	225,648
Renault-Dacia-Samsung (1)	**–**	**–**	**240,985**	**234,198**	**209,629**	**206,178**	**226,649**	**225,648**
Renault Trucks (1)	**–**	**–**	**8,321**	**8,335**	**7,944**	**6,762**	**8,430**	**9,460**
Other	–	–	42	38	42	37	37	24

(1) See footnotes on page 56.

LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL, 2005

In units	Model	World production	Production in France	Production outside France
PSA Peugeot Citroën		**392,676**	**126,389**	**266,287**
Citroën		**205,376**	**58,223**	**147,153**
	C2	9,059	9,059	
	C3	12,438	12,438	
	C4	4,621	4,621	
	XSARA	109		109
	C15	26,615		26,615
	BERLINGO	71,339		71,339
	JUMPY	32,105	32,105	
	JUMPER	49,090		49,090
Peugeot		**187,300**	**68,166**	**119,134**
	206	29,453	26,336	3,117
	307	8,653	8,653	
	807	27	27	
	PARTNER	70,480		70,480
	EXPERT	33,150	33,150	
	BOXER	44,065		44,065
	J9	1,472		1,472
Renault-Dacia-Samsung		**421,656**	**225,648**	**196,008**
Renault		**401,785**	**225,648**	**176,137**
	TWINGO	957	957	
	CLIO	42,429	2,871	39,558
	MODUS	2,131		2,131
	MEGANE	9,492		9,492
	KANGOO	118,404	104,135	14,269
	TRAFIC	106,414		106,414
	MASTER	106,703	102,430	4,273
	MASCOTT	15,255	15,255	
Dacia		**19,871**	**0**	**19,871**
	Pickups/small vans	19,871		19,871
Renault Trucks		**9,460**	**9,460**	**0**
	MASCOTT	9,460	9,460	
Other		**24**	**24**	**0**
	Etalmobil	24	24	
TOTAL		**823,816**	**361,521**	**462,295**

Source: CCFA.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

HEAVY TRUCK (5T AND OVER) PRODUCTION BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Renault Trucks (1)	39,475	50,493	87,719	48,883	47,722	45,593	52,246	54,501
of which Mack Trucks	–	15,423	34,562	–	–	–	–	–
Other (2)	17,836	4	2	20	1	2	3	3
TOTAL	**57,311**	**50,497**	**87,721**	**48,903**	**47,723**	**45,595**	**52,249**	**54,504**
of which production in France	–	–	44,402	39,700	38,578	36,386	40,156	40,768
Renault Trucks*	–	–	44,400	39,680	38,577	36,384	40,153	40,765
Other (2)	–	–	2	20	1	2	3	3

(1) Mack was included in Renault V.I. between 1990 and 2000. In 2001, Renault and AB Volvo pooled their truck operations. Renault V.I. was renamed Renault Trucks.
(2) Of which Unic up to 1984.

COACH AND BUS (OVER 5T) PRODUCTION BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Renault Trucks (1)	2,979	2,306	–	–	–	–	–	–
CBM	105							
Heuliez (2)	–	231	391	–	–	–	–	–
Irisbus-Renault (2)	–	–	2,547	–	–	–	–	–
TOTAL	**3,084**	**2,537**	**2,938**	**–**	**–**	**–**	**–**	**–**
of which production in France	–	–	2,938	–	–	–	–	–
Renault Trucks (1)	–	–	–	–	–	–	–	–
Heuliez (2)	–	–	391	–	–	–	–	–
Irisbus-Renault (2)	–	–	2,547	–	–	–	–	–

(1) From 1986 to 1990, the bus subframes supplied by Renault V.I. are included in Heuliez production.
(2) On January 1, 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

HEAVY TRUCK (OVER 5T) PRODUCTION, 2005

In units	Model	World production	Production in France	Production outside France
Trucks				
Commercial vehicles: 5 to 6 tonnes		**3,001**	**3,001**	**0**
	Mascott	3,001	3,001	
Mid range: 7 to 16 tonnes		**15,375**	**10,746**	**4,629**
	Midliner	2,401		2,401
	Midlum	12,974	10,746	2,228
High range: more than 16 tonnes		**15,888**	**8,076**	**7,812**
	Premium	7,912	7,616	296
	Magnum	456	456	
	Kerax	7,520	4	7,516
Total Renault Trucks trucks		**34,264**	**21,823**	**12,441**
Road tractors				
	Midlum	110	110	
	Premium	11,079	11,079	
	Magnum	7,752	7,752	
	Kerax	1,296	1	1,295
Total Renault Trucks road tractors		**20,237**	**18,942**	**1,295**

Source: CCFA.

PRODUCTION

LIGHT COMMERCIAL VEHICLE (UP TO 5T) PRODUCTION BY TYPE

In units	1980	1990	2000 (1)	2001	2002	2003	2004	2005
Passenger car derivatives								
Citroën	26,904	22,942	29,449	21,658	19,330	21,381	27,278	26,227
Peugeot	69,411	55,208	41,451	40,296	40,262	37,950	44,003	38,133
PSA Peugeot Citroën (2)	103,229	78,150	70,900	61,954	59,592	59,331	71,281	64,360
Renault	30,420	56,245	60,320	89,375	60,992	55,000	53,666	55,009
TOTAL	**133,649**	**134,395**	**131,220**	**151,329**	**120,584**	**114,331**	**124,947**	**119,369**
Small vans								
Citroën	45,573	67,257	100,832	104,381	102,250	104,588	99,945	97,954
Peugeot	27,002	18,537	70,443	74,468	71,329	68,135	71,186	70,480
PSA Peugeot Citroën (2)	90,178	85,794	171,275	178,849	173,579	172,723	171,131	168,434
Renault	126,779	129,335	147,670	131,712	113,752	115,764	120,093	118,404
TOTAL	**216,957**	**215,129**	**318,945**	**310,561**	**287,331**	**288,487**	**291,224**	**286,838**
Large vans								
Citroën	23,813	32,209	61,957	63,961	63,881	71,889	76,249	81,195
Peugeot	33,031	47,623	75,023	72,900	71,064	71,784	81,874	78,687
PSA Peugeot Citroën (2)	56,844	79,832	136,980	136,861	134,945	143,673	158,123	159,882
Renault	40,508	84,681	104,811	115,281	139,560	162,718	207,422	228,372
Renault Trucks	–	–	8,321	8,335	7,943	6,762	8,430	9,460
Sovam-Etalmobil	86	71	42	38	42	37	37	24
TOTAL	**97,438**	**164,584**	**250,154**	**260,515**	**282,490**	**313,190**	**374,012**	**397,738**
4x4								
Peugeot		1,730						
Pickups, small vans								
Dacia	–	–	12,580	10,840	12,942	18,931	22,552	19,871

(1) World production of French manufacturers as of 1997.
(2) Including Talbot up to 1985.

Source: CCFA.

COMMERCIAL VEHICLE PRODUCTION (INCLUDING COACHES AND BUSES) BY WEIGHT AND ENGINE TYPE

GAS: Gasoline
D: Diesel
EL: Electric
G: CNG or LPG

In units		1980	1990	2000 (1)	2001	2002	2003	2004	2005
Up to 3.5t		318,633	402,994	577,926	620,175	582,776	613,905	669,430	670,654
	GAS	281,031	128,422	55,883	73,863	43,695	33,740	41,500	39,019
	D	37,602	274,572	521,229	545,773	538,799	579,867	627,799	631,499
	EL			814	539	282	298	131	136
3.5t to 5.1t		60,824	33,573	134,973	113,070	120,571	121,034	143,305	153,162
	GAS	14,675	1,961	1,724	721	539	615	816	719
	D	46,149	31,612	133,249	112,349	120,032	120,419	142,489	152,443
5.1t to 12t	D	25,538	6,377	13,593	10,892	11,383	10,070	12,936	11,820
12t to 16t	D	12,541	8,251	5,009	4,537	4,253	5,095	5,777	5,685
16t to 20t	D	6,909	5,518	7,304	7,635	8,099	7,022	6,259	7,115
20t and over	D	3,054	3,650	6,255	6,797	5,926	5,819	7,805	9,647
Road tractors	D	9,269	11,278	20,998	19,042	18,062	17,589	19,472	20,237
Coaches and buses		3,084	2,548	2,938	–	–	–	–	–
	D	3,035	2,548	2,606	–	–	–	–	–
	G			332	–	–	–	–	–
	GAS	49			–	–	–	–	–
Total gasoline		**295,706**	**130,383**	**57,607**	**74,584**	**44,234**	**34,355**	**42,316**	**39,738**
Total diesel		**144,097**	**343,806**	**710,243**	**707,025**	**706,554**	**745,881**	**822,537**	**838,446**
Total electric		**49**	**0**	**814**	**539**	**282**	**298**	**131**	**136**
Total CNG or LPG				**332**	**–**	**–**	**–**	**–**	**–**
TOTAL ALL CATEGORIES		**439,852**	**474,189**	**768,996**	**782,148**	**751,070**	**780,534**	**864,984**	**878,320**

(1) World production of French manufacturers as of 1997.

Source: CCFA.

EXPORTS (1)

NEW PASSENGER CAR EXPORTS OF FRENCH MANUFACTURERS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	269,223	429,937	690,690	745,651	833,681	905,687	888,656	900,165
Peugeot	298,589	764,606	1,070,846	1,224,949	1,314,094	1,349,982	1,467,506	1,457,101
PSA Peugeot Citroën (2)	750,090	1,194,543	1,761,536	1,970,600	2,147,775	2,255,669	2,356,162	2,357,266
Renault	779,562	687,455	1,412,911	1,324,068	1,321,606	1,382,536	1,463,379	1,484,182
TOTAL	**1,529,652**	**1,881,998**	**3,174,447**	**3,294,668**	**3,469,381**	**3,638,205**	**3,819,541**	**3,841,448**

NEW LIGHT COMMERCIAL VEHICLE EXPORTS OF FRENCH MANUFACTURERS BY MAKE (UP TO 5T)

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	16,521	41,209	113,113	118,073	120,408	125,896	128,045	129,854
Peugeot	74,050	58,034	116,063	110,824	109,880	110,799	119,123	115,443
PSA Peugeot Citroën (2)	103,921	99,243	229,176	228,897	230,288	236,695	247,168	245,297
Renault	36,535	96,657	184,839	182,601	145,266	143,216	165,625	189,832
Renault Trucks	4,126	2,137	–	–	–	–	3,010	4,322
Etalmobil	2	12	10	10	6	5	10	5
TOTAL	**144,584**	**198,049**	**414,025**	**411,508**	**375,560**	**379,916**	**415,813**	**439,456**

NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE EXPORTS OF FRENCH MANUFACTURERS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	285,744	471,146	803,803	863,724	954,089	1,031,583	1,016,701	1,030,019
Peugeot	372,639	822,640	1,186,909	1,335,773	1,423,974	1,460,781	1,586,629	1,572,544
PSA Peugeot Citroën (2)	854,011	1,293,786	1,990,712	2,199,497	2,378,063	2,492,364	2,603,330	2,602,563
Renault	816,097	784,112	1,597,750	1,506,669	1,466,872	1,525,752	1,629,004	1,674,014
Renault Trucks	4,126	2,137	–	–	–	–	3,010	4,322
Etalmobil	2	12	10	10	6	5	10	5
TOTAL	**1,674,236**	**2,080,047**	**3,588,472**	**3,706,176**	**3,844,941**	**4,018,121**	**4,235,354**	**4,280,904**

NEW HEAVY TRUCK, COACH AND BUS EXPORTS OF FRENCH MANUFACTURERS BY MAKE (OVER 5T)

In units	1980	1990	2000	2001	2002	2003	2004	2005
Renault Trucks	18,854	15,451	30,198	28,256	27,600	27,522	33,507	35,075
Irisbus-Renault	–	–	293	–	–	–	–	–
Unic	14,689							
Other		2		10	1	2	1	1
TOTAL	**33,543**	**15,453**	**30,491**	**28,266**	**27,601**	**27,524**	**33,508**	**35,076**

(1) As of 1996, exports of vehicles of French manufacturers include both assembled vehicles and KD/CKD units. Deliveries to French Overseas Departments are no longer counted in exports. As of 2005, Dacia's exports of passenger cars and light commercial vehicles are included in Renault's figures.

(2) Including Talbot up to 1985.

Source: CCFA.

EXPORTS OF FRENCH MANUFACTURERS (1)

NEW PASSENGER CAR EXPORTS BY DESTINATION

In units	1980	1990	2000	2001	2002	2003	2004	2005
Europe (2)	**1,202,834**	**1,645,276**	**2,636,150**	**2,666,696**	**2,766,527**	**2,874,729**	**2,878,753**	**2,835,899**
of which: European Union (3)	**946,760**	**1,479,316**	**2,261,904**	**2,400,035**	**2,426,637**	**2,449,696**	**2,580,944**	**2,424,350**
Germany	202,939	277,424	337,743	352,483	369,097	379,668	325,457	365,860
Austria	35,775	36,175	41,510	43,790	51,626	46,587	51,174	48,779
Belgium-Luxembourg	105,966	144,896	172,806	177,410	170,568	176,247	178,562	171,552
Denmark	4,059	13,919	30,239	36,302	42,662	28,426	35,308	34,477
Spain	100,640	297,846	556,934	545,442	514,938	539,194	581,952	577,439
Greece		11,458	54,270	50,897	50,527	43,131	45,639	32,681
Italy	381,626	324,952	353,616	363,509	392,163	446,294	428,494	377,100
Netherlands	84,063	95,340	120,438	137,705	140,469	136,065	119,814	99,707
Portugal	14,729	59,459	68,375	77,841	75,494	64,151	66,279	66,524
United Kingdom	156,071	245,989	432,507	530,527	523,524	499,392	472,007	413,743
Sweden	13,060	18,001	31,473	32,809	42,068	42,154	42,037	43,062
10 new Member States						*206,468*	*184,082*	*147,859*
of which: CEEC/CIS (4)	23,619	31,569	164,814	182,116	251,064	285,723	99,284	214,335
Hungary		2,040	23,887	27,599	37,856	44,117	40,674	26,926
Poland		806	59,093	53,189	69,399	83,026	63,884	47,521
of which: Switzerland	51,821	43,832	45,654	49,213	46,219	44,130	40,507	41,231
of which: Turkey		13,069	148,264	17,970	24,679	76,958	140,873	142,160
Africa	**133,213**	**45,675**	**69,865**	**75,888**	**85,691**	**81,194**	**110,483**	**103,130**
of which: South Africa	22,439	0	13,913	14,247	14,256	15,998	29,539	32,941
North Africa	15,542	20,432	37,236	37,986	52,147	48,374	65,455	42,881
Nigeria	61,133	8,319	8,860	9,679	6,685	6,133	4,661	6,159
North and South America	**145,204**	**29,360**	**230,270**	**221,704**	**202,375**	**216,560**	**288,902**	**314,505**
of which: Argentina	11,899	516	97,605	42,306	16,586	31,277	54,418	70,099
Brazil			80,205	117,293	110,187	104,798	127,465	144,030
Colombia	11,885	9,112	16,659	23,237	20,222	18,539	26,512	36,499
Mexico		20	1,408	8,718	26,225	42,006	60,607	39,871
Asia (2)	**26,178**	**96,645**	**166,261**	**251,715**	**333,598**	**388,732**	**461,879**	**512,772**
of which: Japan	883	14,264	15,976	22,218	23,640	24,288	18,751	16,323
China		3,960	54,334	56,000	88,281	106,895	91,431	143,756
Iran	12,836	29,852	45,722	106,549	158,923	199,179	292,514	304,326
Pacific	**6,290**	**5,761**	**9,984**	**14,530**	**18,466**	**19,849**	**16,409**	**16,698**
of which: Australia	2,398	820	2,765	5,544	8,735	10,410	9,354	11,872
TOTAL	**1,529,652**	**1,881,998**	**3,174,447**	**3,294,668**	**3,469,381**	**3,638,205**	**3,819,541**	**3,841,448**
KD units	471,744	208,241						

NEW COMMERCIAL VEHICLE EXPORTS BY DESTINATION

In units	1980	1990	2000	2001	2002	2003	2004	2005
Europe (2)	**88,235**	**174,998**	**379,289**	**388,838**	**357,282**	**360,169**	**379,999**	**401,860**
of which: European Union (3)	**74,382**	**156,268**	**312,421**	**316,164**	**291,614**	**283,723**	**323,495**	**326,077**
Germany	17,490	23,581	50,081	51,850	45,821	39,672	43,788	40,760
Austria	2,185	3,702	4,697	4,709	3,679	4,290	5,290	6,206
Belgium-Luxembourg	11,455	18,383	22,857	28,055	21,373	22,499	20,863	24,827
Spain	71	44,110	57,516	53,810	54,586	58,112	61,931	71,185
Italy	26,207	19,923	35,910	32,990	34,902	29,525	31,047	29,706
Netherlands	8,234	7,995	23,087	21,297	17,685	19,059	17,188	11,630
Portugal	2,805	14,291	34,551	33,751	27,426	24,713	26,672	25,410
United Kingdom	8,390	21,127	55,647	62,351	60,292	62,970	63,951	64,554
10 new Member States						*28,411*	*28,844*	*24,939*
of which: CEEC/CIS (4)	361	2,781	25,100	52,135	41,316	45,949	24,366	46,685
Poland	301	97	5,624	13,819	6,136	8,633	9,971	9,039
of which: Switzerland	3,317	2,921	4,293	4,608	4,266	4,596	5,033	5,934
Africa	**75,802**	**18,320**	**16,074**	**20,838**	**18,584**	**19,140**	**27,779**	**22,597**
of which: North Africa	18,334	8,588	13,509	16,116	15,553	15,348	24,360	18,345
North and South America	**5,875**	**5,453**	**36,682**	**17,846**	**14,167**	**16,325**	**27,283**	**33,328**
Asia (2)	**6,930**	**11,302**	**8,260**	**8,605**	**8,066**	**8,241**	**11,200**	**11,781**
Pacific	**776**	**1,364**	**1,797**	**1,725**	**1,878**	**1,744**	**1,877**	**1,967**
TOTAL	**178,126**	**213,502**	**444,516**	**439,774**	**403,161**	**407,440**	**449,321**	**474,532**
KD units	39,428	12,207						

(1) As of 1996, exports of vehicles of French manufacturers include both assembled vehicles and KD/CKD units. Deliveries to French Overseas Departments are no longer counted in exports. As of 2005, exports of Dacia are included in the scope of consolidation.
(2) As of 2004, exports by Cyprus are included in Europe, rather than Asia.
(3) European Union: 9 countries in 1980; 10 countries in 1985; 12 countries between 1990 and 1994; 15 countries between 1995 and 2003; 25 countries since 2004.
(4) As of 2004, CEEC/CIS excluding the nine new countries that joined the European Union.

Source: CCFA.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	270,983	266,822	261,508	295,382	288,550	271,455	256,705	271,273
Peugeot	293,461	498,481	397,547	466,554	431,678	379,227	363,224	362,157
PSA Peugeot Citroën (1)	685,318	765,303	659,055	761,936	720,228	650,682	619,929	633,430
Renault	759,312	639,440	602,415	599,857	579,618	546,014	549,192	524,415
Other France	56	146	63	68	65	84	551	148
TOTAL France (2)	**1,444,686**	**1,404,889**	**1,261,533**	**1,361,861**	**1,299,911**	**1,196,780**	**1,169,672**	**1,157,993**
Alfa Romeo	25,380	15,916	12,774	19,471	17,342	13,908	13,454	13,845
Audi	17,455	32,762	34,937	40,105	41,254	37,301	36,461	44,283
BMW	17,239	29,580	31,576	35,836	34,076	31,551	37,108	40,462
Chrysler	16	4,084	4,827	6,418	5,762	5,571	5,751	5,058
Dacia								9,758
Daewoo	–	–	11,731	5,835	4,312	1,887	158	2
GM Daewoo						2,600	7,783	933
Chevrolet								7,939
Daihatsu	–	0	1,043	739	680	964	1,297	1,538
Fiat	53,147	128,822	95,983	86,741	69,401	55,942	48,283	46,154
Ford	68,426	159,575	117,061	108,452	100,087	91,678	101,631	103,587
Honda	8,293	14,002	8,716	6,455	6,377	5,547	6,756	8,879
Hyundai	–	0	11,019	13,509	18,575	23,124	27,814	27,389
Jaguar	269	1,290	1,939	2,235	2,363	2,077	2,912	2,112
Jeep	–	3,824	3,001	2,528	3,030	2,907	2,995	3,522
Kia	–	0	2,631	2,015	1,572	4,304	8,846	18,067
Lada	13,069	15,758	1,867	2,182	1,856	1,861	1,405	1,671
Lancia	6,801	18,225	5,864	5,364	2,065	1,971	3,061	4,414
Land Rover	237	3,611	7,570	6,608	5,603	5,604	5,644	6,932
Mazda	13,021	18,563	6,366	4,336	7,030	9,807	12,179	11,437
Mercedes	14,430	28,605	43,389	52,069	56,695	51,390	49,187	54,628
Mini	–	–	–	1,781	9,263	10,644	10,858	12,613
Mitsubishi	2,788	4,298	5,575	8,224	7,345	7,836	7,751	6,752
Nissan	17,700	25,707	31,330	28,895	30,112	39,840	37,568	40,806
Opel	32,709	113,490	133,576	137,831	122,549	120,758	110,329	106,454
Porsche	1,060	1,297	825	940	1,032	1,602	2,117	2,375
Rover	20,690	41,147	13,474	8,476	5,875	5,080	4,562	1,980
Saab	179	2,459	3,265	3,700	3,575	2,898	3,296	2,701
Santana	–	1,746	4,231	702	11			
Seat	306	48,052	40,562	42,177	37,409	34,608	32,642	32,738
Skoda	1,636	1,825	11,570	13,156	14,033	12,555	12,131	15,042
Smart	–	–	6,645	7,630	8,231	8,904	12,721	12,646
Ssangyong	–	0	19	2	1		467	3,969
Subaru	–	0	2,312	1,911	1,930	1,498	1,447	1,462
Suzuki	–	0	11,355	13,650	12,351	13,411	18,140	21,110
Toyota-Lexus	13,095	15,839	43,698	51,853	64,622	72,199	78,667	87,406
Volkswagen	75,727	155,971	152,868	161,607	137,812	119,318	124,145	135,975
Volvo	8,207	12,415	6,777	7,228	8,544	8,668	11,858	11,089
Total foreign (2)	**428,516**	**904,241**	**872,351**	**892,871**	**845,160**	**812,466**	**844,037**	**909,796**
OVERALL TOTAL	**1,873,202**	**2,309,130**	**2,133,884**	**2,254,732**	**2,145,071**	**2,009,246**	**2,013,709**	**2,067,789**
French makes (%)	77.1%	60.8%	59.1%	60.4%	60.6%	59.6%	58.1%	56.0%
Foreign makes (%)	22.9%	39.2%	40.9%	39.6%	39.4%	40.4%	41.9%	44.0%

(1) Including Talbot up to 1985.
(2) Including others.

USED PASSENGER CAR REGISTRATIONS

In units	1980	1990	2000	2001	2002	2003	2004	2005
OVERALL TOTAL	**4,441,423**	**4,758,750**	**5,082,122**	**5,395,623**	**5,457,129**	**5,321,638**	**5,444,076**	**5,383,361**
Ratio used/new	2.4	2.1	2.4	2.4	2.5	2.6	2.7	2.6

USED LIGHT COMMERCIAL VEHICLE (UP TO 5T) REGISTRATIONS

In units	1980	1990	2000	2001	2002	2003	2004	2005
OVERALL TOTAL		**644,925**	**651,033**	**665,551**	**692,593**	**696,806**	**732,378**	**718,948**
Ratio used/new		1.6	1.6	1.5	1.7	1.8	1.8	1.7

REGISTRATIONS

NEW DIESEL PASSENGER CAR REGISTRATIONS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	24,158	111,881	138,628	187,893	192,341	182,127	175,235	182,569
Peugeot	65,199	189,322	206,153	270,900	277,797	261,237	255,397	258,712
PSA Peugeot Citroën (1)	89,357	301,203	344,781	458,793	470,138	443,364	430,632	441,281
Renault	45,862	205,374	257,909	312,506	351,329	368,705	380,754	357,094
TOTAL France (2)	**135,219**	**506,577**	**602,711**	**771,322**	**821,494**	**812,105**	**811,511**	**798,437**
Alfa Romeo	–	2,524	7,444	10,789	12,098	10,682	10,607	10,845
Audi	19,591	13,495	25,901	31,144	33,934	32,524	32,362	39,365
BMW/Mini	–	8,271	21,065	22,703	24,331	26,463	33,276	36,731
Chrysler/Jeep	–	–	4,161	3,775	6,582	7,226	6,844	6,556
Fiat-Lancia	10,352	33,913	38,337	41,271	33,561	29,071	23,645	27,196
Ford	1,833	56,331	58,896	59,563	64,624	63,856	74,578	76,476
Hyundai	–	–	5,510	7,598	12,195	15,018	20,832	22,129
Land Rover	–	2,980	5,656	4,907	4,606	5,204	5,364	6,560
Mazda	–	5,200	3,204	2,605	4,767	6,348	7,158	6,061
Mercedes	10,635	15,676	30,007	38,635	45,180	43,661	41,078	44,079
Mitsubishi	–	1,623	3,227	6,325	6,340	6,782	5,759	4,793
Nissan	694	4,982	15,533	16,734	19,038	23,124	22,946	23,454
Opel	6,178	28,218	63,726	72,536	72,893	73,346	74,147	75,944
Rover	–	4,419	7,480	5,221	4,014	3,695	3,416	1,482
Seat	–	14,367	27,861	30,029	28,340	26,508	26,019	26,378
Skoda	–	–	7,741	9,255	10,706	9,424	9,901	12,381
Suzuki	–	–	3,165	5,890	6,287	6,828	11,910	11,969
Toyota-Lexus	–	3,594	12,282	16,964	36,262	43,695	48,217	54,560
Volkswagen	–	50,975	89,487	99,789	95,263	92,264	98,330	106,909
Volvo	1,198	4,097	4,786	4,678	7,047	7,397	10,666	10,247
TOTAL foreign (2)	**50,815**	**255,477**	**443,774**	**496,439**	**533,439**	**541,809**	**581,414**	**630,600**
OVERALL TOTAL	**186,034**	**762,054**	**1,046,485**	**1,267,761**	**1,354,933**	**1,353,914**	**1,392,925**	**1,429,037**
% diesel	9.9%	33.0%	49.0%	56.2%	63.2%	67.4%	69.2%	69.1%
French makes (%)	72.7%	66.5%	57.6%	60.8%	60.6%	60.0%	58.3%	55.9%
Foreign makes (%)	27.3%	33.5%	42.4%	39.2%	39.4%	40.0%	41.7%	44.1%

(1) Including Talbot up to 1985.
(2) Including others.

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS (UP TO 5T) BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	53,245	80,958	77,048	74,610	67,945	69,182	71,688	73,166
Peugeot	49,318	60,813	74,950	76,871	76,155	71,426	76,952	73,778
PSA Peugeot Citroën (1)	112,231	141,771	151,998	151,481	144,100	140,608	148,640	146,944
Renault	116,602	162,549	139,752	151,288	143,565	128,338	139,567	140,059
Other France	256	415	40	548	2,253	4,533	6,539	10,076
TOTAL France	**229,089**	**304,735**	**291,790**	**303,317**	**289,918**	**273,479**	**294,746**	**297,079**
Fiat	8,326	10,139	25,253	26,894	22,637	14,569	12,880	12,497
Ford	9,099	16,080	18,110	18,900	13,990	16,328	16,837	19,695
Hyundai	–	–	588	834	653	858	1,377	1,380
Iveco	2,941	11,543	16,534	18,041	13,988	13,433	14,840	15,721
Land Rover	645	2,718	1,857	1,805	1,489	1,431	1,357	1,256
Mazda	579	1,067	916	934	625	356	454	635
Mercedes	5,495	11,156	23,139	24,058	21,148	17,926	19,231	18,973
Mitsubishi	–	–	3,392	963	818	1,228	1,487	1,350
Nissan	861	5,063	5,197	4,905	5,347	7,164	8,484	9,746
Opel	664	2,408	7,561	8,519	10,037	10,140	10,372	12,617
Toyota-Lexus	7,112	6,099	1,771	1,660	1,494	2,064	2,420	2,587
Volkswagen	8,091	9,673	13,819	13,056	11,327	8,916	9,627	10,043
TOTAL foreign (2)	**48,798**	**89,060**	**123,176**	**130,555**	**115,001**	**108,140**	**113,704**	**122,986**
OVERALL TOTAL	**277,887**	**393,795**	**414,966**	**433,872**	**404,919**	**381,619**	**408,450**	**420,065**
French makes (%)	82.4%	77.4%	70.3%	69.9%	71.6%	71.7%	72.2%	70.7%
Foreign makes (%)	17.6%	22.6%	29.7%	30.1%	28.4%	28.3%	27.8%	29.3%

(1) Including Talbot up to 1985.
(2) Including others.

REGISTRATIONS

NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Citroën	324,228	347,780	338,556	369,992	356,495	340,637	328,393	344,439
Peugeot	342,779	559,294	472,497	543,425	507,833	450,653	440,176	435,935
PSA Peugeot Citroën	797,549	907,074	811,053	913,417	864,328	791,290	768,569	780,374
Renault	875,914	801,989	742,167	751,145	723,183	674,352	688,759	664 474
TOTAL France	**1,673,775**	**1,709,624**	**1,553,323**	**1,665,178**	**1,589,829**	**1,470,259**	**1,464,418**	**1,455,072**
Fiat	61,473	138,961	121,236	113,635	92,038	70,511	61,163	58,651
Ford	77,525	175,655	135,171	127,352	114,077	108,006	118,468	123,282
Land,Rover	882	6,329	9,427	8,413	7,092	7,035	7,001	8,188
Mercedes	19,925	39,761	66,528	76,127	77,843	69,316	68,418	73,601
Nissan	18,561	30,770	36,527	33,800	35,459	47,004	46,052	50,552
Opel	33,373	115,898	141,137	146,350	132,586	130,898	120,701	119,071
Rover	20,812	41,343	13,564	8,520	5,906	5,097	4,579	1,982
Seat	306	51,999	42,230	43,452	38,343	35,390	33,148	33,024
Toyota-Lexus	20,207	21,938	45,469	53,513	66,116	74,263	81,087	89,993
Volkswagen	83,818	165,644	166,687	174,663	149,139	128,234	133,772	146,018
TOTAL foreign	**477,314**	**993,301**	**995,527**	**1,023,426**	**960,161**	**920,606**	**957,741**	**1,032,782**
OVERALL TOTAL	**2,151,089**	**2,702,925**	**2,548,850**	**2,688,604**	**2,549,990**	**2,390,865**	**2,422,159**	**2,487,854**
French makes (%)	77.8%	63.3%	60.9%	61.9%	62.3%	61.5%	60.5%	58.5%
Foreign makes (%)	22.2%	36.7%	39.1%	38.1%	37.7%	38.5%	39.5%	41.5%

NEW HEAVY TRUCK (OVER 5T) REGISTRATIONS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Renault Trucks	17,984	20,453	20,818	21,104	20,174	17,116	17,696	18,339
TOTAL France	**18,312**	**20,738**	**20,992**	**21,282**	**20,268**	**17,226**	**17,780**	**18,465**
DAF	1,881	3,460	4,365	5,431	5,123	4,969	5,046	6,321
Iveco	6,578	7,204	6,998	6,751	6,260	5,116	5,407	5,901
MAN	327	1,433	3,498	3,871	3,051	3,089	3,021	4,545
Mercedes	8,014	9,500	9,976	9,569	8,006	6,620	7,246	9,325
Scania	1,389	2,711	4,963	4,281	3,871	3,720	3,382	4,417
Volvo	3,724	4,647	6,739	6,152	4,496	4,468	4,976	5,870
TOTAL foreign	**23,534**	**29,290**	**36,924**	**36,418**	**31,149**	**28,239**	**29,408**	**36,819**
OVERALL TOTAL	**41,846**	**50,028**	**57,916**	**57,700**	**51,417**	**45,465**	**47,188**	**55,284**
French makes (%)	43.8%	41.5%	36.2%	36.9%	39.4%	37.9%	37.7%	33.4%
Foreign makes (%)	56.2%	58.5%	63.8%	63.1%	60.6%	62.1%	62.3%	66.6%

USED HEAVY TRUCK (OVER 5T) REGISTRATIONS

In units	1980	1990	2000	2001	2002	2003	2004	2005
TOTAL	**–**	**–**	**59,056**	**58,577**	**57,174**	**58,141**	**72,714**	**55,975**
Ratio used/new	–	–	1.0	1.0	1.1	1.3	1.5	1.0

NEW COACH AND BUS (OVER 5T) REGISTRATIONS BY MAKE

In units	1980	1990	2000	2001	2002	2003	2004	2005
Renault	2,126	1,692	1,633	–	–	–	–	–
Other France	107	255	367	–	–	–	–	–
Kässbohrer-Setra	479	392	261	–	–	–	–	–
Mercedes	554	245	602	–	–	–	–	–
OVERALL TOTAL	**3,558**	**3,160**	**4,320**	**–**	**–**	**–**	**–**	**–**
Irisbus Group (1)	–	–	–	2,744	2,641	2,525	2,341	2,459
Evobus Group(2)	–	–	–	882	925	750	700	888
Van Hool	57	250	230	258	229	186	263	238
Neoman Bus Group(3)	–	–	–	183	164	281	237	404
Ponticelli	–	–	–	159	212	152	190	48
Other	–	–	–	465	430	468	482	736
OVERALL TOTAL	**–**	**–**	**–**	**4,691**	**4,601**	**4,362**	**4,213**	**4,773**

(1) Irisbus Group: Irisbus, Irisbus-Heuliez, Irisbus-Renault, Iveco and Karosa.
(2) Evobus Group: Kässbohrer and Mercedes.
(3) Neoman Bus: MAN and Neoplan

PHYSICAL AND FINANCIAL DATA ON THE AUTOMOBILE MANUFACTURING INDUSTRY

Physical and financial data are taken from surveys conducted every year of French companies (known as the EAE reports) in the automobile manufacturing industry. The surveys are one of the main sources of information for French industry. They are used by the statistics office of the State Secretariat for Industry (SESSI). The data reflect the businesses of French and foreign-owned companies with operations in France. Their core businesses may operate in other countries. Changes such as the creation, reorganization, acquisition or sale of companies can result in significant variations from one year to another.

AUTOMOBILE MANUFACTURING

	Unit	1980	1990	2000	2001	2002	2003	2004	2005[1]
Physical data									
No. of employees	units	320,922	216,848	190,830	197,069	191,367	183,850	186,123	184,000
Production in France	thousands			3,348	3,628	3,702	3,620	3,666	3,549
Production/employee	**veh./pers.**			**17.5**	**18.4**	**19.3**	**19.7**	**19.7**	**19.3**
Financial data									
Net sales	€ millions	19,251	49,472	73,684	80,549	82,146	83,231	87,667	88,000
Export sales	€ millions	7,511	18,817	42,290	44,998	46,628	49,634	52,751	53,680
Exports as a % of total sales	**%**	**39.0%**	**38.0%**	**57.4%**	**55.9%**	**56.8%**	**59.6%**	**60.2%**	**61.0%**
Value added (VA) before tax	€ millions	5,883	10,650	13,282	13,246	14,148	13,528	15,123	14,000
Value added/sales	**%**	**30.6%**	**21.5%**	**18.0%**	**16.4%**	**17.2%**	**16.3%**	**17.2%**	**15.9%**
Value added/employee	€ thousands	18	49	70	67	74	74	81	76
Social security costs	€ millions	1,452	1,860	2,153	2,169	2,262	2,364	2,491	
Social security costs/employee	€ thousands	4.5	8.6	11.3	11.0	11.8	12.9	13.4	
Wages and salaries	€ millions	3,254	4,271	5,093	5,359	5,610	5,883	6,109	
Wages and salaries/employee	€ thousands	10.1	19.7	26.7	27.2	29.3	32.0	32.8	
Personnel costs	€ millions	4,706	6,132	7,246	7,528	7,871	8,247	8,600	
Personnel costs/employee	€ thousands	14.7	28.3	38.0	38.2	41.1	44.9	46.2	
Personnel costs/VA	%	80.0%	57.6%	54.6%	56.8%	55.6%	61.0%	56.9%	
Operating cash flow	€ millions	928	3,855	5,201	4,822	5,357	4,355	5,487	
Operating cash flow/VA	**%**	**15.8%**	**36.2%**	**39.2%**	**36.4%**	**37.9%**	**32.2%**	**36.3%**	
Interest expense	€ millions	484	1,170	1,178	1,816	1,396	1,089	898	
Interest expense/VA	%	8.2%	11.0%	8.9%	13.7%	9.9%	8.0%	5.9%	
Interest income	€ millions	207	1,095	2,508	2,766	1,840	1,482	2,234	
Interest income/VA	%	3.5%	10.3%	18.9%	20.9%	13.0%	11.0%	14.8%	
Net interest income (expense)	€ millions	–276	–74	1,330	951	444	393	1,336	
Net interest income (expense)/VA	%	–4.7%	–0.7%	10.0%	7.2%	3.1%	2.9%	8.8%	
Cash flow	€ millions	638	2,918	5,499	4,685	4,872	3,687	4,960	
Cash flow/VA	%	10.8%	27.4%	41.4%	35.4%	34.4%	27.3%	32.8%	
Net income (loss)	**€ millions**	**–26**	**969**	**2,851**	**1,294**	**489**	**167**	**2,358**	
Net income/sales	%	–0.1%	2.0%	3.9%	1.6%	0.6%	0.2%	2.7%	
Capital expenditure	€ millions	1,018	3,139	3,807	4,024	3,873	3,720	3,483	3,300
Capital expenditure/sales	**%**	**5.3%**	**6.3%**	**5.2%**	**5.0%**	**4.7%**	**4.5%**	**4.0%**	**3.8%**
Capital expenditure/VA	**%**	**17.3%**	**29.5%**	**28.7%**	**30.4%**	**27.4%**	**27.5%**	**23.0%**	**23.6%**

(1) CCFA estimates.
The series have been revised for 1998 to 2002.

Source: EAE data processed by SESSI.

PHYSICAL AND FINANCIAL DATA ON THE AUTOMOTIVE EQUIPMENT INDUSTRY

Physical and financial data in the table below are taken from surveys conducted every year of French companies (known as the EAE reports) in the automotive equipment manufacturing industry. In 1993, new French definitions of activities were adopted to bring them in line with those used by the European Union. A number of companies were reclassified in the metalworking, electrical equipment and furniture (car seat) industries, resulting in a statistical break in data. Companies classified in the "automotive equipment manufacturing" industry therefore do not account for all automotive industry suppliers, which also include manufacturers of electrical equipment for engines and vehicles, car seats, glass, tires, and automotive closures and springs (see page 43). In addition to these activities, the automotive manufacturing and automotive equipment manufacturing industries purchase a number of intermediate products (metals, rubber, plastics), services (consulting, research, advertising) and capital goods from other industries.

AUTOMOTIVE EQUIPMENT PRODUCTION

	Unit	1980	1990	2000	2001	2002	2003	2004	2005 (1)
Physical data									
No. of companies (> 20 employees)	unit	320	320	243	236	230	227	219	217
No. of employees	unit	143,347	112,963	94,171	94,483	96,319	92,606	91,491	89,500
Financial data									
Net sales	€ millions	5,637	14,452	17,766	18,978	19,597	20,026	20,623	20,000
Export sales	€ millions	1,301	4,018	7,512	7,835	8,045	8,169	8,745	8,400
Exports as a % of total sales	**%**	**23.1%**	**27.8%**	**42.3%**	**41.3%**	**41.1%**	**40.8%**	**42.4%**	**42.0%**
Value added (VA) before tax	€ millions	2,251	4,530	4,643	4,639	5,078	5,251	5,309	
Value added (VA)/net sales	**%**	**39.9%**	**31.3%**	**26.1%**	**24.4%**	**25.9%**	**26.2%**	**25.7%**	
Value added/employee	€ thousands	16	40	49	49	53	57	58	
Social security costs	€ millions	503	867	902	918	968	982	1,011	
Social security costs/employee	€ thousands	3.5	7.7	9.6	9.7	10.0	10.6	11.1	
Wages and salaries	€ millions	1,239	2,060	2,213	2,328	2,416	2,378	2,431	
Wages and salaries/employee	€ thousands	8.6	18.2	23.5	24.6	25.1	25.7	26.6	
Personnel costs	€ millions	1,742	2,926	3,115	3,247	3,384	3,360	3,442	
Personnel costs/employee	€ thousands	12.2	25.9	33.1	34.4	35.1	36.3	37.6	
Personnel costs/VA	%	77.4%	64.6%	67.1%	70.0%	66.6%	64.0%	64.8%	
Operating cash flow	€ millions	418	1,337	1,206	1,062	1,351	1,553	1,511	
Operating cash flow/VA	**%**	**18.6%**	**29.5%**	**26.0%**	**22.9%**	**26.6%**	**29.6%**	**28.5%**	
Interest expense	€ millions	186	387	440	567	313	272	214	
Interest expense/VA	%	8.2%	8.5%	9.5%	12.2%	6.2%	5.2%	4.0%	
Interest income	€ millions	36	213	337	694	173	167	239	
Interest income/VA	%	1.6%	4.7%	7.3%	15.0%	3.4%	3.2%	4.5%	
Net interest income (expense)	€ millions	–150	–174	–103	127	–140	–105	24	
Net interest income (expense)/VA	%	–6.7%	–3.8%	–2.2%	2.7%	–2.8%	–2.0%	0.5%	
Cash flow	€ millions	237	883	889	825	903	1,162	1,085	
Cash flow/VA	%	10.5%	19.5%	19.2%	17.8%	17.8%	22.1%	20.4%	
Net income (loss)	**€ millions**	**54**	**400**	**–92**	**259**	**39**	**252**	**414**	
Net income (loss)/sales	%	1.0%	2.8%	–0.5%	1.4%	0.2%	1.3%	2.0%	
Capital expenditure	€ millions	328	899	1,024	1,019	866	665	650	
Capital expenditure/sales	**%**	**5.8%**	**6.2%**	**5.8%**	**5.4%**	**4.4%**	**3.3%**	**3.2%**	
Capital expenditure/VA	**%**	**14.6%**	**19.8%**	**22.0%**	**22.0%**	**17.1%**	**12.7%**	**12.2%**	

(1) FIEV estimates.
The series have been revised for 1999 to 2002.

VEHICLE OWNERSHIP

DENSITY (INTERNATIONAL COMPARISONS)

Number of passenger cars and commercial vehicles per 1,000 inhabitants at January 1

	1985	1995	2000	2005
European Union (1)	380	473	533	583
Germany	450	529	553	592
Belgium	363	463	504	537
Spain	276	430	508	604
France	**446**	**520**	**560**	**597**
Italy	412	541	616	666
United Kingdom	379	474	527	572
Sweden	400	445	481	513
Poland	117	229	286	377
Turkey	27	65	84	108
Canada	559	562	573	582
United States	708	759	774	794
South Korea	25	177	240	311
Japan	375	527	566	584
Argentina	173	167	180	184
Brazil	86	89	110	123
China	3	8	11	21
India	3	6	7	10

(1) As of 1995, the EU includes 15 countries. *Source: CCFA.*

TOTAL VEHICLES IN USE (JANUARY 1, 2006)

In thousands	All fuels	o/w diesel
Passenger cars		
Up to 5 hp	12,096	5,350
6 hp to 10 hp	16,618	8,600
11 hp and over	1,386	399
Total passenger cars	**30,100**	**14,348**
Light commercial vehicles (LCV)		
Less than 2.5t	3,796	2,885
2.5t to 3.5t	1,752	1,699
3.6t to 5t	11	11
Total light commercial vehicles up to 5t	**5,560**	**4,594**
Total passenger cars and light commercial vehicles	**35,660**	**18,943**
Industrial vehicles over 5t		
Trucks		
5t to less than 12t (all diesel)	86	86
12t to less than 16t (all diesel)	61	61
16t to less than 20t (all diesel)	120	120
20t and over (all diesel)	75	75
Total trucks (all diesel)	**342**	**342**
Road tractors (all diesel)	213	213
Coaches and buses	83	81
Total industrial vehicles over 5t	**638**	**636**
Total commercial vehicles all sizes	**6,198**	**5,230**
Total vehicles	**36,298**	**19,579**

Source: CCFA estimates.

VEHICLE OWNERSHIP

	Unit	1980	1990	2000	2001	2002	2003	2004	2005
Households without a vehicle	%	29.2	23.2	19.7	19.8	19.8	20.3	19.5	18.8
Households with a vehicle	%	70.8	76.8	80.3	80.2	80.2	79.7	80.5	81.2
% with one vehicle	%	54.3	50.5	50.7	50.0	49.4	47.5	46.8	46.4
% with two vehicles	%	14.8	23.0	25.4	25.6	26.0	27.0	28.4	29.4
% with three or more vehicles	%	1.7	3.3	4.2	4.6	4.9	5.2	5.3	5.4
Average age of vehicle	years		5.90	7.25	7.31	7.30	7.43	7.55	7.71
Average ownership period	years		3.66	4.43	4.33	4.46	4.55	4.64	4.73
% used passenger cars	%		50.0	56.1	57.4	58.2	58.9	59.7	59.9
Total average kilometers	km	12,200	13,041	13,560	14,550	13,490	13,069	12,843	12,613
Average kilometers, gasoline	km	11,600	11,651	10,780	11,120	10,670	10,128	9,710	9,546
Average kilometers, diesel	km	26,200	20,950	18,140	19,830	17,640	17,095	16,758	16,174
Domestic passenger road transportation									
By passenger car	billion pass.km	452.5	585.6	699.6	727.6	733.5	738.6	736.9	727.4
By coach and bus	billion pass.km	36.0	41.3	43.0	41.3	42.2	42.7	44.0	44.1
Total transportation	billion pass.km	586.9	712.2	838.5	865.4	873.9	877.4	880.3	873.4
% road transportation	%	83.2	88.0	88.6	88.8	88.8	89.0	88.7	88.3
Annual change									
By passenger car	%	–	+2.6	+0.0	+4.0	+0.8	+0.7	–0.2	–1.3
By coach and bus	%	–	+2.7	+3.4	–4.0	2.2	1.2	3.0	0.2

Source: Sofres, calculations by INRETS-ADEME, INSEE and SESP.

VEHICLES IN USE AS OF JANUARY 1

In thousands	1980	1985	1990	1995	2000	2003	2004	2005	2006
Passenger cars									
Up to 5 hp	5,090	6,645	8,312	9,367	10,572	11,651	11,883	12,040	12,096
6 hp to 10 hp	11,460	12,525	13,385	14,298	15,723	16,251	16,381	16,519	16,618
Over 10 hp	1,890	1,630	1,313	1,235	1,186	1,258	1,297	1,341	1,386
Total passenger cars	**18,440**	**20,800**	**23,010**	**24,900**	**27,480**	**29,160**	**29,560**	**29,900**	**30,100**
o/w diesel	730	1,660	3,265	6,306	9,261	11,822	12,729	13,590	14,348
Commercial vehicles									
Up to 3.5t	1,985	2,754	4,125	4,513	4,974	5,339	5,418	5,489	5,549
3.5t to 5t	103	17	20	17	12	12	12	12	11
5t to 20t	250	307	334	308	287	282	280	274	267
20t and over	26	33	41	43	46	55	62	68	75
Road tractors	129	137	160	181	210	216	214	215	213
Total commercial vehicles	**2,493**	**3,248**	**4,680**	**5,062**	**5,529**	**5,903**	**5,986**	**6,057**	**6,115**
o/w diesel	976	1,298	2,342	3,467	4,202	4,757	4,898	5,030	5,149
Coaches and buses	**57**	**62**	**68**	**78**	**80**	**81**	**82**	**82**	**83**
OVERALL TOTAL	**20,990**	**24,110**	**27,758**	**30,040**	**33,090**	**35,144**	**35,628**	**36,039**	**36,298**
o/w diesel	1,763	3,020	5,675	9,851	13,543	16,659	17,707	18,700	19,579

FUEL, AUTOMOTIVE TAXES AND EMISSIONS

MOTOR FUEL CONSUMPTION, PRICES AND TAXES

Fuel consumption	Unit	1980	1990	2000	2001	2002	2003	2004	2005
Regular gasoline	millions of liters	4,216	959						
Premium leaded – AVSR (anti-valve seat recession additive)	millions of liters	20,007	19,911	3,924	2,870	2,100	1,492	1,072	433
Premium unleaded	millions of liters		3,406	14,329	15,103	15,249	14,762	14,392	14,097
Total gasoline	**millions of liters**	**24,223**	**24,276**	**18,253**	**17,973**	**17,349**	**16,254**	**15,463**	**14,529**
Diesel	millions of liters	11,415	20,664	32,373	33,945	35,113	35,599	36,405	36,744
Total motor fuel	**millions of liters**	**35,638**	**44,940**	**50,627**	**51,918**	**52,462**	**51,853**	**51,868**	**51,273**

Source: CPDP.

Retail fuel prices (annual average)	Unit	1980	1990	2000	2001	2002	2003	2004	2005
Regular gasoline	euros/liter	**0.49**	**0.80**	**–**	**–**	**–**	**–**	**–**	**–**
Tax in %	%	57	73	–	–	–	–	–	–
Premium leaded – AVSR	euros/liter	**0.52**	**0.81**	**1.17**	**1.12**	**1.10**	**1.10**	**1.14**	**1.27**
Tax in %	%	57	74	71	72	74	75	72	67
Premium unleaded 98 octane	euros/liter	**–**	**0.79**	**1.11**	**1.06**	**1.04**	**1.04**	**1.08**	**1.20**
Tax in %	%	–	71	69	70	72	73	71	65
Gasoline	euros/liter	**0.52**	**0.81**	**1.12**	**1.07**	**1.04**	**1.04**	**1.07**	**1.18**
Tax in %	%	57	74	69	71	73	73	72	67
Diesel	euros/liter	**0.37**	**0.54**	**0.85**	**0.80**	**0.77**	**0.79**	**0.88**	**1.02**
Tax in %	%	46	61	62	63	66	66	63	57

Source: Directorate of Energy and Mineral Resources (DIREM).

AUTOMOBILE FLEET EMISSIONS IN MAINLAND FRANCE, 1990 TO 2005

In thousands of tonnes	1990	1995	2000	2001	2002	2003	2004	2005 (1)	% change 2005/1990	% change 2005/2004
Regulated pollutants										
SO_2	139	114	22	23	24	24	24	4	–97%	–83%
CO	6,260	4,557	2,780	2,589	2,266	2,031	1,919	1,708	–73%	–11%
NOx	1,093	987	732	695	647	604	581	546	–50%	–6%
NMVOC	1,051	802	493	441	382	333	299	258	–75%	–14%
Lead	3,887	1,143	7	0	0	0	0	0	–100%	–
PM10 particulates	73	86	69	68	65	63	61	59	–20%	–3%
Other emissions										
CO_2 in millions of tonnes	109	118	126	129	130	129	130	128	18%	–2%

(1) 2005 estimates.

Source: CITEPA/SECTEN data: updated February 2006.

FRENCH AND WORLD CO_2 EMISSIONS

WORLD CO_2 EMISSIONS GENERATED BY FOSSIL FUEL COMBUSTION IN 1999 BY REGION AND SEGMENT

In millions of tonnes of CO_2	Power production	Industry	Residential	Commercial	Transportation	of which road	Agriculture	Total
Asia	2,447	1,915	471	200	943	789	150	6,126
North America	2,124	646	392	247	1,844	1,528	50	5,303
Europe 40 countries	1,816	1,010	715	193	1,147	989	111	4,992
Pacific-Southern Africa	428	264	28	10	945	167	30	1,705
Rest of Africa	395	229	118	15	242	233	20	1,019
South America	86	183	52	12	258	236	27	618
Central America	128	90	26	5	126	123	8	383
TOTAL WORLD	**7,424**	**4,337**	**1,802**	**682**	**5,505**	**4,065**	**396**	**20,146**

WORLD CO_2 EMISSIONS AS A PERCENTAGE OF THE REGIONAL TOTAL IN 1999

In %	Power production	Industry	Residential	Commercial	Transportation	of which road	Agriculture	Total
Asia	40	31	8	3	15	13	2	100
North America	40	12	7	5	35	29	1	100
Europe 40 countries	36	20	14	4	23	20	2	100
Pacific-Southern Africa	25	15	2	1	55	10	2	100
Rest of Africa	39	22	12	1	24	23	2	100
South America	14	30	8	2	42	38	4	100
Central America	33	23	7	1	33	32	2	100
TOTAL WORLD	**37**	**22**	**9**	**3**	**27**	**20**	**2**	**100**

Source: http://earthtrends.wri.org

CO_2 EMISSIONS IN METROPOLITAN FRANCE BY SEGMENT

In millions of tonnes of CO_2	1990	1995	2000	2001	2002	2003	2004	2005
Power production	71	62	68	60	65	67	67	70
Industry	116	110	108	105	102	102	103	103
Residential/Commercial	114	117	115	125	114	124	126	124
Transportation	117	126	134	137	139	137	138	136
of which road	**109**	**118**	**126**	**129**	**130**	**129**	**130**	**128**
of which other transportation	8	8	8	8	9	8	8	8
Agriculture/Silviculture	92	93	96	92	89	86	86	86
TOTAL WITH HEAT SINKS	**364**	**354**	**360**	**357**	**345**	**349**	**353**	**353**

Source: CITEPA/CORALIE/SECTEN format, February 2006.

AVERAGE CO_2 EMISSIONS OF NEW CARS IN FRANCE AND EUROPE

In grams of CO_2 per kilometer	1995	1999	2000	2001	2002	2003	2004	2005
France								
Gasoline	177	171	168	164	164	163	162	159
Diesel	175	161	155	154	152	151	149	149
TOTAL	**176**	**166**	**162**	**156**	**155**	**155**	**153**	**152**
European Union (15 countries)								
TOTAL	**186**	**176**	**172**	**167**	**166**	**164**	**ND**	**ND**

Source: ADEME, May 2006, and European Commission, June 2005.

AUTOMOTIVE TAXES AND FOREIGN TRADE

AUTOMOTIVE TAXES AND DUTIES

In € millions	1980	1990	2000	2001	2002	2003	2004	2005
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	30,557	30,111	30,341	31,531	32,087
Automobile insurance tax	478	2,780	3,429	3,543	3,769	4,083	4,025	4,057
Tax on automobile registration certificates	157	846	1,373	1,413	1,503	1,427	1,479	1,536
Road tax	866	1,901	539	249	205	148	129	145
Tax on company cars	199	345	644	701	756	827	843	861
Tax based on number of axles	59	75	223	226	227	184	216	201
Fixed rate police and traffic fines, sentence fines	154	317	720	726	485	810	1,076	1,266
Driver's license tax	88	86	4	4	4	4	–	–
Regional development tax	0	0	442	448	470	479	494	499
Government royalty	–	30	132	137	145	143	149	154
TOTAL	**11,079**	**27,716**	**38,136**	**38,004**	**37,675**	**38,446**	**39,942**	**40,806**
VAT on spending to acquire and use vehicles	–	–	15,300(1)	–	–	–	–	–
Highway tolls (including VAT)	610	2,592	5,330	6,147	6,626	6,973	7,296	7,666

(1) For 1998.
Source: Internal Revenue, CCFA, URF, Transportation Satellite Account (SESP), French National Transportation Accounting Commission (CCTN).

AUTOMOTIVE IMPORTS AND EXPORTS IN VALUE

The French Overseas Departments are included in the scope of French Customs as of 1997.

In € millions and % change	New cars		New light commercial vehicles		New coaches, buses and trucks		Parts and engines		Total new cars and commercial vehicles		Used vehicles		Total	
Exports (FOB)														
1986	7,286		701		658		6,560		15,204		129		15,333	
1990	10,818	6%	846	–6%	988	7%	9,919	10%	22,571	7%	490	67%	23,060	8%
1995	11,343	–1%	769	9%	2,609	94%	11,357	2%	26,078	5%	441	32%	26,519	6%
2000	19,828	12%	2,146	32%	2,328	34%	18,213	11%	42,515	14%	1,125	–6%	43,640	13%
2004	27,438	7%	2,844	30%	2,798	25%	19,362	13%	52,443	11%	1,575	11%	54,018	11%,
2005	**26,187**	**–5%**	**2,630**	**–8%**	**2,669**	**–5%**	**19,543**	**1%**	**51,031**	**–3%**	**1,571**	**0%**	**52,602**	**–3%**
Imports (CIF)														
1986	5,534		871		1,115		3,520		11,040		284		11,323	
1990	9,813	7%	1,467	3%	1,564	–9%	5,596	1%	18,439	3%	638	21%	19,077	3%
1995	10,838	4%	1,189	2%	2,903	75%	6,687	13%	21,616	12%	349	28%	21,965	13%
2000	16,961	14%	1,997	9%	2,695	26%	11,024	11%	32,678	14%	959	–8%	33,637	13%
2004	19,846	9%	2,660	11%	3,094	18%	15,039	15%	40,639	12%	646	6%	41,285	12%
2005	**20,671**	**4%**	**2,969**	**12%**	**3,285**	**6%**	**15,897**	**6%**	**42,822**	**5%**	**765**	**18%**	**43,587**	**6%**
Balance (Exp.-Imp.)														
1986	+1,752		–170		–457		+3,040		+4,165		–155		+4,010	
1990	+1,005		–621		–576		+4,323		+4,131		–148		+3,983	
1995	+505		–420		–293		+4,670		+4,462		+92		+4,554	
2000	+2,867		+149		–367		+7,189		+9,837		+166		+10,003	
2004	+7,593		+185		–296		+4,323		+11,804		+929		+12,733	
2005	**+5,517**		**–338**		**–616**		**+3,646**		**+8,208**		**+807**		**+9,015**	
Coverage rate (Exp./Imp. x 100)														
1986	132		80		59		186		138		45		135	
1990	110		58		63		177		122		77		121	
1995	105		65		90		170		121		126		121	
2000	117		107		86		165		130		117		130	
2004	138		107		90		129		129		244		131	
2005	**127**		**89**		**81**		**123**		**119**		**205**		**121**	

FOB (Free-on-board): transaction value including freight and insurance up to the border of the exporting country.
CIF (Cost, insurance, freight): transaction value including freight and insurance up to the border of the importing country.
Source: Customs, CCFA presentation.

USEFUL ADDRESSES

FRENCH AUTOMOTIVE MANUFACTURERS

PSA Peugeot Citroën

Peugeot
75, avenue de la Grande-Armée - 75116 Paris
Tel.: +33 (0)1 40 66 55 11 - Fax: +33 (0)1 40 66 54 14
www.psa.fr - www.peugeot.com

Citroën
Immeuble Colisée III - 12, rue Fructidor - 75835 Paris Cedex 17
Tel.: +33 (0)1 58 79 79 79 - Fax: +33 (0)1 58 79 72 25
www.psa.fr - www.citroen.com

Société de Constructions Mécaniques Panhard & Levassor
18, avenue d'Ivry - BP 6 - 75621 Paris Cedex 13
Tel.: +33 (0)1 40 77 40 00 - Fax: +33 (0)1 45 82 73 26
www.panhard.fr

Renault
13-15, quai Le Gallo - 92153 Boulogne-Billancourt Cedex
Tel.: +33 (0)1 76 84 04 04

Renault Communication
1967, rue du Vieux-Pont-de-Sèvres
92109 Boulogne-Billancourt Cedex
Tel.: +33 (0)1 76 84 34 34
www.renault.com

Renault Trucks
99, route de Lyon - 69806 Saint-Priest Cedex 03
Direction des Relations Extérieures
17, rue Paul-Dautier
78451 Vélizy-Villacoublay Cedex
Tel.: +33 (0)1 34 49 26 86 - Fax: +33 (0)1 34 49 26 87
www.renault-trucks.com

Alpine-Renault
Avenue de Bréauté - 76885 Dieppe Cedex
Tel.: +33 (0)2 35 06 81 50 - Fax: +33 (0)2 35 84 56 17

Groupe Henri Heuliez
Boulevard Georges-Pompidou - BP 40 - 79140 Cerizay
Tel.: +33 (0)5 49 81 33 11 - Fax: +33 (0)5 49 80 04 17
www.heuliez.com

AUTOMOBILE TRADE ORGANIZATIONS IN FRANCE

Association des Véhicules Électriques Routiers (AVERE)
24, rue de la Rochefoucauld - 75009 Paris
Tel.: +33 (0)1 53 25 00 60 - Fax: +33 (0)1 53 25 00 40
www.avere-france.org

Chambre Syndicale Nationale des Carrossiers et Constructeurs de Semi-Remorques et Conteneurs (CARCOSERCO)
35, rue des Renaudes - 75017 Paris
Tel.: +33 (0)1 44 29 71 14 - Fax: +33 (0)1 42 67 48 21
www.carcoserco.org

Chambre Syndicale Internationale de l'Automobile et du Motocycle (CSIAM)
5, square de l'Avenue-du-Bois - BP 2116 - 75771 Paris Cedex 16
Tel.: +33 (0)1 53 64 50 30 - Fax: +33 (0)1 40 67 95 94

Comité d'organisation des salons internationaux de l'Automobile, du Cycle, du Motocycle et des Sports (AMC Promotion)
23, avenue Franklin-Roosevelt - 75008 Paris
Tel.: +33 (0)1 56 88 22 40 - Fax: +33 (0)1 42 56 50 80

Comité Français du Butane et du Propane
Tour Arago - 5, rue Bellini - 92806 Puteaux Cedex
Tel.: +33 (0)1 41 97 02 80 - Fax: +33 (0)1 41 97 02 89
www.cfbp.fr

Conseil National des Professions de l'Automobile (CNPA)
50, rue Rouget-de-Lisle - 92158 Suresnes Cedex
Tel.: +33 (0)1 40 99 55 00 - Fax: +33 (0)1 47 28 44 15
www.cnpa.fr

Fédération des Industries d'Équipements pour Véhicules (FIEV)
77 à 81, rue Jean-Jacques-Rousseau - 92150 Suresnes
Tel.: +33 (0)1 46 25 02 30 - Fax: +33 (0)1 46 97 00 80
www.fiev.fr

Syndicat des Constructeurs de Véhicules de Loisirs (SICVERL)
3, rue des Cordelières - 75013 Paris
Tel.: +33 (0)1 43 37 86 61 - Fax: +33 (0)1 45 35 07 39
www.syndicat-vehicules-loisirs.com

Union des Industries et Métiers de la Métallurgie (UIMM)
56, avenue de Wagram - 75017 Paris
Tel.: +33 (0)1 40 54 20 20 - Fax: +33 (0)1 40 54 21 81
www.uimm.fr

Union Routière de France (URF)
10, rue Clément-Marot - 75008 Paris
Tel.: +33 (0)1 40 70 05 45 - Fax: +33 (0)1 47 23 77 57
www.urf.asso.fr

Union Technique de l'Automobile, du Motocycle et du Cycle (UTAC)
BP 212 - 91311 Montlhéry Cedex
Tel.: +33 (0)1 69 80 17 00 - Fax: +33 (0)1 69 80 17 17
www.utac.com

INTERNATIONAL AUTOMOBILE ORGANIZATIONS

Association des Constructeurs Européens d'Automobiles (ACEA)
85, avenue des Nerviens - 1040 Bruxelles (Belgique)
Tel.: +33 (0)0 32 2 732 55 50 - Fax: +33 (0)0 32 2 738 73 10
www.acea.be

Organisation Internationale des Constructeurs d'Automobiles (OICA)
4, rue de Berri - 75008 Paris
Tel.: +33 (0)1 43 59 00 13 - Fax: +33 (0)1 45 63 84 41
www.oica.net

AUTOMOBILE ASSOCIATIONS IN FRANCE

Fédération Française des Automobile-Clubs et des usagers de la route (FFAC)
76, avenue Marceau - 75008 Paris
Tel.: +33 (0)1 56 89 20 70
www.automobileclub.org

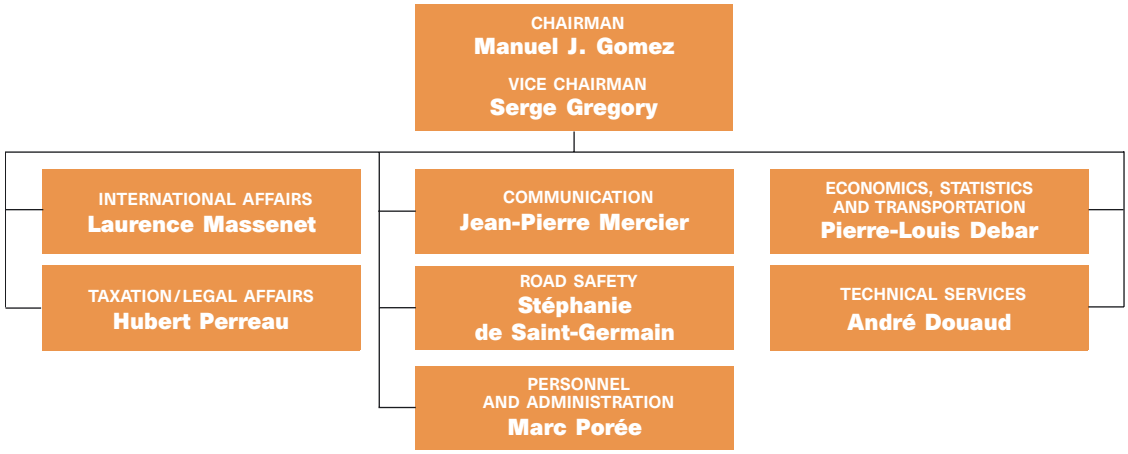
Fédération Française du Sport Automobile (FFSA)
17-21, avenue du Général-Mangin - 75781 Paris Cedex 16
Tel.: +33 (0)1 44 30 24 00 - Fax: +33 (0)1 42 24 16 80
www.ffsa.org

La Prévention Routière
6, avenue Hoche - 75008 Paris
Tel.: +33 (0)1 44 15 27 00 - Fax: +33 (0)1 42 27 98 03
www.preventionroutiere.asso.fr

Société des Ingénieurs de l'Automobile (SIA)
79, rue Jean-Jacques-Rousseau - 92158 Suresnes Cedex
Tel.: +33 (0)1 41 44 93 70 - Fax: +33 (0)1 41 44 93 79
www.sia.fr

COMITÉ DES CONSTRUCTEURS FRANÇAIS D'AUTOMOBILES

Comité des Constructeurs Français d'Automobiles (CCFA) is the French automobile manufacturer's trade association. It has seven members; Alpine, Automobiles Citroën, Heuliez, Panhard, Automobiles Peugeot, Renault and Renault Trucks. Its mission is to study and defend the business and industrial interests—excluding labor issues—of all French automobile manufacturers at both the national and international levels.
CCDA's activities encompass information, analysis and communication for its members as well as for government agencies, public officials, the media and the general public.
Other sectors of the automotive industry—parts and equipment manufacturers, dealers, body manufacturers, etc.—have their own trade association (FIEV, CARCOSERCO, CNPA, Fédération des Industries Mécaniques, Fédération de la Plasturgie, etc.).
Foreign manufacturers are represented by their own association (CSIAM).
CCFA is associated with the Brussels-based ACEA, the European Automobile Manufacturers Association. It is also a member of OICA, the International Organization of Motor Vehicle Manufacturers, which brings together national associations representing the industry from around the world.



Like its members, Comité des Constructeurs Français d'Automobiles constantly focuses on three critical commitments–sustainable mobility, road safety and environmental stewardship. Our latest publication, *Air Quality,* discusses the work performed by official organizations on the Euro 4 emission standards, which recently came into force for all new passengers cars. The findings show that the percentage of emissions from road transportation has been decreasing steadily and that the pollution caused by today's vehicles has decreased tenfold compared to vehicles from the early 1990s.
(Publications can be downloaded from the CCFA Web site or requested by calling +33 (0)1 49 52 51 24).

This brochure was produced by CCFA, 2, rue de Presbourg 75008 Paris, France
Tel.: +33 (0)1 49 52 51 00 – Fax: +33 (0)1 47 23 74 73 – Web site: www.ccfa.fr – E-mail: ccfa@ccfa.fr
Design and printing : SYNELOG - Photo credits: Peugeot, Citroën, Renault, Renault Trucks, Getty Images

2006 PARIS MONDIAL DE L'AUTOMOBILE

SEPTEMBER 30 TO OCTOBER 15

PORTE DE VERSAILLES - EXHIBITION CENTER

Tuesday to Friday: 10:00 a.m. to 10:00 p.m.
Saturday, Sunday, Monday: 10:00 a.m. to 8:00 p.m.

Tickets: www.mondial-automobile.com - Tel.: 0892 700 891* (France only)
Also available from Auchan, Carrefour, Cora, Fnac, Géant,
Leclerc and Virgin Megastore outlets
Combined RATP/Mondial de l'Automobile tickets.

(*€0.34 including VAT per minute)