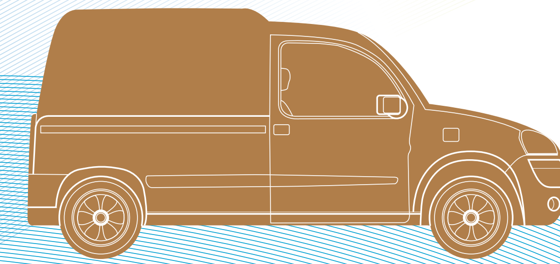
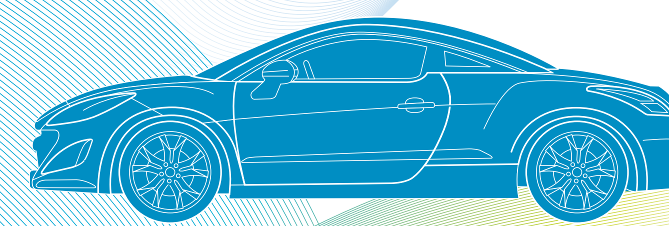
The French Automotive Industry
Analysis and Statistics
2010





THE FRENCH AUTOMOTIVE INDUSTRY 2010 EDITION

Comité des Constructeurs Français d'Automobiles

Contents

This brochure was produced by CCFA, 2 rue de Presbourg, 75008 Paris
Telephone: +33 (0)1 49 52 51 00 – Fax: +33 (0)1 47 23 74 73 – Website: www.ccfa.fr – E-mail: ccfa@ccfa.fr
Design and production: LIGARIS L'AGENCE – Illustrations: Fabrice Mathé –
Photos: Peugeot, Citroën, Renault, Renault Trucks – Translation: Parléclair.
This document is printed on Print Speed Laser paper, certified PEFC (Program for the Endorsement of Forest Certification), guaranteeing sustainable management of forests. It was printed by an Imprim'vert printer who uses only non-toxic products and ensures the safe collection, storage and processing of dangerous products and waste.

AUTOMOTIVE RESEARCH BODIES IN FRANCE

Fondation Sécurité routière
http://www.fondationsecuriteroutiere.org

Groupe d'études et de recherches permanent sur l'industrie et les salariés de l'automobile (GERPISA)
École normale supérieure de Cachan – Bât. Desjardin –
61, avenue du Président-Wilson – 94235 Cachan Cedex
Tel.: +33 (0)1 47 40 20 00
www.leblog.gerpisa.org

Institut français du pétrole (IFP)
1-4, avenue de Bois-Préau
92852 Rueil-Malmaison Cedex
Tel.: +33 (0)1 47 52 60 00 – Fax: +33 (0)1 47 52 70 00
www.ifp.fr

Institut national de recherche sur les transports et leur sécurité (INRETS)
Transport economy and sociology department (DEST)
2, rue de la Butte-Verte
93166 Noisy le Grand Cedex
Tel.: +33 (0)1 45 92 55 00 – Fax: +33 (0)1 45 92 55 01
www.inrets.fr
INRETS Head Office
25, avenue François-Mitterrand – Case 24 – 69675 Bron Cedex
Tel.: +33 (0)4 72 14 23 00 – Fax: +33 (0)4 72 37 68 37

Programme national de recherche et d'innovation dans les transports terrestres (PREDIT)
Tour Voltaire – 92055 La Défense Cedex
Tel.: +33 (0)1 40 81 14 17 – Fax: +33 (0)1 40 81 15 22
www.predit.prd.fr

In 2009, French car manufacturers coped with the crisis; government supports (loans, scrap incentives, temporary part time contracts) were very pertinent and efficient. However, in France, for them, a country of large production and supply, the problem of competitiveness hinders development. Fast and furious efforts must be made in this area.

Xavier Fels
Chairman of CCFA

Dear reader,

In 2009, the historic crisis that began in 2008 has continued to affect the world's economy gravely. For the automotive sector in traditional manufacturing countries, the difficulties continue despite the brutal shock having passed. After global automotive production dropped by 4% in 2008, it fell by a further 13% in 2009 to just under 62 million vehicles representing 11.5 million fewer units than in 2007. These variations were already important on an annual rate; they mask the infra-annual variations and illustrate the brutality of adjustments that affect our sector. They also hide a contrast between zones enjoying geographic growth, China in particular, and the traditional manufacturing regions that are in free fall. In the United States, automotive manufacturing has dropped by nearly 50% compared to 2007. Fortunately, the reaction from French manufacturers and the implementation of government policies to support the economy with finely targeted and calibrated measures limited the impact of the crisis.
From mid-2009, domestic vitality in most developing countries resulted in a return to growth in auto production in these areas. The contrast profoundly accelerated global production development, which swung geographically towards developing countries; they represented 46% of global production in 2009 compared to 16% in 2000.

In this difficult context, French automotive manufacturers focused on gaining market share in Europe and developing in emerging regions. In Western Europe, they took 22.4% (+0.8 point) of the passenger car market and 38.2% (+3.7 points) of that of light commercial vehicles. Outside EU-17, the market was affected by the crisis but nevertheless represented 35% of opportunities. The fall in global production was limited to 8%, and their share of global production grew from 8.2% to 8.7% in 2009.

In France as in other major car manufacturing countries, the size of the sector (both upstream with equipment, goods and services and downstream in the networks) meant the fall in business had serious consequences. From the beginning of the crisis, the French government quickly supported the industry's efforts; direct loans, the launch of scrap incentive schemes (nearly 600,000 vehicles involved at end 2009) and measures associated with temporary part time contracts encouraged controlled management of falling figures. On the industrial side, the Automotive Branch Platform (PFA), set up in 2009 by French manufacturers represented by CCFA, and their suppliers joined to form the CLIFA (Automotive Suppliers' Liaison Committee) and produced its initial results with four key priorities: lean manufacturing, tomorrow's expertise and businesses, better information and communication management and, finally, a mid- and long-term strategy in terms of products and international development.

The perspectives for the French auto industry's growth depend on factors shared by the industry as a whole, and on more specific elements.
In 2009, the government organized the Industry Conventions which inventoried the competitive nature of the French industry compared to others in the eurozone. They highlighted the heavy load of employee social contributions, the changing payroll costs since 2000 and taxation related to production. These factors represent major obstacles to French automakers' competitiveness as there are many production sites in France mainly supplied by French suppliers who are also penalized by this unfriendly environment. Furthermore, the intense competition on the European market, the first market opportunity for French manufacturers, further aggravates the branch as shown by the severe slump in operating margin (operating cash flow/value added) for the car industry measured by Insee; it has shrunk from 40% in the early 2000s to 7% in 2008. For CCFA and also for the *Groupement des Fédérations Industrielles* (GFI) and the MEDEF, the question of competitiveness is capital and a priority.

For the factors more specific to the automotive industry, research and development spending which is huge (over the last few years, the industry has been the leading sector in terms of research and development investments and patents filed in France) has been maintained despite the crisis. Government measures to support innovation such as the research tax credit and the consolidation of automotive competitiveness clusters represent efficient levers for the future of our industry. Part of great national borrowing is for future transportation and therefore automobiles, and should complement this virtuous strategy.

For the French market, results for 2009 vary with a 10% rise in passenger car sales thanks to efficient support measures and, on the other hand, extreme drops for commercial vehicles (–19% for light commercial vehicles and –38% for heavy trucks). For the first half 2010, the success of passenger car sales (+5%) still owes a lot to the scrap incentive scheme; light commercial vehicles are enjoying an upturn (+11%) whilst heavy trucks are still suffering (–24%). For the entire year, the effects of decreasing scrap incentive and “bonus/malus” schemes must be watched carefully. The change in average CO_2 emissions for new registered cars in France in 2009 remains very positive with 133g compared to 149g in 2007. The share of small vehicles is very high; car purchases in household spending represent less than 3%, compared to 4.1% in 1990.

The new car market in Western Europe was supported in several countries by the scrap incentive scheme and remained relatively stable in 2009. In 2010, the end of these schemes may heavily affect the market, which should register a fall. The market for light commercial vehicles dropped 28% in 2009 after falling 11% the previous year. Finally, the heavy truck market collapsed (–41%). As with France, the commercial vehicle situation is starting to turn around but levels are still low, particularly for heavy trucks.
In Eastern Europe, many markets where French manufacturers are present collapsed, leading to a fall in opportunities outside Western Europe after several years of healthy growth. In Africa and South America, French manufacturers consolidated their results whilst they continued to develop in Asia. These economically booming regions with less car ownership and a demand for original equipment represent a market of large potential. The development and consolidation of industrial sites are still strategic objectives.

2009 was also marked by varied changes in how cars are used, illustrated by a development in global sales. On the one hand, passenger car registrations remained almost stable and, on the other, commercial vehicles (all tonnage combined) dropped by 15%. In France, households have continued to travel whilst companies, struck by a drop in business, have reduced the use of their commercial vehicles.
The crisis does not call into question the regular improvement of road haulage eco-efficiency; trucks and commercial vehicles emit increasingly less CO_2 ever year in global volumes and especially per kilometer covered. CCFA and its members work hard to ensure that environmental tax discussions will not result in too high taxation on fuel (particularly diesel), already high in France compared to the European average, which would thwart the virtuous energy-saving and emission-reducing movement.

CCFA is of course at the heart of the automotive industry. At a national level, along with other professional associations (CNPA for distribution and repair, FIEV for equipment manufacturers and CSIAM for imported makes), it is constantly involved in collective discussions and major projects affecting the automotive industry as a whole. With support from its members, it acts within the major organizations throughout the business world like MEDEF, UIMM and GFI, as well as in more specialized organizations such as URF or GERPISA. Internationally, it defends French interests in ACEA and OICA, and contributes actively to the analytical capabilities and statistical data produced by these organizations.

I hope that as you read this new edition of “Analysis and Statistics”, you will become aware of the quality of our work, dedicated as it is to provide a better understanding of the automotive market in France and around the world. Please contact us and visit our website (www.ccfa.fr) for further information.

Best regards
Xavier Fels
Chairman of CCFA

The French Automobile Manufacturers' Association

The *Comité des Constructeurs Français d'Automobiles* (CCFA) is the French automobile manufacturers' trade association. Its members are: Alpine, PSA – Automobiles Citroën – Automobiles Peugeot – Panhard, Renault, Renault Trucks. Its mission is to study and defend the business and industrial interests (excluding labor issues which are the remit of the UIMM) of all French automobile manufacturers at both the national and international levels.
CCFA's activities encompass information, analysis and communication for its members as well as for government agencies, public officials, the automotive and road industry, the media and the general public.
Other sectors of the automotive industry (parts and equipment manufacturers, dealers, body manufacturers) have their own trade associations (FIEV, CNPA, FFC, *Fédération des Industries Électriques, Électroniques et de Communication* – Electrical, Electronic and Communications Industry Federation, *Fédération des Industries Mécaniques* – Mechanical Industry Federation, *Fondeurs de France* – French Foundries Association, *Groupement Plasturgie Automobile* – Automotive Plastics Group, *Syndicat National du Caoutchouc et des Polymères* – National Union of Polymers and Rubber Industries, etc.).
Foreign manufacturers are represented by their own association (CSIAM).
CCFA is associated with 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.

Chairman
XAVIER FELS
Vice Chairman
LUC BASTARD

International Affairs
LAURENCE MASSENET

Communication
FRANÇOIS ROUDIER

Economics, Statistics and Transport
PIERRE-LOUIS DEBAR

Taxation/Legal affairs
HUBERT PERREAU

Road Safety
STÉPHANIE DE SAINT-GERMAIN

Environmental and Technical Affairs
NICOLAS LE BIGOT

Human Resources
JULIEN BILLON

Financial Management
GUILLAUME DE CUGNAC

Telephone: 33 1 49 52 51 00 – Fax: 33 1 47 23 74 73 – Website: www.ccfa.fr – E-mail: ccfa@ccfa.fr

1909
The year in which the *Chambre Syndicale des Constructeurs d'Automobiles* was founded in France

2009: the financial and economic crisis has seriously affected French car manufacturers

The financial and economic crisis put an end to the long period of growth that French manufacturers enjoyed between 1997 and 2007, marked by a 53% increase in national production representing an extra 2.1 million vehicles. Since then, this production has dropped by 13% to 5.4 million with an 8% reduction in 2009 alone during which stocks continued to fall.

After significantly growing by 1.6 million vehicles between 1997 and 2008 (especially from 2002), opportunities for French manufacturers outside Eastern Europe were strongly affected by the crisis, falling by 350,000 units to 1.9 million. These areas, where the level of vehicle ownership is generally much lower than in Western Europe, represent markets of large potential within which investments, at this uncertain financial time, must be consolidated.

The market in Western Europe, a mature automobile zone, rose by 280,000 units over the same period. In France, the improvement was demonstrated by 385,000 Dacia vehicles, but numbers weakened elsewhere in Europe despite the increased market penetration, in a context of developing competition from overseas and a selective sales policy.

In a difficult context in 2010, French manufacturers continued to invest in France in research and development and also plants, and saw many models reviewed and revisited (Peugeot 508, Renault Master and Citroën C4).

KEY DATA

In thousands

	1997	2008	2009	Change 2009-2008	Change 2009-1997
World production of French manufacturers	**4,046**	**5,808**	**5,363**	**–7.7%**	**32.6%**
Passenger cars	3,472	4,901	4,807	–1.9%	38.4%
Light commercial vehicles	507	847	535	–36.8%	5.4%
Total light vehicles	3,979	5,748	5,342	–7.1%	34.2%
Heavy trucks (at constant scope)	36	60	21	–65.2%	–41.4%
Production of French manufacturers in France	**2,525**	**2,128**	**1,691**	**–20.5%**	**–33.0%**
Passenger cars	2,235	1,758	1,490	–15.3%	–33.3%
Light commercial vehicles	258	313	181	–42.2%	–29.8%
Total light vehicles	2,493	2,071	1,671	–19.3%	–33.0%
Heavy trucks	30	57	21	–63.9%	–30.7%
Automotive exports outside France	**2,822**	**4,322**	**3,883**	**–10.2%**	**37.6%**
Passenger cars	2,526	3,737	3,542	–5.2%	40.2%
Light commercial vehicles	276	546	329	–39.7%	19.1%
Total light vehicles	2,802	4,283	3,871	–9.6%	38.1%
Heavy trucks	20	39	12	–69.5%	–38.9%
Exports outside Europe 17 countries	**659**	**2,260**	**1,909**	**–15.5%**	**189.9%**
Passenger cars	563	2,016	1,779	–11.7%	216.3%
Light commercial vehicles	88	222	123	–44.8%	38.8%
Total light vehicles	651	2,238	1,902	–15.0%	192.2%
Heavy trucks	8	22	7	–65.5%	–3.5%
Automotive registrations in France	**2,068**	**2,615**	**2,719**	**4.0%**	**31.4%**
Passenger cars	1,713	2,091	2,302	10.1%	34.4%
Light commercial vehicles	313	460	374	–18.7%	19.6%
Total light vehicles	2,026	2,552	2,676	4.9%	32.1%
Heavy trucks	39.3	57.5	35.5	–38.2%	–9.5%
Coaches and buses	3.1	5.7	6.7	17.8%	113.3%
French-make automotive registrations in Europe 17 countries	**3,300**	**3,600**	**3,582**	**–0.5%**	**8.6%**
Passenger cars	2,841	2,930	3,055	4.3%	7.5%
Light commercial vehicles	432	633	507	–19.9%	17.4%
Total light vehicles	3,273	3,563	3,562	0.0%	8.8%
Heavy trucks	27	37	21	–44.8%	–24.3%

	Units	2008	2009	Change 2009-2008
Market share of French groups (new light vehicles)				
In France (makes)	in %	56.0%	56.3%	+0.3 point
In Europe outside France	in %	16.2%	16.2%	−0.1 point
In Europe	in %	23.1%	23.8%	+0.7 point
Market share of French makes (new heavy trucks)				
In Europe	in %	10.7%	10.0%	−0.7 point
French manufacturers position in world production (PSA Peugeot Citroën, Renault-Dacia-Samsung and Renault Trucks)				
Passenger cars	in %	9.2%	10.0%	0.8 point
Commercial vehicles	in %	5.1%	4.0%	−1.1 point
Total	in %	8.2%	8.7%	0.5 point
French automobile international trade				
Exports	in € billion	46.6	34.6	−25.8%
Imports	in € billion	49.5	39.2	−20.8%
Balance	in € billion	−3.0	−4.7	−1.7
Automotive industry contribution to foreign trade goods balance				
Exports	in %	11.5%	10.3%	−1.2 point
Imports	in %	10.4%	10.0%	−0.4 point
World key data for French manufacturers (PSA Peugeot Citroën + Renault)				
Sales	in € billion	92.1	82.1	−10.9%
Capital expenditure	in € billion	4.4	3.3	−25.1%
No. of employees	in thousand people	331	308	−7.0%
Jobs related to the automotive industry in France				
Automotive industry	in thousand people		229	
As a % of the manufacturing and energy industry	in %		9%	
Total (directly and indirectly related)	in thousand people		2,368	
Share of the employed working population	in %		9%	

The financial and economic crisis ended several years of strong world GDP growth at nearly 5%. After a 3% increase in 2008, GDP suffered an historic drop of 1% in 2009. Similarly to previous years, the change was very inconsistent between members of the OECD where GDP dropped by 3% and developing countries (+3%), boosted by China and India. However, for developing countries excluding China and India, growth was less sustained in Asia and the Middle East (+1%); it stopped in South America; significant decreases were been observed in Eastern Europe, particularly Russia.
Having reached a peak in the first half of 2008 and after dropping in the second, the prices of raw materials rose again returning to 2007 levels. These developments helped sustain consumer purchasing power in the short term but households were still suffering the effects of this crisis, such as the important rise in unemployment that affected their confidence. For businesses, the drop in investments hit many sectors.
In this context of a collapse of Western Europe's base market in terms of the levels observed prior to the recession, French automobile manufacturers were dealing with consumer decisions about what to buy, the rising cost of raw materials for manufacturing processes, dearer money worsened by the crisis and maintaining the euro at a high level in terms of the other main currencies. Despite everything, they had to continue to meet society's demands, which require considerable research and development expenditure. Furthermore, this crisis highlighted the entire automobile branch upstream through suppliers and downstream with transportation and the sale/maintenance of vehicles.
In this harsh economic and financial environment, the world's automobile market dropped 4% in 2009 to 66 million vehicles. In Western Europe, new car markets remained stable thanks to the different government plans for scrap incentives whilst the commercial vehicle market collapsed. French manufacturers managed to raise their penetration in a context of increased competition and a selective sales policy whilst continuing to reduce their stocks.
In Eastern Europe, automobile growth was halted by the crisis. However, to satisfy vehicle ownership requirements, French manufacturers continued to develop commercially and industrially in this area whose opportunities should eventually grow. PSA Peugeot Citroën has recently inaugurated a factory in Russia with Mitsubishi and Renault is developing a strategic partnership with the Russian manufacturer AvtoVAZ.
In 2009, China became the leading automobile market in the world and is behind the growth of sales in Asia and, to a lesser extent, India and South Korea (support measures for the Korean market have been implemented). It is the only zone outside Europe where French manufacturers managed to improve sales in 2009. Furthermore, continuing investments (PSA Peugeot Citroën has a new partnership with Changan in China, Renault in India) should support future growth.
In Latin America in a falling market, French manufacturer sales dropped after many years of growth. New investments have been voted by the French companies to attempt to return to automobile development in this region.
Finally, French manufacturers have successfully consolidated their sales in Africa on markets greatly affected by the crisis.

+33%
Increase in world production by French automotive manufacturers since 1997.

World motor vehicle production

In 2009, world vehicle production dropped by 13% to 61.7 million vehicles.
It had already dropped by 4% in 2008 after many years of sustained growth (+15 million vehicles between 2000 and 2007). The economic and financial crisis was the cause of a sudden end to growth in developed countries. It was illustrated by important drops in production in NAFTA (–32% after –16% in 2008), Western Europe (–19% after –9%) and to a lesser extent in South Korea (–8% after –7%). Japan resisted well in 2008 (–0.3%) but suffered a 31% drop in 2009. In developing regions and countries that represent the current expansion zone for the industry, growth remained, rising in 2009 to 9%.
The market did however slow down compared to 2007 when growth peaked at 20%.

WORLD MOTOR VEHICLE PRODUCTION

	Passenger cars				Commercial vehicles				Total		Change
	2008		2009		2008		2009		2008	2009	2009-2008
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**18,381**	**34.7**	**15,195**	**31.7**	**3,396**	**19.2**	**1,814**	**13.2**	**21,778**	**17,009**	**–21.9**
of which:											
Western Europe	12,849	24.2	11,038	23.0	2,325	13.1	1,203	8.7	15,175	12,241	– 19.3
Germany	5,532	10.4	4,965	10.4	514	2.9	245	1.8	6,046	5,210	–13.8
Belgium	680	1.3	525	1.1	44	0.3	13	0.1	724	537	–25.8
Spain	1,943	3.7	1,813	3.8	599	3.4	357	2.6	2,542	2,170	–14.6
France	2,146	4.0	1,819	3.8	423	2.4	228	1.7	2,569	2,048	–20.3
Italy	659	1.2	661	1.4	365	2.1	182	1.3	1,024	843	–17.6
United Kingdom	1,447	2.7	999	2.1	203	1.1	91	0.7	1,650	1,090	–33.9
Sweden	252	0.5	129	0.3	56	0.3	28	0.2	308	156	–49.3
Central and Eastern Europe	4,911	9.3	3,647	7.6	545	3.1	252	1.8	5,456	3,899	–28.5
Turkey	622	1.2	511	1.1	526	3.0	359	2.6	1,147	870	–24.2
North and South America	**9,203**	**17.4**	**7,006**	**14.6**	**7,683**	**43.3**	**5,529**	**40.2**	**16,886**	**12,536**	**–25.8**
of which:											
NAFTA(1)	6,190	11.7	4,012	8.4	6,754	38.1	4,749	34.5	12,944	8,761	–32.3
South America	3,013	5.7	2,995	6.2	929	5.2	780	5.7	3,942	3,775	–4.2
Asia-Pacific	**25,059**	**47.3**	**25,470**	**53.1**	**6,449**	**36.4**	**6,283**	**45.7**	**31,507**	**31,753**	**0.8**
of which:											
Japan	9,928	18.7	6,862	14.3	1,648	9.3	1,072	7.8	11,576	7,935	–31.5
China	6,738	12.7	10,384	21.7	2,561	14.4	3,407	24.8	9,299	13,791	48.3
South Korea	3,450	6.5	3,158	6.6	376	2.1	355	2.6	3,827	3,513	–8.2
Africa	**382**	**0.7**	**282**	**0.6**	**204**	**1.1**	**135**	**1.0**	**586**	**417**	**–28.9**
TOTAL	53,025	100.0	47,953	100.0	17,732	100.0	13,762	100.0	70,757	61,715	–12.8
CHANGE 2008-2009			–9.6%				–22.4%			–12.8%	

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

In 2009, production of passenger vehicles dropped by 10%. Production of commercial vehicles was greatly affected by the crisis and fell by 22%. This contrast was reflected in Europe (respectively –17% and –47%) and, to a lesser extent, in the Americas (respectively –24% and –28%) and Asia-Pacific (respectively +2% and –3%).
By country and including all vehicles, production slowed in all Western European countries: from –14% in Germany to –52% in Austria, with –18% in Italy and –20% in France.

In the Americas, production fell significantly in all countries except Brazil where there was only a slight drop (–1%).
In Asia-Pacific which now represents over half the world's production, development of Chinese (+48%), Indian (+13%) and Iranian (+10%) production continued. Production in Indonesia (–23%) and in Malaysia (–8%) fell after strong growth in 2008.

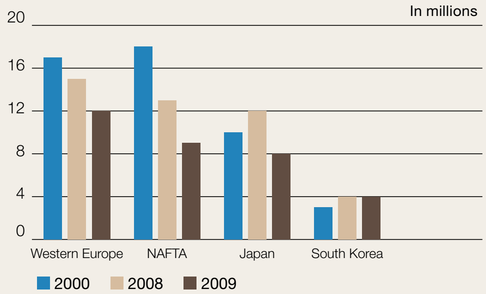
9 million
Drop in the number of vehicles produced in 2009 compared to 2008

World motor vehicle production

Between 2000 and 2009, the world's production of vehicles (61.7 million) grew by 3.4 million units representing nearly 6% growth compared to 26% in 2007, a record production level. It settled at a level close to that of 2003. In developed regions and countries, production fell by 16 million vehicles to 32 million (–32%); around 70% of this reduction was observed in 2009. These regions represent only 53% of the world's production, representing 30 points less than in 2000. Within these regions, production in North America fell by half (–9 million), in Western Europe by nearly 5 million and in Japan by over 2 million whilst it grew in South Korea (+400,000, i.e. +13%) as this country enjoyed privileged exchange rate developments. In developing regions and countries, production grew by 19 million vehicles, relying on the following five zones: China (+11.7 million) which represented 22% of the world's production in 2009, compared to 4% in 2000, Turkey and Central and Eastern Europe (+1.7 million and an 8% share compared to 5%), Indonesia, Iran, Malaysia and Thailand (+2.1 million and a 5% share compared to 2%), South America (+1.7 million and a 6% share compared to 4%) and India (+1.8 million and a 4% share compared to 1%). Overall, the market share of these emerging countries or regions rose from 16% to 46% in this period.

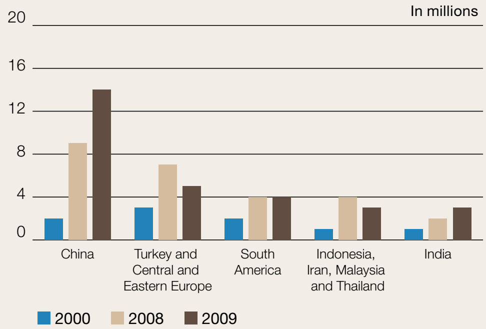
WORLD PRODUCTION OF ALL VEHICLES

DEVELOPED REGIONS AND COUNTRIES

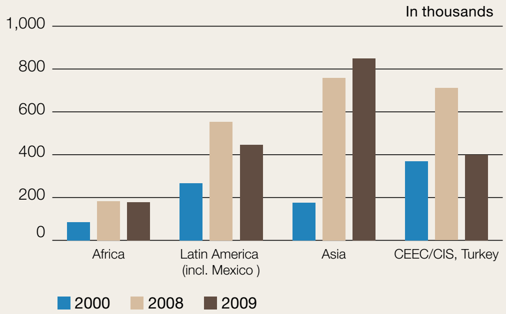


Sources: CCFA, OICA.

EMERGING REGIONS AND COUNTRIES



EVOLUTION OF MARKETS FOR FRENCH MANUFACTURERS OUTSIDE OF EU-17: ALL VEHICLES



Source: CCFA.

46%
Market share of emerging regions and countries in world motor vehicle production in 2009

In this context of changing world production, French manufacturers substantially increased exports to these regions. They grew by nearly 1 million units between 2000 and 2009, excluding EU-17 countries, to reach 1.9 million vehicles. Exports also increased by nearly 30,000 units in Turkey and countries in Central and Eastern Europe, by over 90,000 vehicles in Africa, by 180,000 in Latin America including Mexico and by 675,000 in Asia. Exports grew significantly in 2008 particularly to Turkey and countries in Central and Eastern Europe (+340,000) and Latin America including Mexico (+300,000).

World rankings of automobile manufacturers

French manufacturers relied on their base market in Europe with the help of demand support schemes and on their presence in healthy developing regions. This helped them reduce the crisis's impact. PSA Peugeot Citroën is ranked sixth in the world with a production of 3 million vehicles, a drop of 8.5%. Renault continued to develop synergies through its alliance with Nissan and built nearly 2.3 million vehicles (–5%) and is still ranked eleventh. Production by French manufacturers represented 8.7% of world production, representing less than the highest level reached in 2001 with 9.8% but more than 7.3% in 1997.

WORLD PRODUCTION IN THOUSAND VEHICLES, IN 2009	World ranking	All vehicles[1]	Passenger cars	Light commercial vehicles[2]	Heavy trucks[2]	Coaches and buses[2]
Toyota-Daihatsu-Hino[3]	1	7,234	6,149	927	154	4
General Motors (Opel-Vauxhall-GM Daewoo)	2	6,459	4,998	1,448	7	7
Volkswagen Group	3	6,067	5,903	155	7	2
Ford (Volvo cars)	4	4,685	2,952	1,681	52	–
Hyundai-Kia	5	4,646	4,223	325	–	98
PSA Peugeot Citroën	**6**	**3,042**	**2,770**	**272**	**–**	**–**
Honda	7	3,013	2,984	29	–	–
Nissan	8	2,745	2,381	305	59	–
Fiat-Iveco-Irisbus	9	2,460	1,958	398	72	32
Suzuki-Maruti	10	2,388	2,104	284	–	–
Renault-Dacia-Samsung	**11**	**2,296**	**2,044**	**252**	**–**	**–**
Daimler (including Evobus and Fuso)	12	1,448	1,055	158	183	51
Chana Automobile Liability (excluding Ford)	13	1,426	1,426	–	–	–
BMW (including Mini)	14	1,258	1,258	–	–	–
Mazda	15	985	921	62	1	–
Chrysler	16	959	211	744	4	–
Mitsubishi	17	802	716	83	3	–
Beijing AIG (excluding Hyundai, Daimler)	18	685	685	–	–	–
Tata (Telco, Jaguar, Land Rover)	19	672	377	172	104	19
Dongfeng (excluding PSA, Honda, Kia)	20	663	663	–	–	–
FAW Group (excluding VW, Toyota)	21	650	650	–	–	–
Chery Auto	22	509	509	–	–	–
Fuji (Subaru)	23	491	491	–	–	–
BYD	24	428	428	–	–	–
SAIC-Ssangyong-Nanjing (excluding GM, VW)	25	348	348	–	–	–
Anhui Jianghuai Auto	26	337	337	–	–	–
Zhejiang Geely	27	330	330	–	–	–
Isuzu	28	316	–	19	295	2
Brilliance (excluding BMW)	29	314	314	–	–	–
AvtoVAZ	30	295	295	–	–	–
Great Wall Motor	31	227	227	–	–	–
Mahindra & Mahindra	32	223	146	77	–	–
Shangdong Kaima	33	169	169	–	–	–
Proton	34	153	130	23	–	–
China National	35	121	–	121	–	–
Volvo-**Renault Trucks**-Mack-UD Trucks	36	106	–	10	85	11
Chongqing Lifan	37	104	104	–	–	–
Fujian	38	103	103	–	–	–
Kuozui	39	93	89	3	2	–
Shannxi Auto	40	79	–	79	–	–
Porsche	41	76	76	–	–	–
Ziyang Nanjin	42	72	72	–	–	–
GAZ	43	70	2	45	13	10
Navistar	44	65	–	–	52	14
Guangzhou Auto	45	63	63	–	–	–
Paccar-DAF	46	59	–	–	59	–
Chenzhou Ji'ao	47	51	51	–	–	–
Qingling Motor	48	50	50	–	–	–
Hebei Zhongxing	49	48	48	–	–	–
Ashok Leyland	50	48	–	1	28	18
Total for manufacturers listed		**59,932**	**50,808**	**7,674**	**1,181**	**269**
Other manufacturers (China, India, Russia, Poland, Turkey, etc.)		1,783				
TOTAL PRODUCTION		61,715				

(1) There may be double accounts between manufacturers. (2) Non-standard weight limits. (3) Including Daihatsu, 796,000, and Hino, 67,000. Sources: OICA, CCFA.

In the crisis, world production fell by 13%. Production varies depending on the geographical area and only Asia-Pacific grew slightly.
Since 2006, the Toyota group (–22%) have held the first ranking in front of General Motors (–22%).
The Volkswagen group (–5%) consolidated its third place taken in 2007 from Ford (–15%), whose production no longer includes Jaguar or Land Rover.

Amongst the Asian manufacturers, Hyundai-Kia, whose production grew by 11%, maintained its ranking of fifth.
However, Honda (–24%), Nissan (–19%) and Suzuki-Maruti (–9%) all dropped one position.
European manufacturers all suffered from negative growth. Daimler (–33%) and BMW (–13%) were more affected by the crisis than generalists PSA Peugeot Citroën (–8.5%), Renault (–5%) and Fiat (–3%).

8.7%
Market share of French manufacturers in world automobile production in 2009

World automotive markets

After putting an end in 2008 to a great many years of growth in new vehicle registrations, the financial and economic crisis led to a second year of a weakened world market. It dropped by 4% to 66 million units, 5 million units less than in 2007 but 6 more than 2003. China, whose access to vehicle ownership is continuously developing in line with the progressing lifestyle, saw its market (supported by government measures) increase exponentially to 13.7 million vehicles (+50%, +4.6 million vehicles). The Chinese market is now the world's leading automobile market. Outside China, registrations dropped by over 12%, or 7 million fewer vehicles. After slowed growth in 2008, developing regions witnessed contrasting situations. In South America and Asia excluding the three major countries (China, Japan and South Korea), markets were stable even if the drop in commercial vehicle investment was as evident here as it was elsewhere. Central and Eastern Europe, however, suffered a market collapse (–43%). In key industrialized countries where vehicle ownership has reached maturity, falling markets continued except in countries that had schemes that helped lessen the fall. Within NAFTA (United States, Canada and Mexico), sales fell by 21%, compared to 4% in Western Europe where several passenger car markets were supported and sustained. Finally, the falling trend on the Japanese market continued (–9%) to a level that had not been reached since the end of the 1970s.

WORLD AUTOMOTIVE MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2008		2009		2008		2009		2008	2009	2009-2008
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
EUROPE	**18,758**	**37.6**	**16,638**	**33.4**	**3,226**	**17.3**	**2,132**	**13.4**	**21,984**	**18,770**	**–14.6**
of which:											
Western Europe	13,593	27.3	13,664	27.4	2,215	11.8	1,563	9.8	15,808	15,227	–3.7
Central and Eastern Europe	5,165	10.4	2,975	6.0	1,011	5.4	569	3.6	6,177	3,544	–42.6
AMERICA	**12,045**	**24.2**	**10,414**	**20.9**	**8,964**	**48.0**	**7,083**	**44.6**	**21,008**	**17,497**	**–16.7**
of which:											
NAFTA(1)	8,275	16.6	6,626	13.3	7,967	42.6	6,234	39.2	16,242	12,860	–20.8
USA	6,813	13.7	5,456	10.9	6,680	35.7	5,146	32.4	13,493	10,602	–21.4
South America	3,770	7.6	3,788	7.6	996	5.3	849	5.3	4,766	4,637	–2.7
ASIA-PACIFIC	**18,108**	**36.3**	**22,029**	**44.2**	**6,048**	**32.4**	**6,336**	**39.9**	**24,156**	**28,366**	**+17.4**
of which:											
China	6,833	13.7	10,593	21.3	2,259	12.1	3,078	19.4	9,092	13,671	+50.4
South Korea	1,020	2.0	1,235	2.5	211	1.1	231	1.5	1,231	1,466	+19.0
Japan	4,184	8.4	3,905	7.8	898	4.8	704	4.4	5,082	4,609	–9.3
Other Asia-Pacific	6,071	12.2	6,297	12.6	2,680	14.3	2,323	14.6	8,750	8,620	–1.5
AFRICA	**941**	**1.9**	**754**	**1.5**	**456**	**2.4**	**331**	**2.1**	**1,396**	**1,086**	**–22.2**
TOTAL	**49,852**	**100.0**	**49,837**	**100.0**	**18,694**	**100.0**	**15,883**	**100.0**	**68,546**	**65,719**	**–4.1**
Change 2009-2008			0.0%				–15.0%			–4.1%	

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

In the United States, the financial crisis called a halt to household consumption and the market continued to fall to 10.6 million vehicles compared to over 17 million between 2004 and 2006.

In Western Europe, the market fell for the second consecutive year. The passenger car market remained stable supported by the different scrap incentive schemes, but the commercial vehicle market collapsed by 30%. All vehicles included, the variations between the different countries were very disparate, from –63% in Ireland to +18% in Germany, with –21% in Spain, –11% in the UK, –3% in Italy and +4% in France.

In Central and Eastern Europe, falls of over 50% were observed, particularly in the Ukraine and Russia. Stimulated by a scrap incentive scheme, the Turkish market grew by 9%.

In Japan, sales returned to a level similar to those of the end of the 1970s at 4.6 million vehicles (–9%) with the fall lessened by a scrap incentive scheme. Sales in South Korea were supported by the same kind of incentive and grew by 19% to nearly 1.5 million vehicles, to reach the same level as in the early 2000s.

In Asia-Pacific and excluding the three major countries (China, Japan and South Korea), sales fell by 1.5% because of the drop in commercial vehicles (–13%). Growth continued at over 10% in India and Iran but sales fell by 2% in Malaysia and collapsed in Indonesia (–20%).

In South America, automobile sales continued and the markets dropped only slightly (–3%), still with the dichotomy between passenger and commercial vehicles. Sales collapsed in Argentina (–20%) but increased in Brazil (+11%).

In Africa, where much lower volumes are involved, the markets were affected by the crisis (–22%); the fall observed in South Africa was clearly greater than the reductions posted in North Africa and Egypt.

21%
China's share of world sales in 2009

Trends in production and trade among the three leading world automotive regions

In 2009, the European Union (27 countries) remained the world's leading production zone.
The world crisis particularly affected its exports whilst the domestic market for passenger cars was supported by different government incentive schemes to encourage consumption. In North America including Mexico, production essential for the local market continued to suffer the consequences of falling business. Imports which had long been developed to satisfy this large market fell less, as in 2008, than local production, strongly affected by the situation of the three majors. Japan saw its exports shrink by 46%; the share of these exports in production returned to 46% (58% in 2008), reaching the level observed in the early 2000s. Imports still only account for less than 5% of total car registrations. Beyond these three historical poles, China, which became the second largest producing country in 2009, essentially only produced to satisfy its domestic market; imports, like exports, represented less than 5% of production.

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

	European Union(1)		United States, Canada and Mexico(3)		Japan	
PASSENGER CARS						
PRODUCTION	in thousands	index (100=1990)	in thousands	index (100=1990)	in 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
2009	13,948	110	4,012	56	6,862	70
IMPORTS(2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
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%
2009	2,100	15%	2,294	57%	167	2%
EXPORTS(2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
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%
2009	2,500	18%	340	8%	3,209	47%
COMMERCIAL VEHICLES						
PRODUCTION	in thousands	index (100=1990)	in thousands	index (100=1990)	in 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
2009	1,305	82	4,749	104	1,072	30
IMPORTS(2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
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%
2009	300	23%	1,111	23%	2	0%
EXPORTS(2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
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%
2009	140	11%	70	1%	408	38%

(1) The number of countries included in the "European Union" corresponds to the number of country members for the year.
(2) EU community trade is not included.
(3) Source: Ward's since 1999. Mexico is included since 2009.
Sources: Eurostat, CCFA since 1991.

46%
Percentage of vehicles manufactured for export in Japan in 2009

Trends in the three leading global automotive markets have contrasted sharply since 1990.
In the European Union (currently 27 countries) growth in vehicle production was 6% (compared to 38% in 2007) and trade, already important, appears up by nearly 40% despite the drops of the last two years.
In North America, including Mexico, since 2009 production has fallen by 25%. Imports, already very high in 1990 and which have continued to grow) resisted better, as in 2008, than local production. Exports only represented 5% of production (17% for the EU and 46% for Japan).
Finally, in Japan vehicle production dropped by 40% because of the slower domestic market and the fall in exports observed in 2009. Previously after suffering a decade of falling figures until 2001 (–29% compared to 1990), the domestic market and exports grew in association with the depreciation of the yen. In 2008, they exceeded the levels of 1990 by 15% before falling to 38% of the same levels in 2009.

World trade in automotive products

According to World Trade Organization, worldwide trade in automotive products continued to grow in 2008, a year that marked the beginning of the financial crisis: +3% to $1,234 billion. This trade accounted for 8% of world goods exports and 12% of world manufactured product exports. Trade dropped drastically within and towards certain developed regions but the annual increase continued in development areas. In dollars, the various intra-regional trade in automotive products reached 760 billion (–1.5%), representing 62% of world trade of these same products. In NAFTA and Europe (excluding CIS), this share exceeded 70%. It reached 65% for South America and just over 20% for Asia-Pacific.
Trade outside regions reached around $470 billion (+10%), up in particular for CIS, South America, the Middle East, Africa and China. Contrary to previous years, Europe (excluding CIS) was the main contributor to this increase just in front of Asia. China, whose trade was fairly balanced in 2008, imported for $29 billion of which 44% came from the EU-27, 36% from Japan and 11% from NAFTA.

WORLD TRADE IN AUTOMOTIVE PRODUCTS
Exports (FOB)/Imports (CIF) to/from leading world automotive markets

In US$ billion

ZONES	World			United States and Canada, then North America[1]			European Union[2]			Japan			Other countries[4]		
COUNTRY	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**
2008	111.2	199.2	**–88.0**	63.2	84.2	**–21.0**	18.3	39.7	**–21.4**	1.7	53.2	**–51.5**	28.0	22.2	**5.9**
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**
2008	51.7	61.0	**–9.3**	50.3	47.6	**2.7**	0.4	4.4	**–4.0**	0.0	5.9	**–5.9**	1.0	3.1	**–2.1**
EUROPEAN UNION[2]															
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**
2008	655.4	546.4	**109.0**	49.8	16.7	**33.1**	468.2	468.2	**0.0**	8.2	26.1	**–17.8**	129.2	35.4	**93.8**
GERMANY[3]															
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**
2008	223.5	95.1	**128.3**												
FRANCE[3]															
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**
2008	68.2	72.5	**–4.3**												
UNITED KINGDOM[3]															
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**
2008	36.0	56.4	**–20.4**												
ITALY[3]															
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**
2008	39.2	50.7	**–11.5**												
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**
2008	171.0	15.9	**155.2**	60.0	1.9	**58.1**	25.0	8.6	**16.5**				86.0	5.5	**80.6**
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**
2008	48.8	7.3	**41.6**												
CHINA (excl. Hong Kong)															
2000	1.6	3.8	**–2.2**	0.6	0.6	**0.0**	0.2	1.3	**–1.1**	0.3	1.5	**–1.2**	0.5	0.4	**0.1**
2008	28.7	29.1	**–0.4**	6.1	3.1	**3.0**	4.2	12.8	**–8.6**	2.3	10.3	**–8.0**	16.1	2.8	**13.3**
BRAZIL															
2000	4.7	4.3	**0.4**	0.8	0.4	**0.4**	0.7	1.4	**–0.7**	0.0	0.4	**–0.4**	3.2	2.1	**1.1**
2008	14.8	13.2	**1.6**	2.3	1.8	**0.5**	0.8	0.6	**0.2**	0.0	1.1	**–1.1**	11.7	9.7	**2.0**

(1) Since 2005, exports to North America mainly target the United States, Canada and Mexico.
(2) For comparison, 15 EU countries have been included since 1993, 25 since 2004 and 27 since 2006.
(3) Since 2001, CCFA has based its estimates of imports and exports for European Union countries on local customs statistics.
(4) The "other countries" total regroups countries not included in the three major divisions.
Source: GATT/WTO.

Between 2007 and 2008, the dollar depreciated over 6% in relation to the euro and 13% in relation to the yen, while it gained 18% in relation to the Korean won.
In 2008, Germany was still the largest exporter of automotive products with an 18% share worth $223 billion.
In the world's second largest market, Japan exported $171 billion worth of vehicles, 35% of this to North America, creating a trade surplus of $155 billion.

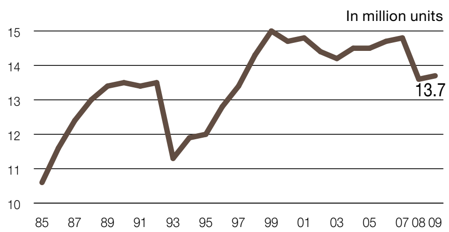
The United States is still the world's leading importer of automotive products at $200 billion; in line with the recession, the deficit in automotive products was reduced to $88 billion.
EU-27 automotive exports amounted to $655 billion. Trade within the EU accounted for over 70% of this total.
France accounted for more than 5% of world exports worth $68 billion.

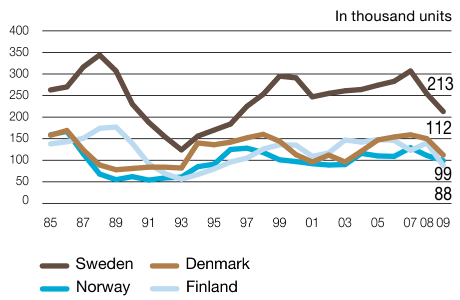
62%
Share of intraregional trade in world automotive industry products

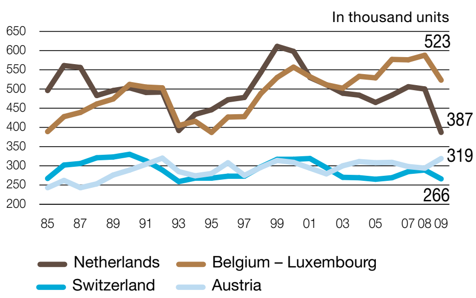
New passenger car registrations by country

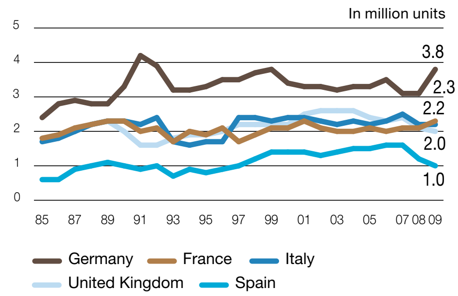
With 13.7 million new cars registered in Western Europe, the market grew slightly compared with 2008 (+0.5%).
For the second consecutive year, it has over 14 million units, representing one fifteenth of the European car fleet.
This almost stagnant situation is the result of contrasting changes for countries the most often associated with the scrap incentive schemes to encourage demand. As in 2008, the infra-annual variations were significant yet on a par with lower levels; the market fell by around 9% in the first half then grew by 14% in the second. Scrap incentive schemes strongly supported the German and French markets. The first, up by 23% achieved its highest level since 1999 thanks to the €2,500 scrap incentive. This resulted in the purchase of a million more passenger cars than originally forecast. In France, the scrap incentive scheme also enabled 10% growth in sales (with the "bonus/malus" system); the French market exceptionally became the second European market in front of Italy and the United Kingdom. For different reasons (synchronization with effects of the crisis, allocated monies, etc.), the different schemes were not always as efficient in the other major European markets.
In Italy, the market was practically stable. In the United Kingdom, the drop in volume reached 137,000 units (–6%).
The Spanish market collapsed by –18% representing a loss of 210,000 units. For markets that had little or no government aid, the drop was very strong compared to 2007.

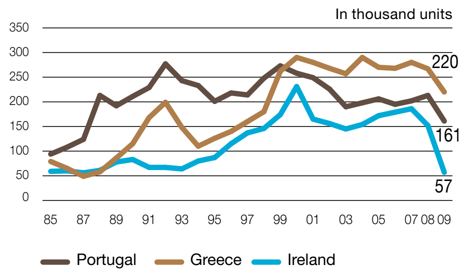
NEW PASSENGER CAR REGISTRATIONS IN EUROPE











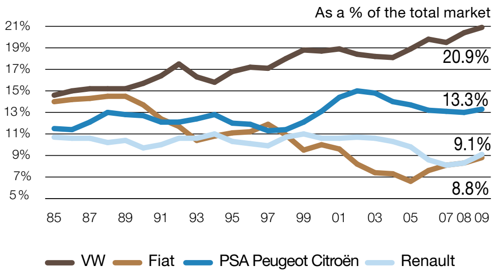
The European market covers 17 countries (the 15 European Union countries plus Switzerland and Norway). These countries have similar environments and comparable economic conditions. Since 1990, this market has included the former East Germany. In 2006, light commercial vehicles were reclassified as passenger cars in Spain: the variations at comparable scope compared to 2005 were –1.9% in Spain and +0.9% in Western Europe.
Lower oil prices and the expansion of the European Union drove strong growth in the automotive market between 1986 and 1989. Then followed a period of high-level stability. Demand plummeted in 1993, leading to a 16% drop in registrations. This market constantly grew and from 1998 to 2007, registrations regularly exceeded 14 million units in more or less favorable economic climates. For the last four months of 2008, the market reflected the global crisis. So over the whole of 2008, it dropped 8% before a slight upturn in 2009 (+0.5%) thanks to the success of the scrap incentive scheme in many countries.

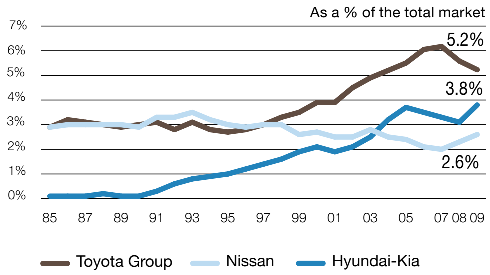
+0.5%
Increase in new passenger car registrations in Western Europe in 2009

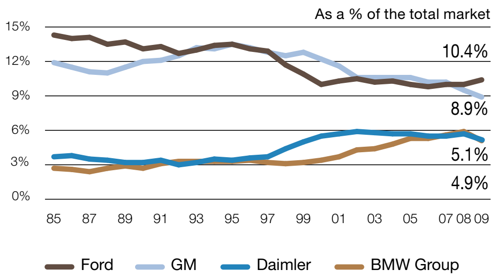
New passenger car registrations by group

After three years of dropping figures with a stable market in 2008, 2009 was marked by a 22% upturn in penetration for French groups on the European market. The launch of new models allowed French manufacturers to maintain their presence after this falling trend, due in particular to the intense competition and the weak yen.
Six major 'generalist' European automakers manufacturing a full line of vehicles each held more than 8% of the market.

GROUP MARKET SHARES(1) IN EUROPE







(1) Based on the 2008 scope of consolidation.
See page 61 for group definitions.

1 out of 5
new passenger cars sold in Western Europe is manufactured by a French group

The Volkswagen Group, with its four main makes, has maintained its position since 1999, and now accounts for more than 20% of the market.
The penetration of French groups (22.4% for them both) stopped dropping in 2008 and grew in 2009. It reached a level close to that in 1997, after exceeding 25% between 2001 and 2003.
Since 2000, Ford's market share now without Jaguar and Land Rover is around 10%; it includes Volvo (1.4%), which was purchased in 2010 by the Chinese manufacturer Geely. For the second consecutive year, Ford are ahead of General Motors who have dropped by 0.6 point to 8.9%; in 2010 GM sold Saab (0.2%). General Motors includes Opel and Chevrolet whose market share is respectively 7.4% and 1.2%. In the mid-1990s, the penetration of these two American groups was over 13% each.
The Fiat Group improved its market share for the fourth year running and its penetration reached 8.8%; it was nearly 12% in 1997 and 15% in 1989. In 2009, the Italian manufacturer purchased 20% of Chrysler representing 0.4% of the European market.
The scrap incentive schemes stimulated the markets for passenger and small cars. The German groups Daimler and BMW, specialists in premium ranges and corporate sales, were more affected by the recession.
After consolidating its positions from 1997 to 2008 through diversifying its range of vehicles, Daimler lost 0.8 point market share compared to 2008, at 4.9%. BMW, including Mini, grew from 1999 to 2008; its penetration peaked at 5.9% before also dropping 0.8 point in 2009 to 5.1%.
The penetration of Toyota (including Daihatsu) was growing continuously from 1995 to 2007 but dropped for the second consecutive year to reach 5.2%, a fall of 0.3 point. Group Hyundai-Kia's penetration rose after three years in the doldrums. Its market share grew by 0.7 point at 3.8%

Range analysis in 2009

In 2007, a new range-based segmentation of the market was introduced, with the aim of eliminating the previous “others” range. Light vans such as the Citroën Berlingo have been reclassified in the low range, while other vehicles based on commercial vehicles such as the Renault Trafic have been reallocated. Four-wheel drive vehicles are now classified inside all ranges, from low to mid to high (Peugeot 3008).

Groups	Makes	Economy and low range	Low-mid range	High-mid range	Premium range
PSA PEUGEOT CITROËN	CITROËN	C1, C2, C3, DS3, Nemo, Berlingo	Xsara, C4, Jumpy, Jumper	C5, C-Crosser	C8, C6
	PEUGEOT	107, 1007, 206, 207, Bipper, Partner	307, 308, RCZ, 3008, 5008, Expert, Boxer	407, 4007	807, 607
RENAULT GROUP	RENAULT	Twingo, Wind, Clio, Modus, Kangoo	Mégane, Master	Laguna, Trafic, Koleos	Espace, Vel Satis
	DACIA	Logan, Sandero, Duster			
BMW	BMW		1-Series	X1	3, 5, 6, 7, X3, X5, X6, Z4 Series
	MINI	Mini			
CHRYSLER	CHRYSLER-JEEP		PT Cruiser	Wrangler, Compass, Cherokee	(Grand) Voyager, Crossfire, 300C, Sebring, Grand Cherokee, Commander
	DODGE			Caliber, Journey, Nitro	
DAIMLER	MERCEDES		A, B, Class Vito	Viano	C, E, S, CL, SL, CLS, SLR, CLK, SLK, R, G, GL, GLK, ML classes
	SMART	Fortwo			
FIAT	ALFA ROMEO	Mito	147	159, Brera, GT	166, Spider
	FIAT	Seicento, Panda, 500, Punto, Idea, Sedici, Fiorino, Doblo	Stilo, Bravo, Multipla, Scudo, Ducato	Croma	Ulysse
	LANCIA	Ypsilon, Musa	Delta		Phedra, Thesis
FORD EUROPE	FORD	Ka, Fiesta, Fusion, T. Connect	Focus, Kuga, Transit	Mondeo	Galaxy, S-Max
	VOLVO		C30	S40, V50	S60, S80, V70, C70, XC60, XC70, XC90
GM EUROPE	CHEVROLET	Spark, Aveo, Matiz, Kalos	Tacuma	Lacetti, Nubira, Epica, Cruze, Captiva	Corvette
	OPEL	Agila, Corsa, Meriva, Tigra, Combo	Astra, Zafira, Movano	Vectra, Insignia, Signum, Antara, Vivaro	
	SAAB				9-3, 9-5
HONDA	HONDA	Jazz	Civic, FR-V	Accord, CR-V	
HYUNDAI	HYUNDAI	Atos, I10, Getz	Accent, I30, Coupé, Matrix	Sonata, Santa Fe, Tucson	
	KIA	Picanto, Soul	Rio, Cerato, Cee’d, Carens	Sportage	Magentis, Carnival, Sorento
MAZDA	MAZDA	2	3, 5, MX5	6	RX8
MITSUBISHI	MITSUBISHI	Colt	Lancer	Outlander	Grandis, Pajero
NISSAN	NISSAN	Pixo, Micra, Note		Qashqai, X-Trail	350Z, Murano, Pathfinder, Patrol
PORSCHE	PORSCHE				911, Boxster, Cayman, Cayenne, Panamera
SAIC	SSANGYONG			Actyon, Kyron	Rexton, Stavic
SUBARU	SUBARU	Justy		Impreza, Legacy, Forester	
SUZUKI	SUZUKI	Alto, Splash, Swift, SX4, Jimny, Ignis		Grand Vitara	
TATA GROUP	JAGUAR				X-type, S-type, XJ, XK
	LAND ROVER			Freelander, Defender	Discovery, Range Rover
TOYOTA	DAIHATSU	Cuore, Sirion, Terios			
	LEXUS				GS, IS, LS, RX
	TOYOTA	IQ, Aygo, Yaris, Urban Cruiser	Corolla, Auris	Avensis, Prius, RAV4	Land Cruiser
VOLKSWAGEN GROUP	AUDI		A3	A4, A5, TT	A6, A8, R8, Allroad, Q5, Q7
	SEAT	Ibiza	Cordoba, Leon, Altea	Toledo, Exeo	Alhambra
	SKODA	Roomster, Yeti	Fabia	Octavia	Superb
	VOLKSWAGEN	Fox, Polo, Caddy	Golf, Jetta, New Beetle, Touran, Eos	Passat, Scirocco, Tiguan, Transporter	Sharan, Phaeton, Touareg

Source: CCFA.

46 and 86

Respective numbers of models and body styles offered by French manufacturers

Breakdown and ranking by model

Of the 10 most sold models in Europe in 2009, four are made by Renault, Peugeot or Citroën, whereas in 1997, these makes were only represented by two models.
In a European market enjoying slight growth in 2009, the attractive offering of low-range cars from French manufacturers helped improve their market share.

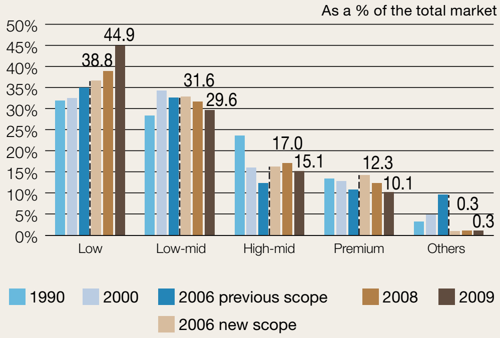
RANGES AND BODIES IN 2009

As a % of new registrations by country	Low range	Low-mid range	High-mid range	Premium range	Others
Germany	38	34	15	13	1
Austria	37	34	19	11	0
Belgium	40	29	17	14	0
Denmark	48	25	20	6	1
Spain	31	42	19	8	0
Finland	16	32	36	14	2
France	57	28	10	5	0
Greece	40	27	24	9	0
Ireland	24	32	31	9	5
Italy	65	19	10	6	0
Luxembourg	32	31	19	18	0
Netherlands	45	26	19	9	1
Portugal	42	34	14	10	0
United Kingdom	41	30	17	13	0
Sweden	16	27	28	28	0
European Union 15 countries	**45**	**30**	**15**	**10**	**0**
Norway	17	28	40	15	0
Switzerland	34	27	24	15	1
All 17 countries	**45**	**30**	**15**	**10**	**0**

	Sedans	Estates	Coupés	Cabriolets	MPVs	Others
Germany	56	16	2	3	14	10
Austria	52	14	1	1	18	13
Belgium	51	14	2	2	20	10
Denmark	59	21	0	0	14	5
Spain	66	5	2	1	13	12
Finland	48	27	1	0	8	15
France	63	8	2	1	20	6
Greece	71	0	2	2	6	19
Ireland	75	4	2	0	6	14
Italy	67	8	1	1	13	10
Luxembourg	54	12	4	1	13	16
Netherlands	59	16	1	1	13	10
Portugal	62	18	3	2	9	6
United Kingdom	66	7	3	4	12	9
Sweden	37	41	1	1	7	12
European Union 15 countries	**61**	**11**	**2**	**2**	**15**	**9**
Norway	37	30	1	1	8	24
Switzerland	44	18	2	3	15	17
All 17 countries	**61**	**11**	**2**	**2**	**15**	**10**

Source: CCFA.

BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY RANGE IN THE 17 COUNTRIES OF WESTERN EUROPE



RANKING OF THE 15 LEADING MODELS IN 2009

Models	Rank	Market share
Volkswagen Golf	1	4.8%
Peugeot 206-207	**2**	**3.4%**
Ford Fiesta	3	3.4%
Renault Mégane	**4**	**2.7%**
Opel Corsa	5	2.5%
Ford Focus	6	2.3%
Renault Clio	**7**	**2.2%**
Fiat Panda	8	2.1%
Volkswagen Polo	9	2.0%
Citroën C4-Xsara	**10**	**1.9%**
Opel Astra	11	1.9%
Citroën C3	**12**	**1.8%**
Peugeot 307-308	**13**	**1.6%**
Volkswagen Passat	14	1.5%
Toyota Yaris	15	1.4%
Renault Twingo		**1.3%**
Dacia Sandero		**0.9%**
Citroën C1		**0.9%**
Peugeot 107		**0.8%**
Citroën C5		**0.6%**
Renault Modus		**0.5%**
Dacia Logan		**0.5%**
Citroën Berlingo		**0.4%**
Renault Laguna		**0.4%**
Peugeot 3008		**0.3%**
Citroën C2		**0.3%**

Source: CCFA.

In Europe, 75% of new passenger cars are in the low and low-mid range. Tax breaks for more eco-friendly cars, scrap incentive schemes and the wide scope of cars available have oriented the market towards the low range, whose share has increased by an exceptional 6 points in 2009.
In the ten years from 1990 to the start of the 2000s, buyers tended to trade down from the high-mid range to the low-mid range, which offers more MPVs. The market share of sedans, although still dominant, has declined in recent years in favor of estates, MPVs, convertibles, light vans and four-wheel drives.
From 2006 to 2008, this stabilized because of an increase in the number of sedans in the low range. In 2009, the dynamic vitality of the low range, relatively poorer in MPVs, station wagons, coupés, etc. was reflected by a strong increase in the sedans which rose 5 points to 6.1%.
Each European country retained its own features until 2008 when Southern Europe continued to prefer low- and low-mid range vehicles, while premium cars and station wagons remained the most popular choice in Northern Europe. But in 2009, the success of the low range and sedans, particularly in Germany and the United Kingdom, reduced the contrast between the different regions.

+8 points
Increase in the European market share for low-range models between 2007 and 2009

Technical characteristics of new passenger cars

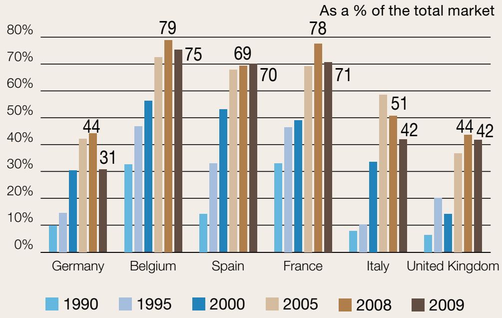
The proportion of new diesel-powered cars in Europe as a percentage of total registrations grew significantly between 1997 and 2007. The percentage of cars with diesel engines was only 22% in 1997, and reached 53% ten years later. After a relatively stable 2008, in 2009 it dropped by nearly 7 points compared to the previous year. On this market of 6.3 million units, the share of French manufacturers was 27% in 2009 (25% in 2008, 23% in 2007 and 29% in 2000) representing about 1.7 million new diesel cars.
In terms of passenger cars, diesel vehicle ownership continued to grow reaching 34% in 2009, up by 2 points for the seventh consecutive year.

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS IN EUROPE FOR 2009

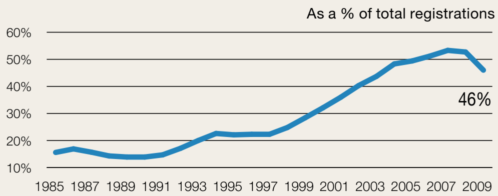
	Average cylinder capacity	Average horsepower	4WD %	Diesel %
Germany	1,664	86	7.8	30.7
Austria	1,645	81	12.7	46.0
Belgium	1,672	80	6.2	75.3
Denmark	1,550	78	1.7	45.2
Spain	1,709	84	7.9	70.1
Finland	1,787	95	11.3	46.2
France	1,548	73	3.7	70.7
Greece	1,558		12.6	3.3
Ireland	1,609	79	2.7	52.1
Italy	1,490	72	8.9	41.9
Luxembourg	1,874	101	11.9	73.0
Netherlands	1,576	82	4.2	20.1
Portugal	1,562	78	3.0	66.6
United Kingdom	1,682	88	7.6	41.7
Sweden	1,866	103	13.7	41.0
European Union 15 countries	**1,619**	**81**	**7.3**	**46.2**
Norway	1,798	91	25.7	72.7
Switzerland	1,857	106	25.8	29.4
All 17 countries	**1,625**	**82**	**7.8**	**46.0**

Source: CCFA.

DIESEL MARKET SHARE BY COUNTRY



EUROPEAN DIESEL PASSENGER CAR MARKET



–7 points
Reduction in the market share for new diesel-powered passenger cars in the total 2009 market

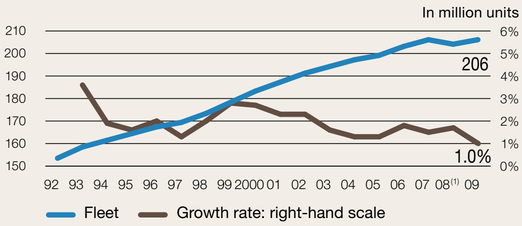
In Europe, cylinder capacity and average horsepower of car engines are very different from country to country. They depend mostly on the economic, tax and geographical conditions of each domestic market.
Since 2008, the slow and regular upward trend towards the highest horsepower has stopped in parallel in particular with the increasing penetration of low range cars. Cylinder capacity stopped increasing in 2006 as a result of downsizing (identical engine power with less cylinder capacity).
The four-wheel drive share has dropped again reaching 7.8% of the entire European market representing a million units. The *per capita* rate of ownership varies widely from one country to the next depending on national market characteristics. This market share is very high in Switzerland, Norway and Austria, where mountainous terrain has fuelled sales of these vehicles.
The market share of diesel vehicles in Europe is largely dependent on local regulations and tax rules. In Europe, in a market that had grown slightly in 2009, diesel car market share had lost nearly 7 points, at 46%. In Belgium, Spain Luxembourg, Portugal, France and Norway, over two out of three new registered passenger cars are diesel. In Germany and Italy, the diesel share has fallen and respectively reached 31% (–13 points) and 42% (–9 points).
Traditionally unfavorable to diesel, Scandinavian countries have sharply increased their purchase of diesel vehicles, a development mainly attributable to changes in tax regulations. This trend stopped in 2009, except in Sweden where diesel car sales increased a further 5 points in 2009 to 41%. Denmark dropped 1 point however, at 45% and Finland over 3 points at 46%. In Norway, the market is almost stable at 72%.

Passenger car fleet in Europe

In Western Europe as in France, the growth of passenger cars in use slowed at the end of the 1990s and is now at around 1% a year.
In new European countries and in Turkey where vehicle ownership is at a lower level, the need for mobility is reflected in more sustained growth (5 to 7%); demand at the lowest cost is partly satisfied by imports of used vehicles.
Sales of diesel cars in Western Europe developed considerably over the last few years and diesel ownership has increased to reach 34% in 2009.
Since 2000, the percentage of cars over ten years old has remained stable in Western Europe at between 32 and 34%; the large drop in new car registrations in 2008 resulted in a strong increase in this share. The new car market in Western Europe has become a replacement market.
At 1 January 2010, the effects of the scrap incentive scheme were contrasting: a sustained increase in Germany within a huge framework, similar growth in France and a reduction to numbers in the United Kingdom.

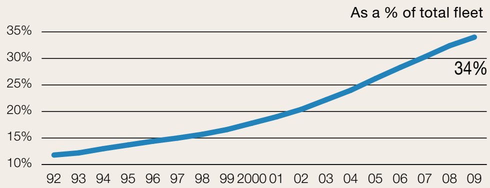
PASSENGER CAR FLEET, AT 1 JANUARY FOR EACH YEAR

IN EU-17: EU-15, SWITZERLAND AND NORWAY

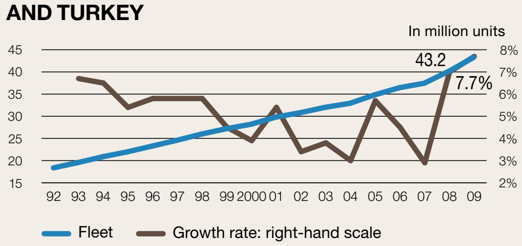


(1) The change for 2008 was calculated on a like-for-like basis.

DIESEL CAR OWNERSHIP IN EU-17

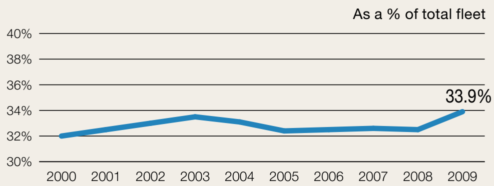


IN THE 12 NEW EU MEMBER COUNTRIES AND TURKEY



National sources: statistics organizations, Transport and Interior Ministries, professional sources.
Bulgarian and Romanian data has been revised since 2007.

SHARE OF CARS OVER 10 YEARS OLD IN EU-17



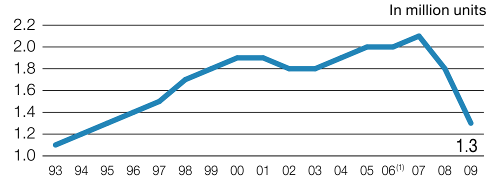
At 1 January 2009, passenger cars in Western Europe (EU-15, Switzerland and Norway) reached 206 million units. In a financial and economic recession, growth continued to weaken (1% in 2009) nearing that of the population. Increases were particularly weak (below 0.5%) in Germany, the United Kingdom, France and Sweden.
The share of diesel cars has been growing by 2 points a year since 2002 and reached 34% at 1 January 2009. In four countries, this diesel car ownership has become the majority: Austria, Belgium, France and Luxembourg. However, it is nearer 25% in Germany and the United Kingdom.
In the new EU member countries and Turkey, growth for this fleet of cars is now nearer 5-6%; in 2009 it was almost 8%. Rates as high as 10% have been observed in Poland, a country which represents over a third of this car ownership, as well as in Bulgaria and Romania. On the other hand, growth was lower in the Czech Republic (3-4%) and Slovenia (2-3%), both of which are countries with a higher car density, a higher standard of living and a local automotive industry.

34%
Share of diesel in the Western European passenger car fleet in 2009

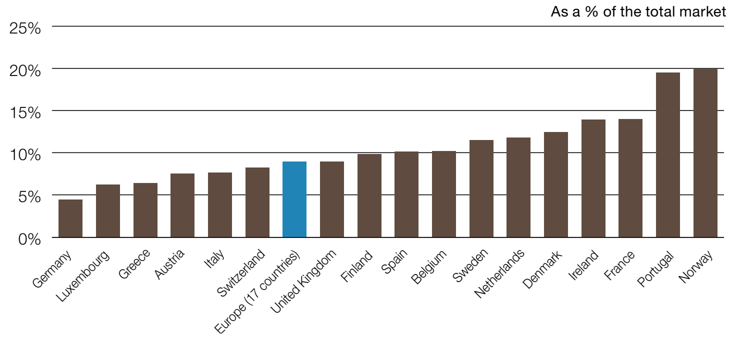
New light commercial vehicles in Europe

The European market for light commercial vehicles dropped by 28% in 2009 after falling 11% in 2008.
It has 1.3 million vehicles compared to 2.1 in 2007, representing 750,000 fewer vehicles.
Sales of French vehicles dropped by 20% to 507,000 units representing 38% of the market (+3.7 points).
Renovation and the extension of their offer to the small van sector in 2008 (Citroën Berlingo and Nemo, Peugeot Partner and Bipper and Renault Kangoo) have enabled French manufacturers to gain significant market shares, particularly in Belgium (+3.6 points), Spain (+1.8 points) and Germany (+1.2 points).

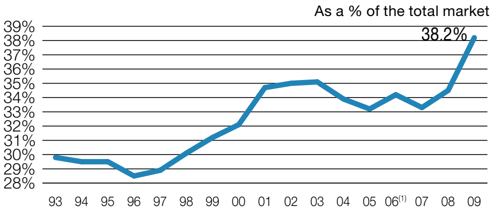
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (17 COUNTRIES)



MARKET SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS IN 2009 (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES)

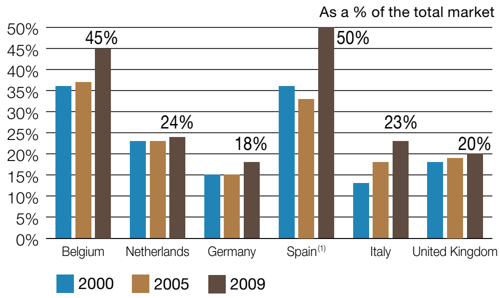


FRENCH MARKET SHARE



(1) There was a change of scope in Spain in 2006: see notes on page 61.

FRENCH MANUFACTURERS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



Light commercial vehicles are defined as vehicles whose gross weight rating is less than 5 tons. They come in various categories: commercial vehicles derived from passenger cars, light vans, light trucks, large vans, pick-up 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 ranges from 4% in Germany to nearly 20% in Portugal and Norway. Globally, it stood at 9% in 2009 compared to over 12% in 2007.

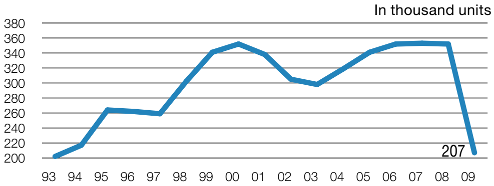
For many years, sales of these vehicles have been stimulated by model renewals and the fact that they offer an appropriate response to business transport and mobility needs. In 2009, the recession was still hitting this market hard and it had dropped to a level observed in 1996. In Spain and Belgium, market share for French manufacturers exceed 45% in 2009. In Germany and Italy, countries with their own, national manufacturers, French manufacturer market share stood respectively at 19% and 23%, up since 2000.

+5 points
Increase in French manufacturers' share in light commercial vehicle sales in Western Europe between 2007 and 2009

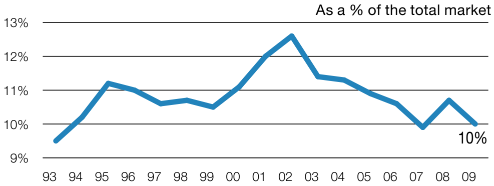
Heavy truck market and production in Europe

The European market for heavy trucks over 5 tons fell by 41% in 2009, standing at 207,000 units, a drop of 145,000 units. After four years of growth between 2003 and 2007 and a record ceiling between 2007 and 2008, in 2009 the market returned to a level close to that of 1993, a dark year for heavy trucks.
European production shrank by 64% to 203,000 units, reflecting the seriousness of the recession in 2009, after five years of great stability on the domestic market and continuous development of heavy truck exports outside the EU-15, particularly to Eastern Europe and Asia. Compared to 2003, it had dropped by 47% to a level slightly below that of 1993.

NEW HEAVY TRUCK REGISTRATIONS IN EUROPE



RENAULT TRUCKS' MARKET SHARE IN EUROPE



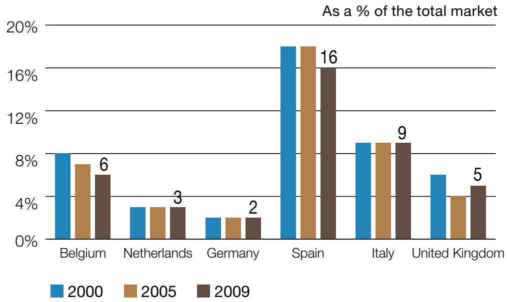
HEAVY TRUCK MARKET AND PRODUCTION IN WESTERN EUROPE

In thousand units

	2003	2008	2009	Change 2009-2008
New heavy truck registrations				
5.1 t to 15.9 t	83	80	55	−31.9%
16 t and over	214	271	152	−43.9%
TOTAL	**298**	**352**	**207**	**−41.1%**
Heavy truck production				
5.1 t to 15.9 t	102	117	60	−48.8%
16 t and over	279	440	144	−67.4%
TOTAL	**381**	**557**	**203**	**−63.5%**

Source: CCFA.

RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



–64%
Decrease of new heavy trucks production in Western Europe in 2009 compared to 2008 (record level)

In Europe, after feeling the effects of the recession between 2001 and 2003, in 2008, the heavy truck market reached a record level for the third consecutive year with an increase of 18% compared to 2003, thanks in part to the upturn in spending and in world trade that began in the second half of 2003.
However, it suffered under the impact of the financial crisis in 2009 and leveled out 30% below its 2003 figures.
Heavy truck investment cycles are relatively long; the high points of 2000, 2006 to 2008 represent 75% more than the lowest point of 1993 or 150,000 more vehicles. In 2009, the market was only 3% higher than 1993.
Demand continued to focus on the 16t-and-over segment, which accounted for 74% of total registrations, including both trucks and road tractors.
Within this climate, Renault Truck registrations dropped sharply in 2009 and its penetration stabilized at 10%, slightly below 2007.
International development of Renault Trucks was affected and its penetration in Europe (outside France) was 5% compared to 6% in 2008.

French automobile manufacturers in the new EU member countries

Since 1 May 2004 and 1 January 2007, 12 new countries have joined the European Union whose centre of gravity has now moved eastwards. New markets, such as those of the Community of Independent States and the Balkans, now seem closer. French manufacturers have had a commercial presence in this region for a number of years, developing local production plants: PSA Peugeot Citroën in Slovakia, Russia and, in partnership with Toyota, the Czech Republic; Renault in Slovenia, Romania, through the acquisition of Dacia, and Russia (plant and partnership with AvtoVAZ).
These industrial plants will enable the two manufacturers to meet demand in these countries, which is set to grow given the low vehicle densities (number of vehicles per 1,000 inhabitants) compared with France or Germany.
In 2009, vehicle production dropped sharply (–8% to 3 million vehicles) compared to the record levels achieved in 2008.

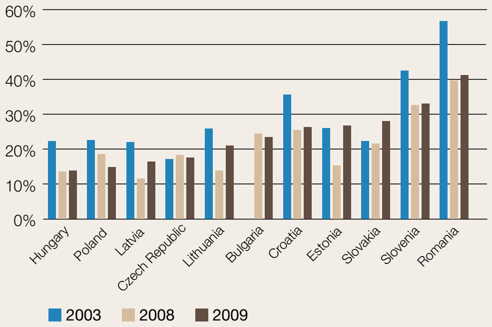
THE MARKET AND VEHICLE PRODUCTION IN THE MAIN CENTRAL AND EASTERN EUROPEAN COUNTRIES

New European Union member countries[(1)] and Croatia — In thousand units

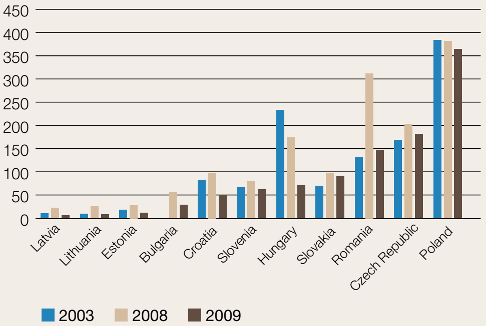
	2008	2009	Change 2009-2008
Vehicle production			
Passenger cars	3,105	2,910	–6.3%
Light commercial vehicles	131	85	–35.2%
Heavy trucks	19.5	8.4	–54.3%
New vehicle registrations			
Passenger cars	1,267	904	–28.7%
Light commercial vehicles	208	115	–44.7%
Heavy trucks	67.4	22.1	–67.2%

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

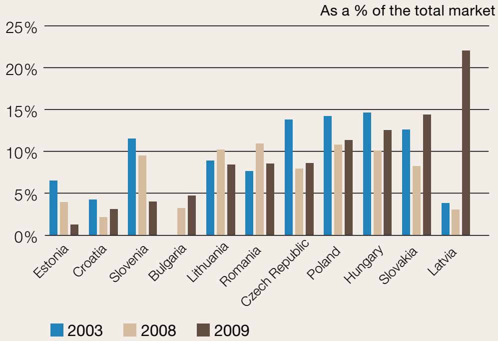
FRENCH MANUFACTURERS' MARKET SHARE: NEW LIGHT VEHICLES



NEW LIGHT VEHICLE REGISTRATIONS (UP TO 5 TONS GVWR)



FRENCH MANUFACTURERS' MARKET SHARE: NEW HEAVY TRUCKS



Although the EU-15 is dominated by replacement demand, this is not the case in new and future member states and neighboring countries, where the potential for first-time car ownership is significantly higher.
Central and Eastern European countries (CEEC) produced 3 million vehicles in 2009. Their activity slowed less than in Western Europe because of the local manufacture of small cars in phase with the current West European trends.

In 2009 because of the recession this production was higher than the domestic demand of the area, this being the sum of new vehicle registrations plus imports of used vehicles.
In 2009, new vehicle sales fell by 33%. The results are different for each country. Hungary, Romania and the Baltic States are most affected by the recession.

22%
Share of new light vehicles from French manufacturers in the main new EU countries

The automotive industry in the European Union

In 2007, 2.3 million people worked in the automotive industry in the EU-27 in companies with more than 20 employees.
Value added per employee ranged from €33,000 a year in the six main new member states (up 13% compared to 2006) to more than €86,000 in Germany. In France, it was €69,000, near the European average.
Personnel costs per employee ranged from €13,000 in the six main new member states to €64,000 in Germany. In France, they reached €52,000, above the European average (€47,000).

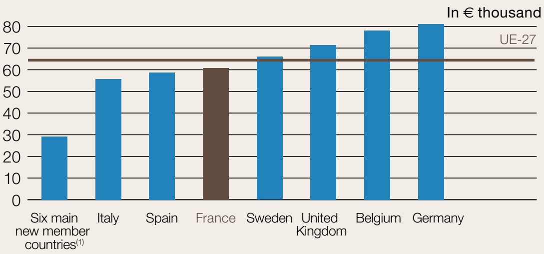
2.3 million
people were employed in the automotive industry in EU-27 in 2007

THE AUTOMOTIVE INDUSTRY IN EU-27 IN 2007

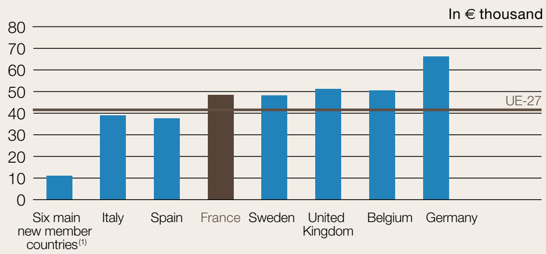
Companies with more than 20 employees	Units	European Union (27 countries)	Germany	France	Six main new member countries(1)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**in thousands**	**2,254**	**848**	**255**	**421**	**166**	**155**	**169**	**85**	**45**
Automotive manufacturing	in thousands	1,100	489	161	145	74	72	69	49	26
Body and trailer manufacturers	in thousands	200	44	28	–	24	16	16	10	8
Automotive equipment manufacturing	in thousands	968	315	66	276	68	67	84	27	11
Sales	**€ million**	**847,996**	**364,940**	**115,702**	**77,170**	**72,991**	**63,396**	**65,766**	**32,810**	**19,433**
Production	**€ million**	**755,988**	**309,240**	**110,939**	**75,566**	**63,240**	**56,612**	**56,395**	**31,211**	**18,108**
Production/Sales	%	89.1	84.7	95.9	97.9	86.6	89.3	85.8	95.1	93.2
Value added (to factor costs)	**€ million**	**155,396**	**73,257**	**17,486**	**13,865**	**13,186**	**9,647**	**10,411**	**6,203**	**3,069**
VA/Production	%	20.6	23.7	15.8	18.3	20.9	17.0	18.5	19.9	16.9
VA per employee	€ thousands	68.9	86.4	68.6	32.9	79.5	62.2	61.5	72.7	68.2
Base 100: six main new member countries		209	262	208	100	241	189	187	221	207
Goods and services purchased	**€ million**	**699,570**	**292,811**	**98,703**	**65,331**	**60,114**	**54,728**	**55,821**	**27,737**	**16,374**
Purchases as a % of output	%	92.5	94.7	89.0	86.5	95.1	96.7	99.0	88.9	90.4
Personnel costs	**€ million**	**105,859**	**54,534**	**13,154**	**5,416**	**8,471**	**6,013**	**6,851**	**4,407**	**2,808**
Personnel costs per employee	€ thousands	47.0	64.3	51.6	12.9	51.0	38.8	40.5	51.6	62.4
Base 100: six main new member countries		365	500	401	100	397	301	315	401	485
Operating cash flow (OCF)	**€ million**	**49,536**	**18,723**	**4,333**	**8,552**	**4,715**	**3,634**	**3,560**	**1,796**	**261**
OCF/VA	%	31.9	25.6	24.8	61.7	35.8	37.7	34.2	29.0	8.5

(1) Six main new member countries: Czech Republic, Hungary, Poland, Romania, Slovakia and Slovenia. Body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
Sources: Eurostat and CCFA estimates.

VALUE ADDED PER EMPLOYEE



PERSONNEL COSTS PER EMPLOYEE



The automotive industry is a key sector of the European economy, encompassing:
– automotive manufacturing;
– body and trailer manufacturing;
– automotive equipment manufacturing.
The data in the above table come from surveys of national companies and have been adjusted for consistency by Eurostat. Due to difficulties in collecting and standardizing statistics at both the national and European level, only data up to 2007 were available.
In 2007, the European automotive industry employed 2.3 million people, half of them in vehicle manufacturing. Together, Germany and France accounted for more than half of the employees in the industry, with 38% and 11% respectively. At 19%, the people employed in the new six new member countries (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) grew again by 2 points.
The automotive industry differed significantly from country to country in terms of structure and wages. In Germany, Belgium, France and Sweden, around 60% of automotive industry staff were employed in vehicle construction whilst this share was around 35% in the 6 new member countries.
It was between 41% and 47% in Italy, Spain and the United Kingdom.
Personnel costs per person employed varied between 13,000 in the six new member countries and €64,000 in Germany, a ratio of 1 to 5.

French automobile manufacturers in 2009

FRENCH MANUFACTURERS IN 2009

	Units	PSA Peugeot Citroën	Renault
Sales	€ million	48,417	33,712
Capital expenditure	€ million	1,680	1,623
Net income	€ million	–1,274	–3,068
Employees worldwide[1]	**No. of people**	**186,220**	**121,422**

	Units	PSA Peugeot Citroën						Renault		
		Automotive activity: Peugeot and Citroën	Automotive equipment: Faurecia	Transport: Gefco	Financing: PSA Finance	Others	Eliminations	Automotive sector	Financial sector	Eliminations
Sales	€ million	38,265	9,292	2,888	1,823	276	–4,127	31,951	1,761	
Operating income	€ million	–1,257	–92	102	498	54	6	–915	506	13
Capital expenditure[2]	€ million	1,670			10			1,620	3	
Employees worldwide[1]	**No. of people**	**121,365**	**52,065**	**9,335**	**2,470**	**985**		**118,477**	**2,945**	

(1) On 31 December.
(2) The capital expenditure given for automotive activities are those for all industrial and commercial activities, excluding financing.
Sources: PSA Peugeot Citroën and Renault annual reports.

PSA Peugeot Citroën: www.psa.fr
In 2009, in a world crisis and when part of the base market was supported by demand incentive schemes, PSA Peugeot Citroën sales dropped by 2.2%, slower than the global market. The group's European penetration grew in a weakened market; outlets outside of this zone were maintained with good results in China and exports of spare parts. Business outside Europe represented 33.1% of total sales and PSA Peugeot Citroën remains the second European group (passenger cars and light commercial vehicles). It is the world's largest manufacturer of diesel engines.
Highly complementary Peugeot and Citroën products, models in line with demand, a policy of building cost-reducing platforms and an industrial productivity improvement program have helped the group weather the storm against a background of stiff competition in the European market, rising raw material prices and negative exchange rates (sterling).
The Group's commitment to globalization is based mainly on long-term, targeted cooperation initiatives with other automobile manufacturers. In 2006, an agreement was signed with Dongfeng Motor (second largest assembly plant in China, operating since end 2009). In 2009, PSA Peugeot Citroën cooperated further with Mitsubishi on electrical vehicles. In 2010, the two manufacturers inaugurated a vehicle assembly plant in Kalouga. More recently, a cooperation contract was singed with China Changan Automobile Group, one of its objectives being the construction of an assembly plant in China. PSA Peugeot Citroën is accelerating adaptation of its models to suit non-European consumers as part of its strategy to become a global market player.
Furthermore, the group has continued to conduct research aimed at reducing fuel consumption in vehicles. A new family of small three cylinder gasoline engines will also be developed and industrialized in France by 2012, with the objective of vehicles emitting less than 100 g of CO_2/km. The second generation of Stop&Start called e-HDi will progressively be installed in the Group's ranges as of end 2010. Finally, the first cars fitted with HYbrid4 technology will be on the market in 2011.
The group's Performance Plan for 2010-2012 based on dynamic sales and cost reduction, the launch of new models and the revision of part of the range should enable it to weather the still difficult economic climate. This strategy is supported by many commitments in terms of sustainable development (eco-design, safety and mobility, etc.)

Renault: www.renault.com
Even though it is softened by governmental schemes and support, the crisis affecting the automotive markets impacted Renault's results. In a weakened market with intense competition and continuing selective sales policies, results were up by 1.5% in Europe. Outside Europe, they dropped by 10.9% representing nearly 34% of sales.
Cooperation launched in 1999 with Nissan was further strengthened within the Alliance. New synergies have also been set up. They concern plants (the first factory manufacturing for the world was inaugurated in Chennai, India early 2010) and also purchasing, logistics, engineering, advanced research and studies. Moreover, Renault and Nissan electric vehicles will be equipped with jointly developed batteries. Many projects have been launched for developing zero emission general public vehicles; the first agreement protocol has been signed in Israel, others are following around the world, from the United States (Tennessee) to Japan, Germany and China. In 2009, the first stone of the Tangiers plant (Morocco) was laid. In 2010, the group also strengthened its alliance strategy by signing an agreement with Daimler AG. The cooperation concerns the development of small cars including electric, gas and diesel cars and also light commercial vehicles. The strategic partnership with AvtoVAZ, now involving Nissan, will accelerate the growth of this manufacturer and strengthen Renault's and Nissan's presence in Russia.
Renault is continuing its ambitions in terms of quality (products and services) and profitability (cost control) whilst focusing on the industry's social challenges (sustainable mobility, safety for all, etc.).
The development of the Logan program and the end of the renovation of the Mégane family (Scénic produced in France) ensure Renault has one of the youngest ranges in Europe, which should allow it to weather the uncertain times ahead.

Renault Trucks: www.renault-trucks.com
Renault Trucks employ 14,000 people all over the world. In France, the manufacturer employs 10,000 people, of which 1,300 work in research and development. Beyond industrial cooperation, synergies within the AB Volvo group between the 4 brands (Renault, Volvo, Mack and UD Trucks—formerly Nissan diesel) have generated significant savings, particularly in purchasing.
2009 was marked by a drastic fall in the heavy truck market. In Europe, it reached levels similar to 1993, a dark year for this sector. In this context, Renault Trucks' penetration remained above 10% within the EU and was consolidated on the French market and also in Eastern Europe. The crisis did not spare the international market; however, Asia and North Africa were less affected. In this last region, Algeria and Tunisia remained the key markets for Renault Trucks, outside of Europe and Turkey.
Starting in 2009, Renault Trucks will be able to use two new sites outside Western Europe: the first in Turkey following an agreement signed in 2007 with Karsan for the assembly of several thousand vehicles per year and the second in Russia, after the opening of a Volvo plant.
The product offering is led by the current Euro V standards of October 2009 and Euro VI for end 2012 as well as the launch of solutions that aim to reduce heavy truck fuel consumption.

322,000
Worldwide employees of French manufacturers

World production sites of French automobile manufacturers

58
production and assembly sites used by French groups in the world, six currently as projects

EUROPE

France
(1) Aulnay
(2) Batilly
(3) Blainville
(4) Bourg-en-Bresse
(5) Dieppe
(6) Douai
(7) Flins
(8) Hordain
(9) Limoges
(10) Maubeuge
(11) Mulhouse
(12) Poissy
(13) Rennes
(14) Sandouville
(15) Sochaux

Spain
(16) Barcelona (Nissan)
(17) Palencia
(18) Valladolid
(19) Vigo
(20) Villaverde

Italy
(21) Val di Sangro

Portugal
(22) Mangualde

Czech Republic
(23) Kolín

Romania
(24) Pitesti (Dacia)

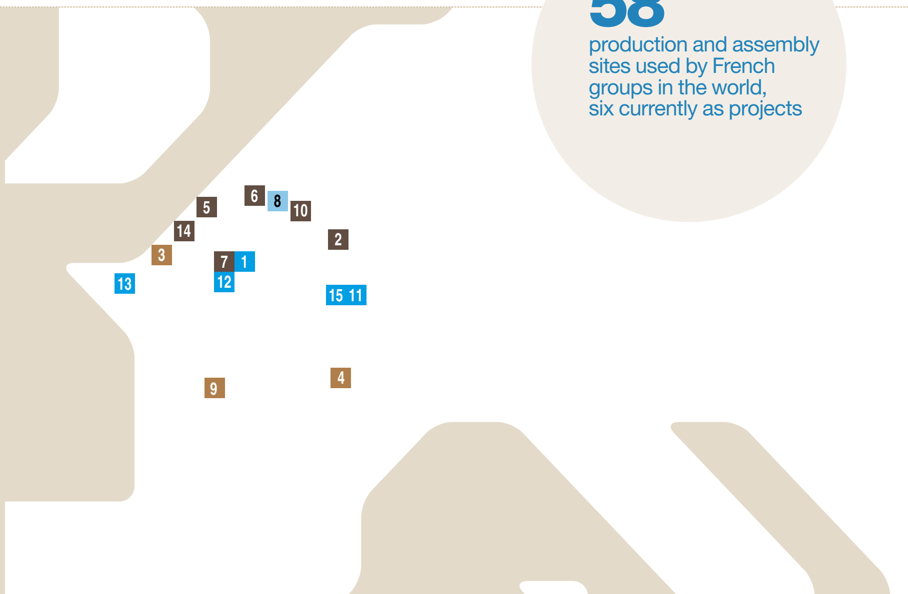
United Kingdom
(25) Luton (General Motors)

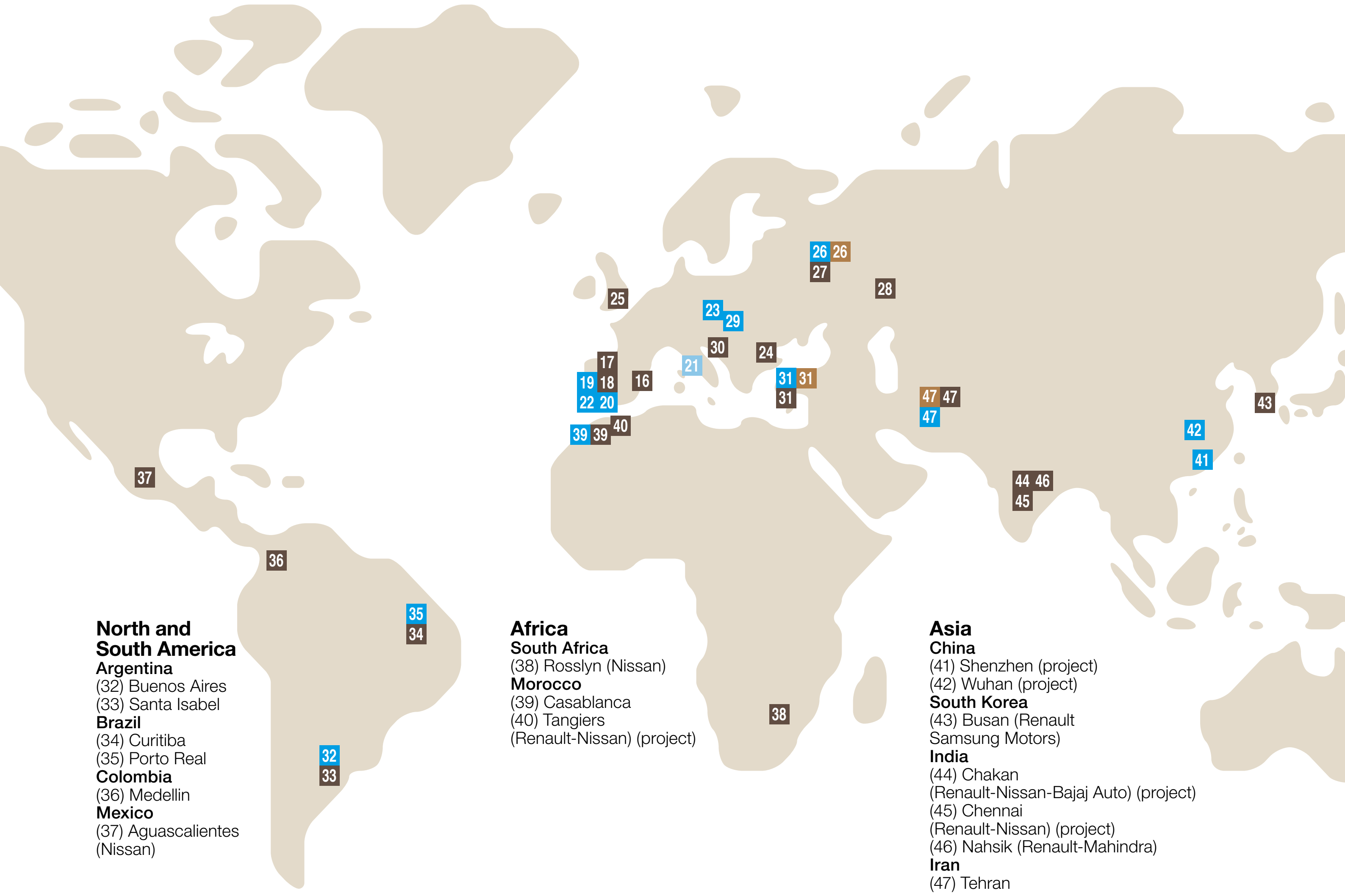
Russia
(26) Kalouga
(PSA-Mitsubishi)
(Volvo Trucks)
(27) Moscow
(28) Togliatti (AvtoVAZ) (project)

Slovakia
(29) Trnava

Slovenia
(30) Novo Mesto

Turkey
(31) Bursa
(Tofas)
(Karsan)





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

South Africa
(38) Rosslyn (Nissan)

Morocco
(39) Casablanca
(40) Tangiers
(Renault-Nissan) (project)

Asia

China
(41) Shenzhen (project)
(42) Wuhan (project)

South Korea
(43) Busan (Renault Samsung Motors)

India
(44) Chakan
(Renault-Nissan-Bajaj Auto) (project)
(45) Chennai
(Renault-Nissan) (project)
(46) Nahsik (Renault-Mahindra)

Iran
(47) Tehran

PSA Peugeot Citroën · Sevel · Renault · Renault Trucks

World production of French automobile manufacturers

Between 2004 and 2008, world production by French manufacturers oscillated around 6 million vehicles.
In 2008 and 2009 respectively, it fell by 6.1% and 7.7% because of the global recession. However, since 1996, production had grown by 42% representing annual growth of 3% thanks, initially, to the increase of opportunities in Europe outside France and then, to opportunities outside Europe. Passenger car production fell by 1.9% to 4.8 million units in 2009 but production of light commercial vehicles (–37.1%, at 533,000 units) and heavy trucks (–65.2%, at 21,000 units) which had grown in 2008 was more heavily affected by the recession.

PRODUCTION/ASSEMBLY SITES AND CUMULATED PRODUCTION PER MODEL

Group/Make	Model	Launch	Production or assembly sites in 2009	Production (in units) Total at end 2009
PSA PEUGEOT CITROËN				
Peugeot, Citroën	107, C1	2005	Kolín (Czech Rep.)	465,100 / 448,900
Peugeot	1007	2005	Poissy	49,200
Peugeot	206	1998	Mulhouse, Argentina, Iran	6,755,500
Peugeot	207	2006	Poissy, Villaverde (S), Trnava (Sl), Argentina, Brazil, China	1,730,800
Citroën	C2	2003	Aulnay, China	651,200
Citroën	C3	2002/2008	Aulnay, Poissy, Villaverde (S), Porto Real (Br), Trnava (Sl)	2,371,100
Citroën	DS3	2009	Poissy	1,500
Peugeot	307	2001	Argentina, China	3,522,200
Peugeot	308	2007	Mulhouse, Sochaux	643,500
Peugeot	RCZ	2010	Austria (Magna Steyr)	100
Peugeot	3008	2009	Sochaux	64,700
Peugeot	5008	2009	Sochaux	21,900
Citroën	Xsara	1997	Rennes-la-Janais, Vigo (S), Porto Real (Br), China	3,372,600
Citroën	ZX	1991	China	–
Citroën	C4	2004	Mulhouse, Vigo (S), Argentina, China	1,743,800
Peugeot	405	1987	Iran	–
Peugeot	407	2004	Rennes-la-Janais	831,300
Peugeot, Citroën	4007, C-Crosser	2007	Japan (Mitsubishi)	30,300 / 29,200
Citroën	Xantia	1993	Iran	–
Citroën	C5/C6	2006/2008	Rennes-la-Janais	907,700 / 19,700
Peugeot	607	2000	Rennes-la-Janais	168,500
Peugeot, Citroën	807, C8	2002	Hordain	173,100 / 132,500
Peugeot, Citroën	Bipper, Nemo	2008	Turkey (Tofas)	65,100 / 78,000
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (S), Mangualde (P), Turkey, Argentina, Morocco	1,627,700 / 2,110,100
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	415,500 / 383,800
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (I)	673,200 / 596,300
RENAULT GROUP				
Renault	Twingo	1993/2007	Novo Mesto (Sl), Colombia	2,476,537 / 390,048
Renault	Clio	1998/2005	Flins, Turkey, Novo Mesto (Sl), Valladolid (S), Dieppe, Argentina, Colombia, Mexico	7,324,320
Renault	Modus	2004	Valladolid (S)	538,305
Renault	Logan	2004	Russia, Brazil, Morocco, Colombia, Iran, India	606,934
Renault	Sandero	2007	Brazil, Morocco, Colombia, South Africa (Rosslyn)	133,473
Renault	Fluence	2009	Turkey	10,437
Renault	Mégane	1995/2002/2008	Douai, Palencia (S), Turkey, Brazil, Dieppe, Colombia	4,852,357 / 3,779,656 / 409,672
Renault	Laguna	2007	Sandouville	182,736
Renault	Vel Satis	2002	Sandouville	61,822
Renault	Espace	2002	Sandouville	320,330
Renault	Kangoo	1997/2007	Maubeuge, Morocco, Argentina	2,490,309 / 223,509
Renault	Master/Mascott	1997/1999	Batilly, Brazil	1,023,890 / 77,402
Renault	Trafic II	2001	Luton (UK, GM), Barcelona (E, Nissan)	404,834
Dacia	Logan	2004	Pitesti (Romania)	970,697
Dacia	Sandero	2008	Pitesti (Romania)	207,662
RSM	SM3	2002/2008	Busan (South Korea)	368,086 / 46,187
RSM	SM5	2000	Busan (South Korea)	651,646
RSM	QM5 (Koleos)	2007	Busan (South Korea)	89,304
RSM	SM7	2004	Busan (South Korea)	96,508

Sources: CCFA, PSA Peugeot Citroën, Renault.

In 1996, French automobile manufacturers changed the way they reported output. They began reporting the number of vehicles assembled at the roll out location. The concept of KD and CKD units has been abandoned. This production takes into account the Renault Trafic II, 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 66)*.

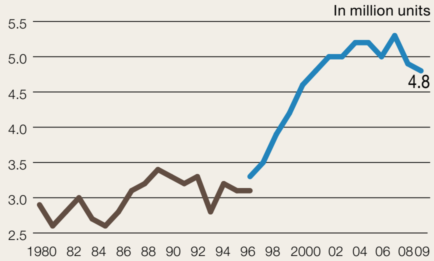
5.4 million
vehicles produced by French manufacturers worldwide in 2009

Markets for new French vehicles

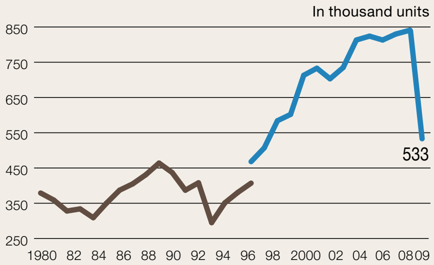
In 2009 for the second consecutive year and in contrary to the previous years, the national markets for French manufacturers (+5.5%) grew more than sales outside France (–10%) which were more affected by the world crisis.
In France, the strong presence of French manufacturers in sectors benefitting from market support (scrap incentive scheme) or eco-improvement support ("bonus/malus" system) allowed them to increase sales in a difficult environment.
Foreign markets represented about three-quarters of opportunities for French manufacturers compared to two-thirds between 1999 and 2001 and less than 60% in 1990.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

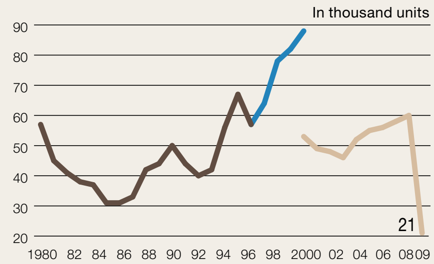
New passenger cars



New light commercial vehicles up to 5 t

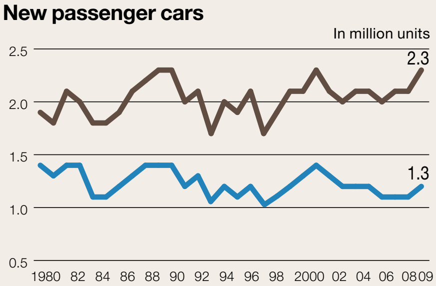


New heavy trucks over 5 t

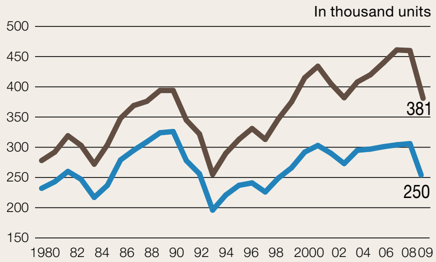


VEHICLE REGISTRATIONS IN FRANCE

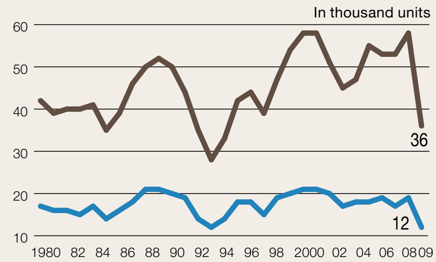
New passenger cars



New light commercial vehicles up to 5 t



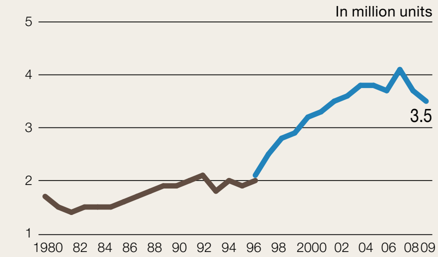
New heavy trucks over 5 t



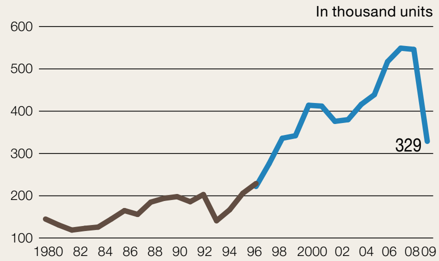
Total registrations
French make registrations

EXPORTS OUTSIDE FRANCE

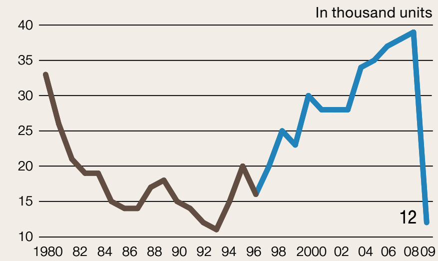
New passenger cars



New light commercial vehicles up to 5 t



New heavy trucks over 5 t



From 1997 to 2001, registrations of French vehicles in France followed a rising trend. An offer that was rich in new models, efficient and financially advantageous allowed them to gain market share above 1997 figures. The cycle reversed in the period 2002-2007. Increased competition and, subsequently, a selective sales strategy implemented by French manufacturers had not allowed them to consolidate these gains. In 2008, the rise in volumes sold can be explained by the dynamic commercial vehicle market and the offer from French manufacturers that was rich in models with low CO_2 emissions in-line with the "bonus/malus" system. In 2009, this eco-scheme associated with the scrap incentive program supported general car sales and particularly those in French groups adapted to the offer.
Since 2006, French car exports have included the Renault Trafic II and from 2007 those of Renault Samsung Motors.
French passenger car exports reached 3.5 million units, a fall of 5%. Commercial vehicles were severely affected by the crisis with a 37% decline and nearly 350,000 units for the light commercial vehicle market and 70% with 12,000 units for heavy trucks.

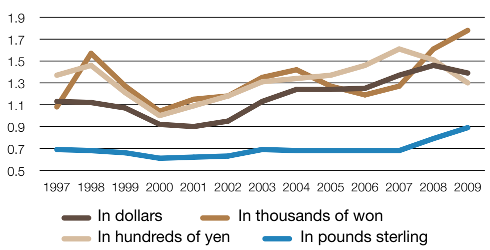
3 out of 4 vehicles produced by French manufacturers are sold abroad

Competitive factors in the French automotive industry

In an aggressively competitive global market, French automobile manufacturers must be competitive, able to handle industry-wide factors such as labor costs and the strong euro and also problems that are the bane of the automotive sector like the opening of the base market to competition, the difficulty of passing the rise in raw material costs on to the end customer, and more.

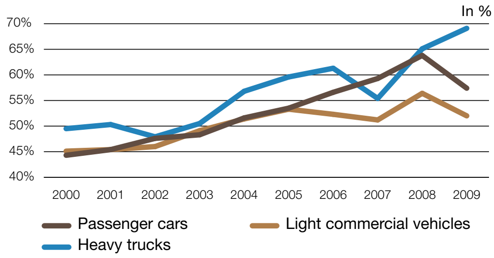
Industry conventions have shown that compared to other eurozone countries the change in hourly labor rates since 2000 and the particularly high social contributions in France weigh heavily.

EURO EXCHANGE RATE



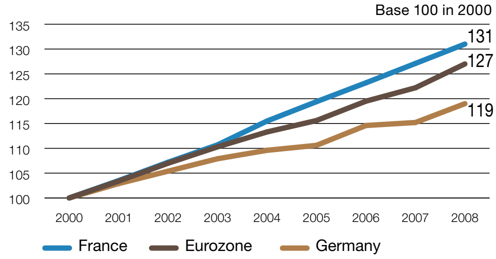
Source: IFM.

SHARE OF NON-EUROZONE IN EXTERNAL MARKETS FOR FRENCH MANUFACTURERS



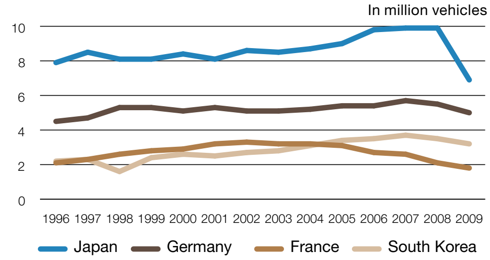
Source: CCFA.

CHANGE IN HOURLY LABOR RATES IN THE MANUFACTURING INDUSTRY



Source: Industry conventions.
Calculated using Eurostat surveys on hourly labor costs.

PASSENGER CAR PRODUCTION



Sources: OICA, CCFA.

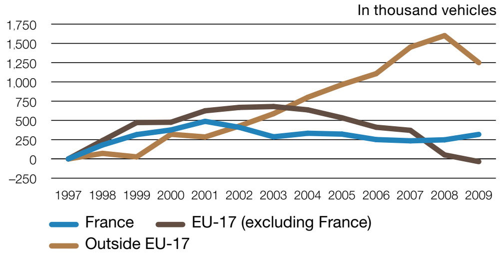
12 points

The difference between France and Germany for hourly labor costs in manufacturing between 2000 and 2008, to France's disadvantage

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. To continue to grow, the French car industry must guarantee performance comparable to that of its European, American, Japanese, Korean and in the future, Chinese, even Indian competitors. Beyond the problems of globalised competition and industry (payroll, social and fiscal costs), there are competitive factors specific to the French automotive industry, resulting from the properties of vehicles and the automobile industry as a whole. One of the factors affecting the French industry is the hourly labor costs. In France, the cost of labor including social contributions is one of the highest in the European Union including the eurozone. It is higher than the Untied Kingdom, Italy, Spain, etc. and much higher than costs in Eastern Europe. And labor costs affect the entire industry, particularly via the supply chain. Furthermore, the exchange rate can significantly alter trade terms because of the increasingly large share of production outside of the eurozone.

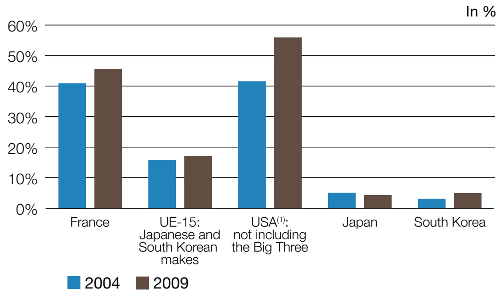
Furthermore, the prices of raw materials in euro have risen substantially since 2001. Passing these price hikes on to consumers is extremely difficult in an environment of aggressive competition and declining purchasing power of households affected by significant price increases in a range of areas: food, energy, housing, etc.
For several years, all of these factors have weighed heavily on the French automotive industry's margins (ratio of operating cash flow to value added); according to Insee (the French National Institute for Statistics and Economic Studies), they have fallen from 40% in the early 2000s to 7% in 2008.

WORLD MARKETS FOR FRENCH MANUFACTURERS: EVOLUTION COMPARED WITH 1997



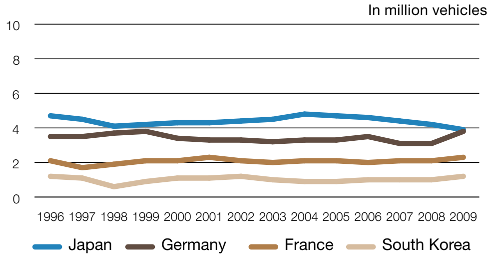
Source: CCFA.

SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS



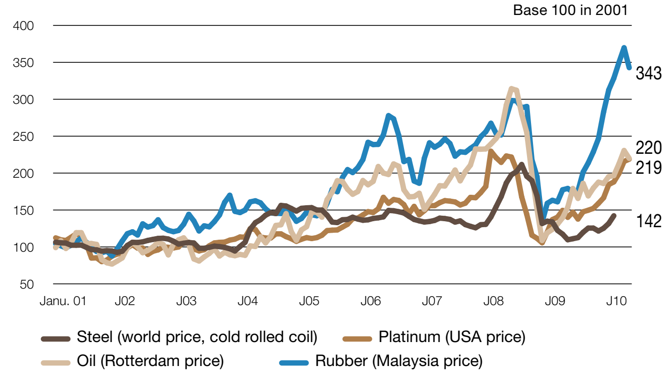
(1) USA: market share based on light vehicles. The Big Three are General Motors, Ford and Chrysler (excluding European makes).
Source: CCFA.

NEW CAR REGISTRATIONS



Source: CCFA.

RAW MATERIAL PRICES IN EURO



Since early 2002, the euro's rise has affected French exports, forcing companies to bolster their sales and production initiatives in order to continue to expand their markets outside the eurozone. On the other hand, there are factors associated with opening up the market, whether internal or external. In general, domestic opportunities (known as the "base market") represent a solid foundation for nourishing growth on international markets through development and innovation. The French automotive industry's base market is its domestic and especially European market where there is open competition and where non-European manufacturers have a significant and steadily growing share. In other auto-making countries, market access is more difficult and local manufacturers therefore have a broader base market from which to develop internationally.
The prices of raw materials in euro have increased hugely since early 2001, despite the fall in the second half 2008 followed by a rebound. Since 2010, rubber price increased by 243%, reaching a record level; oil price has climbed by 119% and steel price by 42%.

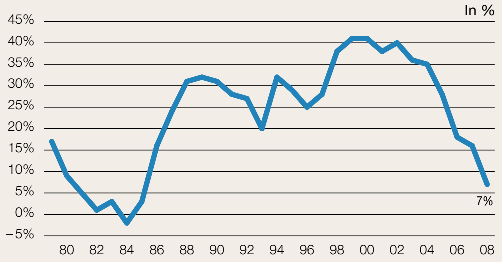
It is difficult to pass price hikes on to consumers in the current climate of stiff competition. This is particularly the case in so-called developed countries in light of the multiple choices made by households in terms of consumption, which have only been aggravated by the economic and financial crisis.
Finally, for the freight sector that buys light commercial vehicles and heavy trucks, the current gloomy context weighs on demand and prices.

+119%
Increase since 2001 of the price of a barrel of oil in euro in Rotterdam

The automotive industry and the crisis

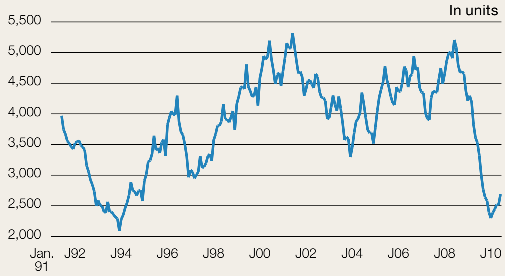
A vehicle needs liquidity in the short and long-term associated with the different stages in its life: from design to sale, throughout the various production stages.
As a durable good for households and an investment for businesses, world sales of automobiles, particularly in OECD countries, have been harshly hit by the financial crisis that began in 2008, which was closely followed by an economic crisis. These considerable drops in sales have similar effects on the entire automotive sector in the broad sense.
The operating margin of the automotive sector, measured by Insee, dropped to low levels observed in the early 1980s during the second oil crisis, making it more difficult to attract capital investment and conduct research.
The various government measures (nearly 600,000 scrap inventive bonuses in France, training support, temporary part time contracts, etc.) helped control the crisis, supporting a sector of the industry characterized by brutal and extensive fluctuations.

OPERATING MARGIN OF THE AUTOMOTIVE SECTOR: RATIO OF OPERATING CASH FLOW TO VALUE ADDED (OCF/VA)



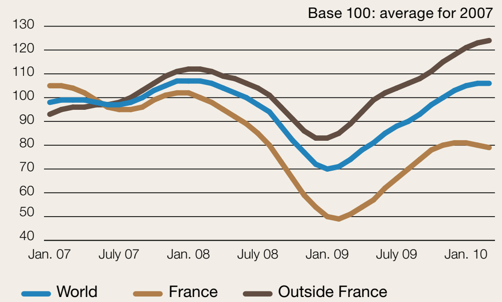
Source: Insee.

NEW HEAVY TRUCK REGISTRATIONS IN FRANCE (AVERAGE FOR THE LAST 6 MONTHS, RAW DATA)



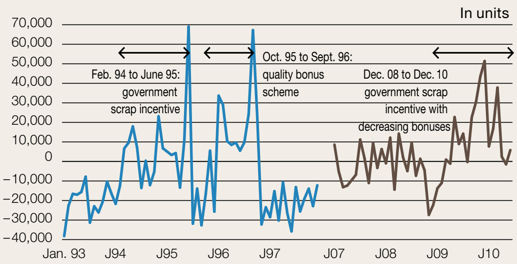
Source: CCFA.

WORLD PRODUCTION OF LIGHT VEHICLES IN NUMBER OF VEHICLES: TREND DATA



Source: CCFA.

NEW PASSENGER CAR REGISTRATIONS IN FRANCE (FOR EACH MONTH, DIFFERENCE WITH THE SAME MONTH IN 1991 TO 1999, THEN FROM 2004 TO 2010)



Source: CCFA.

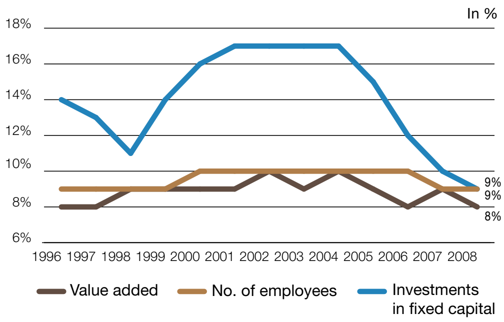
Halved
Difference in the production of light vehicles in France by French manufacturers from before to during the crisis

The economic and financial crisis has dramatic effect on the automotive sector, upstream starting with the suppliers and downstream as far as vehicle sales/maintenance, including freight transport, manufacturers of equipment or services for companies, including research and development.
Liquidity is required at the various stages mentioned.
From the physical process of manufacturing the vehicle until the point of sale, many financing instruments, including loans between companies, are already used. During the sale, households and companies often use loans to finance this durable good.
Capital-intensive by nature, the automotive industry requires considerable physical investments (production sites, etc.), which are paid off over long periods.
During their design and before they are sold, vehicles require research phases lasting several years, in a process of permanent progress, in order to be able to meet the needs of society in terms of safety as well as the environment (reducing greenhouse gas emissions, etc.).
Research is currently being conducted for applications in the longer term.
The falling market share of French manufacturers in the European base market starting in 2004, following the considerable increase observed between 1997 and 2003, as well as the difficulties in passing on rising raw material prices to consumers and the collapse of the European market in 2008 can explain the fall in operating margins of the automotive industry measured by Insee, which have now reached that of the early 1980s, the era of the oil crisis.
It is important to remember that operating cash flow (OCF) and financing are the main sources of liquidity for future capital expenditure.
The support measures set up by many European countries (France, Germany, etc.) helped stabilize in 2009 the new car market in Western Europe. In France, nearly 600,000 scrap incentive bonuses were paid by the Ministry of Recovery, and a progressive end to the scheme is in place until the end of 2010.
Other government measures such as training or temporary part time contracts have encouraged management of this crisis by keeping jobs in a context where production of French commercial vehicles in France has been cut in half, between the average level of 2007 and the lowest point in 2009.

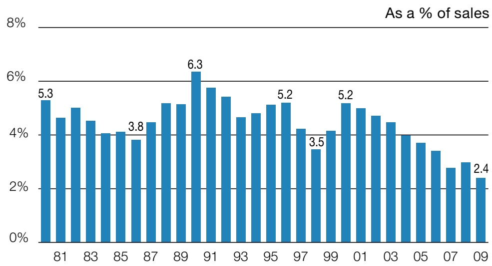
Economic ratios of the automotive industry in France

The automotive industry uses a wide variety of technologies, requiring significant investment that has accounted for over 16% of all industrial capital expenditure since the beginning of the 2000s. However, this share fell to 9% in 2008, as the Western worlds market for new vehicles stagnated and subsequently plummeted.
To address new social and environmental demands, the automotive industry is investing more in intangibles and R&D *(see over the next few pages)* for which automotive competitiveness clusters are particularly appropriate.

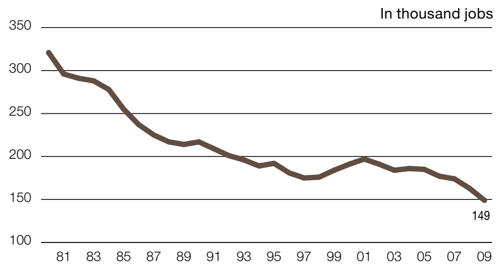
CONTRIBUTION OF THE AUTOMOTIVE INDUSTRY TO THE MANUFACTURING AND ENERGY SECTOR(1)



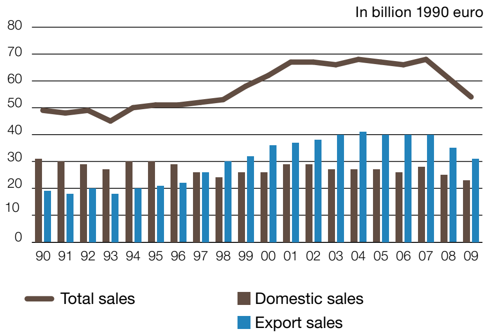
INVESTMENTS OF AUTOMOTIVE MANUFACTURING(1)



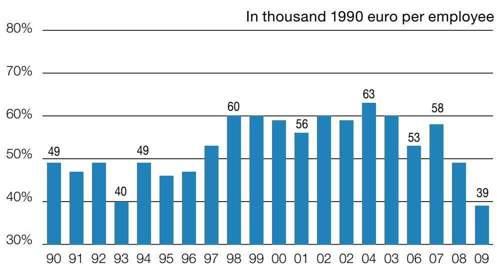
EMPLOYEES IN AUTOMOTIVE MANUFACTURING(1)



DOMESTIC AND EXPORT SALES BY THE AUTOMOTIVE MANUFACTURING INDUSTRY(1)



VALUE ADDED OF AUTOMOTIVE MANUFACTURING(1)



(1) CCFA estimations for 2008 and 2009: see also pages 72 and 73.

9%
Share of automotive industry employees in the manufacturing and energy sector in 2008 in France

Every year, the SESSI, formerly the *service statistique du secrétariat d'État* (Department for Industrial Studies and Statistics) and now attached to Insee, produced annual surveys providing one of the main sources of information about the French industry.
A significant overhaul of these surveys is currently in progress, which explains why this data is not available after 2007. The future data will be available through a new business nomenclature.
The automotive industry covers motor vehicle manufacturing; motor vehicle, caravan and recreational vehicle body manufacturing; and the upstream manufacturing of automotive equipment. However, the statistics do not encompass all automotive industry suppliers. Products such as seats, tires and glass are classified under other categories *(see also page 53)*.

Automotive manufacturing
After rising strongly between 1996 and 2004 (+30%), in line with growth in vehicle production, value added (excluding VAT) per employee in constant euro declined for several reasons: costs associated with new environmental standards, a stagnating and then contracting market for new cars in Western Europe aggravated by the recession, and the rising cost of raw materials. In 2009 it reached the lowest point of 1993.
The automotive manufacturing industry dedicated 2% of sales to capital expenditure, representing nearly €2 billion, to develop new models and optimize its production capacity. These figures do not include research and development costs *(see the next page)*. Export sales have constantly increased, today oscillating around 60% compared with 38% in 1990.

Research and development spending in the automotive sector

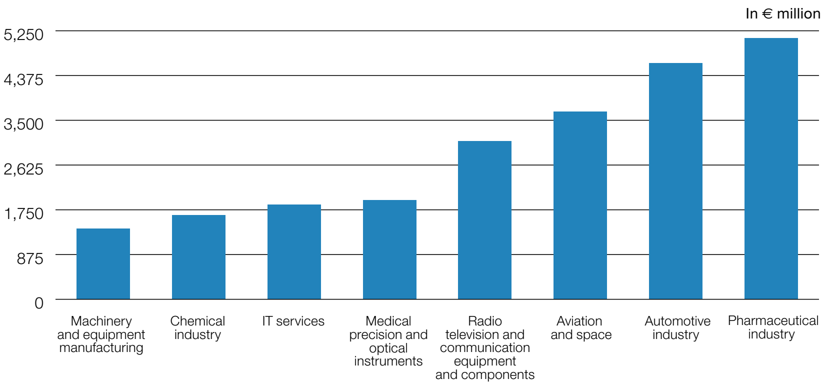
In 2007, the French automotive industry was not the leader of all other industries in France in terms of corporate spending on research and development (R&D), as it has been since 1999.
The automotive industry's R&D budgets followed that of the pharmaceutical industry and exceeded those of the aviation and space industry. Its expenditure stood at €4.6 billion, representing 15% of all corporate R&D costs.
After rising strongly between 1998 and 2005 (+70%), R&D expenditure in the automotive industry reached a ceiling of around €4.5 billion. In 2007, this represented 27% of gross value added in the sector. The automobile leverages a wide variety of technologies and therefore requires significant research initiatives to ensure its reliability throughout its lifetime, guarantee user safety and protect the environment.

GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2007

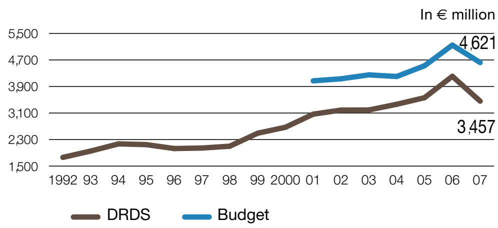
	DRDS[1]	ERDS[2]	Budget		Of which public financing[3]	
	in € million	in € million	in € million	% of total	in € million	% of total
Pharmaceutical industry	3,544	1,565	5,109	16.5%	44	1.6%
Automotive industry	3,457	1,164	4,621	14.9%	19	0.7%
Aviation and space	2,673	1,000	3,673	11.9%	1,013	35.9%
Radio, television and communication equipment and components	2,575	523	3,098	10.0%	446	15.8%
Medical, precision and optical instruments	1,551	385	1,937	6.3%	394	14.0%
IT services	1,741	107	1,848	6.0%	102	3.6%
Chemical industry	1,416	226	1,642	5.3%	67	2.4%
Machinery and equipment manufacturing	1,135	251	1,386	4.5%	276	9.8%
Machinery and electrical equipment manufacturing	1,081	294	1,375	4.4%	17	0.6%
Energy and energy extraction products	808	240	1,047	3.4%	10	0.3%
Rubber and plastics	758	93	851	2.7%	12	0.4%
Transport and communication services	809	S	809	2.6%	14	0.5%
Other research segments	2,921	643	3,564	11.5%	411	14.5%
TOTAL	**24,470**	**6,490**	**30,960**	**100.0%**	**2,824**	**100.0%**

(1) DRDS: Domestic Research and Development Spending.
(2) ERDS: External Research and Development Spending.
(3) Excluding research tax credits.
S: statistical secrecy.
R: reserve.
Source: French Education and Research Ministry (MEN-MESR-DEPP C2).

TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2007 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY SPENDING ON RESEARCH AND DEVELOPMENT



€4.6 billion
French automotive industry research and development budget in 2007

The research-related statistics office of the French 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 (DRDS), which covers work performed in France, regardless of the origin of funding, and external spending (ERDS), corresponding to work performed by other companies or public research organizations. A portion of the latter work may be performed outside of France.
From 1999 to 2006, the leading R&D segment in France was the automotive industry; it was the second largest in 2007. It stimulates other industries such as plastics and electronics. In 2007, 20% of domestic R&D spending in the automobile industry was performed by subsidiaries in which foreign companies had a controlling interest (over 50%).
In 2007, 31,000 equivalent full-time employees (including 14,600 researchers) worked in automotive R&D. These figures were up 41% compared to 1998 (+127% for researchers).
According to the French National Industrial Property Institute (INPI), the groups PSA Peugeot Citroën Automobiles (including Faurecia) and Renault respectively filed the first and second largest number of patents with INPI in 2009. France has three major equipment manufacturers in the top twenty.

Automotive competitiveness clusters in France

Set up by the government and local authorities in 2005, these competitiveness clusters bring together companies (small and mid-sized), research units and training centers to work on collaborative projects. They also provide many services: business intelligence, assistance for filing patents, networking, etc. Their role is to boost the competitive nature of the French economy by highlighting its capacity for innovation and encouraging the structure and proximity of the different regions.

In 2009, the automotive industry continued to conduct its research and development efforts through clusters, where it works to meet the challenges of industrial excellence and durable mobility. This transverse action brings together automakers, equipment manufacturers, innovative small and mid-sized companies, research laboratories and educational organizations including universities. In 2008, 383 companies were involved in automotive competitiveness clusters.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2008(1)

	Mov'eo	Véhicule du Futur	LUTB	iDforCAR	MTA
With a vocation	world	national	national	national	technical center
Number of companies with a business unit in a competitiveness cluster	103	98	77	54	51
including small and mid-sized companies (less than 250 employees)	66	54	43	25	24
Employees of business units involved in the cluster (no. of employees)	18,973	34,391	16,118	16,560	44,881
Provisional spending by public bodies on cluster projects (in € thousand)	50,925	18,269	12,930	1,709	15,929
Provisional spending by business units on cluster projects (in € thousand)	99,799	29,452	23,382	5,482	71,166
Total provisional spending (in € thousand)	150,724	47,721	36,312	7,191	87,095
Number of labelled projects	52	25	21	9	20

(1) Information concerning cluster members in 2008 are taken from 2007 data.
Sources: DGCIS survey, Insee, DIACT, competitiveness clusters.

The internationally oriented *Mov'eo* cluster (www.pole-moveo.org) covers the Ile-de-France, Basse-Normandie and Haute-Normandie regions. *Mov'eo* has the main aim of federating projects dealing with the optimization of mobility, the development of synergy between individual and collective modes and performance improvement: consumption, the environment, road safety, mobility and services, mechatronics. Two new business fields were created in 2009 for energy storage systems and also demo and carbon-free vehicles, taking the number of themes explored by the cluster to 7. The extent of its geographical scope offers this cluster a broad range of opportunities for increasing catchment areas and creating new business.

The *Mobilité et Transports Avancés* cluster (www.pole-mta.com), based in Poitou-Charentes, benefits from considerable experience with alternative propulsion modes: hybrid and electric vehicles, biofuel, onboard energy. Experimentation, development, production and use of electric vehicles are its flagship activity.

Since early 2009, the *Mov'eo* and MTA clusters are enjoying a rapprochement thanks to the complementary nature of their respective activities. MTA will become a technical and testing center specializing in "clean mobility" and its members will join *Mov'eo*.

The *Véhicule du Futur* cluster (www.vehiculedufutur.com) draws on the traditional catchment areas of the automotive industry, Alsace and Franche-Comté, with growing interaction with Germany and Switzerland. The cluster aims to anticipate industrial activity, technological orientation and customer expectations for coming years around several focal points: reducing engine consumption and emissions, improving passenger compartments, developing new vehicle types, traffic management tools, design and production systems, material and process research, industrial excellence in the service of companies. In 2009, a program steered by this cluster to improve the competitive edge of small and mid-sized companies in the automotive industry was applied to all of France.

The goal of the *Lyon Urban Truck & Bus* cluster (www.lutb.fr) is to meet the challenges offered by the growing need for mobility of persons and goods within towns. It coordinates structuring activities for the region: manufacturers, transport operators, research centers. The business of the LUTB cluster focuses on optimizing the energetic sector (diesel engine, hybridization, gas, biofuels, etc.) for heavy vehicles (trucks and buses), security, safety (users of public transport, truck drivers, freight, hazardous materials, etc.), architecture and comfort, telematic systems (ITS) and modeling of movement. At the end of 2009, a demonstrator project for a freight system in an urban environment coordinating all the cluster's research programs was launched.

Set up in western France (Brittany, Pays de La Loire, Poitou-Charentes), the *iDforCAR* cluster (www.id4car.org) aims to achieve excellence in the automotive industry, involving small and mid-sized companies, by developing know-how in small series and specific vehicles, a field with stiff competition on the international stage. The cluster is also involved with processes and products: on-board systems (assisted driving, communication interfaces, reliability), research in architecture and materials used (weight, solidity, recyclability), control of engineering and industrial processes for small series, perceived quality, in particular sensorial, of the finished vehicle, and environmentally friendly vehicle design.

127
Number of labelled projects from automotive clusters in 2008

French automotive foreign trade

2009 was a crisis year marked by an unprecedented contraction of world trade. Exports of French automotive products fell by 26% to €35 billion. The automotive industry remains one of the leading export sectors alongside aeronautical, agro-food, etc. In 2008, 4 companies in this sector are ranked in the leading nine exporting companies. The industry's trade deficit continues to worsen (–€4.7 billion) affected in particular by the French market's healthy demand for small cars produced in countries with much lower cost structures and the drop in demand for premium cars in Europe, reducing opportunities for French manufacturers' domestic plants.
The positive balance for parts and engines remained relatively stable at €3.9 billion, mainly due to the momentum of French manufacturers' production sites outside France with French supplies, for example for thruster units.

FRENCH AUTOMOTIVE FOREIGN TRADE

In € billion

	New cars	New light commercial vehicles	New heavy trucks	Parts and engines	Automotive industry sector	Used vehicles	Automotive sector	% share of automotive products (1)	% share of automobiles
EXPORTS									
(FOB)									
2008	18.1	2.4	3.7	21.2	45.4	1.2	46.6	406.5	11.5%
2009	13.7	1.4	1.8	16.7	33.6	1.0	34.6	336.0	10.3%
% change 2009/2008	–24.2	–42.6	–51.1	–21.0	–25.9	–18.9	–25.8	–17.3	
IMPORTS									
(CIF)									
2008	24.1	3.4	3.8	17.2	48.5	1.0	49.5	477.8	10.4%
2009	20.8	2.1	2.3	12.8	38.0	1.2	39.2	393.1	10.0%
% change 2009/2008	–13.5	–38.6	–40.0	–25.7	–21.7	+23.2	–20.8	–17.7	
BALANCES									
2008	–6.0	–1.0	–0.1	+4.0	–3.2	+0.2	–3.0	–71.4	
2009	–7.2	–0.7	–0.5	+3.9	–4.4	–0.2	–4.7	–57.1	
COVERAGE RATE (2)									
2008	75	72	97	123	93	123	94	85	
2009	66	67	79	131	88	81	88	85	

(1) Not 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.
Sources: customs data processed by CCFA, National Accounts, 2000 base.

In 2009, the automotive industry's share of all goods exports (imports) stood at 10%. In 1997, a crisis year for the French new vehicle market, it stood at 12% and 9% respectively.
The trade balance for passenger cars improved significantly between 1996 and 2004, from a deficit of €350 million in 1996 to healthy surpluses of more than €7 billion.
Since 2005, a decrease in production in France and rising imports following the large-scale opening of the French markets to foreign manufacturers were reflected in a sharp decline in the surplus, which became a deficit in 2007. The world crisis worsened the deficit in 2008 and 2009.
The trade balance deficit for commercial vehicles dropped to €0.7 billion in this crisis context. Exports of light commercial vehicles and heavy trucks respectively fell by 42.6% to €1.4 billion and 51.1% to €1.8 billion.
Flows of parts and engines also slowed: –25.7% for imports and –21.0% for exports. The surplus remained relatively stable at €3.9 billion.

EXPORT RANKINGS – YEAR 2008

Rank	Company (1)
2	Peugeot Citroën Automobiles SA
3	Renault SAS
7	Renault Trucks
9	Automobiles Peugeot

(1) In these rankings, customs use the company name not the group.
Source: customs.

10%
Share of automotive products in French goods exports in 2009

French automotive foreign trade

The deficit of industrial automobile trade (excluding used vehicles) worsened in 2009, at –€4.4 billion (–3.2 in 2008). It is broken down into a deficit of €5.6 billion with the EU-27 and a surplus of €1.2 billion with the rest of the world (respectively –6.1 and –2.9 in 2008). The deficit is mainly due to the result posted with the EU-27, which can be attributed to the crisis in the automotive markets and stiff competition.

The positive balance with the rest of the world is down to €1.2 billion. The crisis affected EU exports but many countries show a significant trade surplus: Algeria (€770 million), Iran (€590 million), Switzerland (€460 million) and Brazil (€290 million).

INDUSTRIAL AUTOMOBILE TRADE BALANCE

In € billion

	1985	1990	2000(1)	2005	2006	2007	2008	2009
All	4.57	4.13	9.84	8.21	5.28	1.02	−3.19	−4.42
INTRA EC (12 countries)	**0.29**	**0.45**						
INTRA EU (15 countries)			**5.80**	**4.11**	**1.80**	**−1.18**	**−5.04**	**−3.11**
INTRA EU (25 countries)				**4.42**	**1.38**	**−2.10**	**−6.24**	**−5.41**
INTRA EU (27 countries)					**1.79**	**−1.83**	**−6.06**	**−5.63**
of which: Germany	−1.62	−2.20	−3.75	−5.54	−5.94	−7.46	−8.07	−6.09
Austria			0.33	0.43	0.39	0.38	0.37	0.31
Belgium-Luxembourg	0.26	0.68	0.35	2.23	2.49	2.47	2.42	2.12
Denmark		0.12	0.23	0.34	0.32	0.31	0.29	0.10
Spain	−0.55	−0.14	1.55	0.46	−0.15	−1.44	−2.92	−1.62
Finland			0.17	0.23	0.18	0.15	0.13	0.06
Italy	0.59	0.13	0.58	1.56	0.49	0.70	0.21	0.77
Netherlands	0.34	0.57	1.54	0.37	0.22	0.17	0.27	−0.01
Poland				0.15	−0.20	0.13	0.01	−0.38
Portugal	0.12	−0.12	0.50	0.51	0.28	0.35	0.26	0.04
Czech Republic				−0.21	−0.43	−0.65	−0.69	−1.00
United Kingdom	0.98	1.21	3.56	2.81	3.10	2.94	2.04	1.06
Slovenia				0.05	0.11	−0.16	−0.27	−0.46
Sweden			0.14	0.07	−0.09	−0.24	−0.43	−0.01
OUTSIDE EC (12 countries)	**4.27**	**3.69**						
OUTSIDE EU (15 countries)			**4.04**	**4.10**	**3.48**	**2.20**	**1.85**	**−1.31**
OUTSIDE EU (25 countries)				**3.79**	**3.90**	**3.12**	**3.05**	**0.99**
OUTSIDE EU (27 countries)					**3.49**	**2.85**	**2.87**	**1.21**
of which: Austria	0.15	0.22						
Finland		0.10						
Norway		0.06	0.13	0.20	0.18	0.20	0.12	0.08
Poland			0.25					
Czech Republic			−0.01					
Slovenia			0.15					
Sweden		0.05						
Switzerland	0.27	0.50	0.59	0.57	0.47	0.47	0.45	0.46
Turkey		0.17	0.55	0.13	−0.26	−0.66	−0.86	−0.94
Yugoslavia	0.03	0.07						
Canada	0.12	0.15	−0.02	0.02	0.05	0.02	0.02	0.03
USA	0.81	0.41	0.46	0.41	0.35	0.15	0.07	0.22
Mexico	0.00	−0.01	0.03	0.13	0.12	0.10	0.05	0.03
Argentina		0.06	0.38	0.17	0.28	0.33	0.27	0.19
Brazil		0.07	0.25	0.19	0.27	0.32	0.36	0.29
Algeria	0.56	0.47	0.29	0.52	0.67	0.65	0.81	0.77
Morocco		0.18	0.12	0.17	0.17	0.21	0.27	0.28
Nigeria		0.14	0.15	0.08	0.16	0.12	0.06	0.02
Tunisia		0.11	0.17	0.08	0.09	0.07	0.08	0.10
Saudi Arabia		0.06	0.06	0.06	0.06	0.07	0.08	0.06
China		0.05	0.09	0.26	0.51	0.30	0.16	0.19
South Korea		0.02	−0.22	−0.47	−0.50	−0.48	−0.40	−0.30
Iran		0.10	0.15	0.92	0.66	0.53	0.80	0.59
Japan	−0.43	−0.63	−1.04	−1.67	−1.78	−1.63	−1.42	−1.60
Taiwan	0.03	0.14	0.02	−0.02	−0.02	−0.02	−0.04	−0.03

(1) French overseas departments are included in the scope of French Customs as of 1996.
Sources: customs data processed by CCFA.

After exceeding 4 billion between 1997 and 2005, the trade surplus with the EU-15 gave way to a deficit of €1.2 billion in 2007. This extended in 2008 to €–5 billion and reduced to €3.1 billion in 2009. Between 2008 and 2009, the improved deficit can be explained by improved trade with Italy (€0.2 billion to €0.8 billion) and by a smaller deficit with Spain (–€2.9 billion to –€1.6 billion) and Germany (–€8.1 billion to –€6.1 billion), after the launch of the scrap incentive scheme in these countries to support the market. With the 12 new EU member countries, the heavy truck deficit was €2.5 billion in 2009 (–€1 billion in 2008), because of the rise in local operators and a collapse of the local markets. Outside the EU-27, the heavy truck deficit stood at €1.2 billion. Trade with Latin America and Africa remains encouraging. The deficit with Japan and South Korea combined was relatively stable at –€1.9 billion.

€1.2 billion

Surplus of industrial automobile trade between France and the EU-27 for 2009

Diesel passenger cars

Since 2002 in France, there have been more diesel passenger car registrations than registrations of vehicles running on other fuels, accounting for 71% of the total in 2009, a drop of 7 points compared to 2008 due do the growth of low range vehicles on the French market. 56% of cars in use on 1 January 2010 had diesel engines.
In 2009, 1.8 million diesel cars were produced by French manufacturers representing a 25% drop compared to the record level of 2004. The share of diesel cars in total production has fallen since 2008 (41%) and 2004 (47%).

DIESEL PASSENGER CARS

	1990	1995	2000	2005	2008	2009	% Change 2009-2008
Production							
In units	804,007	1,036,796	1,648,448	2,328,108	2,018,059	1,823,626	–21.2
As a % of total production	24.4%	34.0%	35.8%	45.0%	41.2%	37.9%	
Exports							
In units	292,061	472,087	975,038	1,500,989	1,400,805	1,211,875	–20.7
As a % of total registrations	15.5%	25.5%	33.7%	39.1%	34.7%	31.1%	
Registrations							
In units	762,054	897,698	1,046,485	1,466,296	1,620,980	1,628,495	+4.2
As a % of total registrations	33.0%	46.5%	49.0%	69.2%	77.5%	70.7%	
Fleet							
In units	3,775,000	6,938,000	9,980,000	14,348,000	16,753,000	17,458,000	+9.6
Total fleet				30,100,000	30,850,000	31,050,000	
As a % of total fleet	16.0%	27.6%	35.6%	47.7%	54.3%	56.2%	

Source: CCFA.

MAIN NEW DIESEL PASSENGER CAR RANKING IN 2009

Rank	Make	Model	% diesel market
1	**Renault**	**Mégane**	**9.3**
2	**Peugeot**	**206-207**	**8.5**
3	**Renault**	**Clio**	**7.1**
4	**Citroën**	**C4-Xsara**	**6.6**
5	**Peugeot**	**307-308**	**5.0**
6	**Citroën**	**C3**	**4,6**
7	Volkswagen	Golf	2.5
8	Ford	Focus	2.1
9	Ford	Fiesta	2.1
10	**Citroën**	**C5**	**2.0**

Source: CCFA.

In 2009, France was the world leader in diesel car ownership with 1,628,000 new passenger diesel engine cars, ahead of Germany with 1.2 million units. The new, quieter, more efficient diesel engines are still enjoying popular acclaim. In Europe, diesel's market share has dropped by over 6 points to 46% representing 6.3 million units. Because of the recession, diesel car production and exports have fallen by 21%.

7 out of 10

new passenger cars registered in France are diesel-powered

New passenger car registrations by model, range and body style

In a competitive market, French manufacturers regularly refresh their offer (new models and restylings) whilst extending their ranges. They still keep old models and offer new versions (short and long MPVs, station wagons, convertibles, coupés, crossovers), focusing on multipurpose applications; they can thus satisfy the increasingly diverse demand. Environmental performance and enhanced active and passive safety are features on the increase in this massive production of new models.

For 2010, the strong presence of French groups in the low range boosted by the "bonus/malus" and scrap incentive schemes, the healthy revision of existing models (Citroën C4 and C4 Picasso, Mégane CC) and the launch of new models (Peugeot RCZ and Renault Wind) should help them deal with challenges from the strong competition.

RANKING OF MAIN NEW PASSENGER MODELS IN 2009

Rank	Make	Model	% market
1	**Peugeot**	**206-207**	**8.2**
2	**Renault**	**Mégane**	**6.9**
3	**Renault**	**Clio**	**6.5**
4	**Citroën**	**C4-Xsara**	**4.9**
5	**Renault**	**Twingo**	**4.7**
6	**Citroën**	**C3**	**4.7**
7	**Peugeot**	**307-308**	**3.9**
8	Ford	Fiesta	2.2
9	Volkswagen	Golf	2.0
10	Volkswagen	Polo	1.9
11	**Citroën**	**C1**	**1.8**
12	**Dacia**	**Sandero**	**1.7**
13	**Peugeot**	**107**	**1.7**
14	**Renault**	**Modus**	**1.6**
15	Ford	Focus	1.6

Rank	Make	Model	% market
16	Opel	Corsa	1.6
17	**Citroën**	**C5**	**1.4**
18	Toyota	Yaris	1.3
19	Fiat	500	1.1
20	**Renault**	**Laguna**	**1.1**
21	Seat	Ibiza	1.0
22	Fiat	Punto	1.0
23	**Peugeot**	**3008**	**1.0**
24	**Dacia**	**Logan**	**0.9**
25	**Renault**	**Kangoo**	**0.9**
26	Fiat	Panda	0.9
27	Nissan	Qashqai	0.9
28	**Citroën**	**C2**	**0.9**
29	**Citroën**	**Berlingo**	**0.8**
30	Mini	Mini	0.8

Source: CCFA.

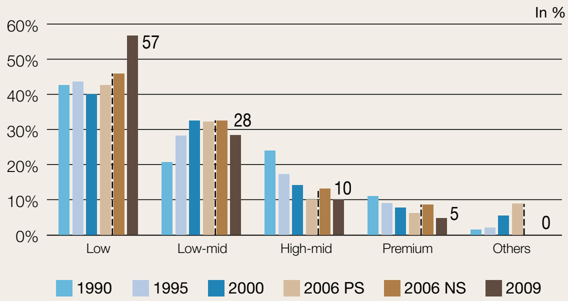
+11 points
Increase in share of new low-range passenger cars in total registrations between 2007 and 2009

NEW PASSENGER CAR REGISTRATIONS BY RANGE

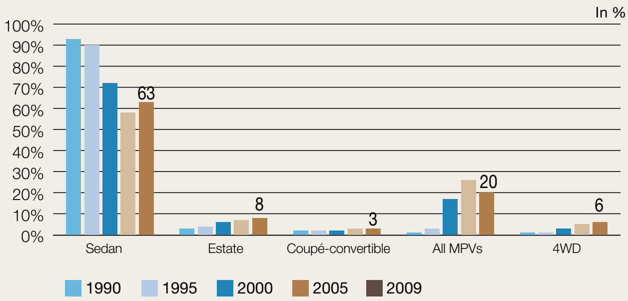
Ranges	1990		2000		2006 PS (1)		2006 NS (1)		2008		2009	
	Units	%	Units	%	Units	%	Units	%	Units	%	Units	%
Low	986,532	42.7	855,161	40.1	871,788	42.6	938,409	45.9	1,052,757	50.3	1,304,706	56.7
Low-mid	477,631	20.7	695,146	32.6	659,096	32.2	664,714	32.5	661,655	31.6	654,079	28.4
High-mid	555,053	24.0	303,028	14.2	204,955	10.0	267,108	13.1	254,475	12.2	233,460	10.1
Premium	256,381	11.1	163,293	7.7	127,685	6.2	175,418	8.6	122,442	5.9	110,104	4.8
Others	33,533	1.5	117,256	5.5	182,221	8.9	96	0.0	40	0.0	49	0.0
Total	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,045,745**	**100.0**	**2,045,745**	**100.0**	**2,091,369**	**100.0**	**2,302,398**	**100.0**

(1) In 2007, a new range-based segmentation was introduced: see page 14 (PS: previous scope, NS: new scope). The special Transit Temporaire series was integrated as of 2004. Source: CCFA.

MARKET SHARE BY RANGE



MARKET SHARE BY BODY STYLE



NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Body	1990		1995		2000		2005		2008		2009	
	Units	%	Units	%	Units	%	Units	%	Units	%	Units	%
Sedan	2,155,724	93.4	1,731,191	89.7	1,527,676	71.6	1,233,166	58.2	1,266,633	60.6	1,446,314	62.8
Estate	61,418	2.7	78,278	4.1	119,739	5.6	150,656	7.1	192,377	9.2	172,800	7.5
Coupé-cabriolet	36,269	1.6	30,067	1.6	50,527	2.4	60,134	2.8	53,969	2.6	68,969	3.0
All MPVs	28,682	1.2	58,376	3.0	369,434	17.3	543,821	25.7	459,342	22.0	468,644	20.4
Including compact MPVs	–	–	–	–	*241,190*	*11.3*	*292,162*	*13.8*	*278,033*	*13.3*	*240,828*	*10.5*
4WD	17,129	0.7	25,684	1.3	57,116	2.7	113,655	5.4	102,493	4.9	132,942	5.8
Others	9,908	0.4	6,908	0.4	9,392	0.4	16,129	0.8	16,555	0.8	12,729	0.6
TOTAL	**2,309,130**	**100.0**	**1,930,504**	**100.0**	**2,133,884**	**100.0**	**2,117,561**	**100.0**	**2,091,369**	**100.0**	**2,302,398**	**100.0**

Source: CCFA.

Used passenger cars

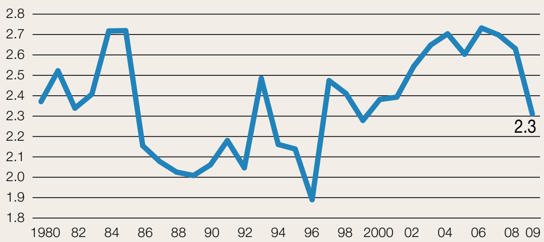
In 2009 as in previous years, registrations of used passenger cars exceeded 5 million units to reach 5,240,000. The used car market is generally affected less by the recession than the new car market but in 2009, the government measures (scrap incentive and "bonus/malus" schemes) supported the new car market more and the used car market dropped by 3%.
Every year, two or three used cars are purchased for every new car. 18% of cars in the total population change hands every year. 60% of cars owned or used by households were bought used, versus 51% in 1991.

USED PASSENGER CARS

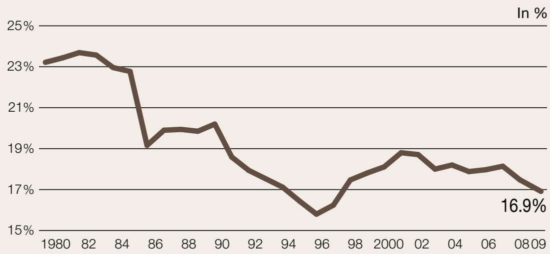
	Units	1980	1990	2000	2005	2006	2007	2008	2009
REGISTRATIONS									
New cars	in thousands	1,873	2,309	2,134	2,118	2,046	2,110	2,091	2,302
Used cars	in thousands	4,441	4,759	5,082	5,383	5,466	5,571	5,393	5,240
Used/new ratio		*2.4*	*2.1*	*2.4*	*2.5*	*2.7*	*2.6*	*2.6*	*2.3*
Cars less than 5 years old	**% used**		**52**	**40**	**40**	**40**	**38**	**37**	**38**
of which: cars less than 1 year old	% used		12	12	10	9	9	8	7
cars less than 1 year old	% new		25	29	25	24	23	22	17
Cars more than 5 years old	**% used**		**48**	**60**	**60**	**60**	**62**	**63**	**62**
Cars in use (at 31/12)	**in thousands**	**19,130**	**23,550**	**28,060**	**30,100**	**30,400**	**30,700**	**30,850**	**31,050**
Used/total car ratio	**%**	**23.2%**	**20.2%**	**18.1%**	**17.9%**	**18.0%**	**18.1%**	**17.5%**	**16.9%**

Source: CCFA.

USED/NEW CAR RATIO



USED/TOTAL CAR RATIO



Passenger cars are durable goods that consumers purchase, use, maintain and eventually sell on 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, who represent approximately half of the total market.
Somewhere between 4 and 6 million used cars are exchanged every year. This market is subject to less fluctuation than the new car market. In 2009, demand for new cars rose by 10.7% to 2.3 million units whilst demand for used cars dropped by 2.8% to 5.2 million units. The new/used ratio fell to 2.3 (i.e. –0.3 point). The demand for used vehicles is generally similar to the growth rate of the entire population, and is less sensitive to economic factors than demand for new cars. It is still affected by measures to stimulate the new car market ("bonus/malus" system, government scrap incentive, etc.).
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. This share rose from 48% in 1990 to 62% in 2009.
Used cars that are less than one year old can be considered new. In fact, they are often registered by automotive dealers as demonstration or leased vehicles and then sold on the retail market. They represented 384,000 registrations or 17% of the new car market, a drop of 5 points compared to the previous year due to the effect of the scrap incentive on the price of new vehicles. Since 2001, registrations of used cars less than one year old have declined steadily as a percentage of total registrations, only accounting for 7% in 2009, versus 12% in 2001.

5 years
Average ownership of a car by a French household

New vehicle registrations in French overseas departments (DOM)

The annual markets for new vehicles are a more recent phenomenon in France's overseas departments and have accounted for 60,000 to 75,000 vehicle registrations since 1998. The four French overseas departments are Guadeloupe, French Guiana, Martinique and Reunion Island.

The ratio of registrations for heavy trucks over 5 tons was exceptionally larger in 2009 in the DOM (1.7%) than in mainland France (1.6%) because of the collapsing market on the mainland. However, the share of light commercial vehicles is still greater (16.5% compared to 14.2%). In 2009, the number of registrations of new light vehicles dropped by 8% compared with the previous year. The DOM market weakened whilst the French mainland grew by 6%. The scrap incentive also supported passenger car sales but the recession and, more specifically in the French Indies, the social climate of early 2009 weighed heavily on the market. French manufacturers suffer from intense competition in passenger cars; their market share has been below 50% since 2006. However, they are faring better on the light commercial vehicle market.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

New passenger cars	2000	2005	2007	2008	2009	Change 2009-2000	Change 2009-2008
Guadeloupe	13,691	14,359	15,539	14,295	14,084	2.9%	–9.4%
French Guiana	4,031	4,085	4,437	4,357	4,446	10.3%	0.2%
Martinique	14,424	14,749	14,666	13,679	13,142	–8.9%	–10.4%
Reunion Island	21,463	25,142	24,819	23,267	20,935	–2.5%	–15.6%
TOTAL FRENCH OVERSEAS DEPARTMENTS	53,609	58,335	59,461	55,598	52,607	–1.9%	–11.5%

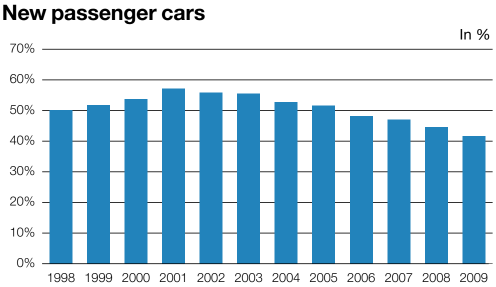
Light commercial vehicles up to 5 t	2000	2005	2007	2008	2009	Change 2009-2000	Change 2009-2008
Guadeloupe	2,685	2,772	3,192	3,120	2,632	–2.0%	–17.5%
French Guiana	1,143	1,169	1,645	1,509	1,355	18.5%	–17.6%
Martinique	2,368	2,732	2,841	2,793	2,247	–5.1%	–20.9%
Reunion Island	5,200	6,021	6,749	6,060	4,412	–15.2%	–34.6%
TOTAL FRENCH OVERSEAS DEPARTMENTS	11,396	12,694	14,427	13,482	10,646	–6.6%	–26.2%

Commercial vehicles including coaches and buses over 5 t	2000	2005	2007	2008	2009	Change 2009-2000	Change 2009-2008
Guadeloupe	146	196	157	232	212	45.2%	35.0%
French Guiana	66	99	100	149	146	121.2%	46.0%
Martinique	187	183	333	296	257	37.4%	–22.8%
Reunion Island	362	464	581	652	492	35.9%	–15.3%
TOTAL FRENCH OVERSEAS DEPARTMENTS	761	942	1,171	1,329	1,107	45.5%	–5.5%

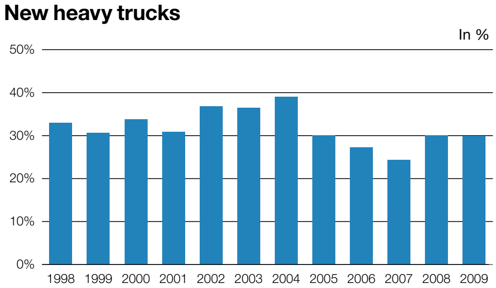
Source: CCFA.

FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

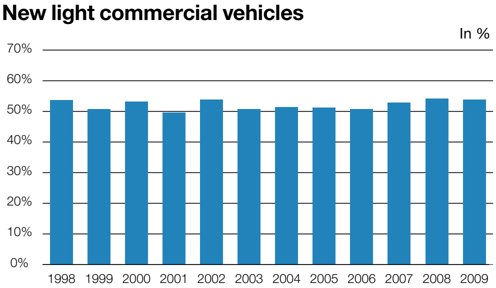
New passenger cars



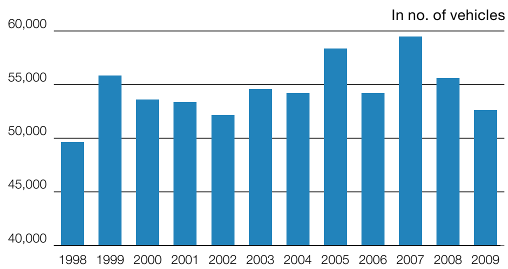
New heavy trucks



New light commercial vehicles



NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



64,000
new vehicle registrations in the DOM in 2009

Households car ownership

In 2009, multi-car households accounted for 36% of the total compared with 26% in 1990 and 16% in 1980.
Car ownership is very high among households in rural and semi-rural areas (rural areas located close to towns) at nearly 93%.
64% of households in the Paris region own at least one vehicle (60% in 2000).

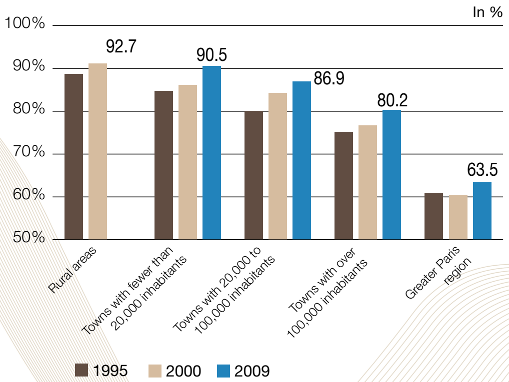
CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR)

In %

	1980	1990	1995	2000	2005	2009
BY SOCIO-PROFESSIONAL CATEGORY						
Farmers	87.3%	95.9%	98.9%	91.1%	100.0%	93.5%
Farm workers	72.6%	74.7%	–	–	–	–
Tradesmen, craftsmen, business owners	91.1%	95.2%	89.4%	90.6%	91.2%	88.8%
Self-employed professionals, executives	93.6%	94.4%	85.5%	84.6%	83.7%	84.0%
Middle management	90.2%	93.3%	88.7%	90.8%	87.6%	89.2%
White collar workers	75.4%	78.3%	75.9%	77.5%	80.9%	83.7%
Blue collar workers	80.4%	87.2%	89.7%	88.7%	89.1%	91.1%
Service employees	57.9%	59.3%	–	–	–	
Other working population	91.2%	90.2%	–	–	–	
Non-working population	39.6%	54.6%	65.8%	70.9%	72.8%	76.5%
Of which retirees	–	59.4%	70.9%	76.0%	76.2%	79.3%
BY AREA OF RESIDENCE						
Rural areas	71.7%	82.1%	88.6%	91.1%	92.4%	92.7%
Towns with less than 20,000 inhabitants	69.6%	76.6%	84.7%	86.1%	88.4%	90.5%
Towns with 20,000 to 100,000 inhabitants	72.3%	77.3%	80.0%	84.2%	83.7%	86.9%
Towns with over 100,000 inhabitants	69.5%	74.2%	75.1%	76.6%	78.5%	80.2%
Greater Paris	69.3%	77.0%	60.8%	60.4%	61.5%	63.5%
Inner Paris	48.8%	47.3%				
BY LOCATION OF RESIDENCE						
Town centre	–	–	67.6%	69.4%	69.2%	72.9%
Suburb	–	–	79.3%	80.5%	80.9%	82.5%
Semi-rural area	–	–	88.5%	89.8%	91.2%	92.1%
Rural area	–	–	85.3%	90.4%	92.6%	91.1%
BY AGE OF HEAD OF HOUSEHOLD						
Under 25	–	–	51.2%	49.3%	63.3%	60.3%
25 to 34	–	–	85.1%	82.4%	82.3%	84.6%
35 to 44	–	–	86.7%	86.3%	87.5%	88.0%
45 to 54	–	–	87.5%	87.4%	86.1%	88.7%
55 to 64	–	–	84.9%	87.0%	86.7%	85.8%
Over 65	–	–	61.9%	69.0%	70.8%	75.4%
ALL	**69.3%**	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.2%**
Vehicles for which women are the main drivers	–	–	–	40.4%	40.7%	41.6%

Sources: Insee up to 1993, Sofres as of 1994.

CAR OWNERSHIP BASED ON AREA OF RESIDENCE



The car ownership rate is the proportion of households that own at least one vehicle, expressed as a percentage.
It is closely connected to income, the age of the head of the household, the socio-professional category, the residential location and the number of people living in the house.

- 20% of the wealthiest households had a car ownership rate of over 90% in 2009; 20% of the least well-off households have at least one car, at over 60%.
- In towns with over 100,000 inhabitants, the car ownership rate has not declined; 80% of households owned vehicles in 2009, compared with 75% in 1995.
- The rate of car ownership among older households is increasing; in 2009, their rate of car ownership reached 75%, compared with 62% in 1995.
- Rural households, large households and workers typically own more vehicles.
- The non-working and employee categories have relatively lower rates, although their car ownership rates have increased considerably since 2000 (+6.2 and +5.6 points respectively).

83%
of households have at least one car

Households vehicles in use

Daily car use has dropped regularly in recent years, with 72% of the total car fleet used in 2009 compared with 79% in 2000.
Since 2006, there are more diesel-powered (58%) than gasoline-powered cars. The average number of kilometers on the odometer continued to rise and now totals 108,000, i.e. 15,000 kilometers more than in 2000 and 38,000 kilometers more than in 1990. 78% of all cars in use belong to the low and mid-low ranges, compared with 60% in 1990.

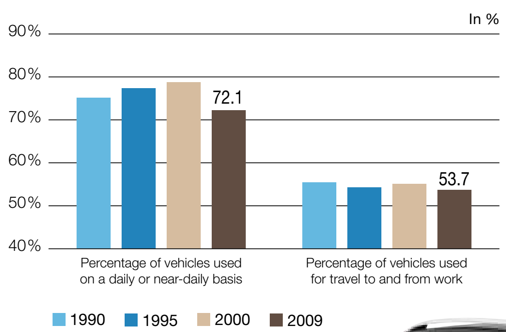
VEHICLE FLEET (OWNED, LEASED OR LOANED) BY HOUSEHOLDS

	Units	1980	1990	1995	2000	2005	2009
Total fleet	in millions	16.7	23.0	25.1	27.4	31.0	33.2
Average age of the fleet	years	5.8	5.8	6.6	7.3	7.7	8.0
BREAKDOWN BY MAKE							
Renault	%	36.2	33.3	33.3	33.3	30.2	28.4
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	37.5
Foreign makes	%	16.7	28.4	30.5	31.4	33.2	34.1
BREAKDOWN BY TAXABLE HORSEPOWER							
2 and 3 hp	%	12.3	3.4	1.6	0.7	43.3	43.6
4 and 5 hp	%	23.2	38.4	38.9	40.5		
6 and 7 hp	%	47.0	47.1	48.6	50.0	46.6	43.9
8hp and above	%	17.5	12.8	10.9	8.8	10.1	12.6
BREAKDOWN BY RANGE							
Low	%		39.4	43.4	45.1	44.5	46.8
Low-mid	%		20.8	24.3	27.3	32.2	31.4
High-mid	%		26.0	22.2	19.9	16.2	12.4
Premium	%		8.7	7.0	7.0	5.7	4.6
Others	%		5.1	3.2	0.8	1.4	4.8
Share of new cars purchased	%	55.7	50.4	45.2	43.9	40.1	40.4
BREAKDOWN BY FUEL TYPE							
Premium unleaded	%		15.5	38.4	49.1	51.1	41.6
Premium leaded - AVSR	%		62.9	28.8	11.9		
Regular gasoline	%		4.1	1.3	–		
LPG-CNG	%		0.1	0.0	0.7		
Diesel	%		17.4	30.9	38.1	48.9	58.4
Average kilometers on odometer	in km		69,500	84,080	93,140	99,460	107,730
Percentage of vehicles used on a daily or near-daily basis	%		75.1	77.4	78.7	75.7	72.1
Percentage of vehicles used for travel to and from work	%		55.4	54.3	55.1	55.2	53.7

Years after 2007 cannot be compared directly with previous years; the scope of light commercial vehicles has been enlarged.
Source: Sofres survey processed by CCFA and INRETS.

An annual Sofres survey gives a detailed 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. Their share continues to grow.
After rising throughout the 1990s, the average age of a vehicle tended to stabilize between 2000 and 2002 as the economic environment improved. After 2003, it started to rise again, reaching 8.2 years in 2007. The two following years it dropped slightly and stood at 8 years in 2009.
The most common taxable horsepowers were in the 4 to 7 hp categories.
Cars in the low and mid-low ranges have gained value after a couple of years and their share of the total population has once again increased to the detriment of the premium ranges: in 2009 they represented respectively 47% and 31% of the population, whilst the high-mid range represented 12%.

VEHICLE USE

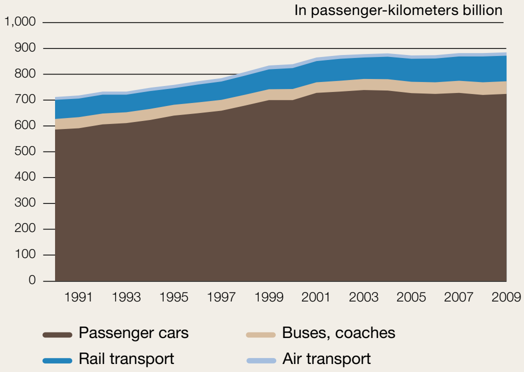


72% and 54%
Respective share of vehicles used daily (or near-daily) and used for travel to and from work

Domestic passenger transport

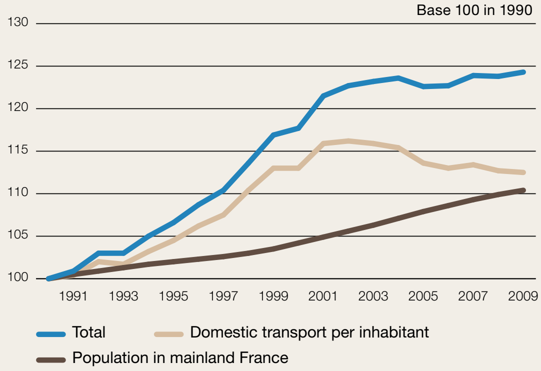
Personal transport drives the economy, shaping economic and social exchanges, creating wealth, and underpinning whole sectors such as health and tourism.
When expressed as passenger-kilometers, which underrepresents urban transport and focuses on domestic transport (excluding long distance international transport), roads emerge as the dominant mode, with 82% passenger cars and 6% coaches and buses using them in 2009.
Cars and light commercial vehicles allow people to carry their belongings, offering an appropriate solution to transport today, particularly in sparsely-populated residential areas or regions where there is insufficient demand to make public transport networks economically and socially relevant solutions.

DOMESTIC PASSENGER TRANSPORT



Sources: MEEDDM/SOeS, Insee.

EVOLUTION OF DOMESTIC PASSENGER TRANSPORT



Sources: MEEDDAT/SOeS, Insee.

Personal transport is obviously linked to the economy, as is the transport of freight, but it also includes the vital social aspect of meeting people.
Whereas freight is more closely associated with industrial, agricultural and craft production, personal transport covers a much broader economic sphere.
While commuting between home and work is predominant, the developing service economy also depends on the mobility of people; this is particularly important in such personal services as health and tourism. People select their mode of transport on the basis of their starting point/destination, distance and time, as in the transport of freight.
Transporting people requires significant capital expenditure in each mode and is generally paid off over a long period during which the infrastructure is built and maintained.
When measuring transport in terms of passenger-kilometers, light vehicles tend to dominate in domestic passenger transport.

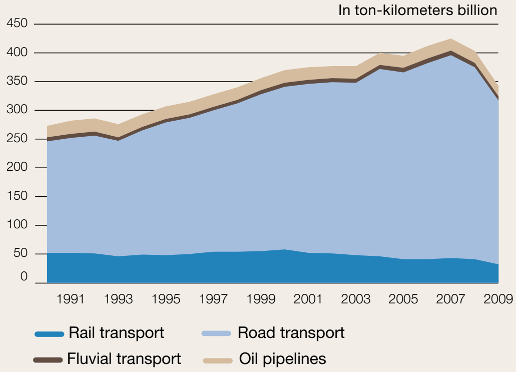
This can be expressed as the number of daily trips, particularly in dense urban areas where transport facilities and other methods (bicycles, motorcycles, etc.) play an important role, or as passenger-kilometers when dealing with international long distance travel, showing the relevance of each mode of transport; the French National Travel & Transport Survey (ENTD 2007) whose results are just being published makes it possible to update national statistics that date back to 1994.
Domestic passenger transport per person expressed in passenger-kilometers rose continuously until 2002 (a rise of 16% compared to 1990). Since then, it appears to have tailed off due to rising fuel prices, and dropped 3% between 2002 and 2009.

–3%
Decrease from 2002 to 2008 in domestic passenger transport for all modes per inhabitant in passenger-kilometers

Domestic freight transport

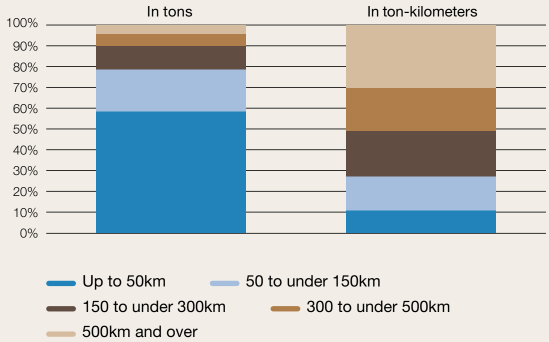
Transporting freight drives the economy, enabling production sites to connect with each other and with consumer sites, which in turn link to reprocessing-recycling plants. The time dimension must be added to this spatial model, often associated with town and country planning.
Each mode of transport (road, rail, inland waterways, pipeline, etc.) depends on infrastructure synonymous with the kind of large-scale capital expenditure that is generally paid off over a long period.
Road haulage meets many of the criteria involved in selecting a transport hub. According to the Road Freight Haulage Survey from the French Ministry of Transport, 58% of the French freight loads are delivered within a radius of 50 kilometers, and 49% of ton-kilometers generated by these deliveries involve distances of under 300 kilometers.

DOMESTIC FREIGHT TRANSPORT IN FRANCE



Source: MEEDDM/SOeS.

BREAKDOWN OF ROAD FREIGHT TRANSPORT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2008



Source: TRM survey by MEEDDM/SOeS.

79%
Goods transported by French road carriers that travel less than 150 kilometers measured as freight tons

The demand for freight transport is closely linked to the economy of the country and its interactions with other countries; it corresponds, on the one hand, with the domestic demand of various economic players and, on the other hand, with exports of producing companies in the country.
Some countries, such as Germany and France, act as key freight transit countries due to their geographical locations. In the case of road haulage, this also leads to the phenomenon of cabotage.
The physical transfer of goods exported by a country is a major focus of economic competitiveness. The destination (the source for imports) and the type of freight or good traded are often critical when choosing the appropriate mode of transport. Some liquids can be transported via pipelines, thereby avoiding any disruptions in supply; ports are used for trade with distant countries.
Domestic demand from economic players (households, businesses and administrations in the broadest sense) covers a very varied range of goods and properties, and is met either by domestic production or by imports, and transport provides a physical connection among production sites and with consumer outlets, and finally between the latter and reprocessing-recycling plants. In France, this has a major impact on town and country planning.
Because of the great variety in goods, many factors influence the choice of mode of transport. Among them:
• the weight of the goods: car manufacturers mainly transport coils of steel by rail or waterways;
• delivery time: perishables such as fresh products must be transported quickly and for the most part are usually transported by road;
• departure and arrival sites, both in production (linked with town and country planning) and in consumption, which mostly means households living in built-up areas.

Different modes of transport also depend on a specific infrastructure. This entails large-scale capital expenditure, usually paid off over a long period, and careful deployment.
Intensive usage, due to massive traffic flows, makes the infrastructure issue all the more relevant, as does the use of several different modes of transport in a single logistics chain, where there will be interruptions when loads are shifted from one mode to another.
Due to its flexibility, ability to pervade the entire road network, adaptability and quality of service, road haulage addresses many of these factors, demonstrating that rather than being a single homogenous market, transport consists of a multitude of sub-markets, which often cannot replace each other. No choice of mode is available for most goods transported, particularly in the last few kilometers.
Ignoring the geographical location of the departure and arrival sites, there are two basic units for measuring the transport of goods: tons (measured during loading) and ton-kilometers.
The French Ministry of Transport's Road Freight Haulage Survey shows that nearly 60% of French freight tons move less than 50km from their source, and that nearly 49% of French ton-kilometers are generated less than 300km from the source.

Automobile traffic

Automotive traffic increased by an annual average of 2.6% between 1980 and 2001, and has remained relatively stable since 2001 (+0.1%). In 2009, a full year of the most serious financial and economic crisis since the Second World War and despite the sharp average annual drop in fuel prices, traffic rose 0.2% after a drop of 1.4% in 2008.
The year's results differ greatly depending on the type of vehicle. Passenger car traffic has been buoyant (+0.5%); increasing tourism travel in vehicles (compared to 2008 when the price of fuel had reached an all time high) compensated for the drop in vehicle commutes. Average kilometers driven remained stable (–0.1%). French freight heavy truck traffic fell by 11.6% because of the recession after a drop of 5.5% in 2008.
Average kilometers driven by a heavy truck fell to the level of the early 1990s.

TRAFFIC STATISTICS

	Units	1990	2000	2008	2009	Average annual change in %		
						2000-1990	2009-2000	2009-2008
FLEETS (annual averages)	in thousand vehicles	**28,106**	**33,452**	**37,123**	**37,326**	**+1.8**	**+1.2**	**+0.5**
Passenger cars		23,280	27,770	30,775	30,950	+1.8	+1.2	+0.6
of which: gasoline		19,760	18,150	14,438	13,845	–0.8	–3.0	–4.1
diesel		3,520	9,620	16,338	17,106	+10.6	+6.6	+4.7
Light commercial vehicles (LCV)		4,223	5,055	5,711	5,746	+1.8	+1.4	+0.6
of which: gasoline		2,279	1,299	790	706	–5.5	–6.6	–10.7
diesel		1,944	3,756	4,921	5,040	+6.8	+3.3	+2.4
Heavy trucks (> 5 t)		535	547	554	546	+0.2	–0.0	–1.5
Coaches and buses		68	80	84	85	+1.6	+0.6	+1.2
ANNUAL AVERAGE KILOMETERS	in thousand km							
Passenger cars		13.8	13.8	12.8	12.8	+0.0	–0.8	–0.1
of which: gasoline		12.3	11.1	9.4	9.1	–1.1	–2.1	–2.5
diesel		21.7	18.9	15.8	15.8	–1.4	–2.0	–0.5
Light commercial vehicles (LCV)		14.6	15.9	16.1	16.1	+0.8	+0.2	–0.1
of which: gasoline		9.9	8.5	7.9	7.8	–1.6	–0.8	–1.0
diesel		20.2	18.4	17.4	17.2	–0.9	–0.7	–1.0
Heavy trucks (> 5 t)		42.2	48.4	47.8	42.9	+1.4	–1.3	–10.2
Coaches and buses		31.0	29.7	32.8	32.7	–0.4	+1.1	–0.2
CONSUMPTION PER VEHICLE	liters/100 km							
Passenger cars: gasoline		8.68	8.07	7.61	7.63	–0.7	–0.6	+0.2
Passenger cars: diesel		6.73	6.67	6.41	6.39	–0.1	–0.5	–0.3
LCV: gasoline		9.39	9.51	8.91	8.93	+0.1	–0.7	+0.2
LCV: diesel		9.77	9.72	9.42	9.48	–0.0	–0.3	+0.7
Heavy trucks: diesel		36.23	37.69	35.14	35.02	+0.4	–0.8	–0.4
Buses and coaches: diesel		32.00	32.60	31.11	31.36	+0.2	–0.4	+0.8
FUEL CONSUMPTION (all road transport)	in million liters							
Gasoline		24,783	18,954	12,394	11,674	–2.6	–5.2	–5.8
Diesel		19,271	32,355	38,061	37,562	+5.3	+1.7	–1.3
Total		44,054	51,309	50,454	49,236	+1.5	–0.5	–2.4
TOTAL TRAFFIC	in billion vehicle-km	**432**	**526**	**552**	**551**	**+2.0**	**+0.5**	**–0.2**
of which: French passenger cars and light commercial vehicles		382	463	486	488	+1.9	+0.6	+0.5
ROAD TRAFFIC								
Passengers in passenger cars	in billion passenger-km	585.6	699.6	720.2	723.9	+1.8	+0.4	+0.5
Passengers in coaches and buses	in billion passenger-km	41.3	43.0	48.6	48.9	+0.4	+1.5	+0.8
Freight(1)	in billion tons-km	193.9	282.5	334.2	284.9	+3.8	+0.1	–14.8

(1) New work has led to an increase in the amount of road haulage (international and in transit) provided by foreign operators.
Source: National Transport Accounts MEEDDM/SOeS, Insee.

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. It also includes data on vehicles registered abroad.
In 2009, road accounts for 87% of all domestic transport for passengers and 83% for freight.
In 2009, the number of French-registered vehicles on the road rose by 0.5%, comparable to previous years, but far lower than in the 1990s.
More light vehicles are using diesel engines, which now power 60% of this segment.

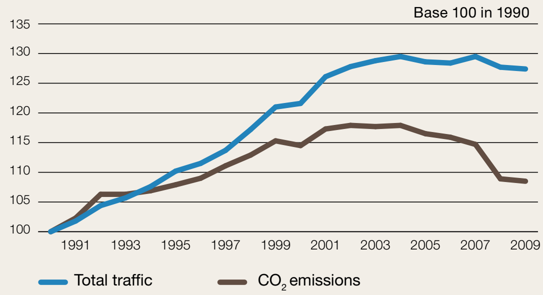
As regards traffic, diesel accounts for 73% of the traffic of light vehicles registered in France, against 54% in 2000 and 30% in 1990.
The consumption per vehicle given in the table above includes overconsumption associated with biofuels, which have a lower energy quotient than conventional fuels. Judging by the first estimates from the French Energy Observatory, deliveries of gasoline in joules fell by 3.6% compared with a drop of 3.3% in liters, while deliveries of diesel rose 1.1% compared with a 1.2% rise in liters.

–1,000km
Drop in a car's annual average kilometers travelled in France, from 2000 to 2009

Automobile traffic and CO_2 emissions

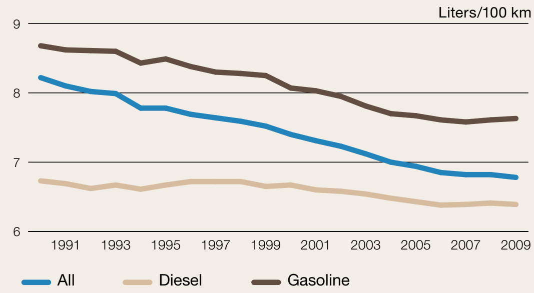
The number of French and foreign vehicles on French roads has increased by 27% since 1990, while the corresponding CO_2 emissions have risen by only 8%.
The credit for enhanced energy efficiency stems from a variety of factors. The average consumption per registered vehicle on the road was 17% between 1990 and 2009 (increased number of diesel engines, efforts made by manufacturers and drivers).
Also and without considering the impact of biofuels, the quantity of CO_2 required for a heavy truck to move a ton of goods a kilometer in France dropped by over 20% between 1990 and 2009, despite the impact of the recession last year.
Contrary to the previous two years, in 2009 the increasing share of biofuels in fuel deliveries (close to annual French targets) also helped lower CO_2 net of renewable energy sources.

TRAFFIC IN FRANCE AND CORRESPONDING CO_2 EMISSIONS NET OF RENEWABLE ENERGY SOURCES



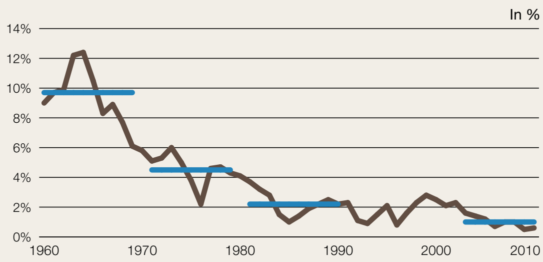
Sources: CITEPA and Traffic Statistics.

AVERAGE CONSUMPTION OF A PASSENGER CAR ON THE ROAD



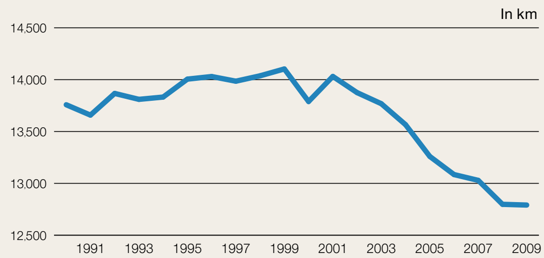
Source: Traffic Statistics.

ANNUAL GROWTH RATE OF THE NUMBER OF PASSENGER CARS ON THE ROAD IN FRANCE



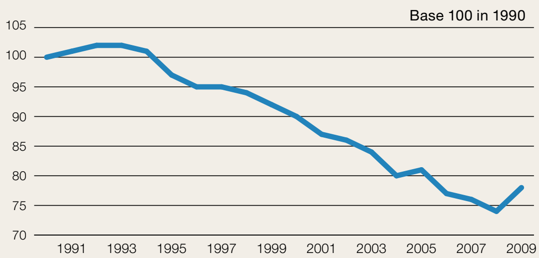
Source: CCFA.

AVERAGE KILOMETERS COVERED IN A YEAR BY A PASSENGER CAR



Source: Traffic Statistics.

CHANGE IN THE AMOUNT OF CO_2(1) EMITTED BY A HEAVY TRUCK TRANSPORTING ONE TONNE OF FREIGHT ONE KILOMETER ACROSS FRANCE



(1) The reduction of CO_2 emissions due to the use of biofuels is not considered.
Sources: MEEDDM/SOeS, CCFA calculations.

–8%
Reduction in CO_2 emissions for road traffic between 2004 and 2009 according to CITEPA

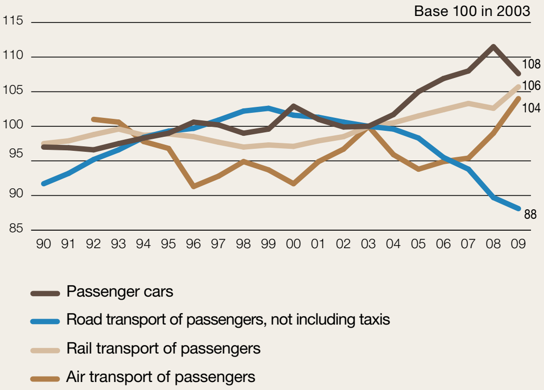
Passenger car traffic involves the number of vehicles on the road and the average number of kilometers they cover in a year. Over the long term, the increase of the fleet has slowed down and now shadows the growth of the population as a whole. The growth in multiple car ownership and the sharp rise in fuel prices are behind the drop in the average number of kilometers driven per year by passenger cars.
In 2009, the first estimates from CITEPA for road transport CO_2 emissions net of renewable energy sources stand at 118 million tons.

After the stable situation observed in the early 2000s, a clear drop was observed linked to the effects of the economic recession and also to the increase of biofuels in fuel deliveries.
For 2008, CO_2 emissions net of renewable energy sources for road traffic can be broken down, according to CITEPA estimations, to 55% for cars, 18% for light commercial vehicles and 27% for heavy trucks, including coaches and buses.

Passenger transport price indices

In 2009, because of the drop in fuel prices, the price index for passenger cars (purchases and use) fell by over 3%. The price index for air passengers benefited less because of an increase in price and services; it rose by 5%. The price index for rail passengers grew by 3%, faster than in previous years. The price index for the road transport of passengers (not including taxis) continued to fall (nearly –2%).
Since 2003 the real price indices for the various passenger transport modes have changed in very different directions: –12% for road transport of passengers (not including taxis), +8% for passenger cars, +4% for air passengers and +6% for rail.

PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES, ADJUSTED FOR INFLATION



Source: Insee.

ANNUAL CHANGE IN PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES, ADJUSTED FOR INFLATION

In %

	Passenger cars	Road transport of passengers not including taxis	Rail transport of passengers	Road transport of passengers	Air transport of passengers
1991	3.1%	4.9%	3.6%	5.1%	–
1992	2.1%	4.6%	3.4%	4.8%	–
1993	3.0%	3.6%	2.9%	4.0%	1.6%
1994	2.4%	3.6%	0.7%	3.5%	–1.2%
1995	2.5%	2.6%	1.9%	2.6%	0.8%
1996	3.6%	2.4%	1.6%	2.4%	–3.9%
1997	0.9%	2.4%	0.5%	2.4%	2.9%
1998	–0.5%	2.0%	–0.1%	2.1%	3.0%
1999	1.2%	0.9%	0.9%	1.1%	–0.8%
2000	5.1%	0.6%	1.4%	1.0%	–0.5%
2001	–0.2%	1.4%	2.5%	1.8%	5.2%
2002	0.8%	1.2%	2.6%	1.4%	3.9%
2003	2.2%	1.5%	3.6%	1.7%	5.6%
2004	3.9%	1.7%	2.7%	1.9%	–2.0%
2005	5.1%	0.4%	2.8%	1.3%	–0.4%
2006	3.5%	–1.2%	2.4%	0.1%	2.8%
2007	2.5%	–0.4%	2.4%	0.4%	2.0%
2008	6.2%	–1.6%	2.1%	–0.4%	6.6%
2009	–3.4%	–1.7%	3.1%	–0.1%	5.2%

Source: Insee.

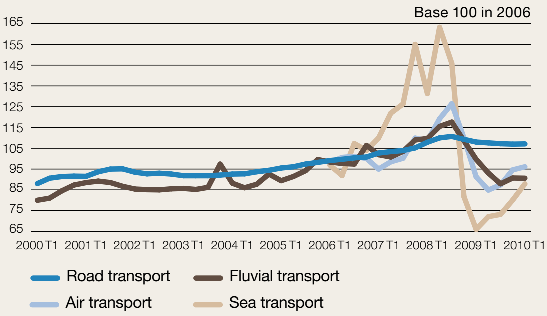
The price indices of the various passenger transport modes show evolutions in prices inclusive of tax. So, for air transport, this includes airport tax; in other modes, infrastructure-related costs are only shown insofar as they can be included in the retail price. Furthermore, only the part paid directly by the household is considered. For example, if a region or a local authority decides, in the context of a town or country planning strategy or social measures, to subsidize a part of transport-related expenses, this will appear as a reduction in household expenses. Fuel surcharges are included in the index for air transport of passengers.
The indices for rail and road transport of passengers only relate to intercity links.
The index for passenger cars is defined including purchasing as well as running expenses.
To calculate the actual change in the real prices of these main modes of transport, these indices have been adjusted by the consumer price index in the above graph.
After remaining near their 1995 level, the real price indices of the various modes of passenger transport fluctuated in different directions after 2003: from 2003 to 2009, the tax-adjusted personal car index (purchase and use of passenger cars) rose 8%, and largely exceeded its 2000 level. After 4 years of increases, the index for air passengers rose again (+4%). The rail passenger index increased by 6%, continuing the growth it began in 2000, whilst road transport of passengers (not including taxis) dropped by 12%. Only the share of the price paid directly by households is factored into these calculations.

+8% and –12%
Respective change between 2003 and 2009 of the price indices adjusted for inflation, for passenger vehicles and haulage

Freight transport price indices

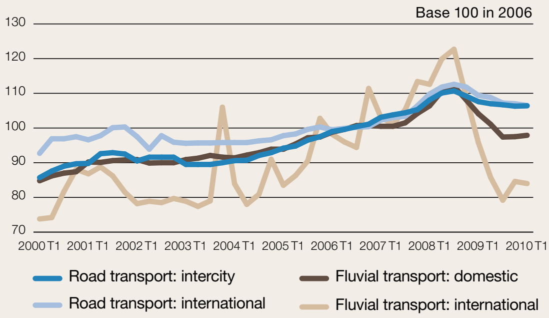
Over the last quarters, changes in freight transport price indices have been much more extreme than previously. In 2008, road freight, traditionally moderately variable, grew by 5% compared to the previous year before dropping by 2% in 2009. Since 2000, the price index of freight transport by road rose by 2% per year on average, from 1.3% for international to almost 2.2% for intercity, with 2% for proximity freight transport by road. Over the same period, the fluvial index showed a lesser change (+1.2% per year), varying from 1.3% for domestic transport to 0.1% for international transport.
Air transport, followed by fluvial transport and, to a lesser extent, road transport, have seen considerable year-on-year variations in freight indices. The high and low points of the air transport index observed over the last year have a 13% gap (39% in 2008). The volatility of fuel prices is the cause; for river transport, the relationship between demand and supply explains the figures.

FREIGHT TRANSPORT PRICE INDICES IN FRANCE



Source: MEEDDM/SOeS.

FREIGHT TRANSPORT PRICE INDICES



Source: MEEDDM/SOeS.

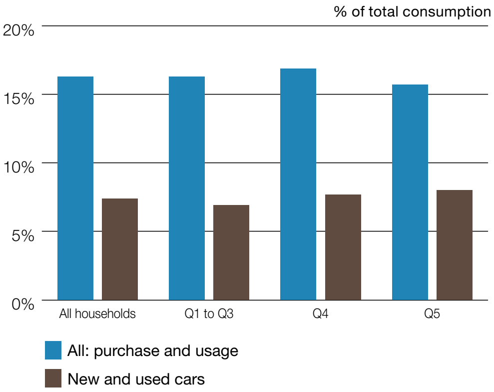
+2.2%
Average annual increase since 2000 of the intercity road freight transport price index

Freight transport price indices are calculated by the statistics department of the French Transport Ministry (SOeS). For road and river transport, only activities performed on behalf of others by companies registered in France with freight as their core business are included; a company transporting its own products by its own means is therefore not counted. The indices are calculated according to representative services defined mainly by the loading and unloading locations, the type of freight transported, as well as the characteristics of the contract binding the shipper and the carrier. The data used correspond to the current prices at the end of each quarter.
Monitored since the start of 2006, indices for air freight consist of freight transport services departing France by air waybill. The transport service is defined by the unloading location and the airline in charge of transport. Unlike the data for road and fluvial transport, the indices are drawn up using the so-called unit value method. They include fuel and security surcharges paid to the airline providing the transport.
The maritime price index has also been monitored since early 2006. It includes services provided by a company registered in France with maritime freight as its core business (bulk and ferry). It is based on international price indices, unit price and tariffs.
Due to the high volatility of fuel prices, the price index for air freight has fluctuated greatly since 2006; a difference of 39% was observed between the low point, in the first quarter of 2009 and the high point, in the third quarter of 2008. Between the low point of the second quarter of 2009 and the high point of the first quarter 2010, the difference was 13%. After annual average growth of 16% between 2006 and 2008, the index dropped 23% in 2009 compared to the previous year and in the first quarter 2010, reached a level below that observed in 2006. The price index for maritime freight is very volatile, in line with the changes in bulk prices. On annual average, after growing 31% between 2006 and 2008, it fell 44% compared to the previous year.
Available since 2000, the fluvial freight price index has risen an average of 1% per year until 2009, compared to 4% until 2008. Between 2000 and 2008, the increase was considerably lower in the domestic index (+3% per year) than in the international index (+5%). However the international index fell in 2009, so for the period 2000-2009, it only rose by 1.0% whereas the domestic index grew by 1.6%. To a lesser extent than with air transport, infra-annual variations are also found in fluvial transport, more often due to supply and demand.
The road haulage price index has increased on average by 1.9% per year since 2000 compared to 2.4% in 2008. This can be broken down as 1.3% for international and 2.2% for intercity. Compared with fluvial and air transport, infra-annual variations are of less importance even though, as shown by the structure of road haulage cost price of the CNR (see page 47), in December 2008 fuel accounted for 23% and 16% respectively of the total cost of long-distance and regional road haulage.

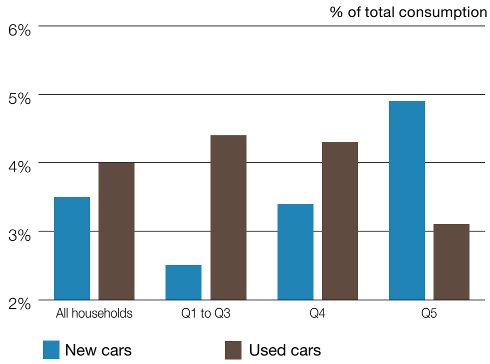
Household motoring costs

For all households, the smaller the district in which the household is, the more the fuel purchases increase.
For households with cars, fuel purchases comprise a lower share of overall consumption for the 20% of better-off households (3%), compared with over 4% for other households.
In light of the tax component in the price of fuel and insurance, low-income households with cars pay more taxes, proportionally to their consumption, than the 20% of wealthier households.

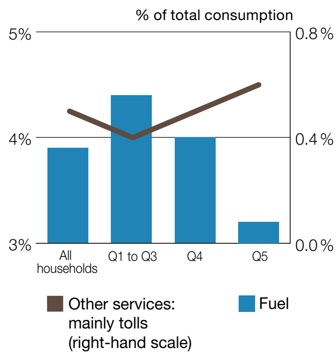
CAR BUDGET



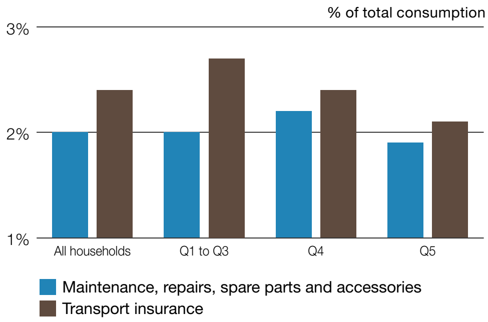
CAR PURCHASES



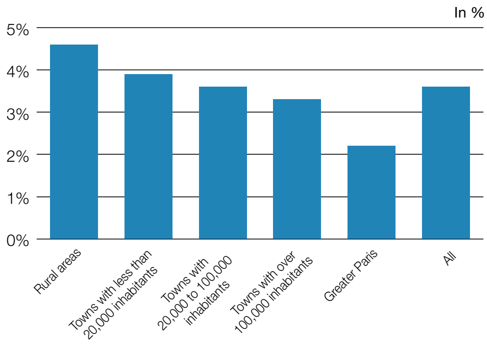
FUEL AND OTHER USE-RELATED SERVICES (mainly tolls)



MAINTENANCE, REPAIRS, SPARE PARTS AND TRANSPORT INSURANCE



FUEL COST FOR HOUSEHOLDS, INCLUDING THOSE WITHOUT CARS, BY RESIDENCE AREA



Source: Insee, Family budget survey 2006.

5%
Share of fuel in the total consumption of households living in rural areas

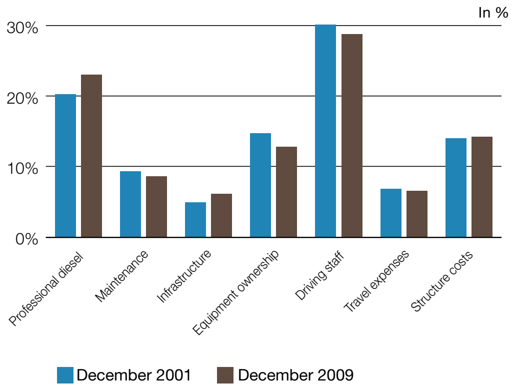
The "Family Budget" surveys conducted every 5 years by the French National Institute for Statistics and Economic Studies (Insee) reveal the proportion of large consumer items in the household budget and provide data depending on their different characteristics: socio-professional category, age, income, residence area, etc.
There are two important differences for typical car items when compared to national figures. With respect to transport insurance costs, the full cost is factored into the surveys, while only the service (spending minus repayments) is recorded at the macro-economic level. When it comes to spending on used vehicles, the full cost is reflected in the surveys, while at the macro-economic level, this spending corresponds mainly with the margins made by professionals involved in a transaction, and does not include transactions between individuals. Some charts show the breakdown of different car items as a percentage of total consumption, equivalent to individual consumption (excluding rent) based on income, broken down by 20% segments of the population: Q5 is the fifth quintile, i.e. 20% of households with the highest earners, ahead of Q4 and then the combination of Q1 to Q3.

In 2005-2006, the vehicle budget for all households with cars amounted to just over 16% of their total consumption. New car purchases account for barely a half, ranging from 7% for the 60% of households with lower incomes to 8% for the fifth quintile. Nearly two thirds of households in Q1-Q3 buy used cars, whereas nearly two-thirds of Q5 households buy new cars. While nearly 4% of total consumption is devoted to fuel, only the richest quintile spends much less on consumption for this item. The same goes for transport insurance. As these items are taxed most heavily, it looks as if car-owning Q1-Q3 households pay more taxes than households in the richest quintile for the use of their vehicles in proportion to their consumption. By breaking down all households (car owners or not) into categories of residence location, fuel appears to play a higher role the smaller the town. This means that households in the Paris area spend 2% of their consumption on fuel whereas people in rural areas spend 5%.

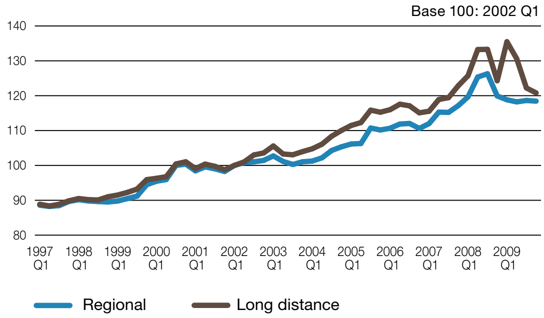
Road freight cost price

According to the National Road Transport Committee (CNR), the share of professional diesel in long distance road freight rose by 7 points between 2001 and 2007 to 28%.
This share then lost nearly 5 points and settled around 23% in 2008-2009.
For the period 2001-2009, the share linked to infrastructures increased by 1.2 points to reach 6.1% in 2009.
The cost of equipment ownership (road tractors and semi-trailers) dropped by 1.9 points to 12.8%.
Between 2002 and 2009, the cost price for long distance road freight rose by 25%, an average of 3.2% a year.
For this same period, cost price for regional transport rose by 18%, an average of 2.3% per year.

ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE

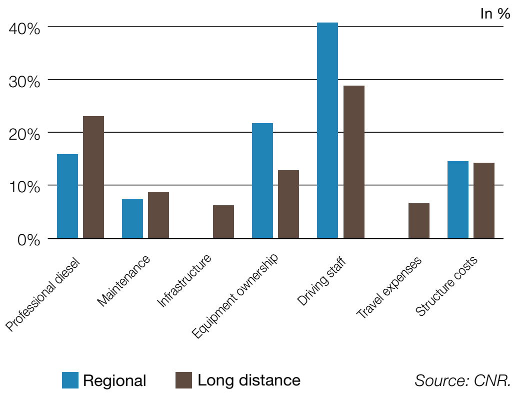


ROAD FREIGHT PRODUCTION COST



13%
Share of vehicle ownership in the CNR index of long-distance road freight costs

ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2009



Source: CNR.

The National Road Transport Committee (CNR) publishes, among others, two indexes showing changes in the cost of professional road transport: one for long distances and the other for regional transport.
Long-distance transport covers domestic or international transport by a maxi-code articulated truck and trailer where operating restrictions make it impossible or uncertain for the driver to return home each day.
Regional transport, with vehicles carrying a total load of between 3.5 and 19 tons, refers to transport within a region and its neighboring regions, where operating conditions enable the driver to return home each day.
Between December 2001 and 2007, professional diesel, together with substantial increases in oil prices, took an increasingly large role in the production cost of long-distance road freight, rising from 20% to nearly 28% of the total price. One year later, because of the drop in oil prices from this summer, costs fell by 22% before returning to 23% in 2009.
From 2001-2009, infrastructure costs increased by 1.2 points to 6.1%. On the other hand, equipment ownership (road tractors and semi-trailers) and maintenance (upkeep and repairs) dropped by 1.9 and 0.7 point respectively, more than the figure for driving staff (down 0.3 point). In the case of regional transport, fuel accounted for 16% of combined costs in December 2009; this lower percentage is one of the causes of the low 7-point increase in the regional index between 2002 and 2009 when compared with the long-distance index. The share for equipment ownership rose from 20 to 22% over the same period.

Automotive price indices

In 2009, the new passenger car price index rose 0.2%, or 0.1 percentage points more than inflation.
Since 1995, the new car price index has decreased by 14% in real terms.
In the continuing ebb and flow of oil prices after the peak of July 2008, fuel prices dropped sharply in 2009 (–17%). Nevertheless, infra-annual variations during this year showed an increase.
The parts, accessories, repairs and maintenance price index grew strongly (+4.1% in 2009), reflecting among other things the higher cost of raw materials, essential technical capital expenditure and better qualified labor.

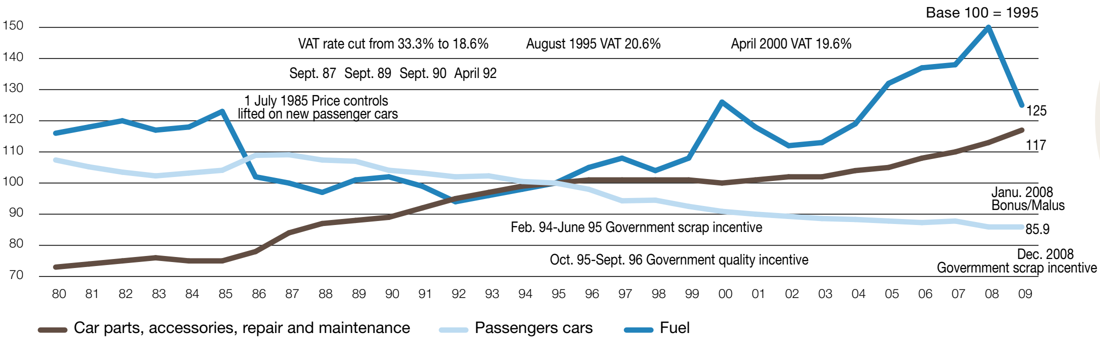
YEAR-ON-YEAR AUTOMOTIVE PRICE CHANGES

In %

	Consumer prices	New car prices	Prices of parts, accessories, repairs and maintenance of passenger vehicles	Fuel prices
2007	1.5%	2.0%	4.2%	1.8%
2008	2.8%	0.6%	5.1%	12.2%
2009	**0.1%**	**0.2%**	**4.1%**	**–17.1%**

Source: Insee, CCFA calculations.

NEW PASSENGER CAR, FUEL, PARTS, ACCESSORIES, MAINTENANCE AND REPAIR PRICE INDICES, ADJUSTED FOR INFLATION

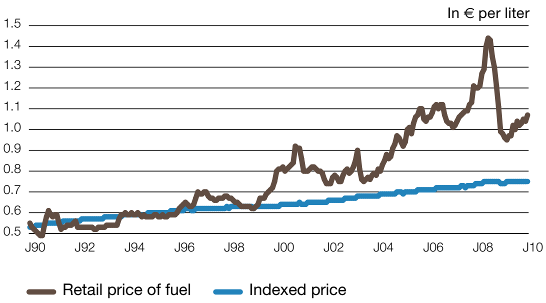


Source: Insee, CCFA presentation.

+10% and +17%

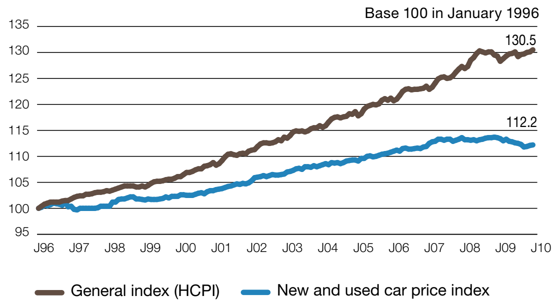
Respective increases in price indices for new cars and all consumer prices since 2000

RETAIL PRICE OF DIESEL IN FRANCE AND THAT FOR JANUARY 1999, INDEXED FOR CONSUMER PRICES



Sources: DGEMP, Insee, CCFA calculations.

HARMONIZED PRICE INDICES FOR THE EUROZONE (13 COUNTRIES)



Source: Eurostat.

The table shows year-on-year changes in the following indices:
– consumer prices;
– new car prices;
– prices of car parts, accessories, repair and maintenance;
– fuel prices.

The new car price index compares the prices of passenger cars with similar technical characteristics, so that price rises resulting from quality and equipment improvements can be factored out. Allowance is made for periodic rebates (except by mutual agreement) as well as the “bonus/malus” system.
To calculate the actual change in the key components of the cost of owning a car, these indices have been adjusted by the consumer price index in the first graph above.
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 the regular impact of competition and occasional impact of government support measures (“bonus/malus” system and scrap incentive scheme since 2008).
Actual repair and maintenance costs have risen steadily since 1985, along with the increase in necessary technological 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, particularly over the last three years.
In the eurozone (13 countries), Eurostat calculates a new and used car price index; the data from the various countries are then harmonized. Since 1996, the evolution of this index compared with that of the general price index has shown intense pressure, as in France, on prices associated with the stiffness of competition.
In 2009, the general price index rose 21% compared to 2000, whilst that of new and used car purchases only grew by 9%.

Consumer spending on private vehicles

The financial and economic crisis has affected household incomes which increased by +1% in 2009.
In view of rising unemployment, households have increased their savings.
As in 2008, the pace of growth in household consumption (in volume) has been substantially curbed, at less than 1%, against more than 2% between 2001 and 2007.
In this context, household purchases of cars supported by the different scrap incentive and "bonus/malus" schemes have risen by 7% to €41 billion; the reduction in average retail prices (more smaller and inexpensive models) that began in 2008 continued in 2009. This expenditure is estimated without any government market support schemes.
Household fuel purchases dropped rapidly (–19% to €32 billion), in line with the considerable price fluctuations. This spending represented 14% less (14% more than in 2008) than new and used car purchases; in 1990 it was a third less.

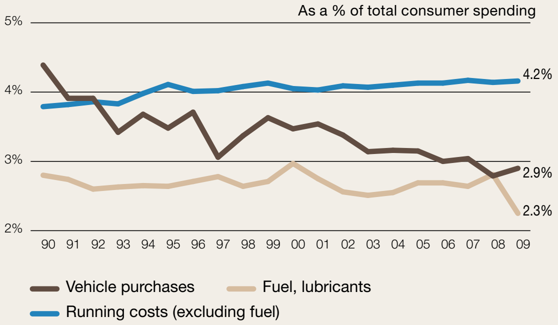
CONSUMER SPENDING ON PRIVATE VEHICLES

Amount and as a % of total consumer spending for the year

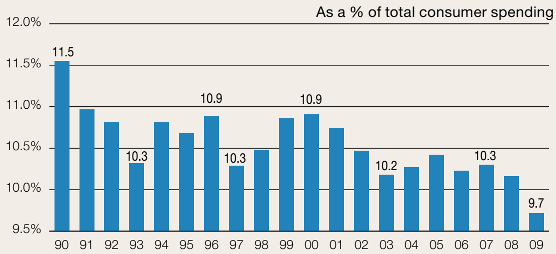
	Unit	1990		1995		2008[1]		2009[1]		Change 2009-2008
VEHICLE PURCHASES	in € billion	31.9	4.4%	29.7	3.5%	39.2	2.8%	41.2	2.9%	+5.1%
– New and used cars		29.6	4.1%	27.3	3.2%	34.7	2.5%	37.1	2.6%	+6.9%
of which new cars		24.7	3.4%	21.8	2.6%	23.6	1.7%	27.3	1.9%	+15.8%
– Caravans, motorcycles, bicycles		2.3	0.3%	2.4	0.3%	4.5	0.3%	4.1	0.3%	–8.7%
RUNNING COSTS	in € billion	47.9	6.6%	57.5	6.7%	97.8	6.9%	91.0	6.4%	–6.9%
– Parts and accessories		12.3	1.7%	16.1	1.9%	28.5	2.0%	29.4	2.1%	+3.2%
– Fuel and lubricants		20.3	2.8%	22.5	2.6%	39.6	2.8%	32.0	2.3%	–19.1%
– Automotive maintenance and repairs		11.1	1.5%	13.3	1.6%	20.0	1.4%	19.5	1.4%	–2.5%
– Tolls, parking fees, rental, driving lessons		4.1	0.6%	5.6	0.7%	9.7	0.7%	10.1	0.7%	+4.2%
INSURANCE	in € billion	4.1	0.6%	3.9	0.5%	6.0	0.4%	5.7	0.4%	–4.5%
TOTAL CONSUMER SPENDING ON PRIVATE VEHICLES	**in € billion**	**83.8**	**11.5%**	**91.0**	**10.7%**	**143.0**	**10.2%**	**137.9**	**9.7%**	**–3.5%**
Public transport	in € billion	10.3	1.4%	11.1	1.3%	23.2	1.7%	23.4	1.7%	+0.9%
TOTAL CONSUMER SPENDING FOR THE YEAR	**in € billion**	**726**	**100%**	**852**	**100%**	**1,407**	**100%**	**1,419**	**100%**	**+0.8%**
NUMBER OF HOUSEHOLDS (mainland France)	in thousands	22,059		23,393		27,403		27,740		+1.2%
Spending on private vehicles per household	in €	3,800		3,891		5,217		4,972		–4.7%
Spending on private vehicles per vehicle-owning household	in €	4,967		4,963		6,308		5,976		–5.3%

(1) These are provisional data and can be readjusted for three years.
Source: Insee – Household consumer spending, 2009-2000 base.

PERCENTAGE OF HOUSEHOLD BUDGET ALLOCATED TO OWNING A CAR, 1990 TO 2009



TOTAL VEHICLE-RELATED EXPENDITURE



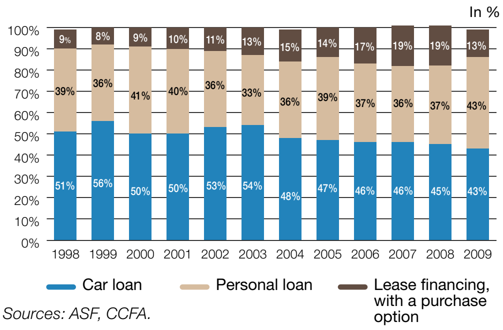
In 2009, French spending on personal transportation most often by car was €138 billion, an amount that represented 85% of all consumer spending on personal and public transportation combined.
Consumer spending on cars, relative to total consumer spending, is expressed as the percentage of household budget allocated to owning a car. This percentage has varied from 9.5% to 11.5% since the start of the 1990s; these macroeconomic data are based on different concepts than those obtained by surveys *(see page 46)*.
Spending on car purchases fluctuates widely, a fact that largely explains most of the changes in the percentage of the household budget allocated to owning a car, and its falling trend. In 2009, the car budget grew by 0.1 point to 2.9% compared to the lowest point observed since 1990.
The cost of maintaining and repairing vehicles, which increased in the 1990s in line with the end of car ownership access and the increase of the average age of cars on the road, has been oscillating between 3.4% and 3.5% for the last few years. After increasing over several years, household spending on car insurance (representing the service, spending minus repayments) fell by 4.5% in 2009 to €5.7 billion; this figure was €3.7 billion in 1999.

€138 bn
Amount spent by consumers on cars and motorcycles in 2009, according to Insee

Automobile financing

In 2009, 58% of new cars purchased by consumers were bought on credit, compared with over 60% in 2003-2009; the levels of 2001-2002 have been reached.
2009 was marked by the effects of the economic and financial crisis. The fall in retail price of new cars *(see page 49)* was reinforced by the effects of the scrap incentive scheme. In this climate, car (or conventional) loans were the most common source of financing (43%) almost equal to personal loans (43%) and lease-financing with a purchase option (13%).
For new vehicles used by companies (both private cars and light commercial vehicles or heavy trucks), 2009 was marked by sharp drops in loans in line with falling numbers of registrations. In view of the difficult financing, many long-term rental contracts were extended.

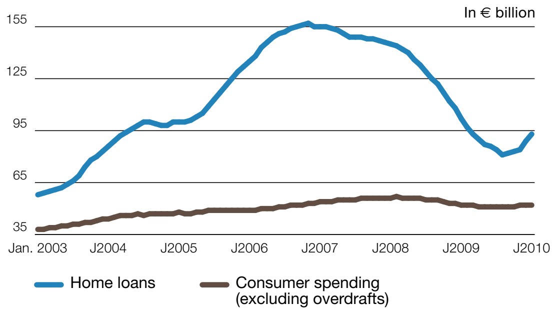
CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES



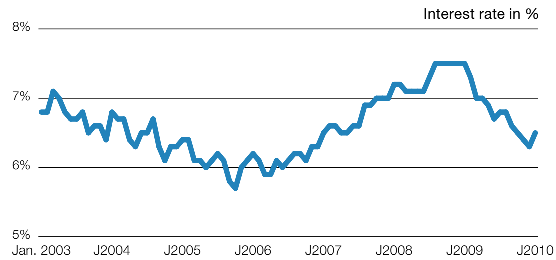
Sources: ASF, CCFA.

58%
New cars purchased on credit by consumers in France

TOTAL AMOUNTS OF NEW LOANS GRANTED TO RESIDENTS OVER A 12-MONTH PERIOD



INTEREST ON LOANS, EXCLUDING OVERDRAFTS



Source: Banque de France.

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:

- car or conventional loan: this is provided either by the finance companies, 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 72 months, i.e. 6 years. The purchase option may be exercised during the lease period or on expiry of the lease;
- personal or bank loans.

Data obtained from a variety of sources (industry associations, registration statistics, surveys, etc.) are used to estimate the percentage of new cars purchased with loans.
Between 2003 and 2007, consumer credit has grown sharply in France: using data over twelve months, new consumer loans (excluding overdrafts) rose from €38 billion in January 2003 to over €56 billion at the start of 2008, an average annual increase of 8%.
Over the same period, home loans rose from 58 to €145 billion, an annual average of 20%. Such growing debt has helped offset lower rises in purchasing power noted by Insee for all households.
Since 2008, due to the financial and economic crisis, households have used less credit and considerable drops were recorded: from 8% for consumer loans to 36% for home loans, which returned to their level of the end of 2004.

Car and motorcycle sales and repairs

In France, all motor vehicles are sold and repaired through dealership networks, totalling 15,000 outlets, including around 10,000 for French makes.
In 2009, motor vehicle sales generated revenue of €95 billion (+2% compared to 2007). Per vehicle type, the change is varied: an increase for passenger cars in a market supported by government schemes and a sharp fall for commercial vehicles. Vehicle maintenance/repair also suffered in 2009 (–3.7% turnover), due to falling household spending and heavy goods traffic. According to Insee, vehicle sales and repairs (categorized as J10) involved 76,869 companies at 1 January 2007, just over 6% of which worked for a manufacturer (apart from franchisees) and employed 45% of all staff in the sector. On 1 January 2006 and for car sales alone, a fifth of these companies employed 77% of staff in the sector, on the basis of annual surveys of businesses.

LIGHT VEHICLE SALES NETWORKS IN FRANCE ON 1 JANUARY 2009

MAKES	Primary dealership
Renault	744
Peugeot	438
Citroën	441
French makes	***1,623***
Ford	315
Opel	284
Fiat	226
Volkswagen	383
BMW	182
Mercedes-Benz	157
Japanese makes	1,288
South Korean makes	451
Other makes	1,651
TOTAL	6,560

Sources: CNPA, CCFA.

STRUCTURE OF HEAVY TRUCK NETWORKS BY MAKE

MAKES	Distribution and service	After-sales only
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

Sources: CNPA, Heavy Truck trade and repair in France, March 2006, and CCFA.

VEHICLE SALE AND REPAIR REVENUE

In current € billion, including VAT

Activity	2004	2005	2006	2007	2008	2009	Change 2009-2008
Automotive sales	82.1	87.9	89.3	95.0	94.8	96.8	2.1%
Automotive maintenance and repairs	20.0	20.5	21.4	22.2	22.5	21.7	–3.7%
Retail automotive equipment sales	5.2	5.6	5.7	5.9	6.0	6.1	1.2%
Motorcycle sales and repairs	3.9	3.8	3.9	4.0	4.0	3.7	–7.8%
Retail fuel sales	11.7	13.2	13.8	13.9	15.5	12.2	–21.5%
TOTAL	122.8	130.9	134.0	141.1	142.9	140.5	–1.7%

Source: Insee – Trade accounts: provisional results.

Vehicles require special care throughout their service life. This care includes continuous supervision whenever and wherever necessary with optimum servicing in order 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.

€97 bn
Net turnover, in 2009, of car sales and repairs in France, according to Insee

The automotive industry production and its economic impact

Since 2000, the production of the automotive industry has ranged between €85 billion and €95 billion.
In 2009 it fell sharply by 22% because of the recession to €65 billion. In current euro, it has returned to the level of 1998.
In a very difficult climate for the automotive market, the value added (VA) of the automotive industry has continued to fall, reaching €11 billion in 2009 (or 16% of total production). Its total purchases (or intermediate consumption) down by 25% represented 5 times its VA, at €57 billion, benefiting a number of economic sectors.
The operating margin (ratio between operating cash flow and VA) was 7% in 2008, much lower than the average of the last twenty years (30%). A capital-intensive industry, the gross fixed capital formation (GFCF) in the automotive segment totaled €3.2 billion in 2009, representing an investment rate (GFCF to VA ratio) of 28% (20% overall and 18% for the industry excluding energy).

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		1990	1995	2000	2005	2008[1]	2009[1]
PURCHASES FROM OTHER INDUSTRIES	%	–	–	59.9	66.9	61.8	–
Consumer goods industries	%	–	–	2.7	3.8	2.9	–
of which: apparel, leather	%	–	–	0.3	0.3	0.2	–
household equipment	%	–	–	2.2	3.2	2.5	–
Capital goods industries	%	–	–	9.1	10.3	8.8	–
of which: mechanical equipment	%	–	–	6.0	6.9	6.0	–
electrical and electronic equipment	%	–	–	2.9	3.4	2.8	–
ships, aircraft and railway rolling stock	%	–	–	0.1	0.1	0.1	–
Intermediate goods industries	%	–	–	32.3	34.8	32.2	–
of which: metallurgy and metalworking	%	–	–	16.1	17.0	16.4	–
chemicals, rubber, plastics	%	–	–	8.9	10.3	9.2	–
electrical and electronic components	%	–	–	4.1	3.9	3.4	–
mineral products	%	–	–	1.4	1.7	1.5	–
textiles	%	–	–	1.3	1.4	1.1	–
Energy	%	–	–	1.2	1.3	1.3	–
of which: electricity, gas and water supply	%	–	–	0.6	0.7	0.7	–
fuels and motor fuels	%	–	–	0.5	0.6	0.6	–
Construction	%	–	–	0.1	0.2	0.2	–
Transport	%	–	–	0.5	0.6	0.6	–
Financial services	%	–	–	0.8	0.8	0.7	–
of which: financial intermediation	%	–	–	0.6	0.5	0.4	–
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	12.6	12.6	–
of which: consultancy and support	%	–	–	3.9	4.6	4.1	–
operating services	%	–	–	3.2	3.1	2.9	–
research and development	%	–	–	4.0	4.7	5.4	–
post and telecommunications	%	–	–	0.3	0.3	0.2	–
Other commercial sector industries	%	–	–	1.6	2.1	2.2	–
All commercial sector purchases	%	–	–	14.5	16.5	16.4	–
PURCHASES WITHIN THE INDUSTRY	%	–	–	40.1	33.1	38.2	–
Total production at base prices	in € billion	49.7	55.3	85.8	91.4	88.3	68.8
In % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL PURCHASES[2]	in € billion	38.9	43.3	69.8	76.5	76.7	57.6
In % of production at base prices	%	78.1	78.3	81.3	83.7	86.9	83.7
Value added by the industry	in € billion	10.9	12.0	16.0	14.9	11.6	11.2
In % of production at base prices	%	21.9	21.7	18.7	16.3	13.1	16.3
Operating cash flow (OCF)	in € billion	3.4	3.5	6.6	4.2	0.8	–
In % of value added (margin rate)	%	30.8	28.9	41.2	28.1	7.1	–
Gross Fixed Capital Formation (GFCF)	in € billion	–	–	5.0	3.7	3.6	3.2
In % of value added (investment rate)	%	–	–	31.4	24.6	30.8	28.4

(1) Accounts for 2008 are semi-definitive, those for 2009 are provisional. (2) Total purchases (intermediate consumption): value of goods 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.
Source: Insee – National Accounts (2000 base).

In 2009, total purchases as a percentage of production reached 84%, slightly lower than 2007-2008 and equivalent to 2005 figures.
In 2008, over a third of total industry purchases were within the industry and less than two-thirds from other industries.
Intermediate goods accounted for less than a third of purchases, including metallurgy; the metalworking industry remained the leading supplier, accounting for 16% of total purchases.

The commercial sector accounted for 16% of purchases. The most requested corporate services were research and development (5%), consultancy and support (4%), and operating services (3%).
Purchases of capital goods (mechanical, electrical and electronic equipment) accounted for 9% of total industry purchases.

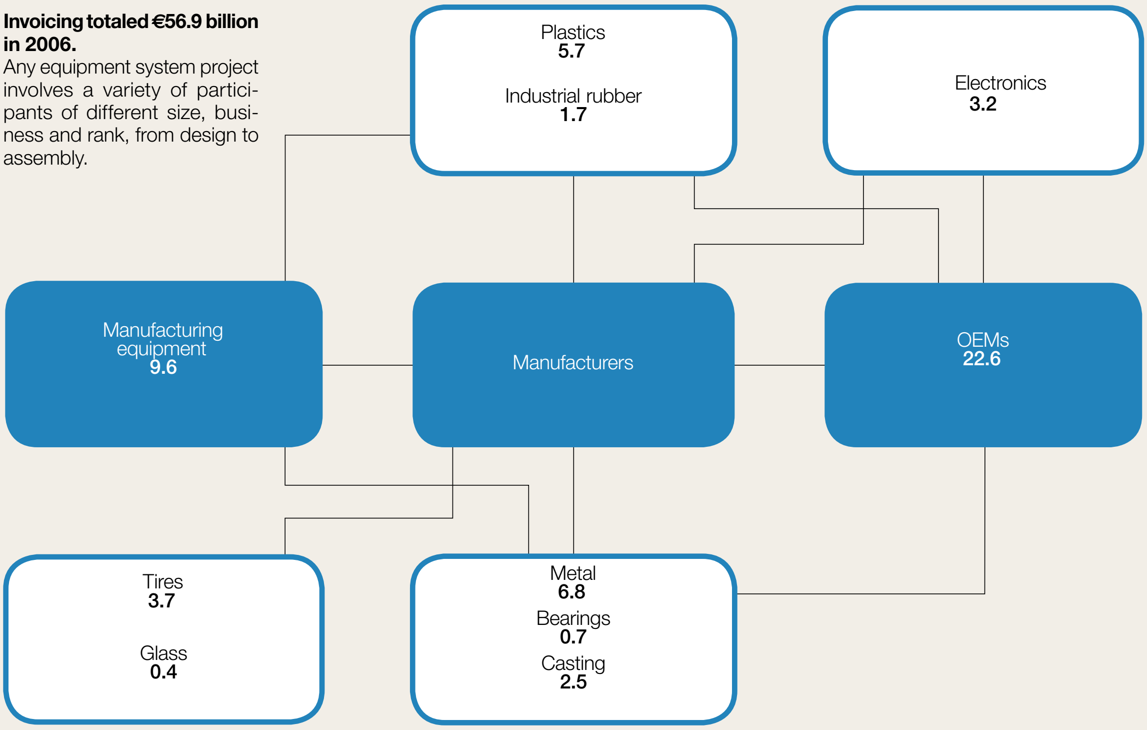
7%
Operating margin of the automotive industry in 2008, far below the average observed over the last twenty years (30%)

Automotive OEMs and suppliers

French automobile manufacturing acts as a structure for its 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, etc.
In 2008-2009, the financial and economic crisis severely affected manufacturers' production as well as that of the OEM and other supplier sectors.

FRENCH SUPPLIER CHAIN ACCORDING TO SESSI IN 2006

Invoicing totaled €56.9 billion in 2006.
Any equipment system project involves a variety of participants of different size, business and rank, from design to assembly.



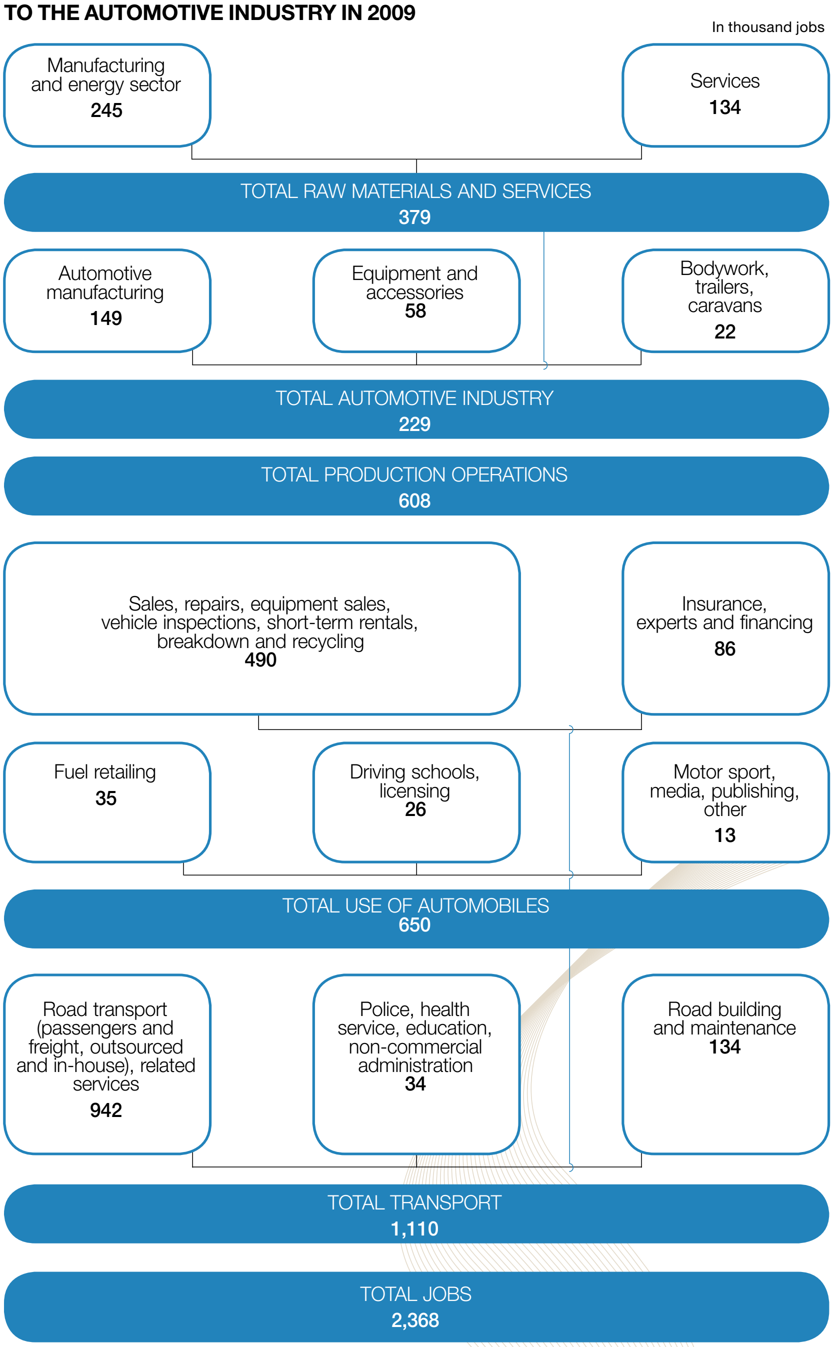
A variety of participants of different sizes, businesses and ranks contribute to automotive manufacturing. Partnership solutions can also be very varied as shown by studies conducted by the *Service des Études et des Statistiques Industrielles* (Department for Industrial Studies and Statistics - SESSI) on the automotive supplier chain. The automotive industry comprises automotive 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 (about three quarters according to the French Automotive Equipment Industries Association - FIEV).
According to SESSI, the French automotive industry, which leverages the French industrial base, made purchases of nearly €57 billion from its suppliers in France in 2006.
It accounted 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.

1st
The French automotive industry remains the largest customer of many sectors such as plastics, industrial rubber and industrial metalworking

Employment

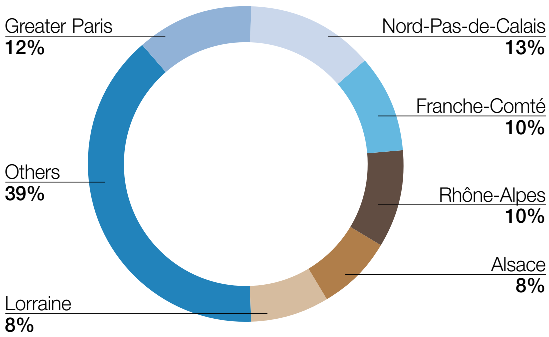
In the broadest sense, in 2009 the industry provided work for close to 2.3 million people, representing 9% of France's employed working population. The automotive industry alone directly employed 229,000 people, representing more than 9% of all employment in the manufacturing and energy sector.
The effects of the financial and economic crisis that started in 2008 were sorely felt in industrial branches and those associated with vehicle use, particularly for heavy trucks, and transport.

JOBS RELATED DIRECTLY OR INDIRECTLY TO THE AUTOMOTIVE INDUSTRY IN 2009



Sources: CCFA, CNPA, SESSI, Insee, SOeS, URF and USIRF.

GEOGRAPHIC BREAKDOWN OF AUTOMOTIVE INDUSTRY EMPLOYEES IN 2007



Source: SESSI.

As the driving force behind industrial output in France, the automotive industry and its suppliers directly and indirectly created 608,000 jobs either in production or through its purchases from other sectors.
Vehicle usage provided jobs for more than 650,000 people, particularly in the areas of vehicle-related services (sales, repairs, automotive equipment retailing), fuel and recycling (oil recovery and car breakers).
Finally, the road transport (passenger and freight) sector and its related infrastructure employed more than 1 million people. These jobs include both outsourced and in-house transport operations.
In a broader sense of freight transportation and logistics (storage and related services), the French Transportation Ministry's Statistics Department (SESP) carried out a multi-sector analysis that showed there were 1.5 million employees in this sector in 2004.
In the past, most jobs in the automotive industry (manufacture and equipment) were located in the Greater Paris area but the industry has since become more decentralized, with only 12% of all employees still based in the Paris region in 2007.
The other main automotive regions are Nord-Pas-de-Calais (13%), Franche-Comté (10%), Upper and Lower Normandy (both 10%), Rhône-Alpes (10%), and Alsace and Lorraine (8% each).

9%
French people in employment working in the automotive industry (direct and indirect jobs)

Statistics
2010

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.

PASSENGERS CARS

In units

	1980	1990	2000(2)	2005(2)	2006	2007	2008	2009
Europe	**11,983,548**	**15,231,409**	**17,407,047**	**17,677,904**	**18,099,954**	**19,330,513**	**18,381,339**	**15,195,240**
WESTERN EUROPE	**10,401,320**	**13,061,853**	**14,778,879**	**14,222,460**	**13,934,905**	**14,216,262**	**12,849,218**	**11,037,634**
Germany	3,520,934	4,660,657	5,131,918	5,350,187	5,398,508	5,709,139	5,532,030	4,964,523
Belgium	882,001	1,160,412	912,233	895,109	881,929	789,674	680,131	524,595
Spain	1,028,813	1,679,301	2,366,359	2,098,168	2,078,639	2,195,780	1,943,049	1,812,688
France(1)	**2,938,581**	**3,294,815**	**2,879,810**	**3,112,961**	**2,723,196**	**2,550,869**	**2,145,935**	**1,819,462**
Italy	1,445,221	1,874,672	1,422,284	725,528	892,502	910,860	659,221	661,100
Netherlands	80,779	121,300	215,085	115,121	87,332	61,912	59,223	50,620
Portugal	61,000	60,221	178,509	137,602	143,478	134,047	132,242	101,680
United Kingdom	923,744	1,295,611	1,641,452	1,596,356	1,442,085	1,534,567	1,446,619	999,460
Sweden	235,320	335,853	259,959	288,659	288,583	316,850	252,287	128,738
CENTRAL AND EASTERN EUROPE	**1,582,228**	**2,002,000**	**2,330,692**	**3,001,781**	**3,619,367**	**4,479,368**	**4,910,554**	**3,646,675**
TURKEY	**31,529**	**167,556**	**297,476**	**453,663**	**545,682**	**634,883**	**621,567**	**510,931**
AMERICA	**8,663,060**	**8,450,862**	**10,022,089**	**8,816,463**	**9,302,895**	**9,325,594**	**9,202,759**	**7,006,124**
NAFTA	**7,526,658**	**7,747,823**	**8,371,806**	**6,523,591**	**6,892,197**	**6,475,498**	**6,189,535**	**4,011,613**
of which: Canada	846,777	1,072,281	1,550,500	1,356,271	1,427,582	1,342,133	1,195,436	822,267
USA	6,376,825	6,077,449	5,542,217	4,321,272	4,366,996	3,924,268	3,776,641	2,246,470
Mexico	303,056	598,093	1,279,089	846,048	1,097,619	1,209,097	1,217,458	942,876
SOUTH AMERICA	**1,136,402**	**703,039**	**1,650,283**	**2,292,872**	**2,410,698**	**2,850,096**	**3,013,224**	**2,994,511**
of which: Argentina	218,516	81,107	238,921	182,761	263,120	350,735	399,236	380,067
Brazil	977,697	663,097	1,351,998	2,011,817	2,092,029	2,391,354	2,545,729	2,576,628
ASIA-PACIFIC	**8,796,971**	**11,910,333**	**13,573,073**	**20,049,013**	**22,175,957**	**24,212,695**	**25,058,888**	**25,469,752**
of which: China	–	–	605,000	3,931,807	5,233,132	6,381,116	6,737,745	10,383,831
South Korea	55,000	986,751	2,602,008	3,357,094	3,489,136	3,723,482	3,450,478	3,158,417
India	30,538	176,015	517,957	1,264,111	1,473,235	1,713,479	1,846,051	2,166,238
Japan	7,038,108	9,947,972	8,359,434	9,016,735	9,754,903	9,944,637	9,928,143	6,862,161
AFRICA	**277,058**	**209,603**	**213,444**	**319,598**	**339,772**	**332,544**	**382,095**	**281,879**
of which South Africa	277,058	209,603	230,577	324,875	334,482	276,018	321,124	222,981
TOTAL	**29,720,637**	**35,802,207**	**41,215,653**	**46,862,978**	**49,918,578**	**53,201,346**	**53,025,081**	**47,952,995**

COMMERCIAL VEHICLES

In units

	1980	1990	2000(2)	2005(2)	2006	2007	2008	2009
EUROPE	**2,563,596**	**2,688,509**	**2,783,468**	**3,140,884**	**3,299,335**	**3,522,065**	**3,396,455**	**1,814,228**
WESTERN EUROPE	**1,663,080**	**1,671,915**	**2,326,653**	**2,246,463**	**2,341,198**	**2,474,948**	**2,325,472**	**1,203,399**
Germany	357,619	315,895	394,697	407,523	421,106	504,321	513,700	245,334
Belgium	47,029	91,784	121,061	31,419	36,127	44,729	44,367	12,759
Spain	152,846	374,049	666,515	654,332	698,796	693,923	598,595	357,390
France(1)	**439,852**	**474,178**	**468,551**	**436,047**	**446,023**	**464,985**	**423,043**	**228,196**
Italy	166,635	246,178	316,031	312,824	319,092	373,452	364,553	182,139
Netherlands	32,102	29,832	52,234	65,627	72,122	76,656	73,271	25,981
Portugal	58,000	77,466	68,215	83,458	83,847	42,195	42,913	24,335
United Kingdom	389,170	270,133	172,442	206,753	207,707	215,686	202,896	90,679
Sweden	63,080	74,415	41,384	50,570	44,489	49,170	56,012	27,600
CENTRAL AND EASTERN EUROPE	**900,516**	**975,000**	**323,203**	**468,632**	**516,039**	**582,587**	**545,440**	**252,155**
TURKEY	**19,352**	**41,594**	**133,471**	**425,789**	**442,098**	**464,530**	**525,543**	**358,674**
AMERICA	**2,599,948**	**5,032,605**	**9,761,798**	**10,492,212**	**9,761,754**	**9,828,465**	**7,683,330**	**5,529,416**
NAFTA	**2,349,318**	**4,775,818**	**9,325,214**	**9,795,192**	**9,016,810**	**8,979,266**	**6,754,191**	**4,748,923**
of which: Canada	527,522	850,566	1,411,136	1,331,621	1,143,784	1,236,657	886,805	668,365
USA	1,634,846	3,702,787	7,257,640	7,625,381	6,925,127	6,856,461	4,916,900	3,462,382
Mexico	186,950	222,465	656,438	838,190	947,899	886,148	950,486	618,176
SOUTH AMERICA	**250,630**	**256,787**	**436,584**	**697,020**	**744,944**	**849,199**	**929,139**	**780,493**
of which: Argentina	63,153	5,337	100,711	136,994	168,981	193,912	197,850	132,857
Brazil	187,477	251,450	329,519	519,023	519,005	585,796	670,247	605,989
ASIA-PACIFIC	**4,344,363**	**4,492,406**	**4,497,938**	**5,784,312**	**6,013,551**	**6,502,163**	**6,448,515**	**6,283,352**
of which: China	–	–	1,464,000	1,776,614	2,044,767	2,501,340	2,561,435	3,407,163
South Korea	65,012	334,879	512,990	342,256	350,966	362,826	376,204	354,509
India	83,379	186,640	283,403	374,563	543,276	540,250	486,277	466,456
Japan	4,004,776	3,538,824	1,781,362	1,782,924	1,729,330	1,651,690	1,647,501	1,072,355
AFRICA	**127,698**	**125,174**	**115,305**	**202,053**	**229,757**	**212,022**	**203,918**	**134,698**
of which South Africa	127,698	125,174	126,787	200,352	253,237	258,472	241,841	150,942
TOTAL	**9,675,970**	**12,399,000**	**17,158,509**	**19,619,461**	**19,304,397**	**20,064,715**	**17,732,218**	**13,761,694**

(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.
Sources: CCFA, OICA.

Production

WORLD MOTOR VEHICLE PRODUCTION BY MANUFACTURER AND ECONOMIC AREA, 2009

In thousands

Manufacturers	North America NAFTA	South America	European Union 27 countries	Other European countries and Turkey	Japan	South Korea	China	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**611**	**2,198**	**10,922**	**598**	**118**	**192**	**1,597**	**595**	**16,831**
BMW	123		1,089				0	46	1,258
Fiat-Iveco-Irisbus		831	1,339	179			87	24	2,460
MAN			41	2					42
Daimler	145	80	1,082	6	88		4	43	1,448
Porsche			76						76
PSA Peugeot Citroën		200	2,146	82	10		263	342	3,042
Renault-Dacia-Samsung	2	234	1,458	329		192		80	2,296
Scania		12	24						36
Volkswagen	321	831	3,612				1,244	60	6,067
Volvo	20	11	55		20				106
American manufacturers	**4,807**	**1,113**	**2,825**	**197**	**0**	**532**	**2,215**	**539**	**12,228**
Chrysler	954		5						959
Ford	1,860	420	1,660	173			446	126	4,685
General Motors	1,890	693	1,138	23		532	1,769	413	6,459
Navistar	65								65
Paccar	37		22						59
Japanese manufacturers	**3,133**	**345**	**1,133**	**92**	**7,859**	**0**	**2,288**	**3,123**	**17,974**
Fuji Heavy (Subaru)	83				408				491
Honda	1,031	135	76	18	841		602	310	3,013
Isuzu	1	8		2	120		26	158	316
Mazda	39	10			717		174	44	985
Mitsubishi	18	31	51		427		97	179	802
Nissan	728	19	391		895		547	165	2,745
Suzuki-Maruti	0		181		908		241	1,058	2,388
Toyota-Daihatsu-Hino	1,232	142	435	72	3,543		601	1,210	7,234
South Korean manufacturers	**211**	**0**	**268**	**49**	**0**	**2,744**	**815**	**560**	**4,646**
Hyundai-Kia	211		268	49		2,744	815	560	4,646
Chinese manufacturers	**0**	**0**	**0**	**0**	**0**	**35**	**313**	**0**	**348**
SAIC (Ssangyong)						35	313		348
Indian manufacturers	**0**	**0**	**158**	**0**	**0**	**8**	**0**	**505**	**672**
Tata (Telco, Jaguar, Land Rover)			158			8		505	672
ALL MANUFACTURERS	**8,761**	**3,775**	**15,253**	**1,757**	**7,935**	**3,513**	**13,791**	**6,931**	**61,715**

As % of total production

Manufacturers	North America NAFTA	South America	European Union 27 countries	Other European countries and Turkey	Japan	South Korea	China	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**4%**	**13%**	**65%**	**4%**	**1%**	**1%**	**9%**	**4%**	**100%**
BMW	10%		87%				0%	4%	100%
Fiat-Iveco-Irisbus		34%	54%	7%			4%	1%	100%
MAN			96%	4%					100%
Daimler	10%	6%	75%	0%	6%		0%	3%	100%
Porsche			100%						100%
PSA Peugeot Citroën		7%	71%	3%	0%		9%	11%	100%
Renault-Dacia-Samsung	0%	10%	63%	14%		8%		3%	100%
Scania		32%	68%						100%
Volkswagen	5%	14%	60%				20%	1%	100%
Volvo	19%	10%	52%		19%				100%
American manufacturers	**39%**	**9%**	**23%**	**2%**	**0%**	**4%**	**18%**	**4%**	**100%**
Chrysler	99%		1%						100%
Ford	40%	9%	35%	4%			10%	3%	100%
General Motors	29%	11%	18%	0%		8%	27%	6%	100%
Navistar	100%								100%
Paccar	63%		37%						100%
Japanese manufacturers	**17%**	**2%**	**6%**	**1%**	**44%**	**0%**	**13%**	**17%**	**100%**
Fuji Heavy (Subaru)	17%				83%				100%
Honda	34%	4%	3%	1%	28%		20%	10%	100%
Isuzu	0%	3%		1%	38%		8%	50%	100%
Mazda	4%	1%			73%		18%	4%	100%
Mitsubishi	2%	4%	6%		53%		12%	22%	100%
Nissan	27%	1%	14%		33%		20%	6%	100%
Suzuki-Maruti	0%		8%		38%		10%	44%	100%
Toyota-Daihatsu-Hino	17%	2%	6%	1%	49%		8%	17%	100%
South Korean manufacturers	**5%**	**0%**	**6%**	**1%**	**0%**	**59%**	**18%**	**12%**	**100%**
Hyundai-Kia	5%		6%	1%		59%	18%	12%	100%
Chinese manufacturers	**0%**	**0%**	**0%**	**0%**	**0%**	**10%**	**90%**	**0%**	**100%**
SAIC (Ssangyong)						10%	90%		100%
Indian manufacturers	**0%**	**0%**	**24%**	**0%**	**0%**	**1%**	**0%**	**75%**	**100%**
Tata (Telco, Jaguar, Land Rover)			24%			1%		75%	100%
ALL MANUFACTURERS	**14%**	**6%**	**25%**	**3%**	**13%**	**6%**	**22%**	**11%**	**100%**

Sources: CCFA, OICA.

Registrations

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2005	2006	2007	2008[2]	2009
Germany	2,426,187	3,349,788	3,378,343	3,319,259	3,467,961	3,148,163	3,090,040	3,807,175
Austria	227,548	288,618	309,427	307,915	308,594	298,182	293,697	319,403
Belgium	399,240	473,506	515,204	480,088	526,141	524,795	535,947	476,194
Denmark	73,774	80,654	112,688	146,881	154,383	159,341	150,143	112,199
Spain[1]	504,051	988,270	1,381,515	1,528,877	1,634,608	1,614,835	1,161,176	952,772
Finland	103,167	139,095	134,646	147,949	145,689	123,163	139,611	88,344
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,117,561**	**2,045,745**	**2,109,672**	**2,091,368**	**2,302,398**
Greece	35,700	115,480	290,222	269,728	267,669	279,745	267,295	219,730
Ireland	93,563	82,584	230,989	171,741	178,766	186,335	151,603	57,455
Italy	1,717,432	2,307,055	2,415,600	2,237,272	2,325,718	2,492,774	2,161,673	2,159,436
Luxembourg	21,500	38,422	41,896	48,517	50,837	51,332	52,359	47,265
Norway	95,550	61,901	97,376	109,907	109,164	129,195	110,617	98,675
Netherlands	450,076	502,732	597,640	465,160	483,970	505,540	499,918	387,155
Portugal	58,357	210,924	257,834	206,488	194,702	201,816	213,389	161,013
United Kingdom	1,513,761	2,008,934	2,221,670	2,439,717	2,344,864	2,404,007	2,131,795	1,994,999
Sweden	192,588	229,941	290,529	274,301	282,766	306,799	253,982	213,408
Switzerland	279,764	329,899	316,519	264,941	269,452	284,688	288,557	266,049
European Union 15 countries	**9,690,146**	**13,125,133**	**14,312,087**	**14,161,454**	**14,412,413**	**14,406,499**	**13,193,996**	**13,298,946**
Europe 17 countries	**10,065,460**	**13,516,933**	**14,725,982**	**14,536,302**	**14,791,029**	**14,820,382**	**13,593,170**	**13,663,670**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**3,368,221**	**3,892,851**	**4,785,713**	**5,165,113**	**2,974,715**
Canada	948,967	886,217	849,132	842,322	858,826	841,585	872,720	731,093
USA	8,760,937	9,300,678	8,846,625	7,667,066	7,820,854	7,618,413	6,813,369	5,456,246
Mexico	286,000	353,000	603,010	714,047	680,942	641,394	589,051	439,103
Argentina	215,177	77,306	224,950	290,648	336,296	422,230	452,539	373,231
Brazil	793,028	532,791	1,188,818	1,440,696	1,634,396	2,086,681	2,341,709	2,645,013
South Korea	45,972	626,126	1,057,620	944,451	976,211	1,040,372	1,020,457	1,234,618
Japan	2,854,185	5,102,659	4,259,771	4,748,482	4,612,318	4,325,508	4,184,266	3,905,310
Turkey	31,000	215,000	456,696	438,597	373,219	357,465	305,998	369,819
WORLD	**28,500,000**	**34,825,967**	**38,689,767**	**44,015,119**	**46,602,403**	**49,515,309**	**49,851,806**	**49,836,515**

Source: CCFA.

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2005	2006	2007	2008[2]	2009
Germany	175,687	203,389	314,804	295,627	304,433	334,116	334,999	242,178
Austria	21,821	29,211	36,457	37,678	38,793	41,509	42,303	31,026
Belgium	34,478	46,670	66,125	75,083	72,079	81,664	81,276	63,431
Denmark	19,469	23,031	38,108	64,293	71,965	66,867	41,465	19,585
Spain[1]	105,934	249,185	335,684	430,611	318,526	324,463	201,367	121,450
Finland	17,699	32,154	18,128	19,955	20,941	20,944	21,632	12,451
France	**323,291**	**446,983**	**477,204**	**480,122**	**498,397**	**519,492**	**523,432**	**416,183**
Greece	53,500	30,075	25,015	25,538	26,391	27,130	25,570	17,388
Ireland	11,905	28,087	46,261	41,965	46,957	50,013	34,010	10,566
Italy	122,293	159,322	268,057	246,894	273,021	276,548	260,412	198,390
Luxembourg	1,300	2,961	4,642	4,605	4,675	5,315	6,046	4,197
Norway	15,135	23,035	35,618	42,681	49,243	53,008	42,630	28,762
Netherlands	47,926	68,791	114,354	80,771	84,713	97,275	104,139	64,204
Portugal	46,967	71,904	161,045	71,982	70,472	74,790	61,730	42,747
United Kingdom	274,143	293,473	301,523	388,410	389,496	395,179	353,463	227,543
Sweden	19,684	33,133	38,474	41,807	47,194	51,923	47,477	34,105
Switzerland	22,418	28,165	29,345	26,702	28,932	30,720	32,789	28,675
European Union 15 countries	**1,276,097**	**1,718,369**	**2,245,881**	**2,305,341**	**2,268,053**	**2,367,228**	**2,139,321**	**1,505,444**
Europe 17 countries	**1,313,650**	**1,769,569**	**2,310,844**	**2,374,724**	**2,346,228**	**2,450,956**	**2,214,740**	**1,562,881**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**847,773**	**888,951**	**1,015,478**	**1,011,410**	**569,139**
Canada	335,827	416,041	736,951	787,820	807,182	848,760	800,802	750,849
USA	2,476,777	4,845,360	8,965,048	9,777,263	9,228,127	8,841,902	6,679,796	5,145,655
Mexico	166,000	198,000	302,944	452,600	507,180	510,290	486,712	337,279
Argentina	59,881	17,481	81,995	112,042	124,182	142,696	159,231	113,911
Brazil	187,233	180,000	302,288	273,948	293,342	376,047	478,641	496,227
South Korea	58,502	328,151	372,840	244,332	244,000	249,000	211,000	231,000
Japan	2,161,305	2,674,834	1,703,114	1,103,552	1,127,202	1,028,140	897,969	703,946
Turkey	19,000	43,015	199,825	319,940	292,296	276,741	220,546	206,046
WORLD	**9,150,000**	**13,410,615**	**18,723,143**	**21,945,086**	**21,309,891**	**21,573,201**	**18,693,732**	**15,882,801**

(1) As of 2006, some light commercial vehicles have been reclassified as passenger cars. On a like-for-like basis, the Spanish new passenger car market contracted by 1.9% to 1.5 million units in 2006.
(2) Some light commercial vehicles have been reclassified as passenger cars.
Source: CCFA.

Production

PASSENGER CAR PRODUCTION BY ENGINE TYPE, CYLINDER CAPACITY AND COUNTRY

In units

	Gasoline and others, except diesel and electric							Diesel						Electric
	TOTAL	Up to 1,000	1,001 to 1,500	1,501 to 2,000	2,001 to 2,500	Over 2,501	Not determined	TOTAL	Up to 1,500	1,501 to 2,000	2,001 to 2,500	Over 2,501	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		
2008	2,891,574	18,939	575,402	1,382,255	168,764	746,191	23	2,640,456	149,938	1,885,420	276,629	328,469		
2009	2,737,233	28,776	866,375	1,150,466	135,907	555,709		2,227,276	109,165	1,649,484	210,401	258,226		14
BELGIUM														
1990	1,003,028		207,398	727,812	65,542	2,276		157,384	2,764	126,394	28,226			
2008	294,953		48,494	169,672	74,866	1,921		385,178	26,857	315,842	42,479			
2009	220,564		58,936	101,983	35,207	24,438		304,031	15,550	228,875	59,606			
SPAIN														
1990	1,529,080	25,908	329,437	12,739			1,160,996	150,221	18,753	42,155			89,313	
2008	1,173,541		359,122	205,615		2,749	606,055	840,320	287,253	342,280	63,539	319	146,929	
2009	1,029,520	12,271	721,966	278,243	3,846	637	12,557	803,479	387,191	381,132	18,468	9	16,679	
FRANCE														
1990	2,490,808	259,104	1,315,307	853,195	21,266	41,936		804,007	50,851	547,002	206,154			
2008	2,882,520	253,665	1,072,551	1,362,382	7,843	3,854	182,225	2,018,059	886,569	1,075,275	48,204	7,867	144	
2009	2,982,986	281,054	1,264,823	1,227,523	19,396	1,787	188,403	1,823,626	890,604	910,733	16,545	5,608	136	
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
2008	337,922		277,089	36,337	4,282	20,214		321,299	132,423	180,920	7,956			
2009	436,652		402,604	20,389	1,558	12,101		224,448	111,146	109,935	3,367			
UNITED KINGDOM														
1990	1,173,660	56,860	489,355	449,008		68,744	109,693	121,951		93,644	8,610		19,697	
2008	912,253		182,510	584,967	32,952	111,658	166	535,297	148,156	140,698	161,640	83,703	1,100	
2009	658,558		215,580	373,377	4,598	64,886	117	340,730	116,372	100,733	71,350	52,232	43	

DIESEL PASSENGER CAR PRODUCTION BY MAKE AND COUNTRY

In units

	1980	1990	2000	2005	2006	2007	2008	2009
French manufacturers								
Citroën	33,996	213,010	453,604	546,021	567,042	628,713	585,347	542,860
Peugeot	133,332	334,469	593,349	805,490	709,440	680,576	556,254	484,583
PSA Peugeot Citroën(1)	167,328	547,479	1,046,953	1,351,511	1,276,482	1,309,289	1,141,601	1,027,443
Renault	69,335	256,528	601,495	966,687	867,011	902,957	754,033	716,955
Dacia				9,824	61,777	95,358	81,153	66,948
Renault Samsung Motors				86	0	5,197	41,272	12,280
Renault-Dacia-Samsung				976,597	928,788	1,003,512	876,458	796,183
Total(2)	**236,663**	**804,007**	**1,648,448**	**2,328,108**	**2,205,270**	**2,312,801**	**2,018,059**	**1,823,626**
TOTAL GASOLINE + DIESEL	**2,938,581**	**3,294,815**	**4,598,617**	**5,177,852**	**5,047,274**	**5,300,597**	**4,900,579**	**4,806,612**
Diesel share	8.1%	24.4%	35.8%	45.0%	43.7%	43.6%	41.2%	37.9%
Germany								
Mercedes(2)	216,053	141,547	278,772	365,403	391,758	414,675	397,553	329,107
Opel	32,742	76,441	288,651	361,112	310,346	310,802	238,910	200,410
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,112,321	1,131,175	1,278,671	1,238,822	985,365
Ford	5,344	90,117	179,130	372,133	333,022	342,580	348,715	317,161
BMW	33,520	28,135	194,794	345,998	388,577	483,359	416,432	386,557
Total(2)	**465,788**	**662,007**	**1,788,999**	**2,556,967**	**2,554,878**	**2,830,087**	**2,640,456**	**2,227,276**
TOTAL GASOLINE + DIESEL	**3,520,934**	**4,660,657**	**5,131,918**	**5,344,098**	**5,398,508**	**5,709,139**	**5,532,030**	**4,964,509**
Diesel share	13.2%	14.2%	34.9%	47.8%	47.3%	49.6%	47.7%	44.9%
Italy								
Alfa Romeo	3,851	11,176	77,532	92,589	111,896	114,212	72,405	49,822
Fiat	76,513	87,985	223,889	267,801	306,414	328,545	207,314	142,357
Lancia		17,679	40,891	37,932	32,699	31,002	36,817	31,229
Others	0	297	0	164	115	5,089	4,763	1,040
Total(2)	**80,364**	**117,137**	**342,312**	**398,486**	**451,124**	**478,848**	**321,299**	**224,448**
TOTAL GASOLINE + DIESEL	**1,445,221**	**1,874,672**	**1,422,243**	**725,528**	**892,502**	**910,860**	**659,221**	**661,100**
Diesel share	5.6%	6.2%	24.1%	54.9%	50.5%	52.6%	48.7%	34.0%

(1) Including Talbot up to 1985.
(2) Including other miscellaneous.
Source: CCFA.

Production

LIGHT COMMERCIAL VEHICLE AND HEAVY TRUCK PRODUCTION BY WEIGHT, MANUFACTURER AND COUNTRY IN 2009, EXCLUDING COACHES AND BUSES

In units

Group, manufacturer and country	GVWR[1] 3.5 t to 5 t	GVWR over 5 t to 16 t	GVWR 16 t and over, road tractors all weights	GVWR 3.5 t and over	GVWR over 5 t
Renault	56,491			56,491	–
Renault Trucks	3,405	5,590	15,007	24,002	20,597
Scania			4,724	4,724	4,724
Etalmobil	5	4		9	4
TOTAL FRANCE	**59,901**	**5,594**	**19,731**	**85,226**	**25,325**
Daimler	76,166	16,906	32,868	125,940	49,774
MAN			14,965	14,965	14,965
Iveco Magirus			5,775	5,775	5,775
Volkswagen	25,515			25,515	–
Multicar	1,084			1,084	–
TOTAL GERMANY	**102,765**	**16,906**	**53,608**	**173,279**	**70,514**
MAN - OAF - Steyr		9,464	6,277	15,741	15,741
TOTAL AUSTRIA		**9,464**	**6,277**	**15,741**	**15,741**
Volvo Trucks		1,746	10,245	11,991	11,991
Others			48	48	48
TOTAL BELGIUM		**1,746**	**10,293**	**12,039**	**12,039**
Iveco	23,060	17,695	4,102	44,857	21,797
TOTAL ITALY (INCLUDING OTHERS)	**23,120**	**17,695**	**4,102**	**44,917**	**21,797**
Ford	1,940			1,940	–
Leyland Trucks, Foden (DAF)		4,340	3,861	8,201	8,201
Dennis DSV			802	802	802
LDV	39			39	–
TOTAL UNITED KINGDOM	**1,979**	**4,340**	**4,663**	**10,982**	**9,003**
Volvo Trucks			8,089	8,089	8,089
Scania			5,460	5,460	5,460
TOTAL SWEDEN			**13,549**	**13,549**	**13,549**
DAF			13,609	13,609	13,609
Scania			9,783	9,783	9,783
Others			1,098	1,098	1,098
TOTAL NETHERLANDS			**24,490**	**24,490**	**24,490**
Iveco	8,603	2,051	6,822	17,476	8,873
TOTAL SPAIN	**8,603**	**2,051**	**6,822**	**17,476**	**8,873**
Commercial vehicles					
Daimler (including FUSO)	77,570	18,351	32,868	128,789	51,219
Iveco	31,663	19,746	16,699	68,108	36,445
MAN	0	9,464	21,242	30,706	30,706
DAF	0	4,340	17,470	21,810	21,810
Renault Trucks	3,405	5,590	15,007	24,002	20,597
Volvo Trucks	0	1,746	18,334	20,080	20,080
Scania	0	0	19,967	19,967	19,967
Light commercial vehicles over 3.5 t					
Renault	56,491	–	–	56,491	–
Volkswagen	25,515	–	–	25,515	–
Ford	1,940	–	–	1,940	–
Others	2,472	553	2,066	5,091	2,619
TOTAL ALL CATEGORIES: EU-15	**199,056**	**59,790**	**143,653**	**402,499**	**203,443**

(1) GVWR: gross vehicle weight rating.
Source: CCFA.

Registrations

NEW PASSENGER CAR REGISTRATIONS BY GROUP IN EUROPE

The special French Temporary Transit series was included in the new passenger car registrations as of 2004.

In thousand units and as a % of total registrations

	1985	1990	2000	2005	2006(1)	2007	2008	2009
PSA Peugeot Citroën	**1,225**	**1,719**	**1,930**	**2,012**	**1,971**	**1,970**	**1,792**	**1,818**
	11.5%	12.7%	13.1%	13.8%	13.3%	13.3%	13.2%	13.3%
Renault Group	**1,135**	**1,315**	**1,559**	**1,442**	**1,281**	**1,211**	**1,138**	**1,237**
	10.7%	9.7%	10.6%	9.9%	8.7%	8.2%	8.4%	9.1%
Fiat Group	1,487	1,854	1,477	951	1,120	1,195	1,121	1,200
	14.0%	13.7%	10.0%	6.5%	7.6%	8.1%	8.2%	8.8%
Ford Group	1,521	1,774	1,478	1,453	1,450	1,474	1,360	1,425
	14.3%	13.1%	10.0%	10.0%	9.8%	9.9%	10.0%	10.4%
General Motors	1,261	1,617	1,799	1,539	1,503	1,509	1,286	1,213
	11.9%	12.0%	12.2%	10.6%	10.2%	10.2%	9.5%	8.9%
Volkswagen Group	1,553	2,120	2,755	2,743	2,921	2,881	2,761	2,854
	14.6%	15.7%	18.7%	18.9%	19.7%	19.4%	20.3%	20.9%
Daimler	394	438	811	819	815	810	771	671
	3.7%	3.2%	5.5%	5.6%	5.5%	5.5%	5.7%	4.9%
BMW Group	290	364	499	761	784	834	804	695
	2.7%	2.7%	3.4%	5.2%	5.3%	5.6%	5.9%	5.1%
Nissan	306	395	392	342	311	290	314	349
	2.9%	2.9%	2.7%	2.4%	2.1%	2.0%	2.3%	2.6%
Toyota-Lexus-Daihatsu	303	406	576	793	893	912	756	715
	2.9%	3.0%	3.9%	5.5%	6.0%	6.2%	5.6%	5.2%
Other Japanese makes	534	789	701	820	886	905	806	769
	5.0%	5.8%	4.8%	5.6%	6.0%	6.1%	5.9%	5.6%
Hyundai-Kia	7	18	303	530	519	488	422	520
	0.1%	0.1%	2.1%	3.6%	3.5%	3.3%	3.1%	3.8%
Tata Group	21	44	112	125	127	136	110	87
	0.2%	0.3%	0.8%	0.9%	0.9%	0.9%	0.8%	0.6%
Other makes (including MG-Rover)	575	663	345	206	211	205	152	111
	5.4%	4.9%	2.3%	1.4%	1.4%	1.4%	1.1%	0.8%
TOTAL EUROPE 17 COUNTRIES	**10,611**	**13,517**	**14,738**	**14,536**	**14,791**	**14,820**	**13,593**	**13,664**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		0.9%	–2.1%	–0.2%	1.8%	0.2%	–8.3%	0.5%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN EUROPE

In thousand units and as a % of total registrations

	1985	1990	2000	2005	2006(1)	2007	2008	2009
PSA Peugeot Citroën	**186**	**251**	**349**	**370**	**369**	**387**	**365**	**299**
	16.9%	16.5%	18.1%	18.4%	18.8%	18.7%	19.9%	22.5%
Renault Group	**175**	**278**	**272**	**296**	**304**	**303**	**268**	**208**
	15.8%	18.3%	14.1%	14.7%	15.5%	14.6%	14.6%	15.6%
Fiat Group	114	156	262	256	270	299	277	198
	10.3%	10.3%	13.6%	12.8%	13.8%	14.4%	15.1%	14.9%
Ford Group	126	196	181	225	237	259	219	151
	11.4%	13.0%	9.4%	11.2%	12.1%	12.5%	12.0%	11.4%
General Motors	55	81	92	146	144	147	132	70
	5.0%	5.3%	4.8%	7.3%	7.3%	7.1%	7.2%	5.3%
Volkswagen Group	113	134	202	189	204	223	200	136
	10.2%	8.9%	10.5%	9.4%	10.4%	10.8%	10.9%	10.2%
Daimler	64	71	163	152	149	171	163	118
	5.8%	4.7%	8.4%	7.6%	7.6%	8.2%	8.9%	8.9%
Nissan	61	105	100	101	98	89	62	41
	5.5%	6.9%	5.2%	5.1%	5.0%	4.3%	3.4%	3.1%
Toyota-Lexus-Daihatsu	66	81	69	62	51	65	56	35
	6.0%	5.3%	3.6%	3.1%	2.6%	3.2%	3.1%	2.7%
Other Japanese makes	67	72	117	85	75	70	46	34
	6.1%	4.8%	6.0%	4.2%	3.8%	3.4%	2.5%	2.5%
Hyundai-Kia	1	0	44	48	20	13	9	5
	0.1%	0.0%	2.3%	2.4%	1.0%	0.6%	0.5%	0.4%
Other makes	76	90	81	76	44	45	36	33
	6.9%	6.0%	4.2%	3.8%	2.2%	2.2%	2.0%	2.5%
TOTAL EUROPE 17 COUNTRIES	**1,104**	**1,516**	**1,931**	**2,004**	**1,964**	**2,069**	**1,833**	**1,327**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		–2.6%	5.6%	3.1%	–2.0%	5.4%	–11.4%	–27.6%

(1) In 2006, 135,500 light commercial vehicles, none of which were French makes, were reclassified as passenger cars in Spain. Automobile manufacturers include the following makes:
PSA Peugeot Citroën = Peugeot + Citroën + Talbot / Renault Group = Renault + Dacia / Fiat Group = Alfa Romeo + Fiat + Iveco + Lancia + Ferrari + others / Ford Group = Ford Europe + Ford USA + Volvo + others Ford / General Motors = Opel + Vauxhall + Saab + GM Daewoo + Chevrolet + Pontiac + others / Volkswagen Group = Volkswagen + Audi + Seat + Skoda + Bentley + Lamborghini + Bugatti / Daimler = Mercedes-Benz + Smart + others / BMW Group = BMW + Mini + Rolls-Royce / Other Japanese makes = Mazda, Mitsubishi, Subaru, Suzuki, etc. / Tata Group = Jaguar + Land Rover + Tata. These scopes are defined on the basis of their situation in 2010.

Registrations

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY AND GROUP IN 2009

In thousand 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	Japanese makes	South Korean makes
Germany	3,807	232	101	130	226	181	1,301	317	372	258	317	420	147
	100%	6.1%	2.7%	3.4%	5.9%	4.8%	34.2%	8.3%	9.8%	6.8%	8.3%	11.0%	3.9%
Austria	319	29	13	16	20	20	101	25	26	14	12	47	21
	100%	9.1%	4.2%	4.9%	6.3%	6.4%	31.7%	7.9%	8.3%	4.3%	3.7%	14.6%	6.7%
Belgium	476	88	44	45	51	19	91	51	46	31	20	54	19
	100%	18.5%	9.1%	9.4%	10.7%	4.0%	19.1%	10.6%	9.8%	6.6%	4.2%	11.3%	3.9%
Denmark	112	20	9	11	3	5	17	12	9	3	3	30	10
	100%	18.2%	8.0%	10.2%	2.5%	4.7%	14.7%	11.0%	7.9%	2.4%	2.3%	27.2%	8.7%
Spain	953	170	88	82	98	24	220	92	89	41	31	138	36
	100%	17.8%	9.2%	8.6%	10.3%	2.5%	23.1%	9.7%	9.3%	4.3%	3.3%	14.5%	3.8%
Finland	88	5	2	3	1	2	22	14	4	3	4	26	5
	100%	6.2%	2.5%	3.7%	1.5%	2.6%	25.2%	15.9%	4.5%	3.4%	4.3%	29.5%	5.1%
France	**2,302**	**738**	**346**	**392**	**578**	**99**	**257**	**145**	**112**	**61**	**59**	**199**	**43**
	100%	32.1%	15.0%	17.0%	25.1%	4.3%	11.2%	6.3%	4.9%	2.7%	2.6%	8.6%	1.9%
Greece	220	13	6	8	4	15	42	18	21	8	12	66	17
	100%	6.1%	2.7%	3.5%	1.9%	6.8%	19.1%	8.0%	9.7%	3.5%	5.4%	29.8%	7.9%
Ireland	57	3	1	2	2	1	12	9	4	2	1	18	3
	100%	4.8%	1.4%	3.4%	4.3%	1.8%	21.4%	15.8%	7.8%	3.5%	2.5%	31.6%	5.7%
Italy	2,159	225	111	114	113	709	220	227	181	73	85	236	61
	100%	10.4%	5.1%	5.3%	5.2%	32.8%	10.2%	10.5%	8.4%	3.4%	3.9%	10.9%	2.8%
Luxembourg	47	6	3	3	5	2	14	4	2	4	3	4	2
	100%	12.2%	5.5%	6.7%	10.5%	4.7%	29.5%	8.9%	4.5%	8.8%	6.0%	7.8%	5.2%
Netherlands	387	50	20	30	28	20	71	51	31	15	10	87	20
	100%	12.8%	5.2%	7.7%	7.2%	5.3%	18.2%	13.1%	8.0%	3.9%	2.5%	22.4%	5.2%
Portugal	161	22	10	11	19	10	32	15	14	9	9	24	5
	100%	13.6%	6.5%	7.1%	11.9%	6.3%	20.1%	9.4%	8.8%	5.4%	5.8%	14.7%	3.2%
United Kingdom	1,995	175	72	103	63	72	320	351	264	139	81	356	108
	100%	8.8%	3.6%	5.1%	3.2%	3.6%	16.1%	17.6%	13.3%	6.9%	4.0%	17.9%	5.4%
Sweden	213	12	5	8	8	2	45	55	14	12	8	38	17
	100%	5.7%	2.1%	3.5%	3.6%	1.0%	21.3%	25.7%	6.5%	5.7%	3.7%	18.0%	7.7%
EUROPEAN UNION 15 COUNTRIES	**13,299**	**1,788**	**832**	**956**	**1,220**	**1,183**	**2,766**	**1,386**	**1,191**	**672**	**653**	**1,742**	**514**
	100%	13.4%	6.3%	7.2%	9.2%	8.9%	20.8%	10.4%	9.0%	5.1%	4.9%	13.1%	3.9%
Norway	99	6	2	4	1	1	24	17	5	5	4	32	4
	100%	6.5%	2.0%	4.5%	0.7%	1.0%	24.2%	17.4%	4.7%	4.8%	3.9%	32.2%	3.8%
Switzerland	266	23	11	12	17	16	64	22	17	18	14	59	9
	100%	8.7%	4.3%	4.4%	6.5%	6.1%	24.2%	8.1%	6.5%	6.8%	5.3%	22.1%	3.4%
EUROPE 17 COUNTRIES	**13,664**	**1,818**	**845**	**972**	**1,237**	**1,200**	**2,854**	**1,425**	**1,213**	**695**	**671**	**1,832**	**527**
	100%	13.3%	6.2%	7.1%	9.1%	8.8%	20.9%	10.4%	8.9%	5.1%	4.9%	13.4%	3.9%
Bulgaria	25	2	1	1	2	0	4	2	3	1	1	5	4
	100%	9.8%	4.0%	5.8%	8.9%	1.4%	15.6%	7.2%	13.5%	2.5%	2.2%	20.6%	16.3%
Estonia	10	1	0	1	1	0	2	1	0	0	0	3	1
	100%	10.1%	4.9%	5.2%	13.4%	0.5%	17.7%	5.6%	3.2%	1.6%	2.2%	34.4%	8.8%
Hungary	60	3	1	2	4	3	10	9	9	1	1	18	2
	100%	5.6%	2.2%	3.4%	6.7%	4.7%	16.2%	14.7%	14.6%	1.6%	1.7%	30.0%	3.9%
Latvia	5	0	0	0	1	0	1	0	0	0	0	2	0
	100%	3.2%	1.7%	1.5%	12.0%	0.5%	24.2%	6.2%	3.0%	4.5%	2.9%	32.5%	7.8%
Lithuania	8	1	0	0	1	0	1	0	0	0	0	3	0
	100%	9.0%	3.7%	5.3%	12.4%	1.5%	15.9%	5.6%	4.6%	2.8%	1.6%	40.3%	5.3%
Poland	320	22	10	13	19	33	74	32	28	5	5	71	27
	100%	6.9%	3.0%	3.9%	6.0%	10.4%	23.2%	10.0%	8.8%	1.6%	1.6%	22.3%	8.3%
Czech Republic	168	14	7	7	13	5	67	18	8	3	3	18	16
	100%	8.5%	4.5%	4.1%	7.9%	3.0%	40.0%	10.7%	4.9%	1.8%	1.6%	11.0%	9.6%
Romania	130	6	2	4	48	5	21	9	10	1	1	11	17
	100%	4.5%	1.6%	3.0%	36.6%	4.0%	16.3%	7.0%	7.4%	0.9%	1.0%	8.2%	13.1%
Slovakia	75	10	5	6	11	4	19	3	5	1	1	11	9
	100%	13.9%	6.5%	7.4%	14.9%	4.9%	25.4%	4.5%	6.1%	1.1%	1.2%	14.5%	12.6%
Slovenia	58	8	4	3	10	4	11	4	6	1	1	7	6
	100%	13.5%	7.7%	5.8%	17.6%	7.5%	18.5%	6.5%	10.5%	2.4%	1.3%	11.8%	9.7%
10 new EU countries	859	68	32	37	111	55	210	78	70	14	13	150	83
	100%	8.0%	3.7%	4.3%	12.9%	6.4%	24.5%	9.1%	8.1%	1.6%	1.5%	17.4%	9.7%
EUROPE 27 COUNTRIES	**14,522**	**1,886**	**877**	**1,009**	**1,348**	**1,255**	**3,065**	**1,503**	**1,283**	**708**	**684**	**1,982**	**610**
	100%	13.0%	6.0%	6.9%	9.3%	8.6%	21.1%	10.4%	8.8%	4.9%	4.7%	13.6%	4.2%

Automobile manufacturers include the following makes: PSA Peugeot Citroën = Peugeot + Citroën / Renault Group = Renault + Dacia / Fiat Group = Alfa Romeo + Fiat + Lancia + Ferrari + Maserati + others / Ford Group = Ford Europe + Ford USA + Volvo + others / General Motors = Opel + Vauxhall + Saab + GM Daewoo + Chevrolet + Pontiac + others / Volkswagen Group = Volkswagen + Audi + Seat + Skoda + Bentley + Lamborghini + Bugatti / Daimler = Mercedes + Smart + others / BMW Group = BMW + Mini + Rolls-Royce / Japanese makes = Mazda, Mitsubishi, Nissan, Subaru, Suzuki, Toyota, etc. / 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	2005	2006	2007	2008	2009
Germany	**193,841**	**327,046**	**1,023,997**	**1,401,479**	**1,535,886**	**1,502,282**	**1,361,958**	**1,167,447**
	8.0%	9.8%	30.3%	42.2%	44.3%	47.7%	44.1%	30.7%
Austria	**7,425**	**74,197**	**191,402**	**199,908**	**191,766**	**176,752**	**160,465**	**146,949**
	3.3%	25.7%	61.9%	64.9%	62.1%	59.3%	54.6%	46.0%
Belgium	**54,897**	**154,804**	**290,301**	**348,630**	**392,328**	**404,297**	**422,681**	**358,400**
	13.8%	32.7%	56.3%	72.6%	74.6%	77.0%	78.9%	75.3%
Denmark	**2,352**	**3,305**	**14,898**	**35,356**	**41,365**	**61,825**	**69,347**	**50,729**
	3.2%	4.1%	13.2%	24.1%	26.8%	38.8%	46.2%	45.2%
Spain(1)	–	**140,740**	**734,256**	**1,036,789**	**1,143,512**	**1,144,265**	**804,499**	**668,022**
		14.2%	53.1%	67.8%	70.0%	70.9%	69.3%	70.1%
Finland	–	**7,215**	–	**25,110**	**29,487**	**34,780**	**69,291**	**40,852**
		5.2%		17.0%	20.2%	28.2%	49.6%	46.2%
France	186,050	762,054	1,046,485	1,466,296	1,463,666	1,563,061	1,620,980	1,628,495
	9.9%	33.0%	49.0%	69.2%	71.5%	74.1%	77.5%	70.7%
Greece	–	**60**	**2,006**	**4,189**	**5,852**	**8,116**	**9,590**	**7,237**
		0.1%	0.7%	1.6%	2.2%	2.9%	3.6%	3.3%
Ireland	–	**12,413**	**23,259**	**36,953**	**43,620**	**50,328**	**50,741**	**29,953**
		15.0%	10.1%	21.5%	24.4%	27.0%	33.5%	52.1%
Italy	**138,562**	**179,779**	**812,203**	**1,308,548**	**1,352,585**	**1,389,391**	**1,096,485**	**904,275**
	8.1%	7.8%	33.6%	58.5%	58.2%	55.7%	50.7%	41.9%
Luxembourg	–	**8,206**	**21,110**	**36,561**	**39,280**	**39,753**	**40,314**	**34,480**
		21.4%	50.4%	75.4%	77.3%	77.4%	77.0%	73.0%
Norway	–	**1,581**	**8,761**	**43,146**	**52,770**	**96,051**	**80,096**	**71,752**
		2.6%	9.0%	39.3%	48.3%	74.3%	72.4%	72.7%
Netherlands	**30,450**	**54,738**	**134,426**	**123,990**	**129,292**	**142,770**	**125,377**	**77,674**
	6.8%	10.9%	22.5%	26.7%	26.7%	28.2%	25.1%	20.1%
Portugal	–	**10,426**	**62,417**	**131,731**	**126,704**	**139,877**	**147,896**	**107,178**
		4.9%	24.2%	63.8%	65.1%	69.3%	69.3%	66.6%
United Kingdom	**5,850**	**128,160**	**313,149**	**897,887**	**897,374**	**965,517**	**928,737**	**832,590**
	0.4%	6.4%	14.1%	36.8%	38.3%	40.2%	43.6%	41.7%
Sweden	–	**1,335**	**18,325**	**26,527**	**55,805**	**106,382**	**91,874**	**87,518**
		0.6%	6.3%	9.7%	19.7%	34.7%	36.2%	41.0%
Switzerland	–	**9,998**	**29,466**	**75,247**	**80,732**	**92,568**	**93,493**	**78,307**
		3.0%	9.3%	28.4%	30.0%	32.5%	32.4%	29.4%
EUROPE 17 COUNTRIES(1)	619,427	1,866,021	4,726,461	7,198,347	7,582,024	7,918,015	7,173,824	6,291,858
% diesel in Europe	7.1%	13.9%	32.1%	49.5%	51.3%	53.4%	52.8%	46.0%
Year-on-year change		+0.7%	+10.7%	+2.2%	+5.3%	+4.4%	–9.4%	–12.3%

(1) See notes on page 61.

NEW LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) BY COUNTRY

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Germany	2,527,580	3,475,172	3,590,633	3,521,631	3,670,406	3,376,019	3,320,059	3,981,805
Austria	243,021	310,157	336,670	336,793	339,078	330,703	326,633	345,132
Belgium	429,849	525,996	569,294	542,760	587,125	593,555	604,326	530,509
Denmark	89,485	100,303	145,780	204,957	220,003	219,047	184,582	128,060
Spain	592,093	1,218,091	1,680,761	1,916,080	1,909,241	1,891,243	1,328,219	1,060,263
Finland	115,741	166,602	149,702	164,160	163,074	140,778	156,913	97,898
France	2,151,089	2,702,925	2,548,850	2,537,626	2,485,776	2,571,134	2,551,641	2,676,384
Greece	80,824	144,960	313,230	293,102	291,765	304,262	290,091	234,647
Ireland	102,203	106,720	272,463	208,814	219,748	230,911	181,552	66,751
Italy	1,826,702	2,464,050	2,641,117	2,444,339	2,559,006	2,730,142	2,384,652	2,336,362
Luxembourg	22,514	40,285	44,979	51,581	53,958	54,874	56,447	50,368
Norway	106,945	82,483	129,003	146,928	153,028	175,835	146,716	123,196
Netherlands	483,574	555,812	694,210	531,392	548,830	586,575	584,881	438,710
Portugal	96,954	275,160	410,670	273,262	259,279	270,414	268,991	200,050
United Kingdom	1,725,803	2,256,662	2,466,833	2,770,153	2,678,943	2,752,187	2,431,300	2,189,726
Sweden	204,626	256,303	322,383	309,399	322,745	351,438	293,790	241,266
Switzerland	297,855	352,652	340,640	287,369	293,142	310,721	315,602	289,909
European Union(1)	9,358,799	14,523,790	16,187,575	16,106,049	16,308,977	16,403,282	14,964,077	14,577,931
EUROPE 17 COUNTRIES	11,096,858	15,034,333	16,657,218	16,540,346	16,755,147	16,889,838	15,426,395	14,991,036

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

Registrations

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

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Germany	101,393	125,384	212,290	202,372	202,445	227,856	230,019	174,630
Austria	15,473	21,539	27,243	28,878	30,484	32,521	32,936	25,729
Belgium	30,609	52,490	54,090	62,672	60,984	68,760	68,379	54,315
Denmark	15,711	19,649	33,092	58,076	65,620	59,706	34,439	15,861
Spain[1]	88,042	229,821	299,246	387,203	274,633	276,408	167,043	107,491
Finland	12,574	27,507	15,056	16,211	17,385	17,615	17,302	9,554
France	**277,887**	**393,795**	**414,966**	**420,065**	**440,031**	**461,462**	**460,273**	**373,986**
Greece	45,124	29,480	23,008	23,374	24,096	24,517	22,796	14,917
Ireland	8,640	24,136	41,474	37,073	40,982	44,576	29,949	9,296
Italy	109,270	156,995	225,517	207,067	233,288	237,368	222,979	176,926
Luxembourg	1,014	1,863	3,083	3,064	3,121	3,542	4,088	3,103
Norway	11,395	20,582	31,627	37,021	43,864	46,640	36,099	24,521
Netherlands	33,498	53,080	96,570	66,232	64,860	81,035	84,963	51,555
Portugal	38,597	64,236	152,836	66,774	64,577	68,598	55,602	39,037
United Kingdom	212,042	247,728	245,163	330,436	334,079	348,180	299,505	194,727
Sweden	12,038	26,362	31,854	35,098	39,979	44,639	39,808	27,858
Switzerland	18,091	22,753	24,121	22,428	23,690	26,033	27,045	23,860
European Union[2]	790,064	1,398,657	1,875,488	1,944,595	1,896,564	1,996,783	1,770,081	1,278,985
EUROPE 17 COUNTRIES[1]	**1,031,398**	**1,517,400**	**1,931,236**	**2,004,044**	**1,964,118**	**2,069,456**	**1,833,225**	**1,327,366**

(1) See notes on page 61.

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

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Germany	59,061	73,770	96,830	88,364	96,747	101,320	99,907	62,518
Austria	5,642	7,222	8,508	8,235	7,548	8,289	8,506	4,691
Belgium	8,604	10,690	11,061	11,657	10,282	11,953	11,868	8,271
Denmark	3,179	3,539	4,597	5,902	5,924	6,798	6,563	3,175
Spain	23,208	30,432	33,700	39,753	40,424	44,384	31,226	11,675
Finland	4,497	4,218	3,072	3,492	3,290	3,081	4,018	2,572
France	**41,846**	**50,028**	**57,918**	**55,281**	**53,123**	**52,539**	**57,504**	**35,533**
Greece	1,178	497	1,633	1,589	1,899	2,071	2,344	1,578
Ireland	3,511	2,748	4,666	4,621	5,563	5,092	3,602	1,104
Italy		31,973	38,388	35,313	35,409	35,237	33,852	18,685
Luxembourg	690	1,136	1,451	1,394	1,392	1,609	1,742	898
Norway	3,056	2,106	3,564	4,952	4,835	5,650	5,729	3,429
Netherlands	13,346	14,804	16,835	13,405	19,075	15,099	18,023	11,537
Portugal	8,370	7,186	7,403	4,588	5,403	5,623	5,516	3,195
United Kingdom	57,489	45,794	51,864	53,344	50,776	43,111	49,558	28,539
Sweden	6,703	5,998	5,549	5,688	6,052	6,484	6,749	5,357
Switzerland	3,955	4,832	4,733	3,817	4,733	4,230	4,942	4,276
European Union[2]	187,726	272,597	343,475	332,626	342,907	342,690	340,978	199,328
EUROPE 17 COUNTRIES	**244,335**	**296,973**	**351,772**	**341,395**	**352,475**	**352,570**	**351,649**	**207,033**

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

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Germany	6,058	4,235	5,684	4,891	5,241	4,940	5,073	5,030
Austria	676	450	706	565	761	699	861	606
Belgium	585	580	974	754	813	951	1,029	845
Denmark	579	311	419	315	421	363	463	549
Spain	1,511	2,376	2,738	3,655	3,469	3,671	3,098	2,284
Finland	625	429		252	266	248	312	325
France	**3,558**	**3,160**	**4,320**	**4,776**	**5,243**	**5,491**	**5,655**	**6,664**
Greece		625	374	575	396	542	430	893
Ireland		24	121	271	412	345	459	166
Italy		3,825	4,152	4,514	4,324	3,943	3,581	2,779
Luxembourg	53	57	108	147	162	164	216	196
Norway	684	380	427	708	544	718	802	812
Netherlands	1,082	1,069	949	1,134	778	1,141	1,153	1,112
Portugal		482	806	620	492	569	612	515
United Kingdom	5,792	3,324	4,496	4,630	4,641	3,888	4,400	4,277
Sweden	943	863	1,071	1,021	1,163	800	920	890
Switzerland	371	580	491	457	509	457	802	539
European Union[2]	17,707	20,068	26,918	28,120	28,582	27,755	28,262	27,131
EUROPE 17 COUNTRIES	**22,517**	**22,770**	**27,836**	**29,285**	**29,635**	**28,930**	**29,866**	**28,482**

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

Registrations

NEW PASSENGER CAR REGISTRATIONS IN EUROPE

In units

	2000	2003	2004	2005	2006	2007	2008	2009
Bulgaria					32,481	41,042	43,758	24,972
Estonia	10,600	15,602	16,436	19,640	25,363	30,912	24,579	9,946
Hungary	133,233	208,426	207,055	198,982	187,676	171,661	153,278	60,189
Latvia	7,300	8,713	11,217	16,602	25,582	32,771	19,831	5,367
Lithuania	6,158	7,543	9,493	10,467	14,234	21,606	22,217	7,515
Poland	478,752	358,432	318,111	235,522	238,993	293,305	320,040	320,206
Czech Republic	148,592	152,981	143,622	151,699	156,686	174,456	182,554	167,708
Romania					256,364	315,621	270,995	130,195
Slovakia	55,090	59,742	57,430	57,125	59,084	59,700	70,040	74,717
Slovenia	67,665	59,548	62,002	59,324	59,578	68,719	71,575	57,967
TOTAL NEW EU COUNTRIES(1)	**907,400**	**870,987**	**825,366**	**749,361**	**1,056,041**	**1,209,793**	**1,178,867**	**858,782**
Romania	64,432	106,765	145,130	215,554				

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

In units

	2000	2003	2004	2005	2006	2007	2008	2009
Bulgaria					9,959	10,697	11,478	4,275
Estonia	1,500	2,607	2,429	2,944	3,768	4,693	3,041	1,206
Hungary	26,686	24,978	23,595	20,479	21,604	21,920	21,559	10,619
Latvia	900	1,064	1,437	1,753	2,645	3,615	2,151	555
Lithuania	1,270	1,680	2,347	3,371	4,341	4,445	3,201	884
Poland	33,653	25,769	37,025	35,985	41,027	56,312	61,221	43,764
Czech Republic	14,786	14,566	17,288	16,024	16,229	19,722	20,648	13,258
Romania					32,702	36,431	40,876	15,397
Slovakia	5,812	9,318	10,204	14,428	19,518	23,618	26,907	15,722
Slovenia	6,274	6,676	7,034	6,897	6,080	6,860	7,331	4,452
TOTAL NEW EU COUNTRIES(1)	**90,900**	**86,658**	**101,359**	**101,881**	**157,873**	**188,313**	**198,413**	**110,132**
Romania	14,789	25,435	31,012	35,842				

NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE

In units

	2000	2003	2004	2005	2006	2007	2008	2009
Bulgaria					42,440	51,739	55,236	29,247
Estonia	12,100	18,209	18,865	22,584	29,131	35,605	27,620	11,152
Hungary	159,919	233,404	230,650	219,461	209,280	193,581	174,837	70,808
Latvia	8,200	9,777	12,654	18,355	28,227	36,386	21,982	5,922
Lithuania	7,428	9,223	11,840	13,838	18,575	26,051	25,418	8,399
Poland	512,405	384,201	355,136	271,507	280,020	349,617	381,261	363,970
Czech Republic	163,378	167,547	160,910	167,723	172,915	194,178	203,202	180,966
Romania					289,066	352,052	311,871	145,592
Slovakia	60,902	69,060	67,634	71,553	78,602	83,318	96,947	90,439
Slovenia	73,939	66,224	69,036	66,221	65,658	75,579	78,906	62,419
TOTAL NEW EU COUNTRIES(1)	**998,300**	**957,645**	**926,725**	**851,242**	**1,213,914**	**1,398,106**	**1,377,280**	**968,914**
Romania	79,221	132,200	176,142	251,396				

NEW COMMERCIAL VEHICLE OVER 5 T (INCLUDING COACHES AND BUSES) REGISTRATIONS IN EUROPE

In units

	2000	2003	2004	2005	2006	2007	2008	2009
Bulgaria					2,000	3,600	3,400	800
Estonia	400	465	631	927	1,623	1,875	1,380	337
Hungary	2,900	4,100	4,600	4,400	4,900	5,400	5,500	1,800
Latvia	1,000	948	1,095	1,284	2,216	3,304	2,103	322
Lithuania	1,000	1,437	1,714	2,297	3,169	5,039	3,467	519
Poland	7,464	8,523	11,865	11,079	14,988	22,661	19,971	8,172
Czech Republic	6,400	6,700	7,324	8,200	10,716	12,860	12,249	5,824
Romania					8,096	14,766	12,220	2,370
Slovakia	1,796	2,802	3,105	3,754	4,917	5,776	5,431	2,322
Slovenia	1,876	1,276	1,567	1,635	2,178	2,819	2,725	867
TOTAL NEW EU COUNTRIES(1)	**22,800**	**26,300**	**31,900**	**33,500**	**54,900**	**78,100**	**68,400**	**23,300**
Romania	3,113	3,055	4,809	5,019				

(1) New member states: 8 countries in 2000; 10 countries in 2006.

World production of French automobile 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 PRODUCTON BY MAKE

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Citroën	536,415	783,224	1,168,470	1,379,082	1,406,485	1,464,559	1,377,392	1,302,881
Peugeot	734,461	1,369,359	1,708,968	1,996,284	1,950,374	1,992,499	1,947,822	1,739,430
PSA Peugeot Citroën(1)	**1,647,221**	**2,152,583**	**2,877,438**	**3,375,366**	**3,356,859**	**3,457,058**	**3,325,214**	**3,042,311**
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	2,326,359	2,142,710	2,265,099	1,986,052	1,796,624
Dacia	–	–	55,183	172,021	188,461	222,913	241,991	307,052
Renault Samsung Motors	–	–	14,517	118,438	161,299	181,028	189,308	192,333
Renault-Dacia-Samsung(2)	**1,659,099**	**1,571,264**	**2,426,316**	**2,616,818**	**2,492,470**	**2,669,040**	**2,417,351**	**2,296,009**
C.B.M.	105							
Renault Trucks(3)	54,086	60,263	96,040	63,961	67,593	62,227	65,328	24,314
of which Mack Trucks	–	*15,423*	*34,562*	–	–	–		–
Etalmobil (Sovam)	113	75	44	27	28	21	7	9
Unic	17,809							
Heuliez(4)	–	231	391	–	–	–		–
Irisbus-Renault(4)	–	–	2,547	–	–	–		–
TOTAL	**3,378,433**	**3,784,416**	**5,402,776**	**6,056,172**	**5,916,950**	**6,188,346**	**5,807,900**	**5,362,643**
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	2005	2006	2007	2008	2009
Citroën	49,034	93,259	192,238	205,376	200,111	213,549	236,830	138,864
Peugeot	127,428	81,439	186,917	187,300	195,311	218,956	247,693	140,941
PSA Peugeot Citroën(1)	**200,979**	**174,698**	**379,155**	**392,676**	**395,422**	**432,505**	**484,523**	**279,805**
Renault (including Trafic II)	166,760	254,334	312,801	401,785	395,126	385,530	343,507	235,223
Dacia	–	–	12,580	19,871	11,507	7,466	13,956	16,680
Renault-Dacia-Samsung(2)	**166,760**	**254,334**	**325,381**	**421,656**	**406,633**	**392,996**	**357,463**	**251,903**
C.B.M.	105							
Renault Trucks(3)	54,086	60,263	96,040	63,961	67,593	62,227	65,328	24,314
of which Mack Trucks	–	*15,423*	*34,562*	–	–	–		–
Etalmobil (Sovam)	113	75	44	27	28	21	7	9
Unic	17,809							
Heuliez(4)	–	231	391	–	–	–		–
Irisbus-Renault(4)	–	–	2,547	–	–	–		–
TOTAL	**439,852**	**489,601**	**803,558**	**878,320**	**869,676**	**887,749**	**907,321**	**556,031**
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. As of 2006, some Renault Trafic II vehicles are classified as passenger cars.
(3) Mack was included in Renault V.I. between 1990 and 2000. In 2001, Renault and AB Volvo pooled their truck operations.
(4) On 1 January 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	2005	2006	2007	2008	2009
Foreign manufacturers								
Bugatti				5	44	72	82	3
Fiat	–	–	10,377	8,304	5,321	4,504	2,688	1,717
Heuliez-Opel				37,390	14,470	11,770	8,840	3,218
Lancia	–	–	2,265	5,713	4,825	4,238	4,068	1,996
Smart	–	–	101,365	77,015	68,672	102,588	140,072	115,469
Toyota	–	–	0	180,643	249,934	262,313	232,406	207,456
Passenger cars	**–**	**–**	**114,007**	**309,070**	**343,266**	**385,485**	**388,156**	**329,859**
Light commercial vehicles (Fiat)	**–**	**–**	**39,428**	**20,680**	**20,874**	**41,008**	**35,856**	**17,837**
Industrial vehicles (Scania)	**–**	**–**	**10,710**	**9,391**	**10,133**	**12,002**	**12,629**	**4,724**
Irisbus-Heuliez	–	–	–	291	420	458	404	407
Irisbus	–	–	–	2,869	3,130	3,321	3,117	2,875
Evobus	–	–	535	527	522	557	630	742
Scania	–	–	0	0	0	0	0	0
Coaches and buses	**–**	**–**	**535**	**3,687**	**4,072**	**4,336**	**4,151**	**4,024**
TOTAL FOREIGN MAKES	**–**	**–**	**164,680**	**342,828**	**378,345**	**442,831**	**440,792**	**356,444**
French manufacturers								
TOTAL FRENCH VEHICLES	**–**	**–**	**3,180,741**	**3,206,180**	**2,790,918**	**2,573,023**	**2,128,186**	**1,691,214**
Foreign and French manufacturers								
OVERALL TOTAL	**–**	**–**	**3,345,421**	**3,549,008**	**3,169,263**	**3,015,854**	**2,568,978**	**2,047,658**

Source: CCFA.

World production of French automobile manufacturers

PASSENGER CAR PRODUCTION BY MAKE

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Citroën	536,366	689,965	976,232	1,173,706	1,206,374	1,251,010	1,140,562	1,164,017
Peugeot	607,033	1,287,920	1,522,051	1,808,984	1,755,063	1,773,543	1,700,129	1,598,489
PSA Peugeot Citroën(1)	**1,446,242**	**1,977,885**	**2,498,283**	**2,982,690**	**2,961,437**	**3,024,553**	**2,840,691**	**2,762,506**
Renault	1,492,339	1,316,930	2,043,815	1,924,574	1,747,584	1,879,570	1,642,551	1,561,446
Dacia	–	–	42,603	152,150	176,954	215,447	228,035	290,372
Renault Samsung Motors	–	–	14,517	118,438	161,299	181,027	189,302	192,288
Renault-Dacia-Samsung(1)	**1,492,339**	**1,316,930**	**2,100,935**	**2,195,162**	**2,085,837**	**2,276,044**	**2,059,888**	**2,044,106**
Total	**2,938,581**	**3,294,815**	**4,599,218**	**5,177,852**	**5,047,274**	**5,300,597**	**4,900,579**	**4,806,612**
KD and CKD units	**467,879**	**208,241**	**–**	**–**	**–**	**–**		**–**
of which production in France	–	–	2,765,803	2,803,891	2,379,974	2,165,384	1,757,779	1,489,603
Citroën	–	–	504,323	605,988	583,919	540,171	520,319	404,049
Peugeot	–	–	1,094,756	1,155,292	906,878	835,167	708,459	657,226
PSA Peugeot Citroën(1)	**–**	**–**	**1,599,079**	**1,761,280**	**1,490,797**	**1,375,338**	**1,228,778**	**1,061,275**
Renault	–	–	**1,166,724**	**1,042,611**	**889,177**	**790,046**	**529,001**	**428,328**
Renault-Dacia-Samsung(1)	**–**	**–**	**1,166,724**	**1,042,611**	**889,177**	**790,046**	**529,001**	**428,328**

(1) See notes on page 66.

PASSENGER CAR PRODUCTION BY MODEL IN 2009

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**2,762,506**	**1,061,275**	**1,701,231**
Citroën		1,164,017	404,049	759,968
	C1	116,070		116,070
	C2	46,461	41,391	5,070
	C3	317,988	169,503	148,485
	DS3	1,486	1,486	
	C4	337,887	99,460	238,427
	ZX	75,994		75,994
	XSARA	53,259	5,942	47,317
	XANTIA	11,808		11,808
	C5	82,887	79,987	2,900
	C-CROSSER	5,030		5,030
	C6	982	982	
	C8	5,298	5,298	
	NEMO	21,491		21,491
	BERLINGO	87,376		87,376
Peugeot		1,598,489	657,226	941,263
	107	116,070		116,070
	1007	4,788	4,788	
	206	360,674	129,027	231,647
	207	371,035	166,103	204,932
	307	84,312	32	84,280
	308	230,435	230,341	94
	RCZ	92		92
	3008	64,671	64,671	
	5008	21,923	21,923	
	405	220,320		220,320
	407	33,247	33,247	
	4007	4,546		4,546
	607	909	909	
	807	6,185	6,185	
	BIPPER	15,423		15,423
	PARTNER	63,859		63,859
Renault-Dacia-Samsung		**2,044,106**	**428,328**	**1,615,778**
Renault		1,561,446	428,328	1,133,118
	TWINGO	183,496		183,496
	CLIO	458,831	139,228	319,603
	MODUS	69,359		69,359
	LOGAN	205,271		205,271
	SANDERO	16,951		16,951
	MEGANE	458,004	165,894	292,110
	LAGUNA	46,907	46,907	
	VEL SATIS	1,180	1,180	
	ESPACE	15,214	15,214	
	KANGOO	78,295	57,085	21,210
	TRAFIC	12,578		12,578
	MASTER	2,820	2,820	
	Others	12,540		12,540
Dacia		290,372	0	290,372
	LOGAN	141,745		141,745
	SANDERO	148,512		148,512
	Others	115		115
Renault Samsung Motors		192,288	0	192,288
	SM3	49,406		49,406
	SM5	62,091		62,091
	QM5 (KOLEOS)	28,843		28,843
	SM7	18,395		18,395
	Others	33,553		33,553
TOTAL		**4,806,612**	**1,489,603**	**3,317,009**

Source: CCFA.

World production of French automobile manufacturers

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

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Citroën	49,034	93,259	192,238	205,376	200,111	213,549	236,830	138,864
Peugeot	127,428	81,439	186,917	187,300	195,311	218,956	247,693	140,941
PSA Peugeot Citroën(1)	**200,979**	**174,698**	**379,155**	**392,676**	**395,422**	**432,505**	**484,523**	**279,805**
Renault (including Trafic II(2))	166,760	254,334	312,801	401,785	395,126	385,530	343,507	235,223
Dacia	–	–	12,580	19,871	11,507	7,466	13,956	16,680
Renault-Dacia-Samsung(1)	**166,760**	**254,334**	**325,381**	**421,656**	**406,633**	**392,996**	**357,463**	**251,903**
Renault Trucks(1)	11,632	7,464	8,321	9,460	11,378	4,439	5,271	3,405
Others	**86**	**71**	**42**	**24**	**26**	**17**	**3**	**5**
TOTAL	**379,457**	**436,567**	**712,899**	**823,816**	**813,459**	**829,957**	**847,260**	**535,118**
KD and CKD units	**68,587**	**79,271**	**–**	**–**	**–**	**–**		**–**
of which production in France	–	–	370,538	361,521	365,638	352,246	313,275	181,010
Citroën	–	–	53,561	58,223	64,794	63,887	67,348	33,037
Peugeot	–	–	67,629	68,166	62,903	66,012	52,675	26,348
PSA Peugeot Citroën(1)	**–**	**–**	**121,190**	**126,389**	**127,697**	**129,899**	**120,023**	**59,385**
Renault	–	–	240,985	225,648	226,537	217,891	187,978	118,215
Renault-Dacia-Samsung(1)	**–**	**–**	**240,985**	**225,648**	**226,537**	**217,891**	**187,978**	**118,215**
Renault Truck(1)	**–**	**–**	**8,321**	**9,460**	**11,378**	**4,439**	**5,271**	**3,405**
Others	–	–	42	24	26	17	3	5

(1) See notes on page 66.
(2) As of 2006, some Renault Trafic II vehicles are classified as passenger cars.

LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL, 2009

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**279,805**	**59,385**	**220,420**
Citroën		138,864	33,037	105,827
	C2	2,684	2,684	
	C3	7,324	7,265	59
	C4	3,131	3,131	
	NEMO	20,470		20,470
	BERLINGO	60,259		60,259
	JUMPY	19,957	19,957	
	JUMPER	25,039		25,039
Peugeot		140,941	26,348	114,593
	206	4,167	4,061	106
	207	15,360		15,360
	308	3,337	3,337	
	BIPPER	16,877		16,877
	PARTNER	56,648		56,648
	EXPERT	18,950	18,950	
	BOXER	25,602		25,602
Renault-Dacia-Samsung		**251,903**	**118,215**	**133,688**
Renault		235,223	118,215	117,008
	TWINGO	3,948		3,948
	CLIO	36,196	5,208	30,988
	MEGANE	302		302
	KANGOO	74,476	56,403	18,073
	TRAFIC	39,659		39,659
	MASTER	56,089	50,854	5,235
	MASCOTT	5,664	5,664	
	Others	18,889	86	18,803
Dacia		16,680		16,680
	LOGAN	16,680		16,680
Renault Trucks		**3,405**	**3,405**	
	MASCOTT	3,405	3,405	
Others		**5**	**5**	
Etalmobil		5	5	
TOTAL		**535,118**	**181,010**	**354,108**

Source: CCFA.

World production of French automobile manufacturers

HEAVY TRUCK (5 T AND OVER) PRODUCTION BY MAKE

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Renault Trucks[1]	39,475	50,493	87,719	54,501	56,215	57,788	60,057	20,909
of which Mack Trucks	–	*15,423*	*34,562*	–	–	–	–	–
Others[2]	17,836	4	2	3	2	4	4	4
TOTAL	**57,311**	**50,497**	**87,721**	**54,504**	**56,217**	**57,792**	**60,061**	**20,913**
of which production in France	–	–	44,402	40,768	45,306	55,393	57,132	20,601
Renault Trucks[1]	–	–	44,400	40,765	45,304	55,389	57,128	20,597
Others[2]	–	–	2	3	2	4	4	4

(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) Including Unic up to 1984.

COACH AND BUS (OVER 5 T) PRODUCTION BY MAKE

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Renault Trucks[1]	2,979	2,306	–	–	–	–	–	–
C.B.M.	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 1 January 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

HEAVY TRUCK (OVER 5 T) PRODUCTION, 2009

In units

	Models	World production	Production in France	Production outside France
Trucks				
Commercial vehicles: 5 to 6 t		1,423	1,423	–
	Mascott	1,423	1,423	
Mid range: 7 to 16 t		4,751	4,687	64
	Midlum	4,751	4,687	64
High range: over 16 t		6,096	5,852	244
	Premium	2,602	2,578	24
	Magnum	121	121	
	Kerax	1,978	1,878	100
	Lander	1,395	1,275	120
TOTAL RENAULT TRUCKS		**12,270**	**11,962**	**308**
Road tractors				
	Premium	4,353	4,353	
	Magnum	1,282	1,282	
	Kerax	1,192	1,188	4
	Lander	1,812	1,812	
TOTAL RENAULT TRUCKS ROAD TRACTORS		**8,639**	**8,635**	**4**

Source: CCFA.

World production of French automobile manufacturers

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

In units

		1980	1990	2000(1)	2005	2006	2007	2008	2009
Up to 3.5 t		318,633	402,994	577,926	670,654	624,579	645,852	623,579	419,326
	P	281,031	128,422	55,883	39,019	42,191	45,533	49,354	50,212
	D	37,602	274,572	521,229	631,499	582,388	600,319	574,225	369,114
	EL			814	136	0	0	0	0
3.5 t to 5.1 t		60,824	33,573	134,973	153,162	188,880	184,105	223,681	115,793
	P	14,675	1,961	1,724	719	134	0	14	17
	D	46,149	31,612	133,249	152,443	188,746	184,105	223,667	115,776
5.1 t to 12 t	D	25,538	6,377	13,593	11,820	10,192	7,659	5,724	3,174
12 t to 16 t	D	12,541	8,251	5,009	5,685	4,912	4,212	4,562	2,483
16 t to 20 t	D	6,909	5,518	7,304	7,115	6,999	7,294	8,356	3,179
Over 20 t	D	3,054	3,650	6,255	9,647	10,591	10,678	10,690	3,437
Road tractors	D	9,269	11,278	20,998	20,237	23,523	27,949	30,729	8,639
Coaches & buses		3,084	2,548	2,938	–	–	–	–	–
	D	3,035	2,548	2,606	–	–	–	–	–
	G			332	–	–	–	–	–
	EL	49			–	–	–	–	–
Total gasoline		295,706	130,383	57,607	39,738	42,325	45,533	49,368	50,229
Total diesel		144,097	343,806	710,243	838,446	827,351	842,216	857,953	505,802
Total electric		49	0	814	136	0	0	0	0
Total CNG or LPG				332	–	–	–	–	–
TOTAL ALL CATEGORIES		**439,852**	**474,189**	**768,996**	**878,320**	**869,676**	**887,749**	**907,321**	**556,031**

P: gasoline. D: diesel. EL: electric. G: CNG or LPG.
(1) World production of French manufacturers as of 1997.

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

In units

	1980	1990	2000(1)	2005	2006	2007	2008	2009
Passenger car derivatives								
Citroën	26,904	22,942	29,449	26,227	27,866	26,689	26,314	13,139
Peugeot	69,411	55,208	41,451	38,133	35,462	34,075	30,979	22,864
PSA Peugeot Citroën(2)	103,229	78,150	70,900	64,360	63,328	60,764	57,293	36,003
Renault(3)	30,420	56,245	60,320	55,009	52,737	69,515	69,804	76,015
TOTAL	**133,649**	**134,395**	**131,220**	**119,369**	**116,065**	**130,279**	**127,097**	**112,018**
Small vans								
Citroën	45,573	67,257	100,832	97,954	90,230	91,874	112,254	80,729
Peugeot	27,002	18,537	70,443	70,480	79,106	87,932	113,638	73,525
PSA Peugeot Citroën(2)	90,178	85,794	171,275	168,434	169,336	179,806	225,892	154,254
Renault	126,779	129,335	147,670	118,404	118,219	120,457	108,734	74,476
TOTAL	**216,957**	**215,129**	**318,945**	**286,838**	**287,555**	**300,263**	**334,626**	**228,730**
Large vans								
Citroën	23,813	32,209	61,957	81,195	82,015	94,986	98,262	44,996
Peugeot	33,031	47,623	75,023	78,687	80,743	96,949	103,076	44,552
PSA Peugeot Citroën(2)	56,844	79,832	136,980	159,882	162,758	191,935	201,338	89,548
Renault	40,508	84,681	104,811	228,372	224,469	203,024	172,502	101,412
Renault Trucks	–	–	8,321	9,460	11,378	4,439	5,271	3,405
Sovam-Etalmobil	86	71	42	24	26	17	3	5
TOTAL	**97,438**	**164,584**	**250,154**	**397,738**	**398,631**	**399,415**	**379,114**	**194,370**
4x4								
Peugeot		1,730						
Pick-ups, small vans								
Dacia	–	–	12,580	19,871	11,208	–	6,423	–

(1) World production of French manufacturers as of 1997.
(2) Including Talbot up to 1985.
(3) Including Dacia Logan.
Source: CCFA.

Deliveries of French automobile manufacturers outside France

As of 1996, deliveries of French manufacturers include both assembled vehicles and KD/CKD units. Vehicles delivered to French Overseas Departments are no longer counted in deliveries outisde France. Dacia's deliveries are included in the scope of consolidation as of 2005, Renault Trafic's are included as of 2006, and Renault Samsung Motors as of 2007 (180,973 passenger vehicles). Also, certain deliveries are assigned to regions but not countries.

NEW PASSENGER CAR DELIVERIES BY DESTINATION

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Europe(1)	**1,202,834**	**1,645,276**	**2,636,150**	**2,835,899**	**2,660,616**	**2,777,968**	**2,266,279**	**2,120,054**
of which: European Union(2)	946,760	1,479,316	2,261,904	2,424,350	2,343,310	2,420,691	1,906,629	1,879,124
Germany	202,939	277,424	337,743	365,860	316,509	306,231	287,149	453,617
Austria	35,775	36,175	41,510	48,779	42,720	43,406	43,189	47,424
Belgium-Luxembourg	105,966	144,896	172,806	171,552	173,205	165,486	168,273	158,251
Denmark	4,059	13,919	30,239	34,477	38,020	37,827	31,722	14,857
Spain	100,640	297,846	556,934	577,439	523,571	519,017	326,495	299,407
Greece		11,458	54,270	32,681	32,723	31,769	26,713	13,136
Italy	381,626	324,952	353,616	377,100	341,043	388,295	293,976	339,196
Netherlands	84,063	95,340	120,438	99,707	97,673	105,103	99,265	79,864
Portugal	14,729	59,459	68,375	66,524	58,732	57,473	55,084	39,309
United Kingdom	156,071	245,989	432,507	413,743	364,967	376,050	262,015	225,536
Sweden	13,060	18,001	31,473	43,062	34,518	38,209	18,121	9,556
10 new member States				147,859	142,234	162,776	153,332	114,391
12 new member States				276,433	283,512	321,102	266,698	161,382
of which: CEE/CIS(3)	23,619	31,569	164,814	214,335	154,964	195,460	224,787	100,240
Hungary		2,040	23,887	26,926	26,660	20,064	17,766	4,657
Poland		806	59,093	47,521	46,373	54,784	53,025	39,977
Romania			7,520	122,930	135,140	148,290	103,502	42,841
Russia			6,042	42,637	110,308	139,576	177,610	80,682
of which Switzerland	51,821	43,832	45,654	41,231	38,113	40,352	38,812	38,840
of which Turkey		13,069	148,264	142,160	111,852	108,890	87,572	96,204
Africa	**133,213**	**45,675**	**69,865**	**103,130**	**133,996**	**145,483**	**151,256**	**151,611**
of which: South Africa	22,439	0	13,913	32,941	28,216	11,686	5,637	7,804
North Africa	15,542	20,432	37,236	42,881	85,805	111,815	132,101	133,041
Nigeria	61,133	8,319	8,860	6,159	11,091	12,270	6,244	204
North and South America	**145,204**	**29,360**	**230,270**	**314,505**	**363,711**	**471,245**	**483,777**	**391,503**
of which: Argentina	11,899	516	97,605	70,099	98,588	121,282	122,942	93,781
Brazil			80,205	144,030	160,949	197,369	280,258	248,973
Colombia	11,885	9,112	16,659	36,499	49,853	5,819	2,807	3,510
Mexico		20	1,408	39,871	28,623	44,601	23,298	13,883
Asia(1)	**26,178**	**96,645**	**166,261**	**512,772**	**499,791**	**659,491**	**751,237**	**845,922**
of which: Japan	883	14,264	15,976	16,323	14,534	11,785	9,910	5,098
China		3,960	54,334	143,756	205,247	211,457	180,179	278,739
Iran	12,836	29,852	45,722	304,326	235,652	199,701	358,694	365,277
India						16,934	17,592	3,892
South Korea					121,106	120,013	104,028	133,977
Pacific	**6,290**	**5,761**	**9,984**	**16,698**	**16,532**	**20,320**	**15,591**	**8,100**
of which Australia	2,398	820	2,765	11,872	12,614	15,063	10,762	4,937
TOTAL ALL CATEGORIES	**1,529,652**	**1,881,998**	**3,174,447**	**3,841,448**	**3,738,684**	**4,109,972**	**3,736,921**	**3,542,282**
KD and CKD units	**471,744**	**208,241**						

NEW COMMERCIAL VEHICLES BY DESTINATION

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Europe(1)	**88,235**	**174,998**	**379,289**	**401,860**	**471,483**	**490,820**	**473,705**	**251,928**
of which: European Union(2)	74,382	156,268	312,421	326,077	414,855	448,562	411,784	224,591
Germany	17,490	23,581	50,081	40,760	56,511	60,927	59,809	38,001
Austria	2,185	3,702	4,697	6,206	6,131	6,830	7,956	5,498
Belgium-Luxembourg	11,455	18,383	22,857	24,827	30,049	30,963	34,012	24,811
Spain	71	44,110	57,516	71,185	77,179	63,691	40,419	17,026
Italy	26,207	19,923	35,910	29,706	36,882	45,457	41,408	34,731
Netherlands	8,234	7,995	23,087	11,630	16,574	19,729	20,926	11,097
Portugal	2,805	14,291	34,551	25,410	24,738	22,334	19,242	13,397
United Kingdom	8,390	21,127	55,647	64,554	75,574	69,972	62,972	35,411
10 new member States				24,939	35,439	45,694	49,057	20,802
12 new member States				51,099	55,569	64,926	75,366	22,934
of which: CEEC/CIS(3)	361	2,781	25,100	46,685	25,932	13,392	20,370	4,042
Poland	301	97	5,624	9,039	14,762	19,019	21,606	10,546
of which Switzerland	3,317	2,921	4,293	5,934	7,371	8,123	8,174	7,874
Africa	**75,802**	**18,320**	**16,074**	**22,597**	**26,118**	**24,055**	**30,466**	**27,146**
of which North Africa	18,334	8,588	13,509	18,345	20,141	21,107	26,601	24,961
North and South America	**5,875**	**5,453**	**36,682**	**33,328**	**42,367**	**59,664**	**68,808**	**55,553**
of which USA	1,999	2,000	1,099					
Asia(1)	**6,930**	**11,302**	**8,260**	**11,781**	**7,622**	**7,481**	**7,356**	**3,804**
Pacific	**776**	**1,364**	**1,797**	**1,967**	**2,377**	**3,512**	**3,238**	**1,611**
TOTAL ALL CATEGORIES	**178,126**	**213,502**	**444,516**	**474,532**	**553,680**	**586,686**	**585,270**	**340,931**
KD and CKD units	**39,428**	**12,207**						

(1) As of 2004, deliveries to Cyprus are included in Europe, rather than Asia.
(2) European Union: 9 countries in 1980; 10 countries in 1985; 12 countries between 1990 and 1994; 15 countries between 1995 and 2003; 25 countries from 2004 to 2005; 27 countries since 2006.
(3) CCEC/ CIS: excluding the 10 new countries that joined the European Union in 2004 and 2005, and the 12 that joined in 2006.
Source: CCFA.

Physical and financial data for the automobile manufacturing industry

Physical and financial data are taken from surveys (known as the EAE reports) conducted every year of French companies in the automotive manufacturing industry. The surveys are one of the main sources of information for French industry. The SESSI, formerly the statistics department of the Government Secretary for Industry now attached to Insee, uses the surveys. These data reflect the businesses of French and foreign-owned companies with operations in France. Their core businesses may extend to other countries. Changes such as the creation, reorganisation, acquisition or sale of companies can result in significant variations from one year to another. A significant overhaul of these surveys is currently in progress which explains why this data is not available after 2007. The future data will be available through a new business nomenclature.

	Units	1980	1990	2000	2005	2006	2007	2008[1]	2009[1]
PHYSICAL DATA									
No. of employees	units	320,922	216,848	190,830	185,061	176,803	173,621	163,000	149,000
Production in France	thousands			3,348	3,549	3,169	3,016	2,569	2,048
Production/employee				**17.5**	**19.2**	**17.9**	**17.4**	**15.8**	**13.7**
FINANCIAL DATA									
Net sales	€ million	19,251	49,472	73,684	86,944	87,085	91,770	84,000	75,000
Export sales	€ million	7,511	18,817	42,290	51,988	52,577	54,237	49,000	42,500
Exports as a % of total sales	**%**	**39.0%**	**38.0%**	**57.4%**	**59.8%**	**60.4%**	**59.1%**	**58.3%**	**56.7%**
Value added (VA) before tax	€ million	5,883	10,650	13,282	14,481	12,516	13,456	11,000	8,000
Value added/sales	**%**	**30.6%**	**21.5%**	**18.0%**	**16.7%**	**14.4%**	**14.7%**	**13.1%**	**10.7%**
Value added/employee	€ thousand	18	49	70	78	71	78	67	54
Social security costs	€ million	1,452	1,860	2,153	2,546	2,550	2,597		
Social security costs/employee	€ thousand	4,5	8.6	11.3	13.8	14.4	15.0		
Wages and salaries	€ million	3,254	4,271	5,093	6,216	6,331	6,511		
Wages and salaries/employee	€ thousand	10.1	19.7	26.7	33.6	35.8	37.5		
Personnel costs	€ million	4,706	6,132	7,246	8,761	8,881	9,108		
Personnel costs/employee	€ thousand	14.7	28.3	38.0	47.3	50.2	52.5		
Personnel costs/VA	%	80.0%	57.6%	54.6%	60.5%	71.0%	67.7%		
Operating cash flow	€ million	928	3,855	5,201	4,613	2,522	3,374		
Operating cash flow/VA	**%**	**15.8%**	**36.2%**	**39.2%**	**31.9%**	**20.2%**	**25.1%**		
Interest expense	€ million	484	1,170	1,178	900	704	874		
Interest expense/VA	%	8.2%	11.0%	8.9%	6.2%	5.6%	6.5%		
Interest income	€ million	207	1,095	2,508	2,029	1,157	1,851		
Interest income/VA	%	3.5%	10.3%	18.9%	14.0%	9.2%	13.8%		
Net interest income (expense)	€ million	–276	–74	1,330	1,128	453	977		
Net interest income (expense)/VA	%	–4.7%	–0.7%	10.0%	7.8%	3.6%	7.3%		
Cash flow	€ million	638	2,918	5,499	4,236	1,682	3,504		
Cash flow/VA	%	10.8%	27.4%	41.4%	29.3%	13.4%	26.0%		
Net income (loss)	**€ million**	**–26**	**969**	**2,851**	**1,086**	**–243**	**160**		
Net income/sales	%	–0.1%	2.0%	3.9%	1.2%	–0.3%	0.2%		
Capital expenditure	€ million	1,018	3,139	3,807	3,214	2,967	2,545	2,500	1,800
Capital expenditure/sales	**%**	**5.3%**	**6.3%**	**5.2%**	**3.7%**	**3.4%**	**2.8%**	**3.0%**	**2.4%**
Capital expenditure/VA	**%**	**17.3%**	**29.5%**	**28.7%**	**22.2%**	**23.7%**	**18.9%**	**22.7%**	**22.5%**

(1) CCFA estimates.

Physical and financial data on the automotive equipment industry

Physical and financial data in the table below are taken from surveys (known as the EAE reports) conducted every year of French companies 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 car seating industries, resulting in a statistical break in data.
Companies listed in the “automotive equipment manufacturing” sector do not represent, therefore, all suppliers of the automotive industry. Added to these should be manufacturers of electrical materials (for engines and vehicles), car seats, glass, tires, doors and locks and automotive springs *(see page 53)*.
In addition to these activities, the automotive manufacturing and automotive equipment manufacturing industries purchase a number of intermediate products (metals, rubber, plastics, etc.), services (consulting, research, advertising, etc.) and capital goods from other sectors.

	Units	1980	1990	2000	2005	2006	2007(1)	2008(2)	2009(2)
PHYSICAL DATA									
No. of companies (> 20 employees)	Units	320	320	243	204	200	192	188	183
No. of employees	Units	143,347	112,963	94,171	85,928	82,273	73,110	68,500	58,000
FINANCIAL DATA									
Net sales	€ million	5,637	14,452	17,766	19,889	19,372	18,149	16,000	12,300
Export sales	€ million	1,301	4,018	7,512	8,291	8,452	8,676	7,800	6,150
Exports as a % of total sales	**%**	**23.1%**	**27.8%**	**42.3%**	**41.7%**	**43.6%**	**47.8%**	**48.8%**	**50.0%**
Value added (VA) before tax	€ million	2,251	4,530	4,643	4,869	4,691	4,276		
Value added/sales before tax	**%**	**39.9%**	**31.3%**	**26.1%**	**24.5%**	**24.2%**	**23.6%**		
Value added/employee before tax	€ thousand	16	40	49	57	57	58		
Social security costs	€ million	503	867	902	1,009	996	880		
Social security costs/employee	€ thousand	3.5	7.7	9.6	11.7	12.1	12.0		
Wages and salaries	€ millions	1,239	2,060	2,213	2,374	2,354	2,086		
Wages and salaries/employee	€ thousand	8.6	18.2	23.5	27.6	28.6	28.5		
Personnel costs	€ million	1,742	2,926	3,115	3,383	3,350	2,967		
Personnel costs/employee	€ thousand	12.2	25.9	33.1	39.4	40.7	40.6		
Personnel costs/VA	%	77.4%	64.6%	67.1%	69.5%	71.4%	69.4%		
Operating cash flow	€ million	418	1,337	1,206	1,121	979	1,014		
Operating cash flow/VA	**%**	**18.6%**	**29.5%**	**26.0%**	**23.0%**	**20.9%**	**23.7%**		
Interest expense	€ million	186	387	440	253	288	262		
Interest expense/VA	%	8.2%	8.5%	9.5%	5.2%	6.1%	6.1%		
Interest income	€ million	36	213	337	285	336	268		
Interest income/VA	%	1.6%	4.7%	7.3%	5.9%	7.2%	6.3%		
Net interest income (expense)	€ million	–150	–174	–103	32	48	5		
Net interest income (expense)/VA	%	–6.7%	–3.8%	–2.2%	0.7%	1.0%	0.1%		
Cash flow	€ million	237	883	889	834	777	697		
Cash flow/VA	%	10.5%	19.5%	19.2%	17.1%	16.6%	16.3%		
Net income	**€ million**	**54**	**400**	**–92**	**83**	**103**	**141**		
Net income/sales	%	1.0%	2.8%	–0.5%	0.4%	0.5%	0.8%		
Capital expenditure	€ million	328	899	1,024	687	651	485		
Capital expenditure/sales	**%**	**5.8%**	**6.2%**	**5.8%**	**3.5%**	**3.4%**	**2.7%**		
Capital expenditure/VA	**%**	**14.6%**	**19.8%**	**22.0%**	**14.1%**	**13.9%**	**11.3%**		

(1) In 2007, a part of the reduction can be explained by the reclassification of certain companies under other business nomenclatures.
(2) FIEV estimates.

Registrations

NEW PASSENGER CAR REGISTRATIONS BY MAKE

The special French Temporary Transit series was included in the new passenger car registrations as of 2004.

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Citroën	270,983	266,822	261,508	275,053	262,048	281,480	295,431	346,437
Peugeot	293,461	498,481	397,547	385,739	380,869	373,303	364,523	391,944
PSA Peugeot Citroën(1)	685,318	765,303	659,055	660,792	642,917	654,783	659,954	738,381
Renault	759,312	639,440	602,415	546,227	487,969	459,349	463,019	517,093
Others France	56	146	63	148	85	69	35	77
TOTAL FRANCE(2)	**1,444,686**	**1,404,889**	**1,261,533**	**1,207,167**	**1,130,971**	**1,114,201**	**1,123,008**	**1,255,551**
Alfa Romeo	25,380	15,916	12,774	13,847	14,909	13,959	10,316	11,732
Audi	17,455	32,762	34,937	44,311	44,021	48,121	47,871	49,109
BMW	17,239	29,580	31,576	40,508	40,749	49,602	49,194	43,414
Chrysler	16	4,084	4,827	5,066	4,877	4,014	2,485	1,085
Dacia				9,760	18,753	32,641	43,525	61,217
Daewoo	–	–	11,731	2	1			
GM Daewoo				933	3			
Chevrolet				7,940	7,617	8,971	9,156	21,074
Daihatsu	–	0	1,043	1,538	1,902	2,848	1,853	1,914
Dodge				13	1,323	2,867	2,564	1,358
Fiat	53,147	128,822	95,983	46,157	50,405	53,119	73,504	82,290
Ford	68,426	159,575	117,061	103,597	96,123	103,078	112,128	133,079
Honda	8,293	14,002	8,716	8,883	11,720	15,653	12,382	14,669
Hyundai	–	0	11,019	27,396	26,812	26,835	18,454	21,516
Jaguar	269	1,290	1,939	2,118	1,769	1,567	1,678	1,169
Jeep	–	3,824	3,001	3,525	3,561	4,894	2,278	1,183
Kia	–	0	2,631	18,073	15,021	15,476	15,750	21,164
Lada	13,069	15,758	1,867	1,671	1,043	622	176	98
Lancia	6,801	18,225	5,864	4,414	4,011	4,260	4,765	4,839
Land Rover	237	3,611	7,570	6,946	5,320	7,480	3,177	2,419
Mazda	13,021	18,563	6,366	11,440	13,869	14,529	13,473	13,096
Mercedes	14,430	28,605	43,389	54,779	58,881	61,755	51,584	50,927
Mini	–	–	–	12,627	9,621	16,041	19,015	17,777
Mitsubishi	2,788	4,298	5,575	6,758	3,118	5,463	2,571	2,131
Nissan-Infiniti	17,700	25,707	31,330	40,858	31,418	32,821	38,302	46,070
Opel	32,709	113,490	133,576	106,462	99,266	99,680	89,790	89,265
Porsche	1,060	1,297	825	2,404	2,305	2,879	1,645	2,112
Rover	20,690	41,147	13,474	1,980	239	13	0	0
Saab	179	2,459	3,265	2,701	3,037	3,369	3,174	1,585
Santana	–	1,746	4,231		101	183	144	99
Seat	306	48,052	40,562	32,744	35,017	37,996	34,774	38,364
Skoda	1,636	1,825	11,570	15,044	16,305	18,367	17,399	19,003
Smart	–	–	6,645	12,649	10,080	8,062	8,669	7,920
Ssangyong	–	0	19	3,972	4,509	3,878	595	472
Subaru	–	0	2,312	1,464	1,509	1,791	1,234	1,405
Suzuki	–	0	11,355	21,125	25,536	30,874	25,353	29,056
Toyota-Lexus	13,095	15,839	43,698	87,500	97,217	103,460	92,279	90,320
Volkswagen	75,727	155,971	152,868	136,011	140,803	142,634	144,506	150,392
Volvo	8,207	12,415	6,777	11,096	10,616	13,772	11,001	12,007
TOTAL FOREIGN(2)	**428,516**	**904,241**	**872,351**	**910,394**	**914,774**	**995,471**	**968,361**	**1,046,847**
TOTAL ALL CATEGORIES	**1,873,202**	**2,309,130**	**2,133,884**	**2,117,561**	**2,045,745**	**2,109,672**	**2,091,369**	**2,302,398**
of which Temporary Transit	–	–	–	49,772	45,196	45,129	41,086	33,727
French makes (%)	77.1%	60.8%	59.1%	57.0%	55.3%	52.8%	53.7%	54.5%
Foreign makes (%)	22.9%	39.2%	40.9%	43.0%	44.7%	47.2%	46.3%	45.5%

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

USED PASSENGER CAR REGISTRATIONS

In units

	1980	1990	2000	2005	2006	2007	2008	2009
TOTAL ALL CATEGORIES	**4,441,423**	**4,758,750**	**5,082,122**	**5,383,361**	**5,465,603**	**5,570,764**	**5,393,045**	**5,240,411**
Used/new ratio	2.4	2.1	2.4	2.5	2.7	2.6	2.6	2.3

USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

In units

	1980	1990	2000	2005	2006	2007	2008	2009
TOTAL ALL CATEGORIES		**644,925**	**651,033**	**718,948**	**742,366**	**768,538**	**781,720**	**766,764**
Used/new ratio		1.6	1.6	1.7	1.7	1.7	1.7	2.1

Registrations

NEW DIESEL PASSENGER CAR REGISTRATIONS BY MAKE

The special French Temporary Transit series was included in the new passenger car registrations as of 2004.

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Citroën	24,158	111,881	138,628	185,699	182,296	217,725	239,593	256,454
Peugeot	65,199	189,322	206,153	275,849	277,412	276,877	278,689	295,599
PSA Peugeot Citroën(1)	89,357	301,203	344,781	461,548	459,708	494,602	518,282	552,053
Renault	45,862	205,374	257,909	373,731	344,627	332,703	369,788	377,769
TOTAL FRANCE(2)	**135,219**	**506,577**	**602,711**	**835,341**	**804,368**	**827,305**	**888,070**	**929,822**
Alfa Romeo	–	2,524	7,444	10,845	12,436	12,132	9,079	8,307
Audi	19,591	13,495	25,901	39,387	40,085	42,496	43,243	44,403
BMW-Mini	–	8,271	21,065	36,768	37,648	47,783	52,348	46,578
Chrysler-Dodge-Jeep	–	–	4,161	6,561	8,278	11,069	7,135	3,536
Dacia				0	9,329	21,603	33,846	35,483
Fiat-Lancia	10,352	33,913	38,337	27,198	30,580	33,054	42,262	35,445
Ford	1,833	56,331	58,896	76,482	72,572	77,414	96,417	98,745
Honda			413	4,472	7,586	10,442	7,298	6,575
Hyundai	–	–	5,510	22,136	22,628	22,961	12,675	11,099
Kia			1,200	10,602	10,493	12,168	12,025	12,750
Land Rover	–	2,980	5,656	6,573	5,110	7,330	3,138	2,368
Mazda	–	5,200	3,204	6,061	9,189	9,480	8,615	8,519
Mercedes	10,635	15,676	30,007	44,159	51,120	55,140	46,859	46,125
Mitsubishi	–	1,623	3,227	4,798	2,332	4,730	2,053	1,370
Nissan-Infiniti	694	4,982	15,533	23,498	18,101	21,858	26,832	30,361
Opel	6,178	28,218	63,726	75,949	69,812	72,605	64,629	59,335
Rover	–	4,419	7,480	1,482	154	5	0	0
Seat	–	14,367	27,861	26,383	28,882	32,128	30,402	33,170
Skoda	–	–	7,741	12,383	12,627	15,146	15,548	15,362
Suzuki	–	–	3,165	11,978	16,514	17,544	14,240	13,282
Toyota-Lexus	–	3,594	12,282	54,633	58,789	64,843	55,623	43,266
Volkswagen	–	50,975	89,487	106,932	114,029	119,077	129,683	123,629
Volvo	1,198	4,097	4,786	10,252	9,845	12,717	10,590	11,799
TOTAL FOREIGN(2)	**50,815**	**255,477**	**443,774**	**630,955**	**659,298**	**735,756**	**732,910**	**698,673**
TOTAL ALL CATEGORIES	186,034	762,054	1,046,485	1,466,296	1,463,666	1,563,061	1,620,980	1,628,495
of which Temporary Transit	–	–	–	37,259	35,969	37,622	36,542	30,759
% diesel	9.9%	33.0%	49.0%	69.2%	71.5%	74.1%	77.5%	70.7%
French makes (%)	72.7%	66.5%	57.6%	57.0%	55.0%	52.9%	54.8%	57.1%
Foreign makes (%)	27.3%	33.5%	42.4%	43.0%	45.0%	47.1%	45.2%	42.9%

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

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

In units

	1980	1990	2000	2005	2006(3)	2007	2008	2009
Citroën	53,245	80,958	77,048	73,166	74,786	71,901	78,593	66,833
Peugeot	49,318	60,813	74,950	73,778	75,295	81,050	82,256	66,436
PSA Peugeot Citroën(1)	112,231	141,771	151,998	146,944	150,081	152,951	160,849	133,269
Renault	116,602	162,549	139,752	140,059	151,058	150,532	144,750	116,498
Others France	256	415	40	10,076	300	488	460	532
TOTAL FRANCE	**229,089**	**304,735**	**291,790**	**297,079**	**301,439**	**303,971**	**306,059**	**250,299**
Dacia						2	53	5,237
Fiat	8,326	10,139	25,253	12,497	24,321	33,071	36,403	32,373
Ford	9,099	16,080	18,110	19,695	25,024	26,458	24,765	20,197
Hyundai	–	–	588	1,380	1,614	996	659	374
Isuzu			108	1,370	1,654	2,280	1,950	1,711
Iveco	2,941	11,543	16,534	15,721	16,175	18,828	17,845	10,505
Land Rover	645	2,718	1,857	1,256	1,090	1,218	1,211	1,078
Mazda	579	1,067	916	635	745	760	620	424
Mercedes	5,495	11,156	23,139	18,973	20,177	23,422	22,509	16,929
Mitsubishi	–	–	3,392	1,350	3,263	3,766	2,916	2,111
Nissan	861	5,063	5,197	9,746	11,647	10,050	8,449	6,498
Opel	664	2,408	7,561	12,617	12,936	12,646	11,606	6,772
Toyota-Lexus	7,112	6,099	1,771	2,587	3,232	6,204	7,019	4,348
Volkswagen	8,091	9,673	13,819	10,043	11,939	13,178	13,713	11,506
TOTAL FOREIGN(2)	**48,798**	**89,060**	**123,176**	**122,986**	**138,592**	**157,491**	**154,214**	**123,687**
TOTAL ALL CATEGORIES	277,887	393,795	414,966	420,065	440,031	461,462	460,273	373,986
French makes (%)	82.4%	77.4%	70.3%	70.7%	68.5%	65.9%	66.5%	66.9%
Foreign makes (%)	17.6%	22.6%	29.7%	29.3%	31.5%	34.1%	33.5%	33.1%

(1) Including Talbot up to 1985.
(2) Including others.
(3) 2006 and more recent data are not comparable to data from prior years because some models were reclassified to "Other France" and "Foreign".

Registrations

NEW PASSENGER CARS AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY MAKE

The special French Temporary Transit series was included in the new passenger car registrations as of 2004.

In units

	1980	1990	2000	2005	2006[1]	2007	2008	2009
Citroën	324,228	347,780	338,556	348,219	336,834	353,381	374,024	413,270
Peugeot	342,779	559,294	472,497	459,517	456,164	454,353	446,779	458,380
PSA Peugeot Citroën	797,549	907,074	811,053	807,736	792,998	807,734	820,803	871,650
Renault	875,914	801,989	742,167	686,286	639,027	609,881	607,769	633,591
TOTAL FRANCE	**1,673,775**	**1,709,624**	**1,553,323**	**1,504,246**	**1,432,410**	**1,418,172**	**1,429,067**	**1,505,850**
Dacia				9,760	18,753	32,643	43,578	66,454
Fiat	61,473	138,961	121,236	58,654	74,726	86,190	109,907	114,663
Ford	77,525	175,655	135,171	123,292	121,147	129,536	136,893	153,276
Land Rover	882	6,329	9,427	8,202	6,410	8,698	4,388	3,497
Mercedes	19,925	39,761	66,528	73,752	79,058	85,177	74,093	67,856
Nissan-Infiniti	18,561	30,770	36,527	50,604	43,065	42,871	46,751	52,568
Opel	33,373	115,898	141,137	119,079	112,202	112,326	101,396	96,037
Rover	20,812	41,343	13,564	1,982	239	13	0	0
Seat	306	51,999	42,230	33,030	35,464	38,432	35,150	38,813
Toyota-Lexus	20,207	21,938	45,469	90,087	100,449	109,664	99,298	94,668
Volkswagen	83,818	165,644	166,687	146,054	152,742	155,812	158,219	161,898
TOTAL FOREIGN	**477,314**	**993,301**	**995,527**	**1,033,380**	**1,053,366**	**1,152,962**	**1,122,575**	**1,170,534**
TOTAL ALL CATEGORIES	**2,151,089**	**2,702,925**	**2,548,850**	**2,537,626**	**2,485,776**	**2,571,134**	**2,551,642**	**2,676,384**
French makes (%)	77.8%	63.3%	60.9%	59.3%	57.6%	55.2%	56.0%	56.3%
Foreign makes (%)	22.2%	36.7%	39.1%	40.7%	42.4%	44.8%	44.0%	43.7%

(1) See note (3) on page 75.

NEW HEAVY TRUCK (OVER 5T) REGISTRATIONS BY MAKE

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Renault Trucks	17,984	20,453	20,818	18,339	18,805	16,843	19,359	12,158
TOTAL FRANCE	**18,312**	**20,738**	**20,992**	**18,465**	**18,966**	**16,971**	**19,472**	**12,295**
DAF	1,881	3,460	4,365	6,321	5,464	5,995	6,579	3,752
Iveco	6,578	7,204	6,998	5,901	5,795	5,385	5,838	4,120
MAN	327	1,433	3,498	4,545	3,763	5,171	5,530	3,630
Mercedes	8,014	9,500	9,976	9,325	9,119	8,879	9,610	5,482
Scania	1,389	2,711	4,963	4,417	3,893	4,200	4,156	2,176
Volvo	3,724	4,647	6,739	5,870	5,691	5,522	5,739	3,615
TOTAL FOREIGN	**23,534**	**29,290**	**36,924**	**36,819**	**34,157**	**35,568**	**38,032**	**23,238**
TOTAL ALL CATEGORIES	**41,846**	**50,028**	**57,916**	**55,284**	**53,123**	**52,539**	**57,504**	**35,533**
French makes (%)	43.8%	41.5%	36.2%	33.4%	35.7%	32.3%	33.9%	34.6%
Foreign makes (%)	56.2%	58.5%	63.8%	66.6%	64.3%	67.7%	66.1%	65.4%

USED HEAVY TRUCK (OVER 5T) REGISTRATIONS

In units

	1980	1990	2000	2005	2006	2007	2008	2009
TOTAL	**–**	**–**	**59,056**	**55,975**	**55,946**	**55,012**	**54,586**	**49,452**
Used/new ratio	–	–	1.0	1.0	1.1	1.0	0.9	1.4

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

In units

	1980	1990	2000	2005	2006	2007	2008	2009
Renault	2,126	1,692	1,633	–	–	–	–	–
Others France	107	255	367	–	–	–	–	–
Kässbohrer-Setra	479	392	261	–	–	–	–	–
Mercedes	554	245	602	–	–	–	–	–
TOTAL ALL CATEGORIES	**3,558**	**3,160**	**4,320**	**–**	**–**	**–**	**–**	**–**
Irisbus Group[1]	–	–	–	2,459	2,793	2,861	2,914	3,092
Evobus Group[2]	–	–	–	888	915	974	1,346	1,851
Neoman Bus Group[3]	–	–	–	404	475	550	527	658
Bova	–	–	–	198	217	262	155	150
Ponticelli	–	–	–	48	29	1	0	0
Temsa	–	–	–	301	371	343	284	384
Van Hool	57	250	230	238	212	151	157	117
Others	–	–	–	237	231	349	272	412
TOTAL ALL CATEGORIES	**–**	**–**	**–**	**4,773**	**5,243**	**5,491**	**5,655**	**6,664**

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

Vehicle ownership

DENSITY (INTERNATIONAL COMPARISONS)

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

	1985	1995	2000	2009
European Union(1)	380	473	534	586
Germany	450	529	553	538
Belgium	363	463	505	559
Spain	276	430	517	618
France	**446**	**520**	**564**	**598**
Italy	412	541	615	693
United Kingdom	379	474	525	579
Sweden	400	445	481	522
Poland	117	229	287	497
Turkey	27	65	84	134
Canada	559	562	573	618
USA	708	759	774	819
South Korea	25	177	240	347
Japan	375	527	566	591
Argentina	173	167	181	212
Brazil	86	89	109	141
China	3	8	12	38
India	3	6	7	16

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

TOTAL VEHICLES IN USE (1 JANUARY 2010)

In thousands

	All fuels	Diesel
PASSENGER CARS		
Up to 5 hp	12,946	6,721
6 hp to 10 hp	16,583	10,096
11 hp and above	1,521	641
Total passenger cars	**31,050**	**17,458**
LIGHT COMMERCIAL VEHICLES (LCV) UP TO 5 T		
Up to 2.5 t	3,707	3,071
2.5 t to 3.5 t	2,043	2,009
3.6 t to 5 t	10	10
Total LCVs	**5,760**	**5,089**
Total passenger cars and light commercial vehicles	**36,810**	**22,547**
HEAVY TRUCKS OF MORE THAN 5 T		
Trucks		
5 t to less than 12 t	81	81
12 t to less than 16 t	52	52
16 t to less than 20 t	117	117
20 t and over	91	91
Total	**341**	**341**
Road tractors	**202**	**202**
Total trucks	**543**	**542**
Coaches and buses	**85**	**82**
Total commercial vehicles over 5 t	**628**	**625**
Total commercial vehicles all sizes	**6,388**	**5,714**
TOTAL OVERALL	**37,438**	**23,172**

Source: CCFA estimates.

VEHICLE OWNERSHIP

	Units	1980	1990	2000	2005	2006	2007	2008	2009(1)
Households without a vehicle	%	29.2%	23.2%	19.7%	18.8%	18.0%	17.6%	17.3%	16.8%
Households with a vehicle	%	70.8%	76.8%	80.3%	81.2%	82.0%	82.4%	82.7%	83.2%
Households with one vehicle	%	54.3%	50.5%	50.7%	46.4%	46.3%	46.6%	46.9%	47.5%
Households with two vehicles	%	14.8%	23.0%	25.4%	29.4%	30.2%	30.3%	30.5%	30.5%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.4%	5.5%	5.5%	5.3%	5.2%
Average age of vehicle	years		5.90	7.25	7.71	7.9	8.2	8.1	8.0
Average ownership period	years		3.66	4.43	4.73	4.9	4.9	4.9	4.9
% used passenger cars	%		50.0	56.1	59.9	60.8	61.9	61.9	59.6
Total average kilometres	km	12,200	13,041	13,560	12,613	12,430	12,198	12,015	11,793
Average kilometres, gasoline	km	11,600	11,651	10,780	9,546	9,122	8,832	8,658	8,176
Average kilometres, diesel	km	26,200	20,950	18,140	16,174	15,917	15,590	15,106	14,819
DOMESTIC PASSENGER ROAD TRANSPORT									
By passenger car	billion pass./km	452.5	585.6	699.6	727.4	723.8	727.8	720.2	723.9
By coach-bus	billion pass./km	36.0	41.3	43.0	44.2	44.9	47.1	48.6	48.9
Total traffic	billion pass./km	586.9	712.2	838.5	873.4	873.4	881.0	881.5	884.8
Road transport as a % of total traffic	%	83.2	88.0	88.6	88.3	88.0	88.0	87.2	87.3
ANNUAL CHANGE									
By passenger car	%	–	+2.6	+0.0	−1.3	−0.5	0.6	−1.0	0.5
By coach-bus	%	–	+2.7	+3.4	−0.4	1.6	5.0	3.1	0.8

(1) Provisional data.
Sources: Sofres, calculations by INRETS-ADEME, Insee and SOeS.

TOTAL VEHICLES IN USE ON 1 JANUARY

In units

	1980	1990	2000	2006	2007	2008	2009	2010
PASSENGER CARS								
Up to 5 hp	5,090	8,312	10,572	12,096	12,236	12,323	12,537	12,946
6 hp to 10 hp	11,460	13,385	15,723	16,618	16,720	16,864	16,789	16,583
Over 10 hp	1,890	1,313	1,186	1,386	1,444	1,513	1,523	1,521
TOTAL PASSENGER CARS	**18,440**	**23,010**	**27,480**	**30,100**	**30,400**	**30,700**	**30,850**	**31,050**
of which diesel	**730**	**3,265**	**9,261**	**14,348**	**15,143**	**15,922**	**16,753**	**17,458**
COMMERCIAL VEHICLES								
Up to 3.5 t	1,985	4,125	4,974	5,549	5,609	5,680	5,720	5,750
3.5 t to 5 t	103	20	12	11	11	10	10	10
5 t to 20 t	250	334	287	267	264	259	253	250
20 t and over	26	41	46	75	81	86	89	91
Road tractors	129	160	210	213	213	215	206	202
TOTAL COMMERCIAL VEHICLES	**2,493**	**4,680**	**5,529**	**6,115**	**6,178**	**6,250**	**6,278**	**6,303**
of which diesel	**976**	**2,342**	**4,202**	**5,149**	**5,273**	**5,410**	**5,538**	**5,632**
COACHES AND BUSES	**57**	**68**	**80**	**83**	**83**	**83**	**84**	**85**
TOTAL OVERALL	**20,990**	**27,758**	**33,090**	**36,298**	**36,661**	**37,033**	**37,212**	**37,438**
of which diesel	**1,763**	**5,675**	**13,543**	**19,579**	**20,497**	**21,413**	**22,373**	**23,172**

Source: CCFA estimates.

Fuel and taxation, emissions and CO_2

MOTOR FUEL CONSUMPTION, PRICES AND TAXES

	Units	1980	1990	2000	2005	2006	2007	2008	2009
FUEL CONSUMPTION									
Regular gasoline	million liters	4,216	959						
Premium leaded - AVSR	million liters	20,007	19,911	3,924	433	112	26	0	0
Premium unleaded	million liters		3,406	14,329	14,097	13,566	13,037	12,054	10,871
Premium unleaded 95-E10	million liters								727
Total gasoline	**million liters**	**24,223**	**24,276**	**18,253**	**14,529**	**13,678**	**13,063**	**12,054**	**11,598**
Diesel	**million liters**	**11,415**	**20,664**	**32,373**	**36,744**	**37,740**	**39,004**	**38,849**	**38,913**
TOTAL ROAD FUEL	**million liters**	**35,638**	**44,940**	**50,627**	**51,273**	**51,419**	**52,067**	**50,902**	**50,510**

Source: CPDP.

	Units	1980	1990	2000	2005	2006	2007	2008	2009
RETAIL PRICES OF FUEL (ANNUAL AVERAGE)									
Regular gasoline inc. VAT	**€/liter**	**0.49**	**0.80**	**–**	**–**	**–**	**–**	**–**	**–**
Tax as a %	%	57	73	–	–	–	–	–	–
Premium leaded - AVSR	**€/liter**	**0.52**	**0.81**	**1.17**	**1.27**	**–**	**–**	**–**	**–**
Tax as a %	%	57	74	71	67	–	–	–	–
Premium unleaded 98	**€/liter**	**–**	**0.79**	**1.11**	**1.20**	**1.27**	**1.31**	**1.39**	**1.24**
Tax as a %	%	–	71	69	65	62	63	60	65
Gasoline	**€/liter**	**0.52**	**0.81**	**1.12**	**1.18**	**1.24**	**1.28**	**1.36**	**1.21**
Tax as a %	%	57	74	69	67	63	63	61	66
Diesel	**€/liter**	**0.37**	**0.54**	**0.85**	**1.02**	**1.08**	**1.10**	**1.27**	**1.00**
Tax as a %	%	46	61	62	57	55	55	50	59

Source: SOeS.

AUTOMOBILE FLEET EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2009

In thousand tons

	1990	1995	2000	2005	2006	2007	2008	2009[1]	Change 2009-1990	Change 2009-2008
REGULATED POLLUTANTS										
SO_2	139	114	22	4	4	4	4	1	–99%	–75%
CO	6,205	4,454	2,597	1,430	1,215	1,050	904	788	–87%	–13%
NO_x	1,143	1,051	904	763	741	719	662	639	–44%	–3%
COVNM	1,058	805	507	265	225	191	160	136	–87%	–15%
Lead	3,881	1,139	7	0	0	0	0	0	–100%	–
PM10: particulates	65	78	68	55	53	51	48	46	–29%	–5%
OTHER EMISSIONS (In million tons)										
CO_2	109	117	125	127	126	125	119	118	8%	–0%

(1) 2009 estimates.
Source: CITEPA/Secten data, updated February 2010.

CO_2 EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

In million tons of CO_2

	1990	1995	2000	2003	2004	2005	2006	2007	2008	2009[1]
Power production	69	59	65	64	63	68	65	64	62	59
Industry	112	106	104	103	101	101	99	97	94	86
Residential/commercial	84	86	87	90	95	95	89	82	88	84
Transport	116	125	133	136	137	135	134	133	126	126
of which road	***109***	***117***	***125***	***128***	***128***	***127***	***126***	***125***	***119***	***118***
of which other transportation	7.6	7.9	8.3	8.3	8.2	8.2	8.0	8.0	7.9	7.7
Agriculture/sylviculture	10.0	10.3	10.6	10.6	10.7	10.7	10.4	10.3	10.5	10.5
TOTAL EXCLUDING LULUCF[2]	**391**	**387**	**399**	**403**	**406**	**410**	**397**	**387**	**382**	**365**
LULUCF[2]	–41	–56	–54	–73	–75	–78	–78	–78	–76	–76
TOTAL WITH LULUCF[2]	**350**	**331**	**345**	**331**	**331**	**333**	**319**	**309**	**306**	**289**

(1) 2009 estimates.
(2) LULUCF Land Use, Land Use Change and Forestry.
Source: CITEPA/CORALIE/Secten format, April 2010.

AVERAGE CO_2 EMISSIONS OF NEW CARS IN FRANCE AND EUROPE

In grams of CO_2 per km

	1995	2000	2002	2003	2004	2005	2006	2007	2008	2009
France										
Gasoline	177	168	164	163	162	159	155	153	141	131
Diesel	175	155	152	151	149	149	147	148	139	134
TOTAL	**176**	**162**	**155**	**155**	**153**	**152**	**149**	**149**	**140**	**133**
European Union 15 countries										
TOTAL	**186**	**171**	**166**	**164**	**162**	**161**	**161**	**159**	**154**	**146**

Source: ADEME (May 2010).

Foreign trade and automotive taxes

FRENCH AUTOMOTIVE FOREIGN TRADE IN VALUE

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

In € million and % year-on-year change

	New cars		New light commercial vehicles		New heavy trucks		Parts and engines		Automotive industry sector		Used vehicles		Automotive sector	
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%
2005	26,187	–5%	2,630	–8%	2,669	–5%	19,543	1%	51,031	–3%	1,571	0%	52,602	–3%
2008	18,056	–17%	2,447	–14%	3,703	6%	21,154	–6%	45,359	–10%	1,200	–13%	46,560	–10%
2009	13,679	–24%	1,405	–43%	1,809	–51%	16,704	–21%	33,597	–26%	973	–19%	34,570	–26%
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%
2005	20,671	4%	2,969	12%	3,285	6%	15,897	6%	42,822	5%	765	18%	43,587	6%
2008	24,093	–1%	3,421	0%	3,833	5%	17,201	–4%	48,548	–2%	978	0%	49,526	–2%
2009	20,836	–14%	2,100	–39%	2,300	–40%	12,785	–26%	38,022	–22%	1,204	23%	39,226	–21%
Balance (exports–imports)														
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	
2005	+5,517		–338		–616		+3,646		+8,208		+807		+9,015	
2008	–6,038		–974		–130		+3,954		–3,188		+222		–2,966	
2009	–7,157		–695		–491		+3,919		–4,425		–232		–4,656	
Coverage rate (exports–imports 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	
2005	127		89		81		123		119		205		121	
2008	75		72		97		123		93		123		94	
2009	66		67		79		131		88		81		88	

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.

AUTOMOTIVE TAXES AND DUTIES

In € million

	1980	1990	2000	2005	2006	2007	2008	2009
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	32,205	33,294	33,742	34,619	32,261
Automotive insurance tax	478	2,780	3,429	4,057	3,898	3,900	3,933	3,934
Tax on vehicle registration certificates	157	846	1,373	1,623	1,832	1,939	1,968	1,919
Road tax	866	1,901	539	145	19	0	0	0
Tax on company cars	199	345	644	867	1,126	1,140	1,086	1,097
Tax based on number of axles	59	75	223	205	215	216	226	173
Fixed rate police and traffic fines, sentence fines	154	317	720	1,266	1,162	1,163	1,435	1,201
Driver's license tax	88	86	4	–	–	–	–	–
Regional development tax	0	0	442	499	512	526	521	528
Government royalty	–	30	132	154	163	169	174	180
TOTAL	**11,079**	**27,716**	**38,136**	**41,021**	**42,221**	**42,795**	**43,962**	**41,293**
VAT on spending to acquire and use vehicles	–	–	15,300(1)	–	–	–	–	–
Motorway tolls (including VAT)	610	2,592	5,330	7,666	8,193	8,838	9,078	9,305

(1) For 1998.
Sources: Internal Revenue, CCFA, URF, Transport Satellite Account (SOeS), French National Transport Accounting Commission.

Useful addresses

FRENCH AUTOMOTIVE MANUFACTURERS

PSA Peugeot Citroën

Peugeot
75, avenue de la Grande-Armée – 75116 Paris
Tel.: 01 40 66 55 11 – Fax: 01 40 66 54 14
www.psa.fr – www.peugeot.com

Citroën
Immeuble Colisée III – 12, rue Fructidor
75835 Paris Cedex 17
Tel.: 01 58 79 79 79 – Fax: 01 58 79 72 25
www.psa.fr – www.citroen.com

Renault
13-15, quai Le Gallo – 92153 Boulogne-Billancourt Cedex
Tel.: 01 76 84 04 04

Renault Communication
1967, rue du Vieux-Pont-de-Sèvres
92109 Boulogne-Billancourt Cedex
Tel.: 01 76 84 34 34
www.renault.com

Renault Trucks
99, route de Lyon – 69800 Saint-Priest
Tel.: 04 72 96 51 11
Department of International Relations
15, bd de l'Amiral-Bruix – 75016 Paris
Tel.: 01 58 44 19 71 – Fax: 01 58 44 19 75
www.renault-trucks.com

Alpine-Renault
Avenue de Bréauté – 76885 Dieppe Cedex
Tel.: 01 76 86 31 00 – Fax: 01 76 86 34 01

AUTOMOTIVE ORGANISATIONS IN FRANCE

Association française du gaz naturel pour véhicules (AFGNV)
10, rue Saint-Florentin – 75001 Paris
Tel.: 01 42 97 97 99 – Fax: 01 42 97 40 60
www.afgnv.com

Chambre syndicale nationale des carrossiers et constructeurs de semi-remorques et conteneurs (CARCOSERCO)
12, rue Léon-Jost – 75017 Paris
Tel.: 01 44 29 71 14 – Fax: 01 42 67 69 33
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.: 01 53 64 50 30 – Fax: 01 40 67 95 94

Comité d'organisation des salons internationaux de l'automobile, du cycle, du motocycle et des sports (AMC Promotion)
9, avenue Franklin-Roosevelt – 75008 Paris
Tel.: 01 56 88 22 40 – Fax: 01 42 56 50 80

Conseil national des professions de l'automobile (CNPA)
50, rue Rouget-de-l'Isle – 92158 Suresnes Cedex
Tel.: 01 40 99 55 00 – Fax: 01 47 28 44 15
www.cnpa.fr

Fédération des industries d'équipements pour véhicules (FIEV)
77-81, rue Jean-Jacques-Rousseau – 92158 Suresnes Cedex
Tel.: 01 46 25 02 30 – Fax: 01 46 97 00 80
www.fiev.fr

Syndicat des constructeurs de véhicules et de loisirs (SICVERL)
3, rue des Cordelières – 75013 Paris
Tel.: 01 43 37 86 61 – Fax: 01 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.: 01 40 54 20 20 – Fax: 01 47 66 22 74
www.uimm.fr

Union routière de France (URF)
79, rue Jean-Jacques-Rousseau – 92150 Suresnes
Tel.: 01 46 25 00 50 – Fax: 01 46 25 02 62
www.unionroutière.fr

Union technique de l'automobile, du motocycle et du cycle (UTAC)
BP 212 – 91311 Montlhéry Cedex
Tel.: 01 69 80 17 00 – Fax: 01 69 80 17 17
www.utac.com

INTERNATIONAL AUTOMOTIVE ORGANISATIONS

Association des constructeurs européens d'automobiles (ACEA)
85, avenue des Nerviens – 1040 Brussels (Belgium)
Tel.: 00 32 2 732 55 50 – Fax: 00 32 2 738 73 10
www.acea.be

Organisation internationale des constructeurs d'automobiles (OICA)
4, rue de Berri – 75008 Paris
Tel.: 01 43 59 00 13 – Fax: 01 45 63 84 41
www.oica.net

AUTOMOTIVE ASSOCIATIONS IN FRANCE

40 millions d'automobilistes
118, bd Haussmann – 75008 Paris
Tel.: 01 44 90 00 24 – Fax: 01 44 90 96 09
www.40millionsdautomobilistes.com

L'Automobile Club – French Driver's Association
Head office: 5, avenue de la Paix – 67000 Strasbourg
Paris office: 14, avenue de la Grande-Armée – 75017 Paris
Tel.: 08 21 74 11 11
www.automobileclub.org

Fédération française du sport automobile (FFSA)
32, avenue de New-York – 75781 Paris Cedex 16
Tel.: 01 44 30 24 00 – Fax: 01 42 24 16 80
www.ffsa.org

La Prévention routière
6, avenue Hoche – 75008 Paris
Tel.: 01 44 15 27 00 – Fax: 01 42 27 98 03
www.preventionroutiere.asso.fr

Société des ingénieurs de l'automobile (SIA)
79, rue Jean-Jacques-Rousseau – 92158 Suresnes Cedex
Tel.: 01 41 44 93 70 – Fax: 01 41 44 93 79
www.sia.fr