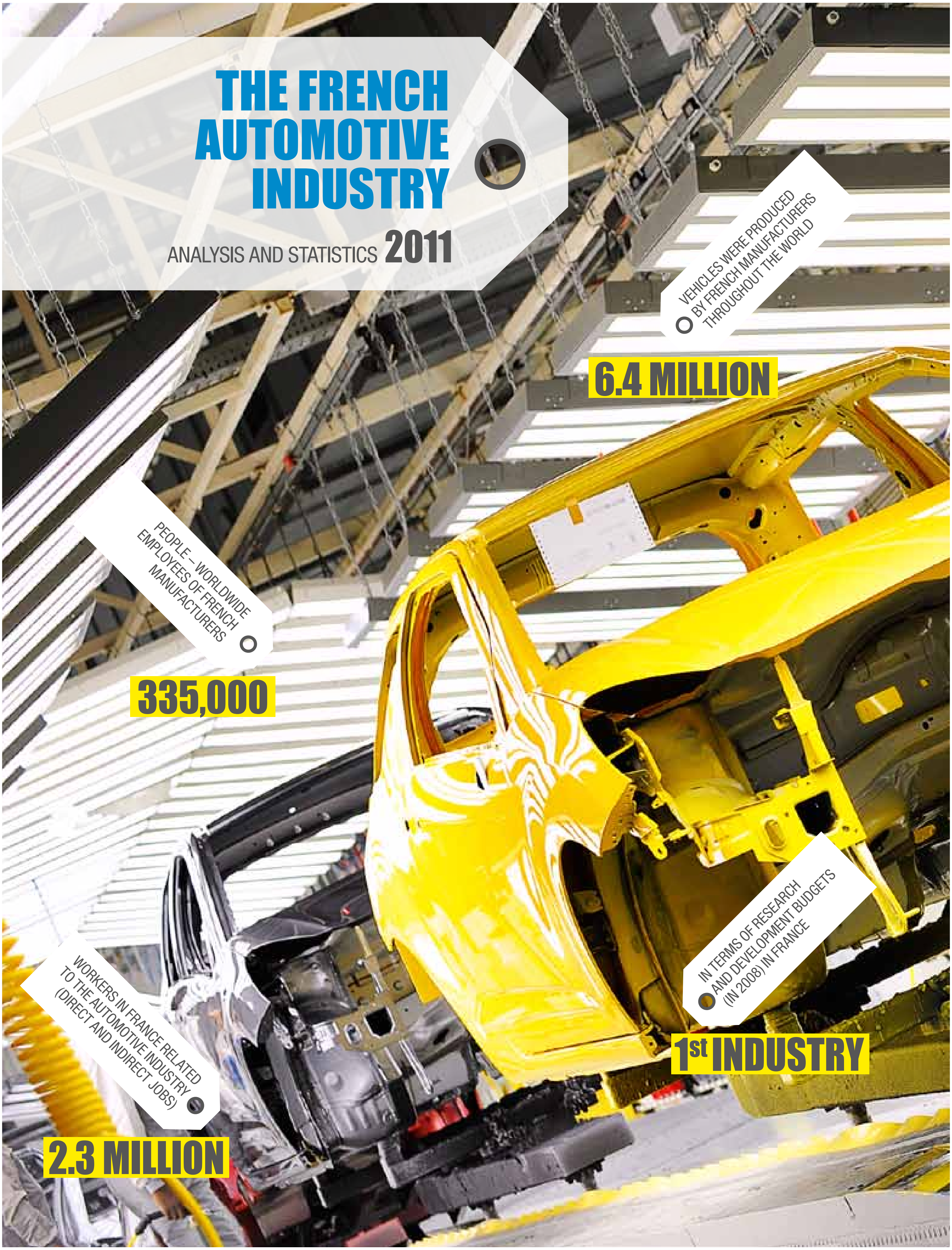
THE FRENCH AUTOMOTIVE INDUSTRY

ANALYSIS AND STATISTICS 2011



VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS THROUGHOUT THE WORLD

6.4 MILLION

PEOPLE – WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

335,000

IN TERMS OF RESEARCH AND DEVELOPMENT BUDGETS (IN 2008) IN FRANCE

1st INDUSTRY

WORKERS IN FRANCE RELATED TO THE AUTOMOTIVE INDUSTRY (DIRECT AND INDIRECT JOBS)

2.3 MILLION

Comité des Constructeurs Français d'Automobiles

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"2010: French manufacturers have tackled the crisis; growth in emerging economies is rapidly expanding, but the industry is still facing competitiveness problems in France."

Patrick Blain
Chairman of CCFA

Dear Sir/Madam,

In 2010, the economic situation recovered and the world automotive industry returned to record production levels with over 77 million vehicles manufactured. However, very different results were achieved by region: the European Union, NAFTA and Japan remained at lower levels than before the crisis, while production in emerging regions such as China and South America reached historically maximum levels. The geography of the automotive industry shifts quickly, and in 2010 more than half of the world's output was from Asia, compared with 30% in 2000.

In this context, French manufacturers produced 6.4 million vehicles, which is a new record in terms of volume. Operations returned to a "normal" trend following the extremely harsh crisis of 2009. French manufacturers continue to rely on the European market as their mainstay. Here, despite very intense competition, they have increased their market share (+1.6 point to 25.3% for light vehicles), while also increasing their sales in emerging economies.

In France, automotive output rose by 9% to more than 2.2 million vehicles. The activity of the automotive branch, which represents equipment manufacturers as well as other suppliers, has benefited from this situation. The work of the Automotive Branch Platform (PFA - *Plateforme de la Filière Automobile)*, set up in 2009 by French automotive manufacturers, represented by the CCFA, and their suppliers, is yielding results. It is organized around four 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.

Despite the crisis, the automotive industry has continued to be the leading sector in terms of investment in research and development and patent applications in France. Government measures to support innovation such as Research Tax Credits and the consolidation of automotive competitiveness clusters (which have already produced more than one hundred projects) represent efficient levers for the future of our industry. Future investments, including future transportation and therefore automobiles, will complement this virtuous strategy. In general terms, the automotive industry remains an important sector in France since, as shown by regional studies conducted by the Insee and the ARIA (*Associations Régionales de l'Industrie Automobile)*, the economy of the automotive branch is made up locally of the workforce of the manufacturers (direct jobs) plus the workforce of all the suppliers (indirect jobs) and those who depend on the latter (induced jobs).

The outlook for 2011 seems encouraging with the combined effect of continued growth in emerging economies and the strengthening of French manufacturers abroad. However, many difficulties should be taken into account: the uncertainty of growth remains, raw materials are still very expensive, the Fukushima accident has had major repercussions… In France, the dangerous problem of competitiveness endures. In 2009, the Public Authorities organized an Industry Convention which drew up a report on the competitiveness of French industry compared with other Eurozone countries; they mainly highlighted the heavy toll social security contributions have on employees and the raising costs of employment since 2000, as well as tax conditions for manufacturing. In 2010, these analyses were confirmed and these handicaps represent major obstacles to the competitiveness of French automakers, as there are many production sites in France, mainly supplied by French suppliers, who are also penalized by this unfriendly environment.

The 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 the support of its members, it makes its voice heard in such large business organizations as MEDEF, UIMM and GFI, as well as in specialized organizations such as URF and GERPISA. Internationally, it defends French interests in OICA and EAMA, 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.

VEHICLES WEREPRODUCED BY FRENCH MANUFACTURERS THROUGHOUT THE WORLD

6.4 MILLION

335,000
PEOPLE – WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

75%
OF VEHICLES PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

25%
SHARE OF FRENCH MANUFACTURERS IN SALES OF NEW PASSENGER CARS IN WESTERN EUROPE

39%
SHARE OF FRENCH MANUFACTURERS IN SALES OF LIGHT COMMERCIAL VEHICLES IN WESTERN EUROPE

9%
OF ALL INDUSTRIAL VEHICLES SOLD IN WESTERN EUROPE ARE FRENCH

2.4 MILLION
PEOPLE WERE EMPLOYED IN THE AUTOMOTIVE INDUSTRY IN EU-27 IN 2008

1st INDUSTRY
IN TERMS OF RESEARCH AND DEVELOPMENT BUDGETS (IN 2008) IN FRANCE

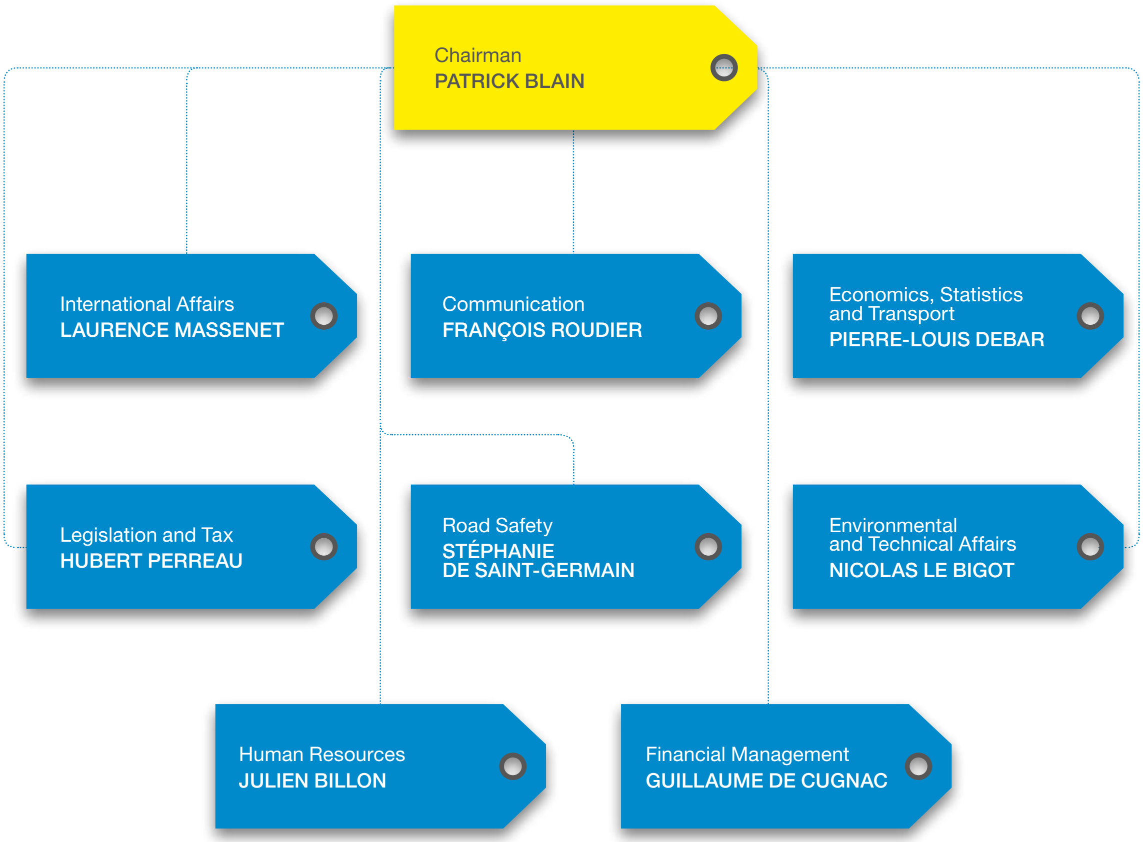
2.3 MILLION
WORKERS IN FRANCE RELATED TO THE AUTOMOTIVE INDUSTRY (DIRECT AND INDIRECT JOBS)

88%
OF DOMESTIC PASSENGER TRIPS ARE MADE BY ROAD

85%
OF DOMESTIC GOODS WERE TRANSPORTED BY ROAD IN 2010

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 and 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 on both 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, CARCOSERCO, *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.).
In 2009 in a period of financial crisis, French automobile manufacturers and their suppliers came together within the CLIFA (Liaison Committee of Automotive Suppliers) to establish the Automotive Branch Platform (PFA – *Plateforme de la Filière Automobile*).
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.



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2010: WITH A RETURN TO GLOBAL GROWTH, FRENCH MANUFACTURERS' PRODUCTION REACHED NEW HEIGHTS

With a return to world growth, French manufacturers rubbed out the sharp falls posted in 2008 and 2009 associated with the economic and financial crisis. Compared to 1997, production grew by 57% to nearly 6.4 million vehicles, reaching new heights. More than ever before, this growth has its roots outside Western Europe. After a drop of 350,000 vehicles in 2009, production grew by 800,000 to over 2.7 million; in 1997, figures stood at only 659,000 vehicles. These areas where the level of vehicle ownership is generally much lower than in Western Europe represent markets of large potential within which investments must continue and increase. The market in Western Europe, a mature automobile zone, remains the base market for French manufacturers. Figures grew by 380,000 over the period, to 3.7 million vehicles. In France, numbers rose to 430,000 vehicles and a rise in market share helped limit the downturn elsewhere in Europe. To weather the development of overseas competition, French manufacturers continued to invest in France, in research and development and also plants.

KEY DATA

In thousands

	1997	2009	2010	Change 2010-2009	Change 2010-1997
World production of French manufacturers	**4,046**	**5,363**	**6,353**	**18.5%**	**57.0%**
Passenger cars	3,472	4,807	5,610	16.7%	61.6%
Light commercial vehicles	507	535	711	32.9%	40.1%
All light vehicles	3,979	5,342	6,321	18.3%	58.9%
Heavy trucks (at constant scope)	36	21	32	52.4%	–10.6%
Production of French manufacturers in France	**2,525**	**1,691**	**1,939**	**14.6%**	**–23.2%**
Passenger cars	2,235	1,490	1,666	11.8%	–25.5%
Light commercial vehicles	258	181	243	34.3%	–5.7%
All light vehicles	2,493	1,671	1,909	14.3%	–23.4%
Heavy trucks (at constant scope)	30	21	30	44.2%	0.0%
Automotive exports outside France	**2,822**	**3,883**	**4,786**	**23.3%**	**69.6%**
Passenger cars	2,526	3,542	4,306	21.6%	70.5%
Light commercial vehicles	276	329	460	39.8%	66.5%
All light vehicles	2,802	3,871	4,766	23.1%	70.1%
Heavy trucks (at constant scope)	20	12	21	71.9%	5.1%
Automotive exports outside Europe (17 countries)	**659**	**1,909**	**2,717**	**42.3%**	**312.5%**
Passenger cars	563	1,779	2,525	41.9%	348.8%
Light commercial vehicles	88	123	180	46.5%	103.4%
All light vehicles	651	1,902	2,705	42.2%	315.5%
Heavy trucks (at constant scope)	8	7	12	62.0%	56.3%
Automotive registrations in France	**2,068**	**2,719**	**2,709**	**–0.4%**	**31.0%**
Passenger cars	1,713	2,302	2,252	–2.2%	31.4%
Light commercial vehicles	313	374	418	11.7%	33.5%
All light vehicles	2,026	2,676	2,669	–0.3%	31.8%
Heavy trucks (at constant scope)	39.3	35.5	34.2	–3.7%	–12.9%
Coaches and buses	3.1	6.7	5.4	–19.2%	72.3%
French-make automotive registrations in Europe (17 countries)	**3,300**	**3,582**	**3,678**	**2.7%**	**11.5%**
Passenger cars	2,841	3,055	3,081	0.9%	8.5%
Light commercial vehicles	432	507	577	13.8%	33.6%
All light vehicles	3,273	3,562	3,658	2.7%	11.8%
Heavy trucks (at constant scope)	27	21	20	–3.2%	–26.7%

	Units	2009	2010	Change 2010-2009
Market share of French groups (new light vehicles)				
In France (makes)	in percentage	58.7%	60.5%	+1.8 point
In Europe outside France	in percentage	16.2%	17.3%	+1.2 point
In Europe	in percentage	23.8%	25.3%	+1.6 point
Market share of French makes (new industrial vehicles)				
In Europe	in percentage	10.0%	9.5%	−0.5 point
French manufacturers position in world production (PSA Peugeot Citroën, Renault-Dacia-Samsung and Renault Trucks)				
Passenger cars	in percentage	10.1%	9.6%	−0.5 point
Commercial vehicles	in percentage	4.0%	3.8%	−0.1 point
Total	in percentage	8.7%	8.2%	−0.5 point
French automobile international trade				
Exports	in € billions	34.6	40.7	+17.6%
Imports	in € billions	39.2	44.2	+12.6%
Balance	in € billions	−4.7	−3.5	1.2
Automotive industry contribution to foreign trade goods balance				
Exports	in percentage	10.1%	10.5%	0.4 point
Imports	in percentage	9.8%	9.7%	−0.1 point
World key figures for French manufacturers (PSA Peugeot Citroën + Renault)				
Sales	in € billions	82.1	95.0	+15.7%
Capital expenditure	in € billions	3.3	2.8	−14.6%
No. of employees	in thousands of people	308	321	+4.3%
Jobs related to the automotive industry in France				
Automotive industry	in thousands of people		220	
As a % of the manufacturing and energy industry	in percentage		8%	
Total (directly and indirectly related)	in thousands of people		2,359	
As a % of the employed working population	in percentage		9%	

After the historic fall in 2009 caused by the economic and financial crisis, world GDP growth return to the high levels it enjoyed until 2007. Similarly to previous years, the development differed between OECD countries where GDP rose by 3% and developing countries (+7 to 8%), steered by China and India in Asia and also Brazil and Argentina in South America. The recoveries in Eastern Europe, particularly in Russia did not erase the drop in 2009. The price of raw materials grew throughout 2010 and with increases noted since early 2011, the high prices of 2008 were nearly reached, as with oil for example. These developments have limited consumer purchasing power; consumers have been affected in developed countries by the effects of this crisis, with the high unemployment levels affecting their confidence. For businesses, a return to investment began.
In this context of a collapse of Western Europe's base market in terms of the levels observed prior to the crisis, French automobile manufacturers must deal 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 other main countries. Despite everything, they must 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 economic and financial environment, in 2010 the world's automobile market reached a new high of 75 million vehicles; supported for the most part by the strong growth of developing countries. In Western Europe, new car markets fell due to the end of the different government plans for scrap incentives, whilst commercial vehicle markets returned to growth. French manufacturers managed to raise their penetration in a context of increased competition while continuing to manage their stocks.
In Eastern Europe, the industry returned to growth, driven by Russia and Turkey. However, to satisfy vehicle ownership requirements, French manufacturers continued to develop commercially and industrially in this area whose opportunities should eventually grow. The PSA Peugeot Citroën and Mitsubishi plant in Russia produced its first vehicles and Renault is developing a strategic partnership with the Russian manufacturer AvtoVAZ, now part of Nissan. In Asia, the car market continued to develop strongly. Beyond China, the world's leading automobile market since 2009, growth was observed in many other countries such as India, Thailand and Indonesia. Market opportunities for French manufacturers grew healthily in this area, and today exceed 1.2 million vehicles. The search for investment (PSA Peugeot Citroën with its partners in China and Renault in India) and renewed, adapted vehicle ranges should support this future growth.
In Latin America where markets have reached all new highs, French manufacturers' sales have enjoyed strong growth at nearly 650,000 vehicles, for the first time exceeding those destined for Eastern Europe, including Turkey. New investments have been voted by the French companies to attempt to return to automobile development in this region.
Finally, French manufacturers have managed to sell 200,000 vehicles in Africa.

+57%

INCREASE IN WORLD PRODUCTION BY FRENCH AUTOMOTIVE MANUFACTURERS SINCE 1997

WORLD MOTOR VEHICLE PRODUCTION

In 2010, world vehicle production grew by 26% to 77.9 million vehicles, a new record. In volume, this increase represents over 16 million vehicles and follows the drop of 9 million units recorded in 2009. Production varies a great deal, overreacting when compared to world growth (–0.8% in 2009 +4.8% in 2010). In developed areas, production levels are below those of 2007 (Western Europe: –17%, NAFTA: –21%, Japan: –17%) except for South Korea (+5%).

In emerging countries or regions currently the main areas for growth in the automotive industry, production is much higher than before the crisis. In 2010, it grew by 32% compared to 2007 in Asia-Pacific (doubling in China) and 20% in Latin America.

WORLD MOTOR VEHICLE PRODUCTION

	Passenger cars				Commercial vehicles				Total		Change
	2009		2010		2009		2010		2009	2010	2010-2009
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**15,247**	**31.9**	**17,266**	**29.5**	**1,809**	**12.9**	**2,557**	**13.2**	**17,056**	**19,823**	**16.2**
of which:											
Western Europe	11,038	23.1	12,139	20.8	1,205	8.6	1,687	8.7	12,243	13,826	12.9
Germany	4,965	10.4	5,552	9.5	245	1.7	354	1.8	5,210	5,906	13.4
Belgium	525	1.1	529	0.9	13	0.1	26	0.1	537	555	3.3
Spain	1,813	3.8	1,914	3.3	357	2.5	474	2.4	2,170	2,388	10.0
France	1,819	3.8	1,924	3.3	228	1.6	305	1.6	2,048	2,229	8.9
Italy	661	1.4	573	1.0	182	1.3	265	1.4	843	838	–0.6
United Kingdom	999	2.1	1,270	2.2	91	0.6	123	0.6	1,090	1,393	27.8
Sweden	129	0.3	177	0.3	28	0.2	40	0.2	156	217	38.8
Central and Eastern Europe	3,698	7.7	4,524	7.7	245	1.7	378	2.0	3,944	4,902	24.3
Turkey	511	1.1	603	1.0	359	2.6	491	2.5	870	1,095	25.9
North and South America	**6,954**	**14.6**	**8,477**	**14.5**	**5,608**	**40.0**	**8,164**	**42.1**	**12,562**	**16,641**	**32.5**
of which:											
NAFTA (1)	3,961	8.3	5,090	8.7	4,822	34.4	7,087	36.6	8,783	12,178	38.7
South America	2,993	6.3	3,387	5.8	786	5.6	1,077	5.6	3,779	4,464	18.1
Asia-Pacific	**25,290**	**52.9**	**32,389**	**55.4**	**6,470**	**46.2**	**8,512**	**43.9**	**31,760**	**40,901**	**28.8**
of which:											
Japan	6,862	14.4	8,307	14.2	1,072	7.6	1,319	6.8	7,934	9,626	21.3
China	10,384	21.7	13,897	23.8	3,407	24.3	4,368	22.5	13,791	18,265	32.4
South Korea	3,158	6.6	3,866	6.6	355	2.5	406	2.1	3,513	4,272	21.6
India	2,175	4.6	2,815	4.8	466	3.3	722	3.7	2,642	3,537	33.9
Africa	**282**	**0.6**	**346**	**0.6**	**132**	**0.9**	**147**	**0.8**	**413**	**493**	**19.3**
TOTAL	47,773	100.0	58,479	100.0	14,019	100.0	19,379	100.0	61,792	77,858	26.0
CHANGE 2010-2009			+22.4%				+38.2%			+26.0%	

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

77.9 million
NEW RECORD OF THE NUMBER OF VEHICLES PRODUCED IN THE WORLD IN 2010

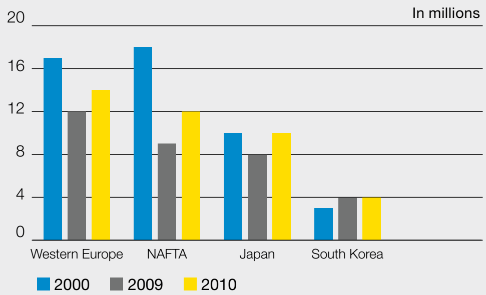
In 2010, production of passenger vehicles increased by 22%. Production of commercial vehicles was greatly affected by the crisis and grew strongly (+38%). This contrast was reflected in Europe (respectively +13% and +41%) and, to a lesser extent, in the Americas (respectively +22% and +46%) and Asia-Pacific (respectively +28% and +32%).
By country and including all vehicles, production increased in all Western European countries except for Finland (–39%) and Italy (–1%). This rise stretched from +9% in France to +45% in Austria, with +13% in Germany and +28% in the United Kingdom. In the Americas, production grew in most countries. In Asia-Pacific which now represents over half the world's production, development of production growth continued in Thailand (+65%), India (+34%), China (+32%) and Iran (+15%). Production in Indonesia (+51%) and Malaysia (+16%) bounced back after falling in 2009 (respectively –23% and –8%).

WORLD MOTOR VEHICLE PRODUCTION

Between 2000 and 2010, the world's production of vehicles (77.9 million) grew by 20 million units representing over 30% growth compared to 26% in 2007, the previous year for a record production level.
In developed regions and countries, production fell by 8 million vehicles to 40 million (–17%); around 70% of this reduction was observed in 2009. These regions represent only 51% of the world's production, more than 30 points less than in 2000. Within these regions, production in North America fell by 30% (–6 million), in Western Europe by over 3 million and in Japan by over 500,000 million whilst it grew in South Korea (+1.2 million, i.e. +37%) as this country enjoyed privileged exchange rate developments.
In developing regions and countries, production grew by 27 million vehicles, relying on the following five zones: China (+16.2 million), which represented 24% of world production in 2010, against less than 4% in 2000; Turkey and Central and Eastern Europe (+2.9 million and a market share of 8%, against 5%), Indonesia, Iran, Malaysia and Thailand (+3.2 million and a market share of 6% against 2%), South America (+2.3 million and a market share of 6% against 4%) and India (+2.7 million and a market share of 5% against 1%). Overall, the market share of these emerging countries or regions rose from 16% to 47% in this period.

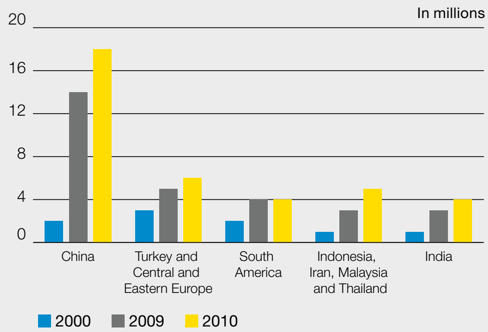
WORLD PRODUCTION OF ALL VEHICLES

DEVELOPED REGIONS AND COUNTRIES

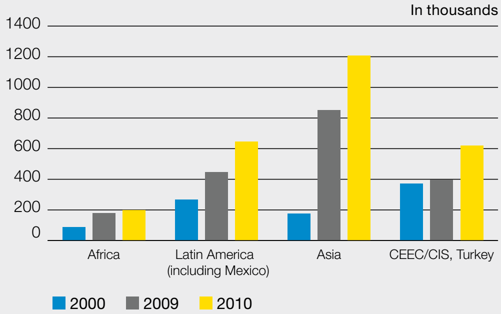


Sources: CCFA, OICA.

EMERGING REGIONS AND COUNTRIES

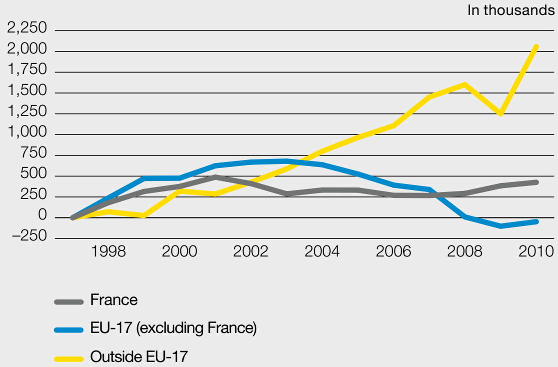


EVOLUTION OF MARKETS FOR FRENCH MANUFACTURERS OUTSIDE OF EU-17: ALL VEHICLES



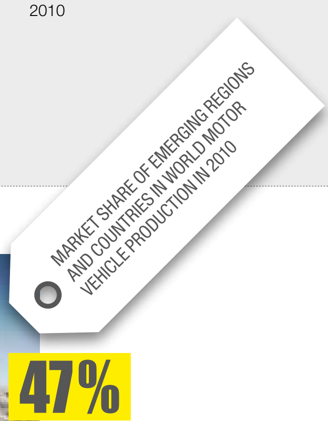
Source: CCFA.

WORLD MARKETS OF FRENCH MANUFACTURERS: EVOLUTION COMPARED WITH 1997



Source: CCFA.

In this context of changing world production, French manufacturers substantially increased exports to these regions. They grew by nearly 1.8 million units between 2000 and 2010, excluding EU-17 countries, to reach 2.7 million vehicles. Exports also increased by around 250,000 units in Turkey and countries in Central and Eastern Europe, by over 110,000 vehicles in Africa, by 380,000 in Latin America including Mexico and by 1,000,000 in Asia. Export growth was less significant in 2009, the year of the crisis, particularly to Turkey and countries in Central and Eastern Europe (+30,000) and Latin America including Mexico (+180,000).



WORLD RANKINGS OF AUTOMOBILE MANUFACTURERS

French manufacturers were able to strengthen their presence in dynamic developing areas. They could thus limit the backlash of the end of the government scrap incentive schemes that had stimulated their sales on the base market in Europe in 2009. PSA Peugeot Citroën held the position of eighth in the world with production of 3.6 million vehicles, up by 19%. Renault continued to develop synergies through its alliance with Nissan and built nearly 2.7 million vehicles (+18%) and is ranked tenth. Production by French manufacturers represented 8.2% of world production, less than the highest level reached in 2001 with 9.8% but more than 7.3% in 1997.

WORLD PRODUCTION IN 2010 In thousands of vehicles	World ranking	All vehicles [1]	Passenger cars	Light commercial vehicles [2]	Heavy trucks [2]	Coaches and buses [2]
Toyota–Daihatsu–Hino [3]	1	8,557	7,268	1,080	204	5
General Motors (Opel–Vauxhall–GM Daewoo)	2	8,476	6,267	2,198	1	10
Volkswagen Group	3	7,341	7,121	221	–	–
Hyundai–Kia	4	5,765	5,247	394	–	124
Ford	5	4,988	2,959	1,963	67	–
Nissan	6	3,982	3,142	769	71	–
Honda	7	3,643	3,592	51	–	–
PSA Peugeot Citroën	**8**	**3,606**	**3,215**	**391**	**–**	**–**
Suzuki–Maruti	9	2,893	2,503	390	–	–
Renault–Dacia–Samsung	**10**	**2,716**	**2,396**	**320**	**–**	**–**
Fiat–Iveco–Irisbus	11	2,410	1,781	499	91	38
Daimler (including Evobus and Fuso)	12	1,940	1,351	221	307	61
Chrysler	13	1,578	340	1,231	7	–
BMW (including Mini)	14	1,481	1,481	–	–	–
Mazda	15	1,308	1,234	73	1	–
Mitsubishi	16	1,174	1,057	114	3	–
Chana Automobile Liability (excluding Ford)	17	1,103	929	173	–	–
Tata (Telco. Jaguar. Land Rover)	18	1,011	579	237	171	24
FAW Group (excluding VW, Toyota)	19	896	781	93	21	1
Zhejiang Geely	20	802	802	–	–	–
Chery Auto	21	692	685	7	–	–
Fuji (Subaru)	22	650	595	54	–	–
Dongfeng (excluding PSA, Honda, Kia)	23	650	350	239	59	2
Beijing Automotive	24	616	13	571	29	3
AvtoVAZ	25	546	546	–	–	–
BYD	26	521	521	–	–	–
Isuzu	27	488	–	33	453	2
Anhui Jac Automotive	28	439	201	188	51	–
Brilliance	29	434	227	204	3	–
Great Wall Motor	30	399	294	104	–	–
SAIC-Ssangyong-Nanjing (excluding GM, VW)	31	347	240	106	0	–
Mahindra & Mahindra	32	292	167	124	1	–
Hafei Motor	33	216	154	61	–	–
Volvo–**Renault Trucks**–Mack–UD Trucks	34	192	–	9	171	12
Jiangxi Changhe	35	191	155	36	–	–
Jiangxi Jiangling Automotive	36	174	0	173	–	–
Proton	37	172	143	29	–	–
Hunan Jiangnan Automobile	38	136	136	–	–	–
MAN	39	128	–	–	112	16
Chongqing Lifan	40	126	71	46	10	–
Fujian Motor	41	126	116	7	3	0
Kuozui	42	122	115	4	4	–
Shandong Kaima	43	108	–	99	9	–
Porsche	44	96	96	–	–	–
Chen Zhou Gonow Nanyan Chifeng Motor Vehicle	45	92	49	43	–	–
Ziyang Nanjun Motor	46	82	–	48	33	1
Rongcheng Huatai Motor	47	81	81	–	–	–
Total for manufacturers listed		**74,781**	**59,812**	**12,772**	**1,897**	**301**
Others manufacturers (China, India, Russia, Poland, Turkey...)		3,076				
TOTAL PRODUCTION		77,858				

(1) There may be double accounts between manufacturers. (2) Non-standard weight limits. (3) Of which Daihatsu had 824,000 and Hino 110,000. Sources: CICA, CCFA.

8.2%
SHARE OF FRENCH MANUFACTURERS IN WORLD MOTOR VEHICLE PRODUCTION IN 2010

In this context of a return to growth, world production grew by 26%. Variations in growth differ greatly depending on the geographical area. Production levels in developed areas are below those of 2007 except for South Korea, whilst Asia-Pacific and Latin America are enjoying strong growth.
The Toyota Group (+18%), as since 2006, took first place ahead of General Motors (+31%). The Volkswagen Group (+21%) consolidated its third place in 2007 ahead of Ford (+6%), whose production no longer includes Jaguar, Land Rover and Volvo.
Amongst the Asian manufacturers, Hyundai-Kia, whose production grew by 24%, climbed a place to position itself about Ford. Nissan (+45%) and Suzuki-Maruti (+21%) also rose in the rankings. However, Honda remains in seventh place. The trend among leading European manufacturers was positive except for Fiat (–2%): Daimler (+34%) and BMW (+18%) enjoyed a strong recovery after being more affected by the recession than the general manufacturers. Production of French groups PSA Peugeot Citroën (+19%) and Renault (+18%) also improved. Manufacturers from developing countries (China, India, Iran) enjoyed significant growth.

WORLD AUTOMOTIVE MARKETS

After an 8% drop between 2007 and 2009 caused by the financial and economic crisis, the world automotive market bounced back to 75 million vehicles (+14%, or 9.4 million more vehicles) establishing a new record.

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 18.3 million vehicles (+34%, or +4.6 million vehicles), compared to 9 million in 2008. Its status as the world's leading automotive market achieved in 2009 is affirmed once again.

After a drop of 7 million vehicles in 2009, new vehicle registrations (outside China) rose by nearly 5 million vehicles in 2010. The main factors are the following: recovery of commercial vehicles, recovery of the American market and growth in developing areas. In developing areas, the South American and Asian markets excluding the three major countries (China, Japan and South Korea) which fell in 2009 grew dynamically, establishing new record heights. Despite the upturn in 2010, Central and Eastern Europe however remained far from their previous levels. In major industrialized countries where demand for cars is now mature, post-crisis situations vary greatly.

In NAFTA (USA, Canada and Mexico), sales recovered. Despite the upturn for commercial vehicles, Western Europe's figures fell, in line with the end of the government scrap incentive schemes. These schemes temporarily supported the Japanese market in 2010. For these three zones, the markets remained much lower than the previous levels.

WORLD AUTOMOTIVE MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2009		2010		2009		2010		2009	2010	2010-2009
	Thousands	%	Thousands	%	Thousands	%	Thousands	%	Thousands	Thousands	%
EUROPE	**16,639**	**33.5**	**16,457**	**29.5**	**2,147**	**13.5**	**2,450**	**12.7**	**18,786**	**18,907**	**+0.6**
of which:											
Western Europe	13,664	27.5	12,975	23.2	1,563	9.8	1,712	8.9	15,227	14,687	–3.5
Central and Eastern Europe	2,976	6.0	3,482	6.2	584	3.7	738	3.8	3,560	4,220	+18.6
AMERICA	**10,288**	**20.7**	**11,092**	**19.9**	**7,113**	**44.7**	**8,472**	**44.0**	**17,401**	**19,565**	**+12.4**
of which:											
NAFTA (1)	6,569	13.2	6,834	12.2	6,291	39.5	7,369	38.3	12,860	14,202	+10.4
USA	5,401	10.9	5,635	10.1	5,200	32.7	6,137	31.9	10,601	11,772	+11.0
South America	3,719	7.5	4,259	7.6	822	5.2	1,104	5.7	4,541	5,362	+18.1
ASIA-PACIFIC	**22,011**	**44.3**	**27,407**	**49.1**	**6,315**	**39.7**	**7,934**	**41.2**	**28,326**	**35,341**	**+24.8**
of which:											
China	10,593	21.3	14,159	25.4	3,078	19.3	4,130	21.4	13,671	18,289	+33.8
South Korea	1,235	2.5	1,308	2.3	231	1.5	248	1.3	1,466	1,556	+6.2
Japan	3,905	7.9	4,203	7.5	704	4.4	753	3.9	4,609	4,956	+7.5
Other Asia-Pacific	6,278	12.6	7,736	13.9	2,302	14.5	2,803	14.6	8,580	10,539	+22.8
AFRICA	**801**	**1.6**	**895**	**1.6**	**352**	**2.2**	**404**	**2.1**	**1,153**	**1,298**	**+12.6**
TOTAL	**49,738**	**100.0**	**55,851**	**100.0**	**15,927**	**100.0**	**19,260**	**100.0**	**65,666**	**75,111**	**+14.4**
Change 2010-2009			12.3%				20.9%			14.4%	

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

In the United States, the consequences of the financial crisis, which had called a halt to household consumption, were less heavy and the market recovered with 11.8 million vehicles compared to over 17 million between 2004 and 2006.

In Western Europe, the market dropped for the third consecutive year to 14.7 million vehicles compared to 17.3 in 2007. The passenger car market fell by 5% caused by the end of the different government scrap incentive schemes. The commercial vehicle market grew by 10%, but still remained below the record level of 2007. For all vehicles, country–to–country variations are great with –21% in Germany and +47% in Ireland, –8% in Italy, stability in France, +3% in the United Kingdom and +4% in Spain.

In Central and Eastern Europe, strong growth continued in Turkey at nearly 800,000 vehicles. With the launch of the government scrap incentive scheme, the Russian market grew to 2 million vehicles whilst the Ukrainian market remained stable at a low level, after its collapse in 2009.

In Japan, sales jumped to nearly 5 million vehicles, a level similar to those of the end of the 1970s; this recovery can be explained by commercial vehicles and the launch of a scrap incentive scheme. Despite the end of a similar scheme in South Korea, new South Korean cars continued their growth at over 1.5 million vehicles.

In Asia–Pacific and excluding the three major countries (China, Japan and South Korea), the slight drop in 2009 was replace by strong growth at 23% with over 10 million vehicles. Growth was exponential in India, Indonesia, Malaysia, Thailand and Iran, as these markets reached new heights.

In South America, car ownership continues to expand and the markets rose by 18%. Sales increased in Argentina by 43% and 12% in Brazil. These markets also reached new record high levels.

In Africa, where volumes are lower, the markets recovered: strong growth was noted in South Africa and Egypt, but North African countries continued to fall.

24%
CHINA'S SHARE OF WORLD SALES IN 2010

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

Leader for many years, in 2010 the European Union (27 countries) became the world's second production zone, whilst remaining open. Production and exports recovered without returning to their pre-crisis levels, but imports continued to fall: amongst other things, the yen's strength compared to the euro continued and Hyundai-Kia's plants in Eastern Europe produced over 400,000 vehicles.

In North America including Mexico, production essential for the local market remained far below its levels prior to the crisis. The situation of the three major countries grew on their domestic market, whilst imports grew slightly. Exports remain the driver behind Japanese production: they represented 50%. Imports still only account for less than 5% of total car registrations. Beyond these three historical poles, China, which became the leading producing country in 2010, essentially only produced to satisfy its domestic market; imports, like exports, represent less than 5% of production.

TRENDS IN PRODUCTION AND TRADE AMONG THE THREE LEADING WORLD 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
2010	15,284	120	5,090	71	8,307	85
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%
2010	1,800	12%	2,310	45%	186	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%
2010	3,050	20%	600	12%	4,272	51%
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
2010	1,819	114	7,087	156	1,319	37
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%
2010	310	17%	1,136	16%	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%
2010	280	15%	80	1%	566	43%

(1) The number of countries included in the "European Union" corresponds to the number of member countries in the year in question.
(2) Trade within the EU not included.
(3) Source: Ward's Automotive Reports as of 1999: Mexico is included from 2009.
Sources: Eurostat, CCFA since 1991.

50%
PERCENTAGE OF VEHICLES MANUFACTURED FOR EXPORT IN JAPAN IN 2010

Trends in the three leading world automotive markets have contrasted sharply since 1990.
In the European Union (currently 27 countries) growth in vehicle production was 19% (compared to +38% in 2007) and trade, already important, appears up by nearly 50%.
In North America including Mexico since 2009, production exceeded 4%, its level in 1990. Imports which were already significant in 1990 and continued to grow were very close to those of 1990 for a much smaller market.
Exports only represented 6% of production (19% for the EU and 50% for Japan).
Finally, in Japan, vehicle production fell by 28% due to the shrinking domestic and export markets (despite the recovery in 2010). Previously, these markets which had suffered a decade of falls until 2001 (29% lower than 1990) grew as the yen weakened and in 2008 were 15% higher than in 1990. In 2010 they were 17% lower.

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

After many years of sustained growth, world trade in automotive products (according to the WTO) fell by 32% in 2009 at 847 billion dollars, a return to 2004's figures. The automotive sector was the second most affected by the 2008 financial crisis. Exports from the major countries have significantly dropped, whilst China's imports grew 6% in 2009 at 31 billion dollars (compared to 20% for the previous years). China posted a deficit of 11 billion dollars in 2009 (–0.4 in 2008). Per zone, the drop in trade was similar to world trade in Europe, the Americas and the Middle East. Trade tumbled in the CIS (–72%) and suffered a more gentle drop in Africa (–24%) and Asia (–17%).

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

In US$ billions

ZONES	World			USA and Canada, later 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															
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**
2009	72.5	133.3	**–60.8**	43.7	61.4	**–17.8**	8.9	23.4	**–14.5**	0.9	31.9	**–31.0**	19.1	16.6	**2.5**
CANADA															
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	**2.6**	0.4	4.4	**–4.0**	0.0	5.9	**–5.9**	1.1	3.1	**–2.0**
2009	34.2	43.5	**–9.3**	33.2	32.9	**0.3**	0.2	3.3	**–3.0**	0.0	4.6	**–4.6**	0.7	2.7	**–2.0**
EUROPEAN UNION [2]															
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	661.3	552.5	**108.8**	49.8	16.8	**33.0**	474.1	474.1	**0.0**	8.2	26.1	**–17.8**	129.2	35.6	**93.6**
2009	455.9	387.0	**68.8**	30.9	8.7	**22.2**	334.8	334.8	**0.0**	5.4	14.9	**–9.5**	84.7	28.6	**56.1**
GERMANY [3]															
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**												
2009	153.1	75.7	**77.3**												
FRANCE [3]															
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**												
2009	48.2	54.7	**–6.5**												
ITALY [3]															
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**												
2009	24.4	40.2	**–15.8**												
JAPAN															
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**
2009	103.4	10.0	**93.4**	37.6	0.9	**36.7**	14.4	5.6	**8.7**				51.5	3.5	**48.0**
SOUTH KOREA															
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**	12.4	0.7	**11.7**	7.8	3.2	**4.5**	0.6	2.0	**–1.4**	28.1	1.4	**26.8**
2008	37.0	5.4	**31.6**	9.8	0.5	**9.3**	4.5	2.4	**2.1**	0.4	1.5	**–1.1**	22.3	1.0	**21.3**
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**	16.0	2.8	**13.3**
2009	19.9	30.9	**–11.0**	4.8	3.5	**1.4**	2.9	12.9	**–10.0**	1.7	11.2	**–9.6**	10.5	3.3	**7.2**
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**
2009	8.6	11.7	**–3.2**	1.3	1.6	**–0.4**	0.3	0.5	**–0.2**	0.0	1.0	**–1.0**	7.0	8.6	**–1.7**

(1) Since 2005, exports to North America mainly target the USA, 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.

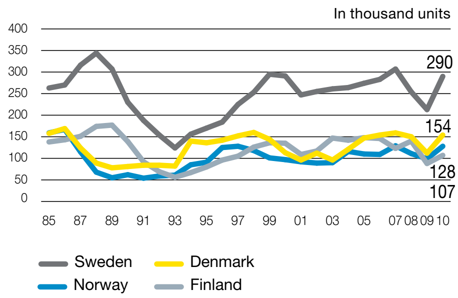
In 2009, world trade in automotive products accounted for 7% of world goods exports and 10% of world manufactured product exports. Trade in automotive products within regions fell less (–27% at nearly 560 billion dollars) than trade outside regions (–40% at over 280 billion). They thus accounted for nearly two–thirds of the world's trade in these products. In NAFTA and Europe (excluding CIS) and South America, this share exceeded 70%. It reached just over 30% for Asia–Pacific. Germany was still the largest exporter of automotive products with an 18% share worth 153 billion dollars. In the world's second largest market, Japan exported 103 billion dollars' worth of vehicles, 36% of this to North America (over 50% in the early 2000s), creating a trade surplus of 93 billion dollars. Its exports to China (10.7 billion dollars, +10%) can be compared with 14.4 billion dollars (–43%) for the EU–27. Automotive exports from the EU–27 amounted to 456 billion dollars, and trade within the EU accounted for over 70% of this total. France accounted for nearly 6% of world exports worth 48 billion dollars. The United States is still the world's leading importer of automotive products at 133 billion dollars; in line with the financial and economic crisis, the deficit in automotive products was reduced to 61 billion dollars (120 billion between 2004 and 2006). China's imports (31 billion dollars in 2009) came from the EU–27 (42%), Japan (36%), NAFTA (11%) and South Korea (estimated at nearly 10%).

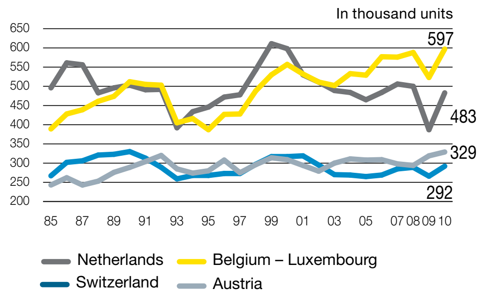
66%
SHARE OF INTRAREGIONAL TRADE IN GLOBAL AUTOMOTIVE INDUSTRY PRODUCTS

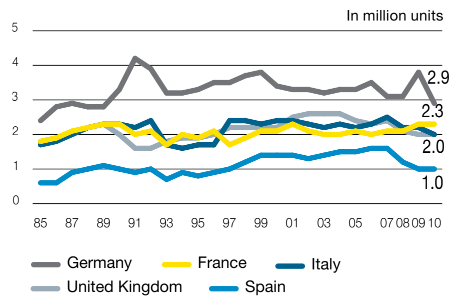
NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

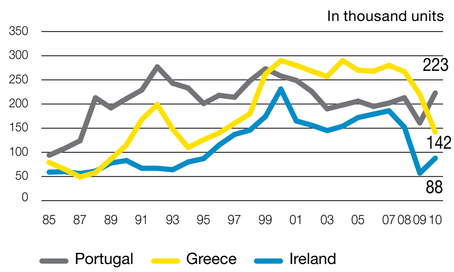
With 13 million new cars registered in Western Europe, the market dropped by 5% compared to 2009. For its third consecutive year it has over 14 million units, representing one fifteenth of the European car fleet. This fall is the result of the end of the scrap incentive schemes to encourage demand which stimulated many markets in 2009.
The different schedules and methods for the end of scrap incentive schemes (progressive or not) are behind the contrasting figures for the German and French markets. The first, down 23% compared to record levels, reached its level at the end of the 1980s. In France, the progressive ending to the scrap incentive scheme enabled 2% growth in sales (with the "bonus/mauls" system); as in 2009, the French market is the second European market in front of Italy and the United Kingdom.
In Italy, the drop in volume reached 200,000 units (–9%). In the United Kingdom, the market grew by 2% compared to a low level. The Spanish market grew by 3% but remained very low.

NEW PASSENGER CAR REGISTRATIONS IN EUROPE







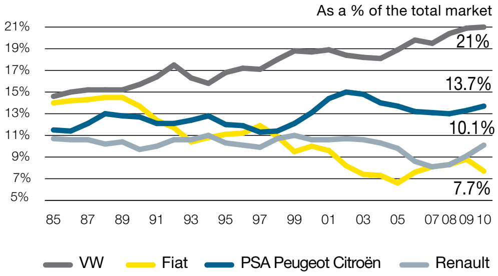


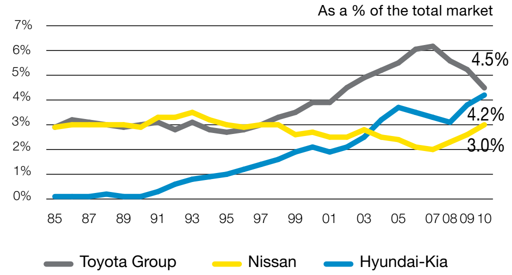
The European market covers 17 countries (the 15 European Union countries before 2004 plus Switzerland and Norway). These countries have similar environments and comparable economic conditions. Since 1990, this market has included the former East Germany.
Lower oil prices and the expansion of the European Union drove strong growth in the automotive market between 1986 and 1989. Then followed a period of high-level stability. Demand plummeted in 1993, leading to a 16% drop in registrations. Then 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 recession. 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. In 2010, it dropped by 5% with the end of schemes designed to support demand. However, the situation varied greatly between countries that had reached historic highs (Belgium, Austria) and others from before the crisis (Spain, Greece, Ireland).

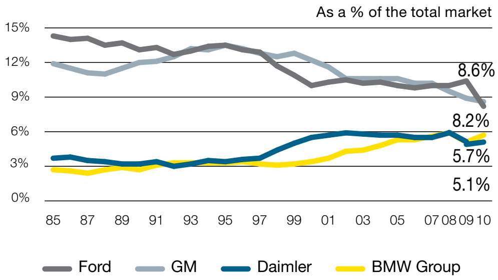
NEW PASSENGER CAR REGISTRATIONS BY GROUP

After 3 years of falling, the French groups' share in the European market stabilized in 2008 before rising in 2009. In 2010, it reached 24%. The launch of new models allowed French manufacturers to increase their market presence by at least a point despite intense competition and the weak yen. The French manufacturers suffered a drop in market share in German (–1.5 point at 11%) but enjoyed an increase particularly in the United Kingdom (+1.8 point at 14%), Belgium (+1.8 point at 31%) and the Netherlands (+1.4 point at 21%).
Six major "generalist" European automakers manufacturing a full line of vehicles held nearly or more than 8% of the market.

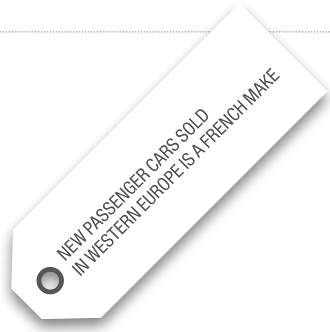
GROUP PENETRATION (1) IN EUROPE







(1) Based on the 2011 scope of consolidation.
See page 61 for group definitions.



1 out of 4

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 (23.7% for them both) stopped dropping in 2008 and grew in 2009 and 2010. It reached a level close to that in 2000 and 2005, after exceeding 25% between 2001 and 2003.
General Motors sold Saab in 2010 and today includes Opel and Chevrolet whose market share is respectively 7.4% and 1.2%. The global group's market share stands at 8.6%. From 2000 to 2009, the market share of the Ford group was around 10%. In 2010, it no longer owned Volvo (1.7%), purchased by the Chinese manufacturer Geely, and its market share stands at 8.2%. So, the Ford group is once again behind General Motors. In the mid–1990s, the penetration of these two American groups was over 12% each.
The Fiat group, after four consecutive years of rising market share, lost 1.1 point for 7.7%; it was nearly 12% in 1997 and 15% in 1989. In 2009, the Italian manufacturer purchased 20% of Chrysler (prior to a progressive increase in 2011) representing 0.3% of the European market.

In 2009, 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 crisis. In 2010, Daimler once again consolidated its growth which began in 1997 by diversifying its range of vehicles; it won 0.2 point of market share compared to 2009, at 5.1%. BMW, including Mini, also confirmed its growth that started in 1999; its penetration rose by 0.6 point at 5.7% (–0.2 point compared to the peak in 2008).
Toyota's market share (including Daihatsu) grew continuously from 1995 to 2007 but dropped for the third consecutive year to 4.5%, a fall of 1.7 point compared to its highest point.
Group Hyundai-Kia's market share rose once again after three years in the doldrums. Its market share (almost non-existent in 1990 and 2.1% in 2000) grew by 0.3 point at 4.2%

RANGE ANALYSIS IN 2010

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 to other ranges. 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	C-Zéro, C1, C3, DS3, Nemo, Berlingo	Xsara, C4, DS4, Jumpy, Jumper	C5, DS5, C-Crosser	C8, C6
	PEUGEOT	iOn, 107, 206+, 207, Bipper, Partner	308, RCZ, 3008, 5008, Expert, Boxer	407, 4007, 508	807, 607
RENAULT GROUP	RENAULT	Twingo, Wind, Clio, Modus, Kangoo	Mégane, Fluence, Master	Laguna, Trafic, Koleos	Espace, Latitude
	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, 300C, Sebring, Grand Cherokee
	DODGE			Caliber, Journey, Nitro	
DAIMLER	MERCEDES		A, B classes, Vito	Viano	C, E, S, CL, SL, CLS, SLS, CLK, SLK, R, G, GL, GLK, ML classes
	SMART	Fortwo			
FIAT	ALFA ROMEO	Mito	147, Guiletta	159, Brera, GT	Spider
	FIAT	Panda, 500, Punto, Idea, Sedici, Fiorino, Doblo	Bravo, Multipla, Scudo, Ducato	Croma	
	LANCIA	Ypsilon, Musa	Delta		Phedra
FORD EUROPE	FORD	Ka, Fiesta, Fusion, T, Connect	Focus, (Grand) C-Max Kuga, Transit	Mondeo	Galaxy, S-Max
GEELY	VOLVO		C30	S40, V50	S60, S80, V60, V70, C70, XC60, XC70, XC90
GM EUROPE	CHEVROLET	Spark, Aveo, Matiz	Orlando	Epica, Cruze, Captiva	Corvette, Camaro
	OPEL	Agila, Corsa, Meriva, Tigra, Combo	Astra, Zafira, Movano	Insignia, Antara, Vivaro	
HONDA	HONDA	Jazz	Civic, FR-V	Accord, CR-V	
HYUNDAI	HYUNDAI	I10, I20, Getz, IX20	I30, Coupe, Matrix, H1	Sonata, IX 35, Santa Fe, Tucson, IX 55	Genesis, Grandeur
	KIA	Picanto, Soul	Rio, Cerato, Venga, Cee’d, Carens	Sportage	Magentis, Carnival, Sorento
MAZDA	MAZDA	2	3, 5, MX5	6, CX-7	RX8
MITSUBISHI	MITSUBISHI	i-MiEV, Colt	ASX, Lancer	Outlander	Pajero
NISSAN	NISSAN	Pixo, Micra, Note, Cube, Juke		Qashqai, X-Trail	370Z, Murano, Pathfinder
PORSCHE	PORSCHE				911, Boxster, Cayman, Cayenne, Panamera
SAIC	SSANGYONG			Actyon, Kyron	Rexton, Stavic
SPYKER	SAAB				9-3, 9-5
SUBARU	SUBARU	Justy		Impreza, Legacy, Forester	
SUZUKI	SUZUKI	Alto, Splash, Swift, SX4, Jimny		Grand Vitara	
TATA GROUP	JAGUAR				X, XJ, XK type
	LAND ROVER			Freelander, Defender	Discovery, Range Rover
TOYOTA	DAIHATSU	Cuore, Sirion, Terios			
	LEXUS				GS, IS, LS, RX
	TOYOTA	IQ, Aygo, Yaris, Urban Cruiser	Verso, Auris	Avensis, Prius, RAV4	Land Cruiser
VOLKSWAGEN GROUP	AUDI	A1	A3	A4, A5, TT	A6, A7, A8, R8, Allroad, Q5, Q7
	SEAT	Ibiza	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.

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NUMBERS OF MODELS AND BODY STYLES OFFERED BY FRENCH MANUFACTURERS

BREAKDOWN AND RANKING BY MODEL

Of the 10 most sold models in Europe in 2010, four are made by Renault, Peugeot or Citroën, whereas in 1997, these makes were only represented by two models.
In a European market down in 2010, the attractive offering of low and mid-low range cars from French manufacturers helped improve their market share.

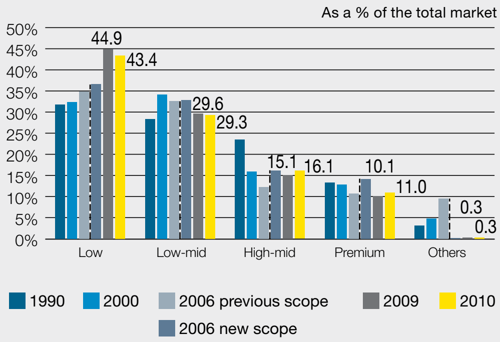
RANGES AND BODY STYLES IN 2010

As a % of new registrations by country	Low range	Low-mid range	High-mid range	Premium range	Others
Germany	30	34	18	17	1
Austria	36	34	18	12	0
Belgium	41	30	16	12	0
Denmark	51	26	16	6	0
Spain	33	39	21	8	0
Finland	19	34	32	14	1
France	57	28	10	5	0
Greece	54	25	17	4	0
Ireland	29	36	25	8	2
Italy	63	19	12	6	0
Luxembourg	33	30	19	18	0
Netherlands	52	25	15	8	0
Portugal	45	33	14	9	0
United Kingdom	39	30	17	13	0
Sweden	19	27	26	28	0
European Union 15 countries	**44**	**29**	**16**	**11**	**0**
Norway	21	29	35	15	0
Switzerland	35	27	23	14	1
All 17 countries	**43**	**29**	**16**	**11**	**0**

	Sedans	Estates	Coupés	Cabriolets	MPVs	Others
Germany	47	18	2	3	15	16
Austria	48	15	1	1	19	16
Belgium	52	15	2	2	18	12
Denmark	59	22	0	0	14	5
Spain	64	5	2	1	13	15
Finland	46	28	1	0	8	16
France	61	7	2	1	19	10
Greece	79	1	2	1	5	12
Ireland	76	5	2	0	5	11
Italy	66	8	1	1	13	12
Luxembourg	51	12	3	1	13	20
Netherlands	62	15	1	1	12	9
Portugal	62	18	2	1	8	8
United Kingdom	64	7	3	3	12	12
Sweden	38	39	1	1	6	15
European Union 15 countries	**58**	**12**	**2**	**2**	**14**	**13**
Norway	38	27	1	0	8	27
Switzerland	43	17	2	3	15	20
All 17 countries	**57**	**12**	**2**	**2**	**14**	**13**

Source: CCFA.

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



RANKING OF THE FIFTEEN LEADING MODELS IN 2010

Models	Rank	Market share
Volkswagen Golf	1	4.3%
Renault Mégane	**2**	**3.3%**
Peugeot 206-207	**3**	**3.2%**
Ford Fiesta	4	3.0%
Volkswagen Polo	5	2.6%
Renault Clio	**6**	**2.5%**
Opel Corsa	7	2.4%
Ford Focus	8	2.4%
Citroën C3	**9**	**2.3%**
Opel Astra	10	2.1%
Fiat Panda	11	1.7%
Fiat G. Punto	12	1.6%
Citroën C4-Xsara	**13**	**1.6%**
Nissan Qashqai	14	1.5%
BMW 3 series	15	1.4%
Peugeot 308		**1.3%**
Renault Twingo		**1.1%**
Dacia Sandero		**1.0%**
Peugeot 3008		**0.9%**
Peugeot 107		**0.8%**
Citroën C1		**0.8%**
Citroën C5		**0.5%**
Peugeot 5008		**0.5%**
Dacia Duster		**0.4%**
Citroën DS3		**0.4%**
Renault Modus		**0.4%**

Source: CCFA.

In Europe, 73% of new passenger cars are in the low and low-mid range. The application of tax breaks to more environmentally friendly purchases and a greater variety in offers have driven the market towards the low range. But because of the end of the scrap incentive schemes to encourage demand, the share dropped two points in 2010 compared to a record high.
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, this dynamic vitality was reflected by a strong increase in the sedans which rose 5 points to 61% before falling by 4 points in 2010.
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 estates remain 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. This trend continued in 2010 except in Germany.

43%
MARKET SHARE OF THE LOW RANGE IN THE EUROPEAN MARKET IN 2010

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS

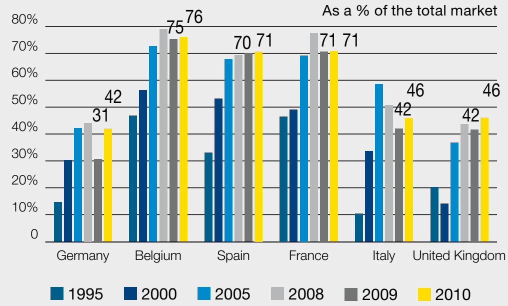
The proportion of new diesel-powered cars in Europe as a percentage of total registrations grew significantly between 1997 and 2007. The percentage of cars with diesel engines was only 22% in 1997, and reached 53% ten years later. After a relatively stable 2008, in 2009 it dropped by nearly 7 points compared to the previous year before climbing nearly 6 points in 2010.
On this market of 6.7 million units, the share of French manufacturers was 28% in 2010 (27% in 2009, 23% in 2007 and 29% in 2000) representing about 1.9 million new diesel cars.
In terms of passenger cars, diesel vehicle ownership continued to grow at a slower rate than for previous years, reaching 35% in 2010, up by over one point.

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS IN EUROPE FOR 2010

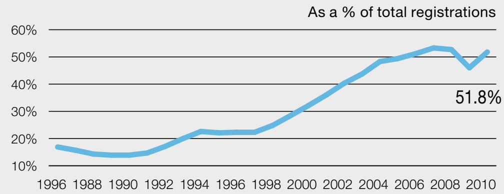
	Average cylinder capacity	Power kW	4X4 %	Diesel %
Germany	1,756	96	10.9	41.9
Austria	1,640	82	13.8	50.9
Belgium	1,640	80	5.6	76.0
Denmark	1,499	76	1.3	47.3
Spain	1,677	83	7.8	70.7
Finland	1,721	94	11.1	41.5
France	1,550	74	4.2	70.8
Greece	1,429		6.7	4.0
Ireland	1,564	77	1.9	62.2
Italy	1,501	74	9.7	45.9
Luxembourg	1,868	103	11.6	75.2
Netherlands	1,488	78	3.0	20.4
Portugal	1,534	78	2.4	66.7
United Kingdom	1,695	90	8.4	46.1
Sweden	1,817	102	17.4	51.0
European Union 15 countries	**1,634**	**84**	**8.2**	**52.1**
Norway	1,747	90	25.0	74.9
Switzerland	1,821	107	27.1	30.4
All 17 countries	**1,639**	**85**	**8.8**	**51.8**

Source: CCFA.

DIESEL MARKET SHARE BY COUNTRY



EUROPEAN DIESEL PASSENGER CAR MARKET



In Europe, average cylinder capacity and 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. In 2008 and 2009, the slow and regular upward trend towards the highest horsepower has stopped in parallel with, in particular, 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). In 2010, these two elements progressed because of the increased share of premium ranges without returning to the 2008 levels.

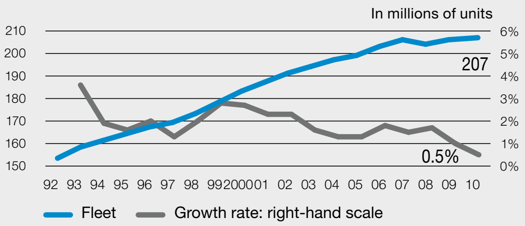
The market share of four-wheel drive vehicles stopped falling and grew by one point standing at 8.8% throughout the European market, or 1.1 million units. The per capita rate of ownership varies widely from one country to the next depending on national market characteristics. This market share is very 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 a falling European market in 2010, diesel car sales grew six points for 52%. 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 recovered and respectively reached 42% (+11 points) and 46% (–4 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. It picked up in 2010 except in Finland where diesel car market share lost nearly 5 points. However, this ratio increased by two points in Norway and Denmark with respectively 75% and 47%. It grew by 10 points in Sweden at 51%.

PASSENGER CAR FLEET IN EUROPE

In Western Europe as in France, growth in the number of passenger cars in use has been slowing since the end of the 1990s and now stands at around 1% a year. The economic and financial crisis of 2008 amplified this phenomenon (+0.5% in 2010).
In new European countries and in Turkey where vehicle ownership is at a lower level, this crisis has extensively slowed numbers down: less than 3% compared to between 5 and 7% in previous years; 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 increased to 35% in 2010.
After oscillating between 32 and 34% between 2000 and 2009, the share of cars over ten years old in Western Europe grew for the second consecutive year, reaching 34.6% in 2010. The scrap incentive schemes in many European countries slowed down this increase, compared with 2009, in a context of low numbers of new passenger car registrations.
Western Europe has become a replacement market.

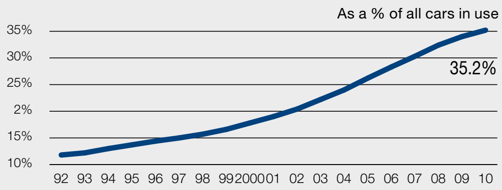
PASSENGER CAR FLEET, AT 1ST JANUARY FOR EACH YEAR

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

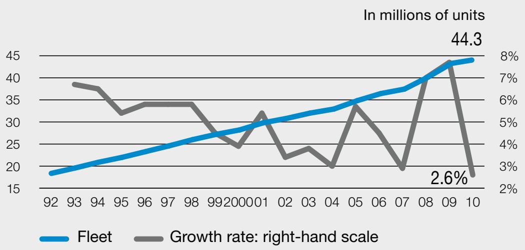


(1) The change for 2008 was calculated on a like-for-like basis.

DIESEL CAR OWNERSHIP IN EU–17

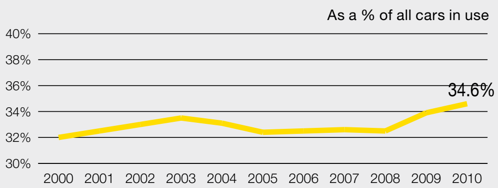


IN THE 12 NEW EU MEMBER COUNTRIES AND TURKEY



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

SHARE OF CARS OVER TEN YEARS OLD IN EU–17

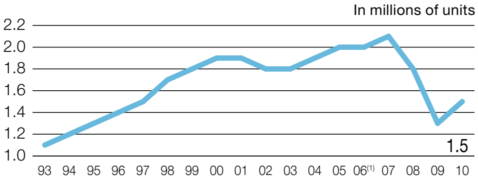


At 1st January 2010, passenger cars in Western Europe (EU-15, Switzerland and Norway) reached 207 million units. The financial and economic crisis amplified the weakened growth of the fleet (0.5% in 2010) nearing that of the population. Per country, fleet drops were observed in Spain and the United Kingdom whilst the effects of scrap incentive schemes on fleet growth differed greatly between Germany (+1% within a huge framework compared to +0.3% the previous year) and France (similar growth: +0.6% vs. +0.5% in 2009).
The share of diesel cars has been growing by 2 points a year since 2002 and reached 35% at 1st January 2010. In five countries, this diesel car ownership has become the majority: Austria, Belgium, Spain, France and Luxembourg. On the other hand, it is slightly over 25% in Germany and the United Kingdom.
In the new EU member countries and Turkey, growth for this fleet of cars slowed dramatically because of the financial and economic crisis to less than 3% compared to 5-7% for the previous years. Per country, drops in diesel fleets were observed in Estonia, Latvia and Hungary. In Poland, growth was less than 3% compared to over 10% in 2009. The Czech Republic's fleet remained stable (+0.3% vs +3.3% in 2009).

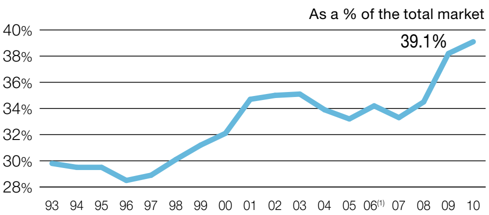
NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

The European light commercial vehicle market recovered by 11% in 2010 to 1.5 million units. After reaching a new record in 2007 with 2.1 million vehicles, the European market for light commercial vehicles was greatly affected by the crisis. In 2009 it fell 36% over two years, representing 800,000 fewer vehicles for a total of 1.3 million.
Sales of French vehicles grew by 14% to 577,000 units representing 39% of the market (+1 point). 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 the United Kingdom (+2.5 points), Spain (+2.4 points), Belgium (+1.5 point) and Italy (+1.2 point) representing one more point than in 2009 and six more than in 2007.

LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (17 COUNTRIES)

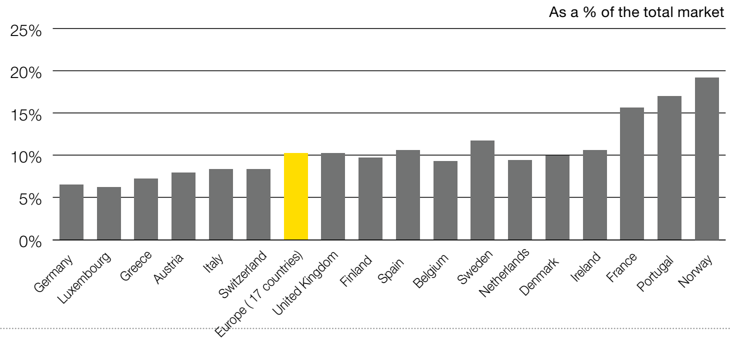


FRENCH MARKET SHARE

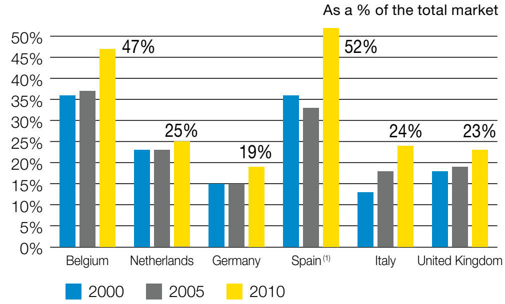


(1) In 2006, there was a change of scope in Spain: see notes on page 61.

SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS IN 2010 (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES)



FRENCH MANUFACTURERS' SHARE IN THE MAIN EUROPEAN COUNTRIES



Light commercial vehicles are defined as vehicles whose gross weight rating is less than five tons. They come in various categories: commercial vehicles derived from passenger cars, light vans, light trucks, large vans, pickups and four-wheel drive vehicles. Since tax conditions are not the same in all European countries, the share of light commercial vehicles in total light vehicles ranges from 6% in Luxemburg and Germany to nearly 18% in Portugal and Norway. Globally, it stood at 10% in 2010 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 crisis had a severe effect on this market, which returned to similar levels to those recorded in 1996 before recovering in 2010.

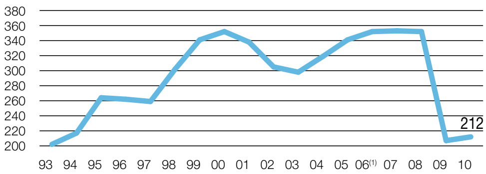
In Spain and Belgium, the market share of French manufacturers exceeded 45% in 2010. In Germany and Italy, countries with national manufacturers, their share was also up on 2000 19% to 24% respectively.
France remains the leading European market (418,000 units) in front of the United Kingdom (232,000 units), Germany (202,000 units), Italy (178,000 units) and Spain (117,000 units).

THE EUROPEAN INDUSTRIAL VEHICLE MARKET AND PRODUCTION

The European market for industrial vehicles weighing more than 5 tons grew slightly in 2010.
It stands at 212,000 units, a drop of 140,000 compared to 2008. After four years of growth between 2003 and 2007 and a record ceiling between 2007-2008, in 2009 and 2010 the market returned to a level close to that of 1993, a dark year for heavy trucks.
European industrial vehicle production rose by 63% to 331,000 units, after the crisis of 2009 (–64% compared to 2008) following five years of high-level stability of the domestic market and the ongoing rise in exports of industrial vehicles outside the European Union (15 countries), especially to Eastern Europe and Asia.
It was down 13% on 2003.

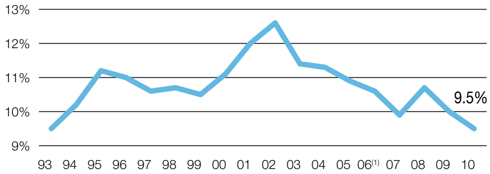
NEW INDUSTRIAL VEHICLE REGISTRATIONS IN EUROPE

In thousands of units



RENAULT TRUCKS' MARKET SHARE IN EUROPE

As a % of the total market



THE WESTERN EUROPEAN HEAVY TRUCK MARKET AND PRODUCTION

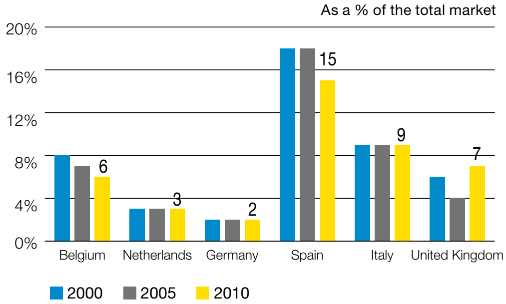
In thousands of units

	2003	2009	2010	Change 2010-2009
Heavy truck registrations				
5.1T to 15.9T	83	55	54	–2.0%
16T and over	214	152	158	3.8%
TOTAL	**298**	**207**	**212**	**2.3%**
Heavy truck production				
5.1T to 15.9T	102	60	77	28.7%
16T and over	279	144	254	77.0%
TOTAL	**381**	**203**	**331**	**62.8%**

Source: CCFA.

MARKET SHARE OF RENAULT TRUCKS IN MAJOR EUROPEAN COUNTRIES

As a % of the total market



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 29% below its 2003 figures despite the recovery. 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 2010, the market is only 5% higher than in 1993. Demand continued to focus on the 16 t-and-over segment, which accounted for 75% of total registrations, including both trucks and road tractors. Within this climate, Renault Truck registrations dropped slightly in 2010 and its market share stabilized at 9%, barely below 2007. Renault Trucks' international development was affected and its European market share outside France has remained stable at 5% compared to 6% in 2008.

FRENCH AUTOMOBILE MANUFACTURERS IN THE NEW EUROPEAN UNION MEMBER STATES

In 2010, vehicle production (+9% at 3.2 million vehicles) grew compared to 2009, stabilizing at a slightly lower level than the record figures reached in 2008 whilst new vehicle sales remained very low (–6% at 980,000 units). 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.

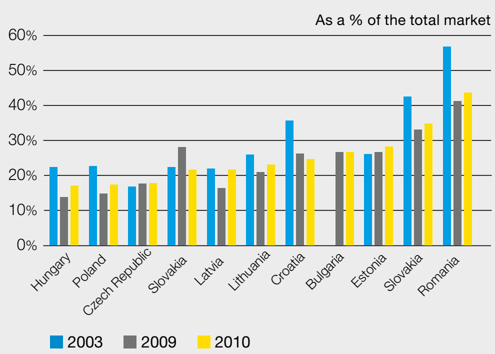
MARKET AND VEHICLE PRODUCTION IN THE MAIN CENTRAL AND EASTERN EUROPEAN COUNTRIES

New European Union member countries (1) and Croatia — In thousands of units

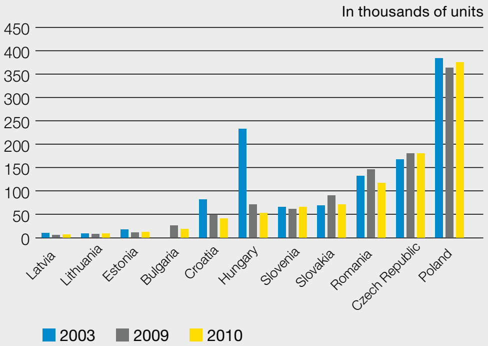
	2009	2010	Change 2010-2009
Vehicle production			
Passenger cars	2,870	3,101	8.0%
Light commercial vehicles	80	114	43.3%
Heavy trucks	8.4	10.2	21.0%
New vehicle registrations			
Passenger cars	900	857	–4.8%
Light commercial vehicles	115	95	–17.5%
Heavy trucks	22.1	28.0	27.0%

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

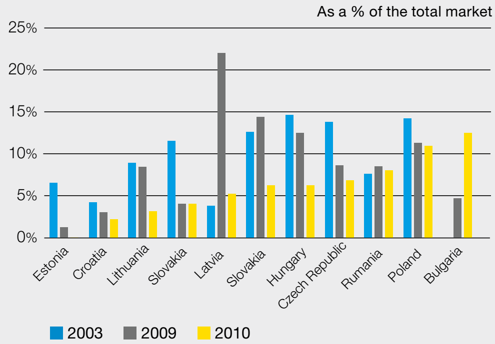
MARKET SHARES OF FRENCH MANUFACTURERS: NEW LIGHT VEHICLES



REGISTRATIONS OF NEW LIGHT VEHICLES (UP TO 5T GVWR)



MARKET SHARES OF FRENCH MANUFACTURERS: NEW INDUSTRIAL VEHICLES



NEW LIGHT VEHICLES SOLD IN MAJOR ENLARGEMENT COUNTRIES COMES FROM FRENCH MANUFACTURERS

1 out of 4

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 3.2 million vehicles in 2010. Their activity grew less than in Western Europe because of the local manufacture of small cars in phase with the current West European trends. In 2010 because of the crisis this production was higher for the second consecutive year (previously it was equivalent) than the domestic demand of the area, this being the sum of new vehicle registrations plus imports of used vehicles. In 2010, new vehicle sales fell by 6% to 980,000 units compared to –33% for the previous year. The results are different for each country. Hungary, Romania and Slovakia are more affected by the recession.

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

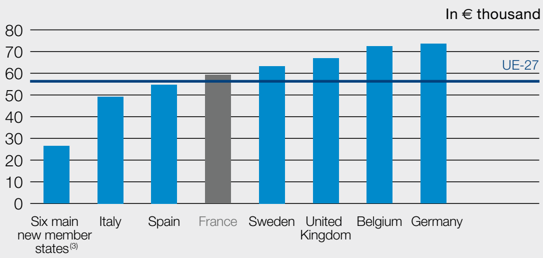
In 2008, 2.4 million people worked in the automotive industry in the EU-27 in companies with more than 20 employees. Value added per employee ranged from €27,000 a year in the six main new member states to more than €70,000 in Germany. In France, this figure was €59,000, above the European average of €56,000. Per capita personnel costs ranged from less than €13,000 in the six main new member states to €62,000 in Germany; in France they are €52,000, above the European average of €41,000. Employer social contributions for per capita personnel costs stood at 28% in France compared to 20% in Germany.

THE AUTOMOTIVE INDUSTRY IN EU-27 IN 2008 (1)

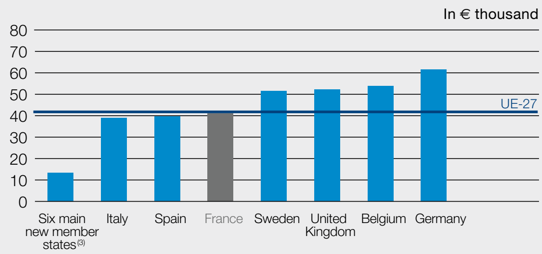
Companies with more than 20 employees	Units	European Union (27 countries) (2)	Germany	France	Six main new member states (3)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**thousand**	**2,420**	**798**	**260**	**576**	**177**	**164**	**184**	**84**	**43**
Automotive manufacturing	thousand	1,000	482	150	185	77	70	69	47	24
Body and trailer manufacturers	thousand	199	47	28	–	24	15	17	10	7
Automotive equipment manufacturing	thousand	1,147	269	82	391	76	80	98	27	11
Sales	**€ million**	**800,000**	**343,394**	**111,867**	**89,111**	**63,818**	**58,226**	**63,880**	**28,656**	**17,836**
Production	**€ million**	**700,000**	**293,528**	**75,148**	**86,333**	**55,267**	**52,955**	**53,665**	**28,678**	**17,174**
Production/Sales	%	87.5	85.5	67.2	96.9	86.6	90.9	84.0	100.1	96.3
Value added (to factor costs)	**€ million**	**135,000**	**58,610**	**15,390**	**15,259**	**12,838**	**8,985**	**9,047**	**5,294**	**2,847**
VA/Production	%	19.3	20.0	20.5	17.7	23.2	17.0	16.9	18.5	16.6
VA per employee	€ thousand	55.8	73.5	59.2	26.5	72.4	54.8	49.2	63.3	66.9
Base 100: 6 main new member states		210	277	223	100	273	207	186	239	252
Goods and services purchased	**€ million**	**680,000**	**286,042**	**95,613**	**75,055**	**50,904**	**50,614**	**55,968**	**26,180**	**14,885**
Purchases as a % of output	%	97.1	97.4	127.2	86.9	92.1	95.6	104.3	91.3	86.7
Personnel costs	**€ million**	**100,000**	**49,199**	**13,418**	**7,651**	**7,316**	**6,492**	**7,169**	**4,506**	**2,226**
Personnel costs per employee	€ thousand	41.3	61.7	51.6	13.3	41.2	39.6	39.0	53.9	52.3
Base 100: 6 main new member state		311	464	389	100	310	298	293	405	394
Operating cash flow (OCF)	**€ million**	–	**9,411**	**1,972**	**7,608**	**5,522**	**2,493**	**1,878**	**788**	**621**
OCF/VA	%	–	16.1	12.8	49.9	43.0	27.7	20.8	14.9	21.8

(1) Since 2008, data has been published in a new economic activity involving in particular a change to the automotive industry scope (inclusion of electrical and electronic equipment manufacture).
(2) Data for the EU (27 countries) has been reconsolidated by CCFA.
(3) 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:
- the construction of automotive vehicles;
- the manufacture of bodies and trailers;
- the manufacture of automotive equipment.

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 2008 were available. In 2008, The European automotive industry employed 2.4 million people, 40% of which worked in vehicle construction. Together, Germany and France accounted for over 40% of the employees in the industry, or 33% and 11% respectively. The people employed in the six new member countries (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) reached 24%. The automotive industries differed significantly from country to country in terms of structure and wages. In Germany, Belgium, France and Sweden, the percentage of employees in the industry involved in automotive manufacturing was around 60%, compared with 32% in the six main new member countries. It was between 37% and 43% in Italy, Spain and the United Kingdom. Personnel costs per person employed varied between €13,000 in the six new member countries and €62,000 in Germany, a ratio of 1 to 5.

2.4 million
PEOPLE WERE EMPLOYED IN THE AUTOMOTIVE INDUSTRY IN EU-27 IN 2008.

FRENCH AUTOMOBILE MANUFACTURERS IN 2010

FRENCH MANUFACTURERS IN 2010

	Units	PSA Peugeot Citroën	Renault
Sales	€ million	56,061	38,971
Capital expenditure	€ million	1,688	1,133
Net income	€ million	1,256	3,490
Employees worldwide [1]	**No. of people**	**198,220**	**122,615**

	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	41,405	13,796	3,351	1,852		–4,561	36,889	2,175	–93
Operating income	€ million	621	456	198	507	11	3	381	703	15
Capital expenditure [2]	€ million	1,672			16			1,130	3	
Employees worldwide [1]	**No. of people**	**120,880**	**64,190**	**9,380**	**2,595**	**1,175**		**119,816**	**2,799**	

(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 2010, in a global economic resurgence and when part of the base market (excluding France) was supported by demand incentive schemes, PSA Peugeot Citroën sales increased by 13%, faster than the global market. The group's European market share grew in a weakened market; opportunities outside of this zone were maintained with, in particular, record sales in Latin America and China. Business outside Europe represented 39% 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.
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 signed with China Changan Automobile Group and approved by the Chinese authorities, one of its objectives being the construction of an assembly plant in China. PSA 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 one liter, three cylinder gasoline engines will also be developed and industrialized in France by 2012, with the objective of vehicles emitting less than 100g of CO_2/km. The second generation of Stop&Start called e-HDi is progressively being installed in the Group's ranges since end 2010. Finally, the first cars fitted with HYbrid4 technology will be on the market from the second half of 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.) The group is also continuing its efforts to improve operational efficiency, particularly in its relationships with suppliers. After identifying thirteen strategic suppliers in 2009, PSA is planning to accredit its one hundred key suppliers by 2015 to consolidate the automotive industry.

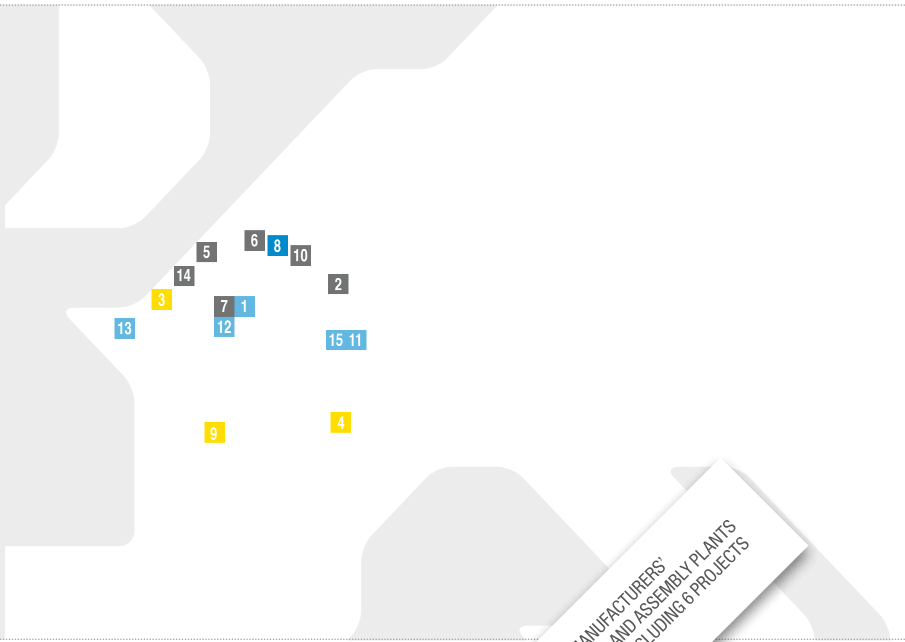
Renault: www.renault.com
The upturn of the automotive market in Europe limited by the end of the governmental schemes and support affected Renault's results. In a weakened market with intense competition and continuing selective sales policies, results were up by 7% in Europe. Outside Europe, they increased by 26% representing nearly 37% of sales. Renault is ranked second on the European light vehicle market. 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. In 2009, the first stone was laid at the Tangiers plant (Morocco). Renault and Nissan's electric vehicles will be equipped with batteries developed in collaboration. 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.
In 2011, Renault launched a new strategic plan "Renault 2016 – Drive the change" to meet two objectives: group growth and generation of free cash flow by 2016. This plan is based on seven levers particularly focused on quality (products and services), profitability (cost reduction, R&D expenditure and investment optimization) whilst taking in to account challenges facing society in general (sustainable mobility). Furthermore, as part of its innovation policy, the group has launched the production of the 1.6 dCi 130 diesel engine in its Cléon plant, to continue improving the efficiency of heat engines.

Renault Trucks: www.renault-trucks.com
Renault Trucks employs 14,000 people all over the world of which about 10,000 work in France. Beyond industrial cooperation, synergies within the AB Volvo group between the four brands (Renault, Volvo, Mack and UD Trucks – formerly Nissan diesel) have generated significant savings, particularly in purchasing. 2010 was marked by an upturn after a drastic fall in the heavy truck market the previous year. In Europe, it reached a level slightly above that observed in 1993, a dark year for this sector. In this climate, Renault Trucks' market share stood at around 10% within the European Union. Figures vary greatly depending on the country. Business is in recovery in four key areas: Russia, Latin America the Middle East and Africa, including North Africa. Since 2009, Renault Trucks is using 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, following the opening of a Volvo plant. Excluding France, there are nine assembly sites throughout the world.

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.

335,000 people
WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

FRENCH AUTOMOBILE MANUFACTURERS IN 2010



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)
(45) Chakan
(Renault-Nissan-Bajaj Auto) (project)
(46) Chennai
(Renault-Nissan)/(project)
(47) Nahsik (Renault-Mahindra)

Iran
(48) Tehran

Malaysia
(49) Gurun

PSA Peugeot Citroën | Sevel | Renault | Renault Trucks

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

In 2010, the global production of French manufacturers reached a record of 6.4 million vehicles, the previous record dating back to 2007 with 6.2 million. In 2008 and 2009, it fell respectively by 6.1% and 7.7% because of the global recession before recovering in 2010 with growth of 18.5%. However, since 1996, production has increased by 68%, with an annual average of nearly 4% primarily due to expanding markets in Europe outside France but also to new non-European markets. Passenger car production fell by 16.7% to 5.6 million units in 2010 after a fall the two previous years; light commercial vehicles (+32.9%, at 711,000 units) and heavy trucks (+52.4%, at 32,000 units), which had done well in 2008 before being heavily affected by the financial and economic crisis, grew dynamically in 2010.

PRODUCTION OR ASSEMBLY/PRODUCTION SITES PER MODEL

Group/Make	Model	Launch	Production or assembly sites in 2010	Production (in units) Total at end 2010
PSA PEUGEOT CITROËN				
Peugeot, Citroën	i0n, C-ZERO	2010	Japan (Mitsubishi)	350/350
Peugeot, Citroën	107, C1	2005	Kolín (Czech Rep.)	575,600/551,100
Peugeot	206	1998	Mulhouse, Argentina, Iran	7,326,000
Peugeot	207	2006	Poissy, Villaverde (S), Trnava (Slovakia), Argentina, Brazil, China	2,075,700
Citroën	C3	2002/2008	Aulnay, Poissy, Villaverde (S), Porto Real (Br), Trnava (Slovakia)	2,759,600
Citroën	DS3	2009	Poissy	70,100
Peugeot	307	2001	Argentina	3,610,500
Peugeot	308	2007	Mulhouse, Sochaux, Russia	870,600
Peugeot	RCZ	2010	Austria (Magna Steyr)	19,200
Peugeot	3008	2009	Sochaux	197,600
Peugeot	5008	2009	Sochaux	91,300
Citroën	Xsara Picasso	1997	Porto Real (Brazil)	3,353,800
Citroën	ZX	1991	China	2,460,000
Citroën	C4	2004/2010	Mulhouse, Vigo (S), China, Russia	2,110,700
Peugeot, Citroën	405/Xantia	1987/1993	Iran	4,236,000/1,326,200
Peugeot	407	2004	Rennes-la-Janais	860,200
Peugeot, Citroën	4007, C-Crosser	2007	Japan (Mitsubishi), Russia	39,700/38,300
Citroën	C5/C6	2008/2006	Rennes-la-Janais, China	1,020,200/20,975
Peugeot	408	2010	China	43,600
Peugeot	508	2010	Rennes-la-Janais	6,400
Peugeot	607	2000	Rennes-la-Janais	169,400
Peugeot, Citroën	807, C8	2002	Hordain	178,800/138,000
Peugeot, Citroën	Bipper, Nemo	2008	Turkey (Tofas)	107,900/121,553
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (S), Mangualde (P), Turkey, Argentina	1,796,700/2,284,100
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	444,400/412,100
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (I)	723,400/635,900
RENAULT GROUP				
Renault	Twingo	1993/2007	Novo Mesto (SI), Colombia	2,482,127/535,352
Renault	Wind	2010	Novo Mesto (SI)	6,388
Renault	Clio	1998/2005	Flins, Turkey, Novo Mesto (SI), Valladolid (S), Dieppe, Argentina, Colombia, Mexico	7,767,369
Renault	Symbol	2008	Argentina, Turkey	198,419
Renault	Modus	2004	Valladolid (S)	585,556
Renault	Logan	2004	Russia, Brazil, Morocco, Colombia, Iran, India	797,763
Renault	Latitude	2010	South Korea	6,010
Renault	Sandero	2007	Brazil, Morocco, Colombia, South Africa (Rosslyn), Russia	287,911
Renault	Fluence	2009	Turkey	83,553
Renault	Mégane	1995/2002/2008	Douai, Palencia (S), Turkey, Brazil	4,854,351/3,788,842/881,345
Renault	Laguna	2007	Sandouville	235,001
Renault	Espace	2002	Sandouville	337,206
Renault	Kangoo	1997/2007	Maubeuge, Morocco, Argentina	2,532,409/362,713
Renault	Master	1997/2010	Batilly, Brazil	1,064,866/50,666
Renault	Trafic II	2001	Luton (UK, GM), Barcelona (S, Nissan)	473,317
Dacia	Logan	2004	Pitesti (Romania)	1,084,338
Dacia	Sandero	2008	Pitesti (Romania)	353,942
Dacia	Duster	2010	Pitesti (Romania)	83,849
RSM	SM3/Fluence	2002/2009	Busan (South Korea)	434,894/99,770
RSM	SM5/Latitude	2000/2010	Busan (South Korea)	666,591/67,371
RSM	QM5 (Koleos)	2007	Busan (South Korea)	137,903
RSM	SM7	2004	Busan (South Korea)	110,796

Sources: CCFA, PSA Peugeot Citroën, Renault.

6.4 million
VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS THROUGHOUT THE WORLD IN 2010

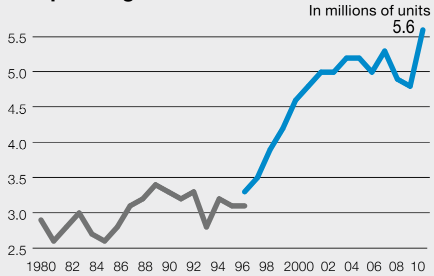
In 1996, French automobile manufacturers changed the way they reported output. They began reporting the number of vehicles assembled at the rollout location. The concept of KD and CKD units has been abandoned. This production takes into account the Renault Trafic II, assembled by GM Europe in the United Kingdom and by Nissan in Spain. In addition, the scopes of consolidation have changed *(see notes on page 66)*.

MARKETS FOR NEW FRENCH VEHICLES

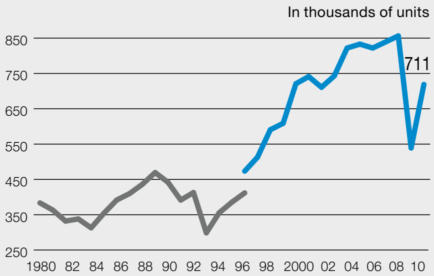
In 2010 for the third consecutive year and in contrary to the previous years, the national markets for French manufacturers (+10%) grew more than sales outside France (–8%) which were more affected by the world financial and economic crisis. In France, the strong presence of French manufacturers in sectors benefitting from market support (scrap incentive scheme) or eco-improvement support ("bonus/malus" system) allowed them to increase sales in a difficult environment. Once again, 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. Deliveries outside Europe in 2010 (i.e. outside EU-27, Switzerland and Norway) represent over 50% of total markets for French manufacturers, compared to less than 30% in 2000.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

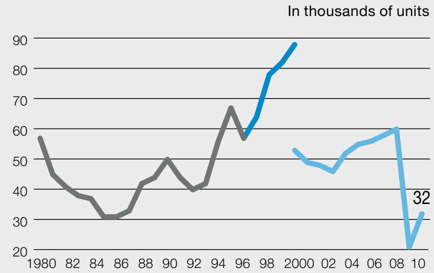
New passenger cars



New light commercial vehicles (up to 5 tons)

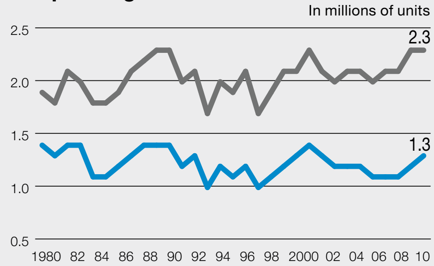


New heavy trucks over 5T

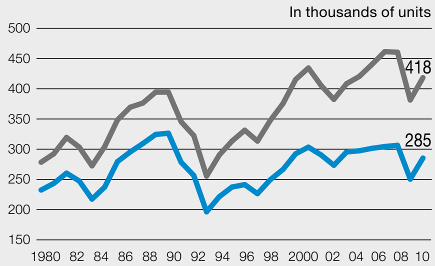


VEHICLE REGISTRATIONS IN FRANCE

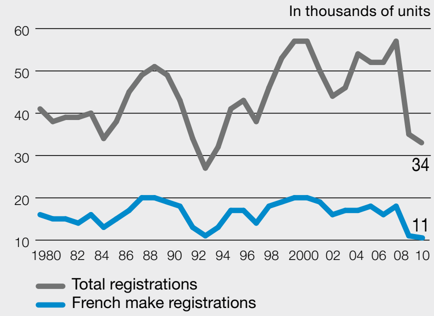
New passenger cars



New light commercial vehicles (up to 5 tons)

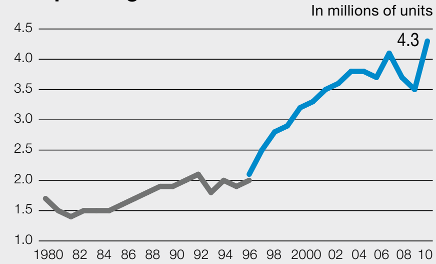


New heavy trucks over 5T

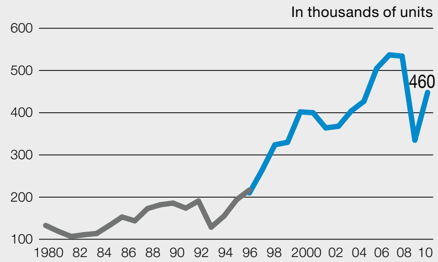


FRENCH CAR EXPORTS

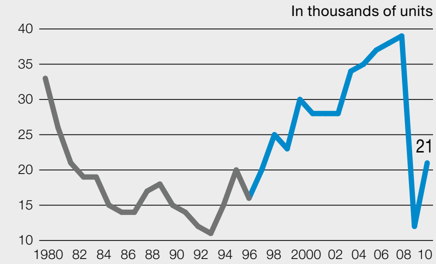
New passenger cars



New light commercial vehicles (up to 5 tons)



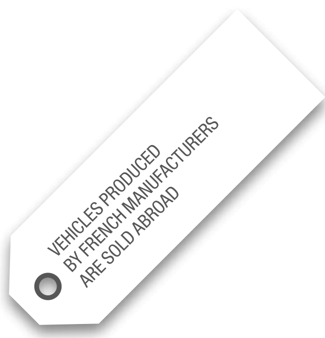
New heavy trucks over 5T



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 over 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 French manufacturers' offer that was rich in models with low CO_2 emissions in line with the "bonus/malus" system. In 2009 and 2010, 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 4.3 million units, a rise of 22%. Commercial vehicle exports increased significantly after being greatly affected by the recession. Light commercial vehicle production totaled 460,000 units (up 40%) and 21,000 units (a 72% rise) for heavy trucks.

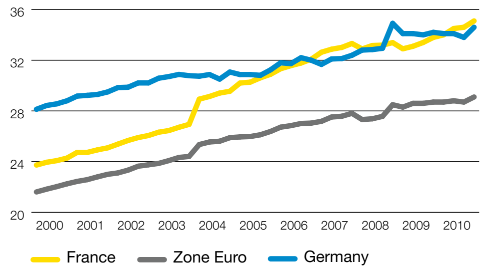
3 out of 4



COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

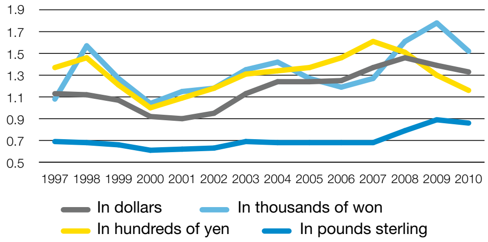
In an aggressively competitive global market, French automobile manufacturers must be competitive, able to handle industry-wide factors such as labor costs and the strong euro and also problems that are the bane of the automotive sector like the opening of the base market to competition, the difficulty of passing the rise in raw material costs on to the end customer, and more.
In 2010, industry conventions have demonstrated that compared to other eurozone countries the change in hourly labor rates since 2000 and the particularly high national contributions in France weigh heavily.

LABOR RATES IN THE MANUFACTURING INDUSTRY (IN EUROS PER HOUR)



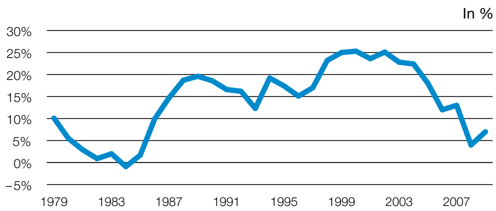
Source: Results of the four yearly ECMOSS survey and extrapolation using quarterly indices of labor costs.

EURO EXCHANGE RATE



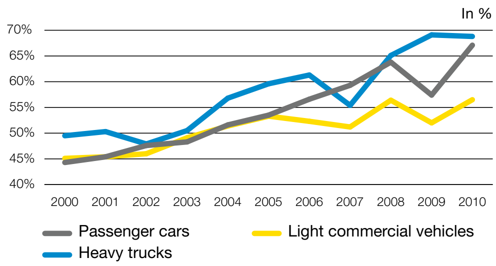
Source: IMF.

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



Source: INSEE (base 2005), CCFA extrapolation according to the new calculation system.

SHARE OF NON-EUROZONE IN EXTERNAL MARKETS FOR FRENCH MANUFACTURERS

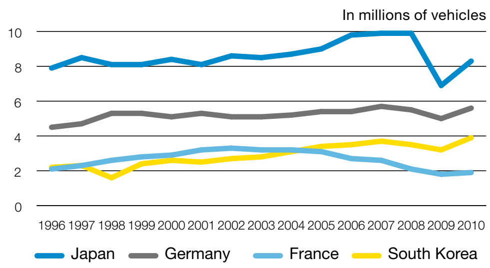


Source: CCFA.

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 globalized competition and industry (payroll, social and fiscal costs), there are competitive factors specific to the French automotive industry, resulting from the properties of the vehicles themselves and of the global automobile industry. 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 United 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.

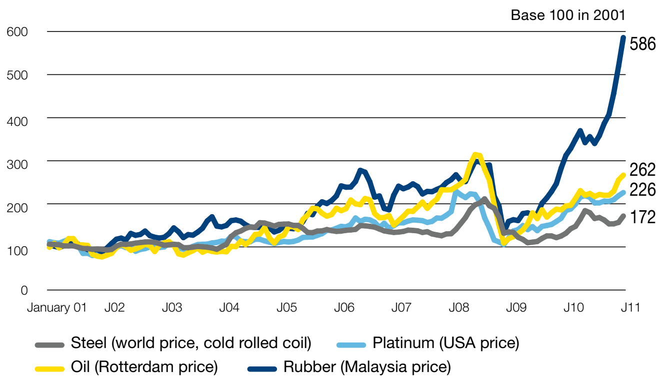
Besides, the prices of raw materials denominated in euros have risen substantially since 2001. Passing these price hikes on to consumers is extremely difficult in an environment of aggressive competition and the declining purchasing power of households affected by significant price increases in a range of areas: food, energy, housing... 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, they vary from 25% in the early 2000s to 7% in 2009 after 4% in 2008. The margin depends in particular on cost competitiveness and is associated (in the mid-term) with non-price competitiveness.

PASSENGER CAR PRODUCTION

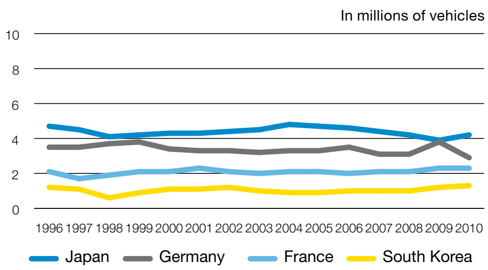


Sources: OICA, CCFA.

RAW MATERIAL PRICES IN EUROS

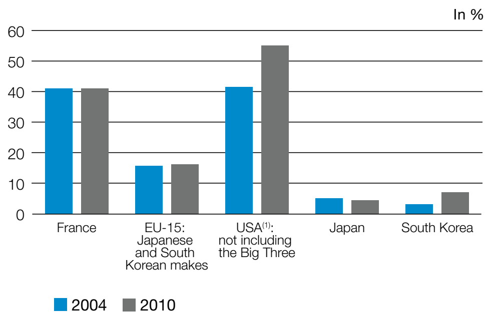


NEW CAR REGISTRATIONS



Sources: CCFA.

SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS



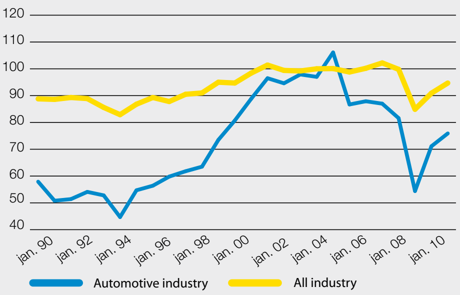
(1) USA: market share based on light vehicles. The Big Three are General Motors, Ford and Chrysler (excluding European makes).
Source: CCFA.

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 euro zone. On the other hand, there are factors associated with opening up the market, whether internal or external. In general, the internal "base market" acts as a strong foundation for using international development and innovation to drive growth in foreign markets. 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 euros have increased hugely since early 2001, despite the fall in the second half 2008 followed by a rebound. In early 2011, rubber appeared very strong with 486% growth reaching a record level; oil shot up by 167% and steel by 72%. 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 were 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 business and prices.

THE AUTOMOTIVE INDUSTRY AND THE FINANCIAL AND ECONOMIC CRISIS

World sales of automobiles, particularly in OECD countries, have been harshly hit by the financial crisis that began in 2007, which was closely followed by an economic crisis. Thus, the industrial production index in France—measured by the INSEE—dropped sharply between summer 2008 and early 2009, before markedly bouncing back a notable recovery by the end of the year and in 2010. These fluctuations affected an important sector with a large presence in certain regions. If we count direct jobs (production and research sites of manufacturers), indirect jobs (supplier sites) and induced jobs (generated by the business of the former), the automotive economy is often a mainstay of local economies. Since 2009, the Public Authorities have helped the automotive industry to deal with the crisis. They rapidly implemented measures with short-term effects (one million scrapping premiums in France, training assistance, partial unemployment benefits, etc.) and later set up instruments of a more structural nature encouraging, for example, research and development capabilities (research tax credits, CIR) and long-term funding (strategic investment fund in 2008 and a fund for modernization of automotive equipment manufacturers in 2009). All of these tools should help increase the competitiveness of the French economy and thus that of the automotive industry. Furthermore, the *Plateforme de la Filière Automobile* (PFA - Automotive Branch Platform) was set up in 2009 by French automobile manufacturers and their suppliers, who joined to form the *Comité de Liaison des Fournisseurs de l'Automobile* (CLIFA - Automotive Suppliers' Liaison Committee), which aimed to improve the effectiveness of the automotive industry.

INDUSTRIAL PRODUCTION INDEX – ALL INDUSTRY AND AUTOMOTIVE INDUSTRY – DATA CORRECTED FOR SEASONAL VARIATIONS AND CALENDAR EFFECTS BY THE INSEE



Regions	Direct jobs	Indirect jobs	Induced jobs	Reference year	Sources
Nord - Pas-de-Calais	21,100	18,439	nd	2008	NPDC Insee – The automotive branch in Nord-Pas-de-Calais – September 2010
South Alsace (Mulhouse) and North Franche-Comté	9,400	3,500	2,345	2007	Alsace Insee – Figures for Alsace no. 2 – March 2009
North Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	Franche-Comté Insee – Essentials no. 113 – May 2009
Seine-Aval	11,200	3,300	3,600	2006	Ile-de-France Insee – On page no. 291 – January 2008
Val-d'Oise and Yvelines	75,000	75,000	between 50,000 and 100,000	2006-2007	RAVY (Automotive Network of Val-d'Oise Yvelines) – Press release – 2008 Version

INVESTMENT FUNDS

	Creation	Aims	Provisions
Strategic Investment Fund (FSI)	November 2008	Sovereign wealth fund set up by the public authorities to meet the equity capital needs of companies with potential for growth and competitiveness for the economy	Equity capital of 21 billion euros on 31 December 2010
Fund for modernization of automotive equipment manufacturers (FMEA)	January 2009	To take minority holdings in companies working in the automotive branch which are undertaking industrial projects that create value and competitiveness for the economy	Initial amount of 600 million euros equally distributed among Renault SA, PSA Peugeot Citroën and the FSI
Funds for modernization of automotive equipment manufacturers (FMEA) Level 2	November 2009	Fund specifically aimed at smaller automotive suppliers (Level 2 and higher)	50 million euros gathered by five leading automotive equipment manufacturers and the players of FMEA Level 1

Source: Fonds Stratégique d'Investissement (FSI).

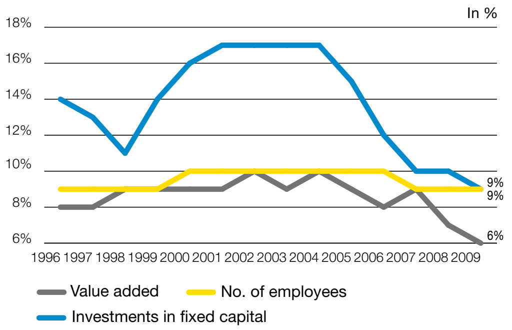
–/+ 40%
RANGE OF THE INDUSTRIAL PRODUCTION INDEX FOR THE AUTOMOTIVE INDUSTRY DURING THE CRISIS

The economic and financial crisis has important effects 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. 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 work in research centers 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.). In addition, industrial sites generate local economic activity that is not limited exclusively to their own employees (direct employment). Regional divisions of the INSEE have produced papers describing, on the one hand, indirect jobs made up of personnel employed by suppliers, subcontractors and service providers and, on the other hand, induced jobs, which are those that are required to fulfill the consumption needs of employees (direct and indirect) and their families. A study conducted by the Franche-Comté INSEE shows that a population of 58,800 depends on the existence of 11,800 jobs in automotive manufacturing. The collapse of the European market in 2008 caused the output of the automotive industry—measured by the INSEE—to drop with a sharper decline than the industrial average. During the crisis, the index declined by 40 % before recovering its losses and then gaining 10 % in 2010 (-14%, +2% and +6% respectively for the industry). These sudden changes in business and resources were difficult to reconcile with, for instance, the need for continuity in the important research work conducted by the automotive industry. On the local level, the falling output of assembly plants has mostly diffused and many regions have been more greatly affected by the extent of the fluctuations in the automotive industry. As regards long-term financing difficulties, the Strategic Investment Fund (FSI) had invested by the end of 2010 in three companies in the automotive sector (investment of 20 million euros and acquisition of holdings equal to 5.9%). As for the Fund for modernization of automotive equipment manufacturers (FMEA) to which French manufacturers contributed 400 million euros, it has already provided almost 200 million euros to 13 equipment manufacturing companies. The Automotive Branch Platform (PFA) has four priorities: lean manufacturing, tomorrow's expertise and businesses, better communication management, and a mid- and long-term strategy for competitiveness of manufacturers and their suppliers. Since 2010, it relies on a regional level on the Associations Régionales de l'Industrie Automobile (ARIA - Regional Associations of the Automotive Industry). It has also organized trade conferences—in particular on die-stamping—and, on a local level, has cooperated with the Public Authorities (DIRECCTE and the leading regional automotive company, credit mediator, OSEO, CDC), the UIMM and other professional organizations, and competitiveness clusters in the context of the Regional Operational Committee for the Automotive Industry, organized by the ARIA.

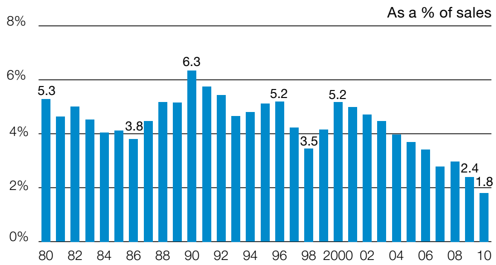
ECONOMIC RATIOS OF THE AUTOMOTIVE INDUSTRY IN FRANCE

The automotive industry uses a wide variety of technologies, requiring significant investment: it has accounted for over 16% of all industrial capital expenditure since the beginning of the 2000s. However, this share fell to 9% in 2009, as the Western worlds' market for new vehicles stagnated and subsequently plummeted. To address new social demands (the environment, road safety, etc), 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

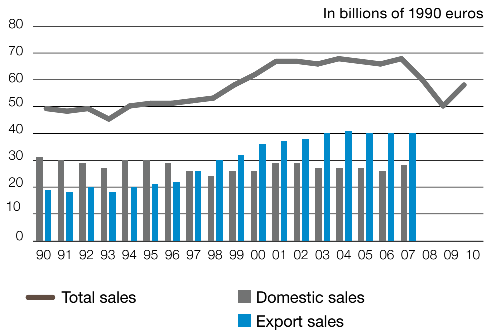


INVESTMENTS OF AUTOMOTIVE MANUFACTURING

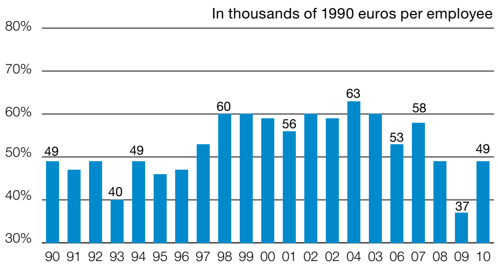


EMPLOYEES OF AUTOMOTIVE MANUFACTURING

DOMESTIC AND EXPORT SALES BY THE AUTOMOTIVE MANUFACTURING INDUSTRY



VALUE ADDED OF AUTOMOTIVE MANUFACTURING



NB – about these graphs: CCFA estimates for 2010 and certain variables for 2008 and 2009 – see also pages 72 and 73 (particularly for concept changes).

Every year, the SESSI, formerly the *Service des Études et des Statistiques Industrielles* (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. These surveys have been overhauled with the new ESANE information system. A new economic activity categorization was launched in early 2008 *(see pages 72 and 73)*.
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 tires, plastics, capital goods 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 euros 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 financial and economic crisis, and the rising cost of raw materials. In 2009 it fell to its lowest 1993 figures. However, it enjoyed new growth in 2010 but did not climb higher than its pre-recession levels. The automotive manufacturing industry dedicated 2% of sales to capital expenditure (€1.5 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. Currently, the new ESANE information system does not allow us to update these data.

9%
SHARE OF AUTOMOTIVE INDUSTRY EMPLOYEES IN THE MANUFACTURING AND ENERGY SECTOR IN 2009 IN FRANCE

RESEARCH AND DEVELOPMENT SPENDING IN THE AUTOMOTIVE INDUSTRY

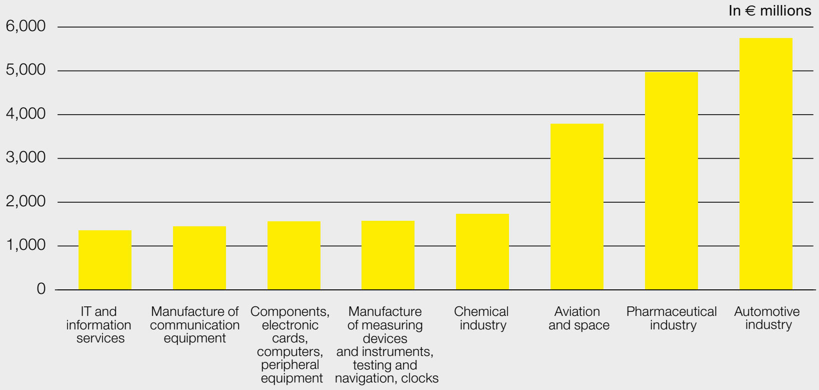
In 2008, the French automobile industry returned to its position as leader of all other industries in France in terms of corporate research and development spending. Its expenditure was €5.7 billion, accounting for 17% of total corporate spending on research and development. After rising strongly between 2001 and 2006 (+24%), R&D expenditure in the automotive industry reached a ceiling of around €4 billion before growing by 9% in 2008, representing 37% of gross added value for the industry. The automobile leverages a wide variety of technologies and therefore requires significant research initiatives to ensure its reliability throughout its lifetime, user safety and environmental protection. The automotive industry's R&D budgets exceeded those of the pharmaceutical industry and the aviation and space construction industry.

GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2008

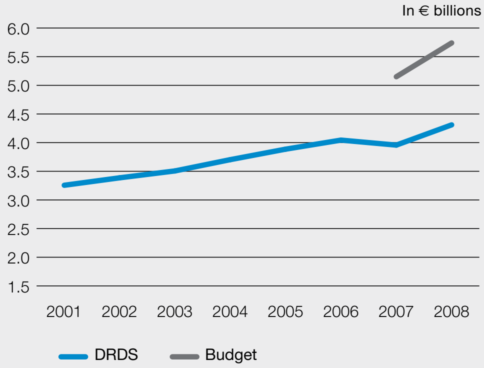
	DRDS (1)	ERDS (2)	Budget		Of which public financing (3)	
	In € millions	In € millions	In € millions	% of total	In € millions	% of total
Automotive industry	4,310	1,430	5,741	17.4%	32	1.0%
Pharmaceutical industry	3,439	1,525	4,964	15.0%	76	2.4%
Aviation and space	2,738	1,056	3,794	11.5%	1,196	38.6%
Chemical industry	1,437	297	1,734	5.3%	81	2.6%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,205	362	1,568	4.7%	363	11.7%
Components, electronic cards, computers, peripheral equipment	1,384	180	1,564	4.7%	158	5.1%
Manufacture of communication equipment	1,167	285	1,451	4.4%	281	9.1%
IT and information services	1,291	61	1,352	4.1%	100	3.2%
Manufacture of machinery and equipment not included elsewhere	934	148	1,082	3.3%	32	1.0%
Manufacture of electrical equipment	759	203	962	2.9%	24	0.8%
Telecommunications	847	s	s	s	22	0.7%
Manufacture of rubber and plastic products	695	105	800	2.4%	17	0.6%
Other research segments	5,561	1,603	7,165	21.7%	719	23.2%
TOTAL	**25,768**	**7,255**	**33,023**	**100.0%**	**3,102**	**100.0%**

(1) DRDS: Domestic Research and Development Spending.
(2) ERDS: External Research and Development Spending.
(3) Excluding research tax credits.
s: statistical secrecy.
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



€5.7 billion
FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN 2008

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, which covers work performed in France regardless of the origin of funding, and external spending corresponding to work performed by other companies or public research organizations. A portion of the latter work may be performed outside of France. From 2008, data are published in a new business nomenclature. Since 1999, the leading R&D segment in France has been the automotive industry except in 2007 when it was ranked second. The R&D segment in France stimulates its suppliers such as the plastics and electronics industries. In 2008, 22% of domestic R&D spending in the automobile industry was performed by subsidiaries in which foreign companies had a controlling interest of 50% or more.

In 2008, 35,000 equivalent full-time employees (including 17,900 researchers) worked in automotive R&D. These figures were up 6% compared to 2003 (29% for researchers).

According to the French National Industrial Property Institute (INPI), PSA Peugeot Citroën Automobiles (including Faurecia) and Renault filed the largest number of patents with INPI in 2010. France has three major equipment manufacturers in the top twenty.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE, RESEARCH TAX CREDITS, FUTURE INVESTMENTS

The public authorities have launched and developed three types of financial instrument to increase the research and development capabilities of French companies.
This support helps improve the innovation of said companies and therefore their competitive edge.
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.
The public authorities also support Research and Development in companies through the Research Tax Credit, a fiscal measure created in 1983, improved in 2004 but simplified and amplified by the 2008 Finances Law.
Future investments were launched at the end of 2009 after the Juppé-Rocard report recommended boosting innovation in France. The objective of this €35 billion investment program, of which €750 million were for the automotive sector, is to strengthen production and improve the competitive edge of French companies.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2009 (1)

	Mov'eo	Véhicule du Futur	LUTB (2)	iDforCAR (2)
With a...	World vocation	National vocation	National vocation	National vocation
Number of companies with a business unit in a competitiveness cluster	168	118	85	72
Of which SMEs (under 250 employees)	108	64	42	35
Employees of business units involved in the cluster (number of people)	26,361	45,919	28,854	18,155
Spending by public bodies on cluster projects (in € thousands)	64,462	53,342	12,930	1,709
Spending by corporate bodies on cluster projects (in € thousands)	17,386	61,286	23,382	5,482
Total spending	81,848	114,628	36,312	7,191
Number of labeled projects	67	39	21	14

(1) Information concerning employees is taken from 2008 data.
(2) Information concerning expenditure is taken from 2008 data.
Sources: DGCIS survey, INSEE, DIACT, competitiveness clusters.

In 2010, 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 training organizations including universities. 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 *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. 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: 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 by developing know-how in small series and specific vehicles, a field with stiff competition on the international stage. In 2009, the manufacturing industry received 70% of the total Research Tax Credit representing €4.7 billion. In 2009, the automotive industry was the third sector to benefit from Research Tax Credit, representing 6.7%.

The €750 million of Future investments dedicated to the automotive sector concern vehicles for the future which must be more economical and higher performing in environmental terms. The automotive industry also enjoys other areas that have opened up amongst the programs investing for the future.

THE AUTOMOTIVE INDUSTRY IS THE THIRD SECTOR TO BENEFIT FROM RESEARCH TAX CREDIT

3

FRENCH AUTOMOTIVE FOREIGN TRADE

2010 was a positive year for world trade after an unprecedented contraction in 2009.
In this climate, exports of French automotive products fell by 18% to €41 billion. The automotive industry remains one of the leading export sectors alongside aeronautical, agro-food, etc. In 2009, two companies in this sector were ranked in the leading three exporting companies.
The industry's trade deficit improved (–€3.5 billion) thanks to the energy of markets outside the European Union, but remains affected in particularly 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 grew to €5.1 billion, mainly due to the increase in production on French manufacturers' sites outside France using French supplies, for example thruster units (surplus of €2 billion).

FRENCH AUTOMOTIVE FOREIGN TRADE

In € billions

	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)									
2009	13.7	1.4	1.8	16.7	33.6	1.0	34.6	341.1	10.1%
2010	15.2	1.7	2.3	20.4	39.6	1.1	40.7	387.6	10.5%
% change 2010/2009	+11.4	+19.9	+28.8	+21.9	+17.9	+8.0	+17.6	+13.6	
IMPORTS									
(CIF)									
2009	20.8	2.1	2.3	12.8	38.0	1.2	39.2	400.3	9.8%
2010	22.4	2.9	2.4	15.3	43.0	1.2	44.2	455.6	9.7%
% change 2010/2009	+7.4	+38.1	+6.1	+19.3	+13.0	–0.7	+12.6	+13.8	
BALANCES									
2009	–7.2	–0.7	–0.5	+3.9	–4.4	–0.2	–4.7	–59.3	
2010	–7.1	–1.2	–0.1	+5.1	–3.4	–0.1	–3.5	–68.1	
COVERAGE RATE [2]									
2009	66	67	79	131	88	81	88	85	
2010	68	58	95	133	92	88	92	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.

SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS IN 2010

10%

In 2010, 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.
The deficit of €350 million observed in 1996 became 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 financial and economic crisis worsened the deficit in 2008 and 2009. The recovery in 2010 helped stabilize the deficit.
The trade balance deficit for commercial vehicles increased to €1.2 billion in line with the rise in exports. After a steep fall in 2009, exports of light commercial vehicles and heavy trucks respectively increased by 19.9% to €1.7 billion and 28.8% to €2.3 billion.
Flows of parts and engines increased: +19.3% for imports and +21.9% for exports. The trade surplus improved by 30.3% at €5.1 billion.
The Customs ranking for export has two French automotive construction companies in the top three exporters. Because of the recession in 2009 and the unprecedented shrinking of global trade, Automobiles Peugeot and Renault Trucks respectively held the fifteenth and the twenty-seventh position compared to the ninth and seventh in 2008.

EXPORT RANKINGS – YEAR 2009

Rank	Company [1]
2	Peugeot Citroën Automobiles SA
3	Renault SAS
15	Automobiles Peugeot
27	Renault Trucks

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

FRENCH AUTOMOTIVE FOREIGN TRADE

The deficit in industrial vehicles (excluding used vehicles) improved in 2010, at –€3.4 billion (–€4.4 billion in 2009). This represents a deficit of €6.5 billion with EU-27 countries to a €3.1 billion surplus with the rest of the world. The reduction of the deficit is mainly due to the result posted with the EU-27, which can be attributed to the end of the crisis in automotive markets outside the European Union.
The surplus with the rest of the world increased by €3.1 billion compared to €1.2 billion in 2009. The deficit with Turkey fell to €300 million after three years of growth. Exchanges with many countries always result in important surplus figures: Algeria (€820 million), Iran (€640 million), Switzerland (€610 million) and Brazil (€450 million).

INDUSTRIAL AUTOMOBILE TRADE BALANCE

In € billions

	1985	1990	2000,[1]	2005	2007	2008	2009	2010
Total	4.57	4.13	9.84	8.21	1.02	−3.19	−4.42	−3.36
INTRA EC (12 countries)	**0.29**	**0.45**						
INTRA EU (15 countries)			**5.80**	**4.11**	**−1.18**	**−5.04**	**−3.11**	**−3.45**
INTRA EU (25 countries)				**4.42**	**−2.10**	**−6.24**	**−5.41**	**−6.08**
INTRA EU (27 countries)					**−1.83**	**−6.06**	**−5.63**	**−6.49**
of which: Germany	−1.62	−2.20	−3.75	−5.54	−7.46	−8.07	−6.09	−6.78
Austria			0.33	0.43	0.38	0.37	0.31	0.25
Belgium-Luxembourg	0.26	0.68	0.35	2.23	2.47	2.42	2.12	1.94
Denmark		0.12	0.23	0.34	0.31	0.29	0.10	0.23
Spain	−0.55	−0.14	1.55	0.46	−1.44	−2.92	−1.62	−1.98
Finland			0.17	0.23	0.15	0.13	0.06	0.11
Italy	0.59	0.13	0.58	1.56	0.70	0.21	0.77	0.69
Netherlands	0.34	0.57	1.54	0.37	0.17	0.27	−0.01	0.2
Poland				0.15	0.13	0.01	−0.38	−0.5
Portugal	0.12	−0.12	0.50	0.51	0.35	0.26	0.04	0.02
Czech Republic				−0.21	−0.65	−0.69	−1.00	−1.08
United Kingdom	0.98	1.21	3.56	2.81	2.94	2.04	1.06	1.66
Slovenia				0.05	−0.16	−0.27	−0.46	−0.42
Sweden			0.14	0.07	−0.24	−0.43	−0.01	−0.02
OUTSIDE EC (12 countries)	**4.27**	**3.69**						
OUTSIDE EU (15 countries)			**4.04**	**4.10**	**2.20**	**1.85**	**−1.31**	**0.09**
OUTSIDE EU (25 countries)				**3.79**	**3.12**	**3.05**	**0.99**	**2.72**
OUTSIDE EU (27 countries)					**2.85**	**2.87**	**1.21**	**3.13**
of which: Austria	0.15	0.22						
Finland		0.10						
Norway		0.06	0.13	0.20	0.20	0.12	0.08	0.17
Poland			0.25					
Czech Republic			−0.01					
Slovenia			0.15					
Sweden		0.05						
Switzerland	0.27	0.50	0.59	0.57	0.47	0.45	0.46	0.61
Turkey		0.17	0.55	0.13	−0.66	−0.86	−0.94	−0.61
Yugoslavia	0.03	0.07						
Canada	0.12	0.15	−0.02	0.02	0.02	0.02	0.03	−0.01
USA	0.81	0.41	0.46	0.41	0.15	0.07	0.22	0.23
Mexico	0.00	−0.01	0.03	0.13	0.10	0.05	0.03	0.03
Argentina		0.06	0.38	0.17	0.33	0.27	0.19	0.32
Brazil		0.07	0.25	0.19	0.32	0.36	0.29	0.45
Algeria	0.56	0.47	0.29	0.52	0.65	0.81	0.77	0.82
Morocco		0.18	0.12	0.17	0.21	0.27	0.28	0.27
Nigeria		0.14	0.15	0.08	0.12	0.06	0.02	0.02
Tunisia		0.11	0.17	0.08	0.07	0.08	0.10	0.12
Saudi Arabia		0.06	0.06	0.06	0.07	0.08	0.06	0.07
China		0.05	0.09	0.26	0.30	0.16	0.19	0.3
South Korea		0.02	−0.22	−0.47	−0.48	−0.40	−0.30	−0.23
Iran		0.10	0.15	0.92	0.53	0.80	0.59	0.64
Japan	−0.43	−0.63	−1.04	−1.67	−1.63	−1.42	−1.60	−1.5
Taiwan	0.03	0.14	0.02	−0.02	−0.02	−0.04	−0.03	−0.02

(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 was further increased in 2008 to €5 billion, reduced in 2009 to –€3.1 billion before once again falling to –€3.4 billion in 2010. Between 2009 and 2010, the increase in the deficit can be explained by the fall in trade with Germany (from –€6.1 billion to –€6.8 billion) and Spain (from –€1.6 billion to –€2 billion) because of the end of the government support for scrap incentive schemes in these countries. Nevertheless, there are important trade surpluses with Belgium–Luxembourg (€1.9 billion), the United Kingdom (€1.7 billion) and Italy (€0.7 billion).

With the 12 new EU member countries, the heavy truck deficit was €3 billion in 2010 (–€2.5 billion in 2009), because of the rise in local operators. Outside the EU-27, the automotive manufacturing trade surplus stood at €3.1 billion. Trade with Latin America and Africa remains encouraging. The deficit with Japan and South Korea combined was slightly improved at –€1.7 billion.

€3.1 billion
SURPLUS OF INDUSTRIAL AUTOMOBILE TRADE BETWEEN FRANCE AND THE NON-EU-27 COUNTRIES FOR 2010

DIESEL PASSENGER CARS

Since 2002, there have been more diesel passenger car registrations than registrations of vehicles running on other fuels. In 2010, they represented 71% of total registrations, remaining at the 2009 level due to the importance of low range passenger cars on the French market.
58% of cars in use on 1st January 2011 had diesel engines.
In 2010, 2.2 million diesel cars were produced by French manufacturers representing a 10% drop compared to the record level of 2004. The share of diesel cars in total production (39%) has risen compared to 2009 but has fallen compared to 2004 (47%). For German manufacturers, it stands at 35%.

DIESEL PASSENGER CARS

	1995	2000	2005	2008	2009	2010	% change 2010-2009
Production							
In units	1,036,796	1,648,448	2,328,108	2,018,059	1,823,626	2,178,408	+19.5
As a % of total production	34.0%	35.8%	45.0%	41.2%	37.9%	38.8%	
Exports							
In units	472,087	975,038	1,500,989	1,400,805	1,211,875	1,607,974	+32.7
As a % of total exports	25.5%	33.7%	39.1%	34.7%	31.1%	34.0%	
Registrations							
In units	897,698	1,046,485	1,466,296	1,620,980	1,628,495	1,593,173	–2.2
As a % of total registrations	46.5%	49.0%	69.2%	77.5%	70.7%	70.8%	
Fleet							
In units	6,938,000	9,980,000	14,348,000	16,753,000	17,458,000	18,165,000	+4.0
Total fleet			30,100,000	30,850,000	31,050,000	31,300,000	
As a % of all cars in use	27.6%	35.6%	47.7%	54.3%	56.2%	58.0%	

Source: CCFA.

MAIN NEW DIESEL PASSENGER CAR RANKINGS IN 2010

Rank	Make	Model	% diesel market
1	**Renault**	**Mégane**	**9.1**
2	**Peugeot**	**206-207**	**8.3**
3	**Renault**	**Clio**	**7.0**
4	**Citroën**	**C3**	**5.8**
5	**Renault**	**C4-Xsara**	**5.1**
6	**Citroën**	**308**	**3.6**
7	**Peugeot**	**3008**	**3.1**
8	Volkswagen	Golf	2.2
9	Ford	Fiesta	2.2
10	Volkswagen	Polo	2.1

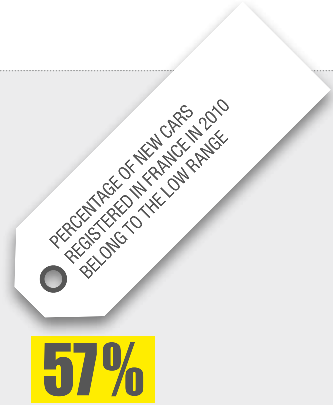
Source: CCFA.

7 out of 10 NEW PASSENGER CARS REGISTERED IN FRANCE HAVE DIESEL ENGINES

In 2010, France was the world leader in diesel car ownership with 1,593,000 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 new car market share has increased by nearly 6 points to 52% representing 6.8 million units. On this market, the French manufacturers' share stands at 28%. Because of the recovery after the recession, diesel car production and exports have grown respectively by 20% and 33%.

NEW PASSENGER CAR REGISTRATIONS BY MODEL, RANGE AND BODY STYLE

The range structure of new cars has developed significantly over the last twenty years. The high-mid range represented 24% of the market in 1990, 14% in 2000 and about 10% in 2009 and 2010. Since 2008, the "bonus/malus" government scrap incentive schemes have encouraged the development of low ranges that today represent 85% of the market, compared to 80% in 2007.
The organization of cars by body has also changed since 1990. Sedan market share was over 90% of the market in 1990 compared to 72% in 2000 and 61% today.
Manufacturers have been adapting over the last few years to the change in demand by offering a wide range of small cars and new models in different segments (DS, 3008, 5008, 508, Wind, Latitude, Duster).



RANKING OF THE MAIN NEW PASSENGER CAR MODELS IN 2010

Rank	Make	Model	% market	Rank	Make	Model	% market
1	**Peugeot**	**206-207**	**8.1**	**16**	**Citroën**	**C5**	**1.2**
2	**Renault**	**Clio**	**7.2**	**17**	**Renault**	**Modus**	**1.2**
3	**Renault**	**Mégane**	**6.9**	**18**	**Peugeot**	**5008**	**1.2**
4	**Citroën**	**C3**	**5.8**	**19**	**Citroën**	**DS3**	**1.2**
5	**Renault**	**Twingo**	**4.1**	20	Ford	Focus	1.1
6	**Citroën**	**C4-Xsara**	**3.7**	21	Nissan	Qashqai	1.1
7	**Dacia**	**Sandero**	**3.0**	**22**	**Renault**	**Laguna**	**1.0**
8	**Peugeot**	**308**	**2.8**	23	Fiat	500	1.0
9	**Peugeot**	**3008**	**2.2**	24	Fiat	Panda	0.9
10	Volkswagen	Polo	2.2	25	Fiat	Punto	0.9
11	Ford	Fiesta	2.0	**26**	**Dacia**	**Duster**	**0.9**
12	Volkswagen	Golf	1.9	27	Seat	Ibiza	0.8
13	Opel	Corsa	1.7	**28**	**Toyota**	**Yaris**	**0.8**
14	**Peugeot**	**107**	**1.5**	**29**	**Renault**	**Kangoo**	**0.8**
15	**Citroën**	**C1**	**1.4**	30	Mini	Mini	0.8

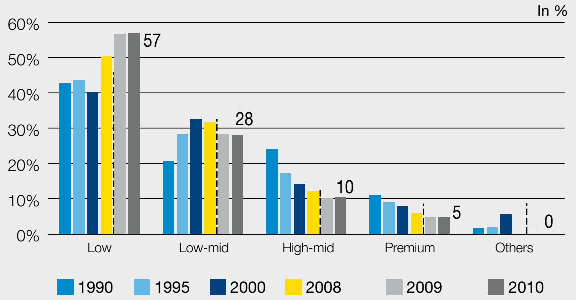
Source: CCFA.

NEW PASSENGER CAR REGISTRATIONS BY RANGE

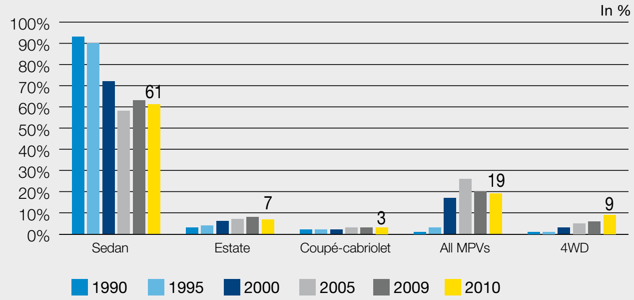
Ranges	1990		2000		2008(1)		2009		2010	
	units	%	units	%	units	%	units	%	units	%
Low	986,532	42.7	855,161	40.1	1,052,757	50.3	1,304,706	56.7	1,283,902	57.0
Low-mid	477,631	20.7	695,146	32.6	661,655	31.6	654,079	28.4	627,694	27.9
High-mid	555,053	24.0	303,028	14.2	254,475	12.2	233,460	10.1	234,664	10.4
Premium	256,381	11.1	163,293	7.7	122,442	5.9	110,104	4.8	105,313	4.7
Others	33,533	1.5	117,256	5.5	40	0.0	49	0.0	96	0.0
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,091,369**	**100.0**	**2,302,398**	**100.0**	**2,251,669**	**100.0**

(1) 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		2008		2009		2010	
	Units	%	Units	%	Units	%	Units	%	Units	%	Units	%
Sedan	2,155,724	93.4	1,731,191	89.7	1,527,676	71.6	1,266,633	60.6	1,446,314	62.8	1,377,498	61.2
Estate	61,418	2.7	78,278	4.1	119,739	5.6	192,377	9.2	172,800	7.5	153,476	6.8
Coupé-cabriolet	36,269	1.6	30,067	1.6	50,527	2.4	53,969	2.6	68,969	3.0	70,353	3.1
All MPVs	28,682	1.2	58,376	3.0	369,434	17.3	459,342	22.0	468,644	20.4	430,857	19.1
Including compact MPVs	–	–	–	–	*241,190*	*11.3*	*278,033*	*13.3*	*240,828*	*10.5*	*233,363*	*10.4*
4WD	17,129	0.7	25,684	1.3	57,116	2.7	102,493	4.9	132,942	5.8	205,106	9.1
Others	9,908	0.4	6,908	0.4	9,392	0.4	16,555	0.8	12,729	0.6	14,379	0.6
TOTAL	**2,309,130**	**100.0**	**1,930,504**	**100.0**	**2,133,884**	**100.0**	**2,091,369**	**100.0**	**2,302,398**	**100.0**	**2,251,669**	**100.0**

Source: CCFA.

USED PASSENGER CARS

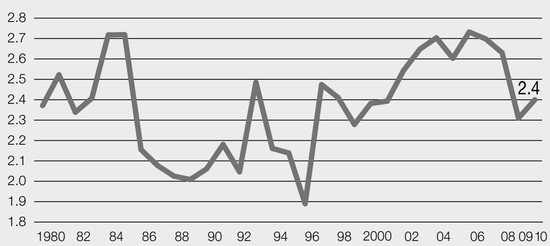
In 2010, as in previous years, registrations of used passenger cars exceeded 5 million units to reach 5,386,000 (+3% compared to 2009)
In 2009, new vehicle sales fell by 3% whilst the new car market (stimulated by incentive schemes) grew by 10%.
Every year, two or three used cars are purchased for every new car. In relation to the number of cars on the road, 18% change hands every year. Households keep a vehicle for an average of five years. 59% of cars owned or used by households were bought used, versus 51% in 1991. Households replacing a second-hand car with another second-hand car represent 45% of car replacements.

USED PASSENGER CARS

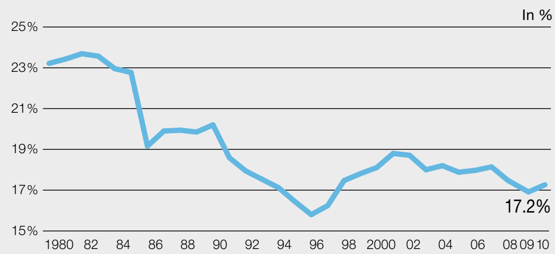
	Units	1980	1990	2000	2006	2007	2008	2009	2010
REGISTRATIONS									
New cars	thousand	1,873	2,309	2,134	2,046	2,110	2,091	2,302	2,252
Used cars	thousand	4,441	4,759	5,082	5,466	5,571	5,393	5,240	5,386
Used/new ratio		*2.4*	*2.1*	*2.4*	*2.7*	*2.6*	*2.6*	*2.3*	*2.4*
Cars less than 5 years old	**% used**		**52**	**40**	**40**	**38**	**37**	**38**	**37**
of which: cars less than 1 year old	% used		12	12	9	9	8	7	8
cars less than 1 year old	% new		25	29	24	23	21	17	19
Cars more than 5 years old	**% used**		**48**	**60**	**60**	**62**	**63**	**62**	**63**
Total (at 31/12)	thousand	**19,130**	**23,550**	**28,060**	**30,400**	**30,700**	**30,850**	**31,050**	**31,300**
Used/total ratio	**%**	**23.2%**	**20.2%**	**18.1%**	**18.0%**	**18.1%**	**17.5%**	**16.9%**	**17.2%**

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 5 and 6 million used cars are exchanged every year. This market is subject to less fluctuation than the new car market. In 2010, demand for new cars dropped by 2.2% to 2.3 million units whilst demand for used cars increased by 2.8% to 5.4 million units. The new/used ratio increased to 2.4 (i.e. +0.1 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 63% in 2010.
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 438,000 registrations or 19% of the new car market, an increase of two points compared to the previous year due to the lesser 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 8% in 2010, versus 12% in 2001.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

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.
Given the geographic environment, commercial vehicles over 5 tons account for a smaller proportion of registrations in overseas departments (1%) than in mainland France (1.5%). In contrast, the proportion of light commercial vehicles is slightly higher (15.9% versus 15.4% in mainland France).
In 2010, the number of registrations of new light vehicles dropped by 3% compared with the previous year. The DOM (French overseas departments) market weakened whilst the French mainland grew by 1%. The scrap incentive also supported passenger car sales but the recession 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 (over 50% of the market) which is a lot lower than in mainland France (around two-thirds of the market). However, on the narrow heavy vehicle market, Renault Trucks have almost 40% market share (around 33% in mainland France).

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

New passenger cars	2000	2005	2008	2009	2010	Change 2010-2000	Change 2010-2009
Guadeloupe	13,691	14,359	14,295	14,084	13,438	–1.8%	–4.6%
French Guiana	4,031	4,085	4,357	4,446	4,382	8.7%	–1.4%
Martinique	14,424	14,749	13,679	13,142	13,147	–8.9%	0.0%
Reunion Island	21,463	25,142	23,267	20,935	20,295	–5.4%	–3.1%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**53,609**	**58,335**	**55,598**	**52,607**	**51,262**	**–4.4%**	**–2.6%**

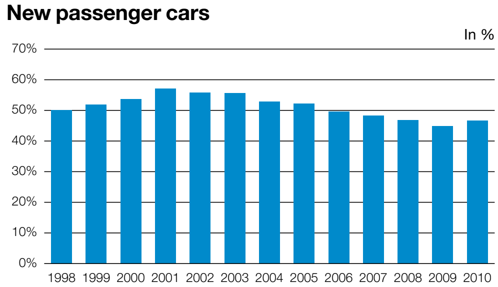
Light commercial vehicles (up to 5 tons)	2000	2005	2008	2009	2010	Variation 2010-2000	Variation 2010-2009
Guadeloupe	2,685	2,772	3,120	2,632	2,394	–10.8%	–9.0%
French Guiana	1,143	1,169	1,509	1,355	1,239	8.4%	–8.6%
Martinique	2,368	2,732	2,793	2,247	2,016	–14.9%	–10.3%
Reunion Island	5,200	6,021	6,060	4,412	4,166	–19.9%	-5.6%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**11,396**	**12,694**	**13,482**	**10,646**	**9,815**	**–13.9%**	**–7.8%**

Commercial vehicles including coaches and buses (over 5t)	2000	2005	2008	2009	2010	Variation 2010-2000	Variation 2010-2009
Guadeloupe	146	196	232	212	135	–7.5%	–36.3%
French Guiana	66	99	128	146	85	28.8%	–41.8%
Martinique	187	183	296	257	84	–55.1%	–67.3%
Reunion Island	362	464	652	492	293	–19.1%	–40.4%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**761**	**942**	**1,308**	**1,107**	**597**	**–21.6%**	**–46.1%**

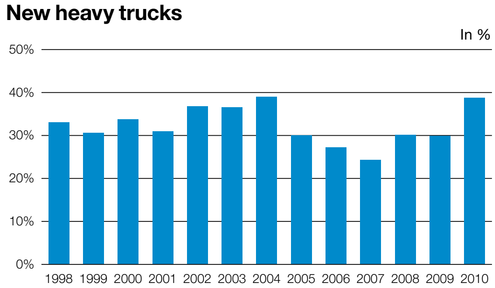
Source: CCFA.

FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

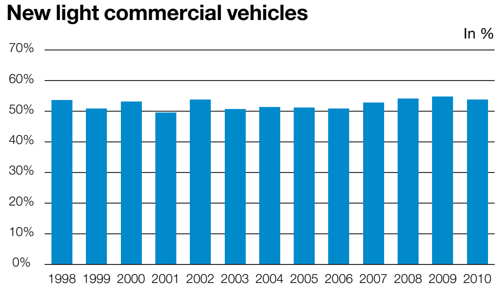
New passenger cars



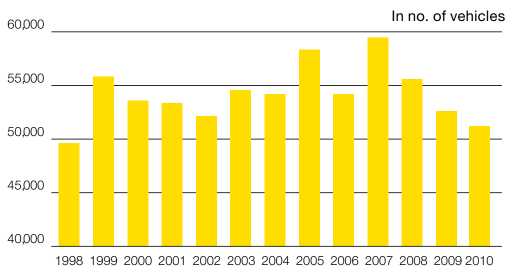
New heavy trucks



New light commercial vehicles



NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



CAR OWNERSHIP

In 2010, 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, i.e. rural areas located close to towns (nearly 93%). 64% of households in the Paris region own at least one vehicle (60% in 2000). 65% of young households bought a vehicle in 2010 (49% in 2000). 76% of older households own a vehicle, compared with 69% in 2000.

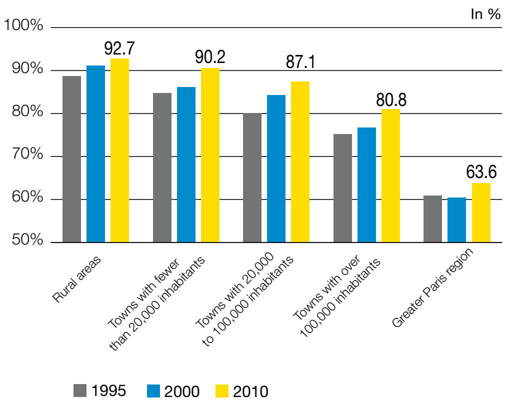
CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR)

In %

	1980	1990	1995	2000	2005	2010
BY SOCIO-PROFESSIONAL CATEGORY						
Farmers	87.3%	95.9%	98.9%	91.1%	100.0%	92.1%
Farm workers	72.6%	74.7%	–	–	–	-
Tradesmen, craftsmen, business owners	91.1%	95.2%	89.4%	90.6%	91.2%	91.1%
Self-employed professionals, executives	93.6%	94.4%	85.5%	84.6%	83.7%	84.1%
Middle management	90.2%	93.3%	88.7%	90.8%	87.6%	89.8%
White collar workers	75.4%	78.3%	75.9%	77.5%	80.9%	82.5%
Blue collar workers	80.4%	87.2%	89.7%	88.7%	89.1%	91.2%
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%	77.1%
of which retired persons	–	59.4%	70.9%	76.0%	76.2%	80.1%
BY AREA OF RESIDENCE						
Rural areas	71.7%	82.1%	88.6%	91.1%	92.4%	92.7%
Towns with fewer than 20,000 inhabitants	69.6%	76.6%	84.7%	86.1%	88.4%	90.2%
Towns with 20,000 to 100,000 inhabitants	72.3%	77.3%	80.0%	84.2%	83.7%	87.1%
Towns with over 100,000 inhabitants	69.5%	74.2%	75.1%	76.6%	78.5%	80.8%
Greater Paris	69.3%	77.0%	60.8%	60.4%	61.5%	63.6%
Inner Paris	48.8%	47.3%				
BY LOCATION OF RESIDENCE						
Town centre	–	–	67.6%	69.4%	69.2%	73.0%
Suburb	–	–	79.3%	80.5%	80.9%	83.2%
Semi-rural area	–	–	88.5%	89.8%	91.2%	91.6%
Rural area	–	–	85.3%	90.4%	92.6%	94.8%
BY AGE OF HEAD OF HOUSEHOLD						
Under 25	–	–	51.2%	49.3%	63.3%	64.9%
25 to 34	–	–	85.1%	82.4%	82.3%	83.9%
35 to 44	–	–	86.7%	86.3%	87.5%	88.0%
45 to 54	–	–	87.5%	87.4%	86.1%	88.1%
55 to 64	–	–	84.9%	87.0%	86.7%	86.9%
Over 65	–	–	61.9%	69.0%	70.8%	76.2%
ALL	**69.3%**	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.5%**
Vehicles for which women are the main drivers	–	–	–	40.4%	40.7%	41.5%

Sources: INSEE up to 1993, PARCAUTO TNS-SOFRES from 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 2010; 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; 81% of households owned vehicles in 2010, compared with 75% 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 (5.0 and 6.2 points respectively).

PERSONAL VEHICLES IN USE

Daily car use has regularly dropped in recent years: the number of vehicles used daily or near-daily was 72% in 2010, compared with 79% in 2000.
Since 2006, there are more diesel-powered (60%) than gasoline-powered cars.
The average number of kilometers on the odometer stands at around 103,000 kilometers, i.e. 10,000 kilometers more than in 2000 and 34,000 kilometers more than in 1990.
78% of all cars in use belong to the low and mid-low ranges, compared with 60% in 1990.

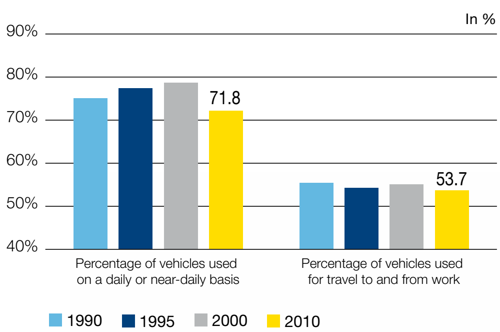
VEHICLE FLEET (OWNED, LEASED OR LOANED) BY HOUSEHOLDS

	Units	1980	1990	1995	2000	2005	2010
Total fleet	millions	16.7	23.0	25.1	27.4	31.0	33.6
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	28.6
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	38.2
Foreign makes	%	16.7	28.4	30.5	31.4	33.2	33.2
BREAKDOWN BY TAXABLE HORSE POWER							
2 and 3 hp	%	12.3	3.4	1.6	0.7	43.3 }	44.3
4 and 5 hp			38.4	38.9	40.5		
6 and 7 hp	%	47.0	47.1	48.6	50.0	46.6	42.5
8 hp and above	%	17.5	12.8	10.9	8.8	10.1	13.1
BREAKDOWN BY VEHICLE RANGE							
Low range	%		39.4	43.4	45.1	44.5	46.8
Low-mid	%		20.8	24.3	27.3	32.2	30.9
High-mid	%		26.0	22.2	19.9	16.2	11.5
Premium range	%		8.7	7.0	7.0	5.7	5.0
Others	%		5.1	3.2	0.8	1.4	5.7
Percentage of vehicles purchased new	%	55.7	50.4	45.2	43.9	40.1	41.1
BREAKDOWN BY FUEL TYPE							
Premium unleaded	%		15.5	38.4	49.1	51.1 }	40.4
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	59.6
Average kilometers on odometer	km		69,500	84,080	93,140	99,460	103,470
Percentage of vehicles used on a daily or near-daily basis	%		75.1	77.4	78.7	75.7	71.8
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: PARCAUTO TNS-Sofres survey processed by CCFA and IFSTTAR.

An annual Sofres survey gives a clear picture of the cars owned or available to households in France. Most of these vehicles are passenger cars, but light commercial vehicles account for about 5% of the total fleet. 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 became stable at 8 years in 2009 and 2010. The most common power categories are between 4 and 7 horse power. 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 2010 they represented respectively 47% and 31% of the population, whilst the high-mid range represented 12%. Luxury or high-end comfort equipment is increasingly popular; in 2010, 64% of cars were fitted with air conditioning. In terms of safety equipment, numbers have also risen; 59% of vehicles have ABS and 30% a speed-limiting device. In terms of the environment, 26% of cars have a particle filter.

VEHICLE USE



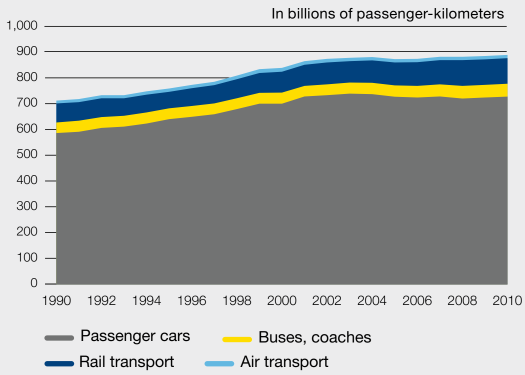
RESPECTIVE SHARES OF VEHICLES USED ON A DAILY (OR NEAR-DAILY) BASIS AND FOR TRAVEL TO AND FROM WORK

72% and 54%

DOMESTIC PASSENGER TRANSPORT

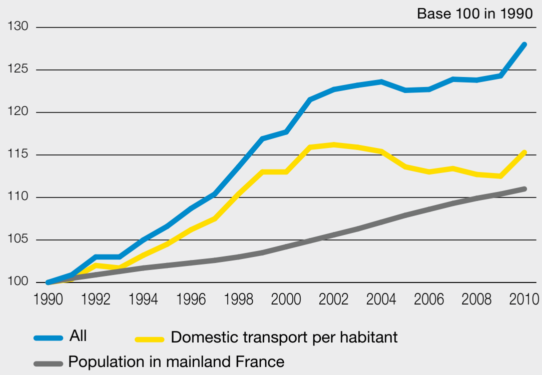
Personal transport drives the economy: shaping economic and social exchanges, creating wealth, and underpinning whole sectors such as health and tourism.
When expressed as passenger-kilometers, which under-represents urban transport and focuses on domestic transport to the exclusion of long-distance international transport, roads emerge as the dominant mode: 82% for passenger cars and 6% for coaches and buses in 2010.
Cars and light commercial vehicles allow people to carry their belongings, offering an appropriate solution to transport 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: MEEDDM/SOeS, INSEE.

DECREASE FROM 2002 TO 2010 IN DOMESTIC PASSENGER TRANSPORT FOR ALL MODES PER INHABITANT IN PASSENGER-KILOMETERS

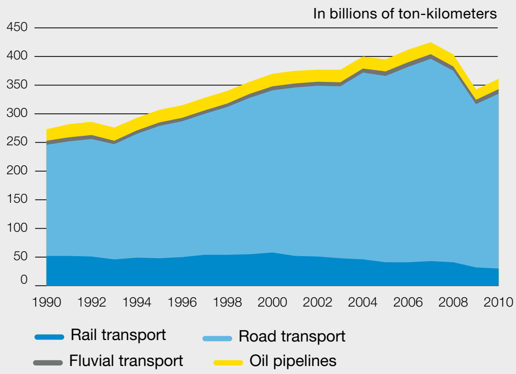
–2%

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. This situation is exacerbated in the case of personal services such as health, tourism, etc. People select their mode of transport on the basis of their starting point/destination, distance and time and the quantities/volumes of goods, 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 18% compared to 1990). Since then, it appears to have tailed off due to rising fuel prices, and dropped 2% between 2002 and 2010.

DOMESTIC FREIGHT TRANSPORT

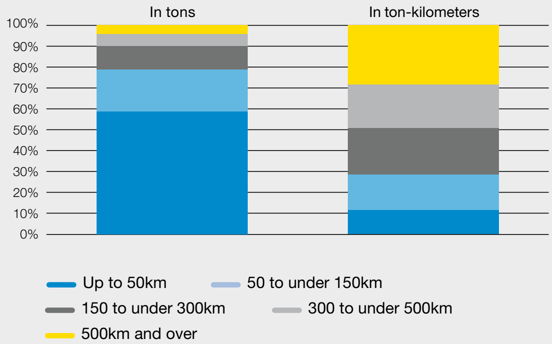
Transporting freight drives the economy enabling production sites to connect with each other and with consumer sites, which in turn link to reprocessing-recycling plants. The time dimension must be added to this spatial model, often associated with town and country planning.
Each mode of transport – road, rail, inland waterways, pipeline, etc. – depends on infrastructure that requires 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: MEEDDAT/SOeS

BREAKDOWN OF ROAD TRANSPORT OF FREIGHT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2009



Source: TRM survey by the MEEDDM/SOeS.

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 goods 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. This demand 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;
• the value of goods transported;
• 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. This 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 because it increases the transportation distances. Good intermodal connections require acceptable costs and changes in efficient transport means.

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 51% of French ton-kilometers are generated less than 300km from the source.

OF GOODS TRANSPORTED BY FRENCH ROAD CARRIERS TRAVEL LESS THAN 150 KILOMETERS MEASURED AS FREIGHT TONS

79%

AUTOMOBILE TRAFFIC

Automotive traffic increased by an annual average of 2.5% between 1980 and 2005, and has remained relatively stable since (+0.1% per year). In 2010, growth in traffic was observed after two low years associated with the most devastating financial and economic crisis since the Second World War. The level remains below that observed in 2007. The economic upturn of 2010 was reflected in more work-home journeys and also by growth in road freight which still remains far below its pre-recession level (2007). Per vehicle type, passenger car traffic in France grew by +0.8%: this moderate increase is mainly caused by the growth in cars on the road. The annual average in number of kilometers travelled remains stable for the second consecutive year after several years of low figures during the 2000s. A reflection of economic activity, French heavy trucks enjoyed growth: +3.9% after two years of falling by over –11%. The average kilometers driven by a heavy truck remains lower than the level of the early 1990s.

TRAFFIC STATISTICS (1)

	Units	1990	2000	2009	2010	Average annual change in %		
						2000-1990	2010-2000	2010-2009
FLEETS (annual averages)	thousands of vehicles	**28,106**	**33,464**	**37,356**	**37,625**	**+1.8**	**+1.2**	**+0.7**
Passenger cars		23,280	27,770	30,950	31,175	+1.8	+1.2	+0.7
of which: petrol		19,760	18,150	13,845	13,364	–0.8	–3.0	–3.5
diesel		3,520	9,621	17,106	17,812	+10.6	+6.4	+4.1
Light commercial vehicles (LCV)		4,223	5,062	5,766	5,810	+1.8	+1.4	+0.8
of which: petrol		2,279	1,302	711	631	-5.4	–7.0	– 11.3
diesel		1,944	3,761	5,055	5,179	+6.8	+3.3	+2.5
Heavy trucks (> 5t)		535	551	552	551	+0.3	+0.0	–0.2
Coaches and buses		68	81	87	88	+1.8	+0.9	+1.2
ANNUAL AVERAGE KILOMETERS	thousands of km							
Passenger cars		13.4	13.5	12.8	12.8	+0.1	–0.6	+0.1
of which: petrol		11.9	10.7	8.8	8.7	– 1.1	–2.1	–0.6
diesel		21.3	18.8	16.0	15.8	– 1.2	– 1.7	– 1.1
Light commercial vehicles (LCV)		14.6	15.5	15.2	15.6	+0.6	+0.0	+2.6
of which: petrol		9.9	8.3	7.5	7.7	– 1.7	–0.9	+1.5
diesel		20.2	18.0	16.3	16.6	– 1.1	–0.8	1.8
Heavy trucks (> 5t)		36.1	41.2	33.9	35.3	+1.3	– 1.5	+4.1
Coaches and buses		31.0	30.2	35.5	35.9	–0.3	+1.7	+1.0
CONSUMPTION PER VEHICLE	liters/100 km							
Passenger cars: petrol		8.68	8.12	7.76	7.82	–0.7	–0.4	+0.7
Passenger cars: diesel		6.73	6.74	6.58	6.56	+0.0	–0.3	-0.4
LCV: petrol		9.39	9.29	8.38	8.44	–0.1	– 1.0	+0.7
LCV: diesel		9.77	9.67	9.36	9.37	–0.1	–0.3	+0.1
Heavy trucks: diesel		36.23	36.62	35.13	35.33	+0.1	–0.4	+0.6
Buses and coaches: diesel		32.00	32.99	32.81	32.99	+0.3	+0.0	+0.6
FUEL CONSUMPTION (all road traffic)	millions of liters							
Gasoline		24,110	18,729	11,817	11,500	–2.5	–4.8	–2.7
Diesel		17,977	30,779	36,881	38,198	+5.5	+2.2	+3.6
Total		42,086	49,508	48,697	49,698	+1.6	+0.0	+2.1
TOTAL TRAFFIC	billions of vehicle-km	**420**	**518**	**552**	**560**	**+2.1**	**+0.8**	**+1.5**
of which: French passenger cars and light commercial vehicles		373	455	482	489	+2.0	+0.7	+1.3
ROAD TRAFFIC								
Passengers in passenger cars	billions of passenger-km	568.1	686.9	721.4	727.3	+1.9	+0.6	+0.8
Passengers in coaches and buses	billions of passenger-km	41.3	43.0	48.9	49.9	+0.4	+1.5	+2.2
Freight	billions of ton-km	192.6	282.5	291.4	305.1	+3.9	+0.8	+4.7

(1) Data from the traffic reports have been refocused.
Source: National transport accounts MEEDDTL/SOeS, Insee.

85%
PERCENTAGE OF ROAD TRANSPORT IN DOMESTIC GOODS TRANSPORTATION IN 2010

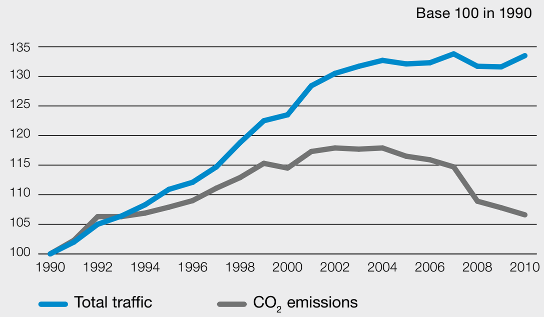
Automobile traffic is estimated by tying in/analyzing/ examining vehicle numbers on national, regional, local and urban roads with the average number of kilometers covered per year by the vehicles in use and fuel consumption data. It also includes data on vehicles registered abroad. In 2010, road accounts for 87% of all domestic transport for passengers and 85% for freight.
In 2010, the number of French-registered vehicles on the road rose by 0.7%, comparable to previous years, but far lower than in the 1990s.
More light vehicles use diesel engines which now power 62% of this segment. In terms of traffic, diesel represented 75% of light vehicles in France compared to 55% in 2000 and 31% in 1990. The consumption per vehicle given in the table above includes over-consumption associated with biofuels, which have a lower energy quotient than conventional fuels. Between 2009 and 2010, the objectives for biofuel use measured in calorific value (PCI) grew from 6.25 to 7%.

ROAD TRAFFIC AND CO_2 EMISSIONS

The number of French and foreign vehicles on French roads has increased by 34% since 1990, while the corresponding CO_2 emissions have risen by only 7%. The credit for enhanced energy efficiency stems from a variety of factors. The average consumption per registered vehicle on the road in France decreased by nearly 16% between 1990 and 2010 as a result of the increased percentage of diesel-powered vehicles, auto improvements and changes in driving behavior. On the other hand, not considering the impact of biofuels, the CO_2 emissions of an industrial vehicle transporting one ton of freight one kilometer across France have dropped by 24% between 1990 and 2010.

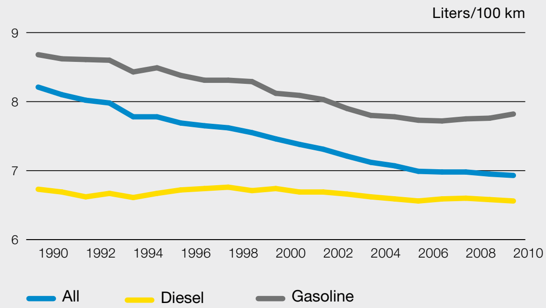
In 2010 as in 2009 and contrary to the previous two years, the increasing share of biofuels in fuel deliveries (close to annual French targets) also helped reduce CO_2 net of renewable energy sources.

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



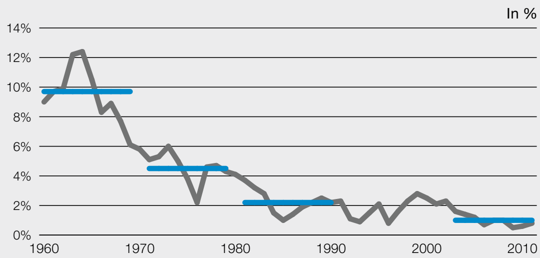
Sources: CITEPA and Traffic reports.

AVERAGE CONSUMPTION OF A PASSENGER CAR ON THE ROAD (1)



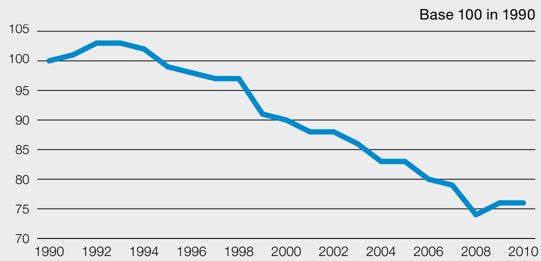
Source: Traffic reports.

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

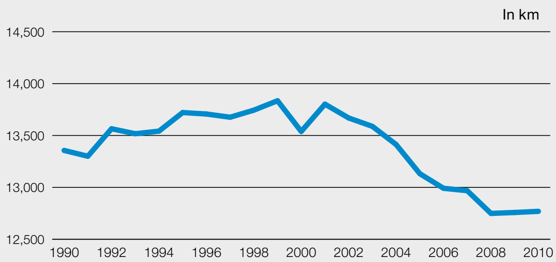


Source: CCFA

CHANGE IN THE AMOUNT OF CO_2 (2) EMITTED BY A HEAVY TRUCK TRANSPORTING ONE TON OF FREIGHT ONE KILOMETER ACROSS FRANCE



AVERAGE KILOMETERS COVERED IN A YEAR BY A PASSENGER CAR



Source: Traffic reports

(1) Unit consumption includes the overconsumption effects associated with biofuels.
(2) The reduction of CO_2 emissions due to the use of biofuels is not considered.
Sources: MEEDDM/SOeS, CCFA calculations.

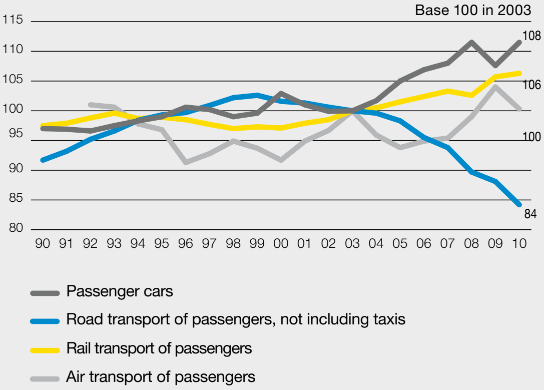
–10%

Passenger car traffic involves two elements: passenger cars and their average annual kilometers driven. 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 2010, the first estimates from CITEPA for road transport CO_2 emissions net of renewable energy sources stand at 116 million tons. After the stable situation observed in the early 2000s, a clear drop was observed linked to the effects of the economic crisis and also to the increase of biofuels in fuel deliveries. For 2009, CO_2 emissions net of renewable energy sources for road traffic can be broken down, according to CITEPA estimations, to 56% for cars, 18% for light commercial vehicles and 25% for heavy trucks, including coaches and buses.

PASSENGER TRANSPORT PRICE INDICES

In 2010, because of the increase in fuel prices, the price index for passenger cars (purchases and use) rose by over 5%. The price index for rail passengers grew by 2%, a rhythm similar to previous years except for 2009. The price index for air passengers fell by 2% after four years of increases. The price index for the road transport of passengers (not including taxis) accelerated its fall (–3%).
Since 2003 the real price indices for the various passenger transport modes have changed in very different directions: from a fall of –16% for road transport of passengers (not including taxis) to a +12% increase for personal vehicles, relative stability for air transport and a 6% rise for rail transport.

PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES, ADJUSTED FOR INFLATION



Source: INSEE.

ANNUAL VARIATION 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%
2010	5.2%	–3.0%	2.1%	–1.6%	–2.1%

Source: INSEE.

RESPECTIVE CHANGE BETWEEN 2003 AND 2010 OF THE PRICE INDICES ADJUSTED FOR INFLATION, FOR PASSENGER VEHICLES AND RAIL PASSENGERS

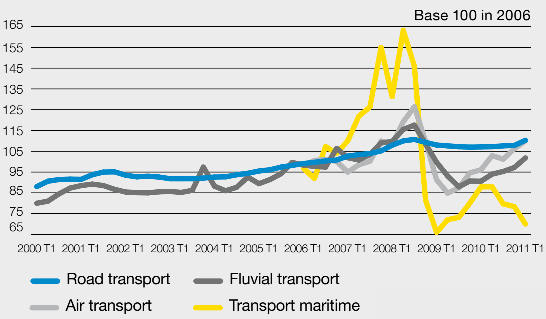
+8% and +6%

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 was 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: between 2003 and 2010, the real index associated with passenger cars (purchase and use of passenger cars) increased by 12%, greatly exceeding its 2000 levels. Despite rising for four years in a context of rising oil prices, the index for air transport of passengers remains relatively stable. The index for rail transport increased by 6%, continuing the growth started in 2000, while the index for road transport of passengers (excluding taxis) fell by 16%; it is important to remember that only the part paid directly by the households is taken into consideration.

FREIGHT TRANSPORT PRICE INDICES

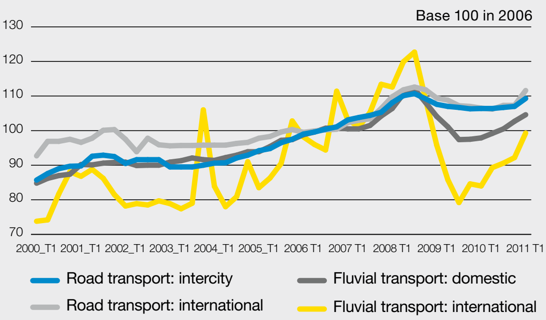
In 2008, road freight, traditionally moderately variable, grew by 5% compared to the previous year before dropping by 2% in 2009 and remaining stable in 2010. However, over the last quarters, price index developments in freight transport excluding road transport have been much greater than previously. Since 2000, the price index of freight transport by road rose by 2% per year on average, from 1.1% for international to 1.9% for intercity and proximity freight transport by road. Over the same period, the fluvial index showed a lesser change (+1.3% per year), varying from 1.5% for domestic transport to 1.1% for international transport. Air transport, followed by fluvial transport and, to a lesser extent, road transport, has seen considerable year-on-year variations in its freight indices. The high and low points of the air transport index observed over the last year have a 11% gap (13% in 2009 and 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.

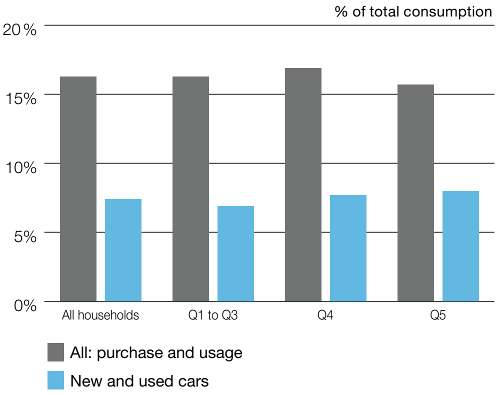
Stability

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; over the last three years, the difference between the low points and the high points respectively stand at 39%, 13% and 14%. On annual average, after growing 16% between 2006 and 2008, the index fell 23% in 2009 compared to the previous year before increasing once again in 2010 (+13%).
The price index for maritime freight is very volatile, in line with the changes in bulk prices. As an annual average, after growing by 31% between 2006 and 2008, it fell by 44% compared to the previous year before bouncing back by 15% in 2010. Available since 2000, river freight price index enjoyed average growth of 1% per year until 2009 and 2010, 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 before returning to growth in 2010, so for the period 2000-2010, it only rose by 1.1% whereas the domestic index grew by 1.5%. 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 1.7% per year since 2000 compared to 1.9% in 2009. This can be broken down as 1.1% for international and 1.9% 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 2010 fuel accounted for 26% and 18% respectively of the total cost of long-distance and regional road haulage.

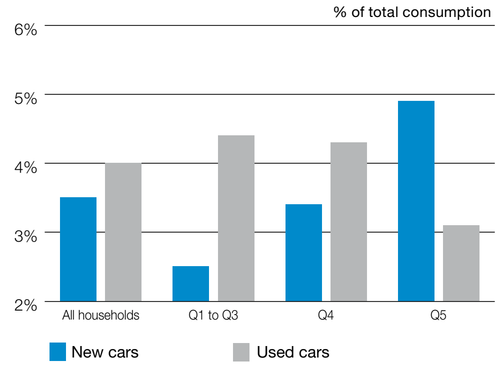
HOUSEHOLD CAR COSTS

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.

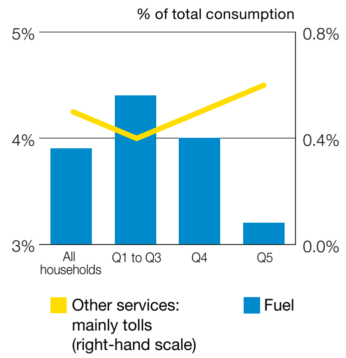
CAR BUDGET



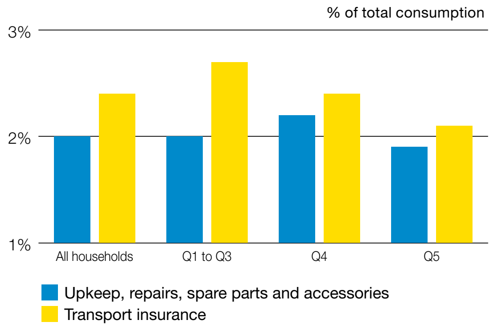
CAR PURCHASES



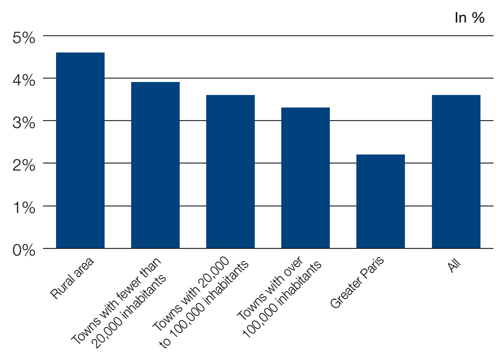
FUEL AND OTHER USE-RELATED SERVICES (mainly tolls)



MAINTENANCE, REPAIRS, SPARE PARTS AND TRANSPORT INSURANCE



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



Source: INSEE, Family budget survey 2006.

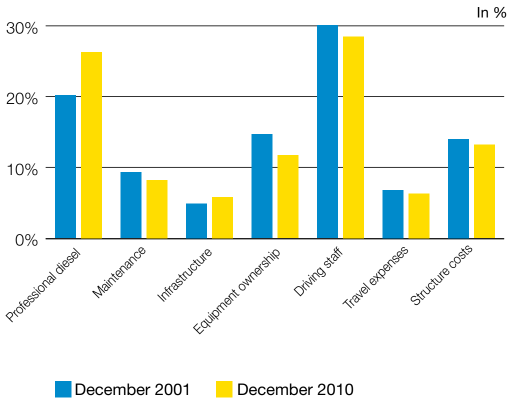
5%

The "Family Budget" surveys conducted every five 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 macroeconomic level. When it comes to spending on used vehicles, the full cost is reflected in the surveys, while at the macroeconomic 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 represents the fifth quintile, i.e. the 20% of households with the highest income, 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 and used car purchases account for barely a half, ranging from 7% for the 60% of households with lowest 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%.

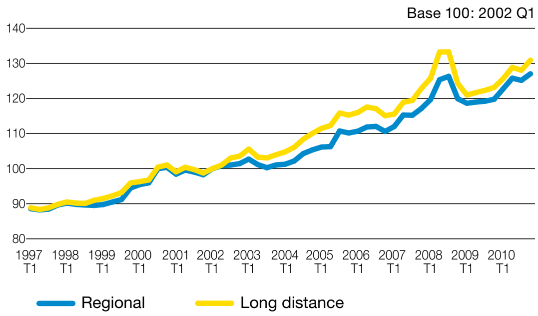
ROAD FREIGHT COST PRICE

According to CNR, between 2002 and 2010 the cost price for long distance road freight rose by 26%, an average of 2.9% a year. For this same period, cost price for regional transport rose by 24%, an average of 2.7% per year. The share of professional diesel in the cost price of long-distance road freight rose by 7 percentage points between 2001 and 2007 to almost 28%. Then, this share lost nearly 5 points to reach around 23% in 2008-2009 before bouncing back three points to 26% in 2010. For the period 2001-2010, the share of infrastructure gained 0.9 point to 5.8% in 2010. The cost of equipment ownership (road tractors and semi-trailers) dropped by 3 points to 11.7%.

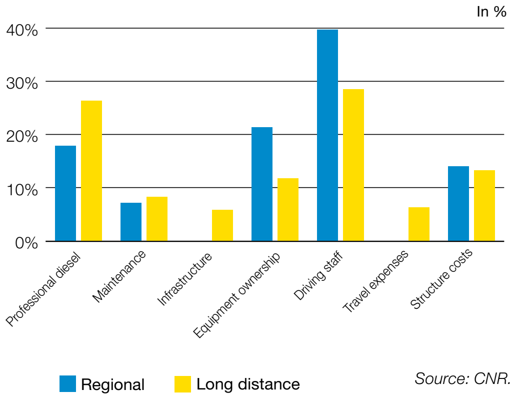
ROAD FREIGHT COST PRICE STRUCTURE: LONG DISTANCE



ROAD FREIGHT PRODUCTION COST



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2010



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 national or international transportation 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 improving to 23% in 2009 and then 26% in 2010.
From 2001-2010, infrastructure costs increased by 0.9 point to 5.8%.
On the other hand, equipment ownership (road tractors and semi-trailers) and maintenance (upkeep and repairs) dropped by 3 and 1.1 percentage points respectively, more than the figure for driving staff (down 1.6 percentage point). In the case of regional transport, fuel accounted for 18% of combined costs in December 2010; this lower percentage is one of the causes of the low 2-point increase in the regional index between 2002 and 2010 when compared with the long-distance index. The share for equipment ownership rose from 20 to 22% over the same period.

AUTOMOTIVE PRICE INDICES

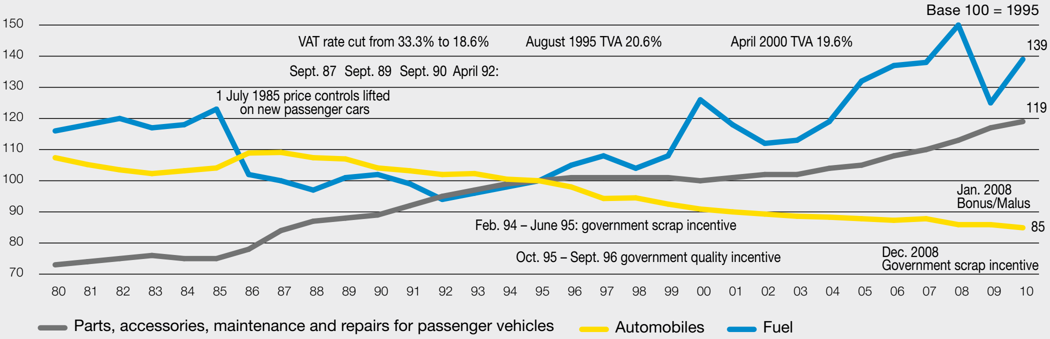
In 2010, the new passenger car price index rose 0.3%, or 1.3 percentage point less than inflation.
Since 1995, the new car price index has decreased by 15% in real terms. In the continuing increase of oil prices after the fall of the second half of 2009, fuel prices rose sharply in 2010 (+13.4%).
The parts, accessories, repairs and maintenance price index continued to rise by more than 3% in 2010, reflecting among other things the higher cost of raw materials, essential technical capital expenditure, and better qualified labor.

YEAR-ON-YEAR AUTOMOTIVE PRICE CHANGES

	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Fuel prices
2008	2.8%	0.6%	5.1%	12.2%
2009	0.1%	0.2%	4.1%	–17.1%
2010	1.5%	0.3%	3.0%	13.4%

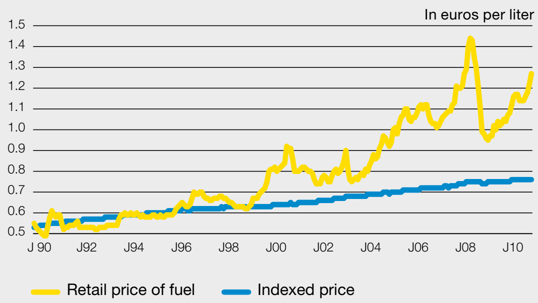
Source: Insee, CCFA calculations.

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



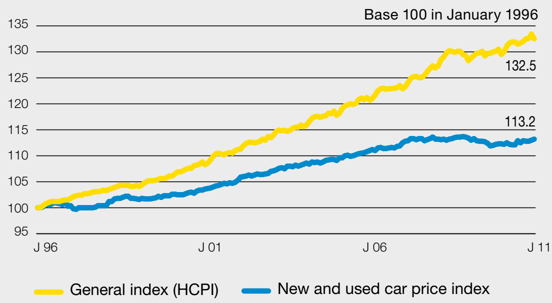
Source: INSEE, CCFA presentation.

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.

11% and 19%
RESPECTIVE INCREASES IN PRICE INDICES FOR NEW CARS AND ALL CONSUMER PRICES SINCE 2000

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 required technology investments and the improved qualifications of mechanics. Between 1996 and 2000, these prices stabilized. Declining component costs were offset by increased labor costs. The index has been rising again since 2002.
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 2010, the general price index rose 23% compared to 2000, whilst that of new and used car purchases only grew by 9%.

CONSUMER SPENDING ON PRIVATE VEHICLES

In 2010, the economic upturn (+1.5%) did not erase the unprecedented fall in 2009 (–2.7%), the most devastating financial and economic crisis since the Second World War. Household spending improved (+1.3% vs. +0.6%) at a slower rhythm than those observed between 2001 and 2007 (over 2%). This growth was made possible by reduced savings as households witnessed their purchasing power stagnate per consumption unit and with high levels of unemployment. In this context, household purchases of cars supported by the different scrap incentive and "bonus/malus" schemes remained at the 2009 level (€41 billion); the reduction in average retail prices (more smaller and inexpensive models) observed in 2008 and 2009 seems to have stopped. It is worth mentioning that these purchases are estimated as net, i.e. without the scrap incentive schemes. Household fuel purchases increased dramatically (+12% to €37 billion), in line with the considerable price fluctuations but remained below those of 2008 (€41 billion). This expenditure accounts for costs similar to purchases of new and used cars, whereas in 1990 it was a quarter lower.

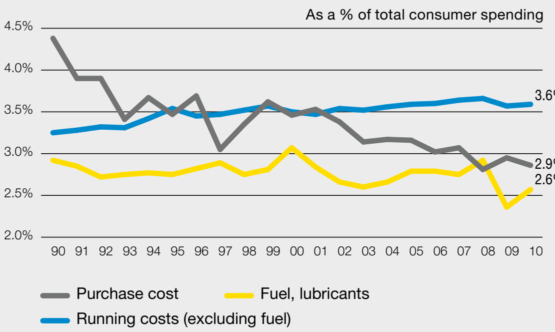
CONSUMER SPENDING ON PASSENGER VEHICLES

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

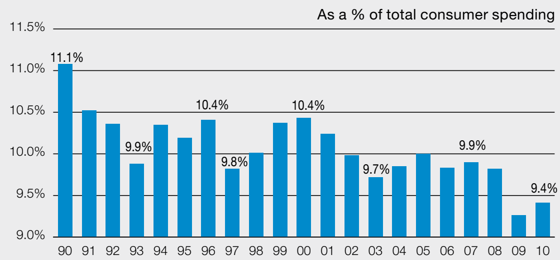
	Units	1990		2000		2009 (1)		2010 (1)		Change 2010-2009
VEHICLE PURCHASES	€ billion	31.9	4.4%	35.0	3.5%	41.2	2.9%	41.0	2.9%	–0.5%
– New and used cars		29.6	4.1%	31.8	3.1%	37.1	2.7%	37.0	2.6%	–0.3%
of which new cars		24.7	3.4%	23.6	2.3%	27.3	1.9%	26.0	1.8%	–4.4%
– Caravans, motorcycles, bicycles		2.3	0.3%	3.2	0.3%	4.2	0.3%	4.0	0.3%	–2.4%
RUNNING COSTS	€ billion	44.9	6.2%	66.5	6.6%	82.9	5.9%	88.4	6.2%	+6.6%
– Upkeep, repairs, spare parts and accessories		19.3	2.6%	27.9	2.8%	39.3	2.8%	40.7	2.8%	+3.4%
Automotive equipment manufacturing		9.3	1.3%	14.3	1.4%	21.9	1.6%	22.7	1.6%	+3.7%
Including automotive service		8.1	1.1%	10.5	1.0%	13.7	1.0%	14.2	1.0%	+3.7%
– Fuel and lubricants		21.2	2.9%	31.1	3.1%	33.0	2.4%	36.9	2.6%	+11.8%
– Tolls, parking fees, rental, driving lessons		4.4	0.6%	7.5	0.7%	10.6	0.8%	10.8	0.8%	+2.4%
INSURANCE	€ billion	3.9	0.5%	4.1	0.4%	5.4	0.4%	5.7	0.4%	+4.9%
TOTAL CONSUMER SPENDING ON PASSENGER VEHICLES	**€ billion**	**80.7**	**11.1%**	**105.7**	**10.4%**	**129.5**	**9.3%**	**135.0**	**9.4%**	**+4.3%**
Public transport	€ billion	10.3	1.4%	15.2	1.5%	23.6	1.7%	24.0	1.7%	+1.7%
TOTAL CONSUMER SPENDING FOR THE YEAR	**€ billion**	**728**	**100%**	**1,013**	**100%**	**1,398**	**100%**	**1,435**	**100%**	**+2.6%**
NUMBER OF HOUSEHOLDS (mainland France)	thousand	21,632		24,256		27,025		27,298		+1.0%
Spending on passenger vehicles per household	euro	3,729		4,356		4,792		4,947		+3.2%
Spending on passenger vehicles per vehicle-owning household	euro	4,855		5,425		5,759		5,924		+2.9%

(1) These are provisional data and can be readjusted for three years.
Source: INSEE – Consumer Spending, 2010 – 2005 base.

PERCENTAGE OF HOUSEHOLD BUDGET ALLOCATED TO OWNING A CAR, 1990 TO 2010



TOTAL VEHICLE-RELATED EXPENDITURE



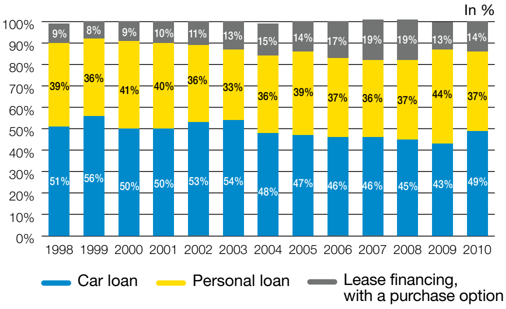
In 2010, households spent €135 billion (+4%) on their individual transport, most frequently by car. This amount represents 85% of the total spending that households devote to transport (individual and public). Consumer spending on cars, relative to total consumer spending, is expressed as the percentage of household budget allocated to owning a car. This percentage has ranged from 9% 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 tends to fluctuate widely, a fact that largely explains most of the changes in the percentage of the household budget allocated to owning a car, and its falling trend.

In 2010, the budget for a car purchase was 2.9%, very close to its lowest figure (2008) since the beginning of the 1990s. The budget for maintaining and repairing vehicles, which increased in the 1990s in line with the development of car ownership and the increase of the average age of cars on the road, has been oscillating between 2.8% and 2.9% since 2002. After increasing over several years, household spending on car insurance (representing the service, spending minus repayments) grew by 5% in 2010 to €5.7 billion; this figure was €3.6 billion in 1999.

AUTOMOBILE FINANCING

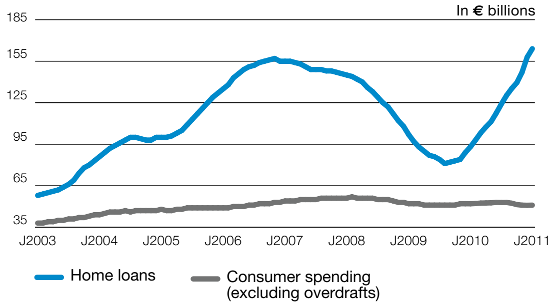
In 2010, 59% of new cars purchased by consumers were bought on credit (+1 point compared with to 2009) compared to over 60% between 2003 and 2008.
Similar to the previous years, car (or conventional) loans were the most common source of financing (49%) almost equal to personal loans (37%) and lease-financing with a purchase option (14%). In a context of very low interest rates (without taking inflation into account), personal loans lost in 2010 what they had regained in 2009, associated in particular with renegotiations in home loans. For new vehicles used by companies (both private cars and light commercial vehicles or heavy trucks), 2009 was marked by an upturn, but il did not compensate for the sharp drops in loans in 2009. After the recession, financing difficulties which led to the extension of many long-term rental contracts were far less significant.

CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES

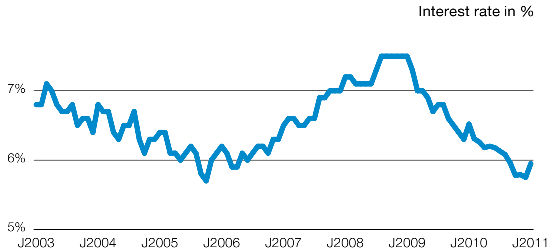


Sources: ASF, CCFA.

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 loans provided either by the finance subsidiaries of the manufacturers and importers, or by the subsidiaries of financial or banking groups, which are independent from the manufacturers;
• Lease financing, with a purchase option (LOA); 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. six years. He can use his purchase option during the lease or at the end of the lease period.
• personal or bank loans.
Data obtained from a variety of sources (industry associations, registration statistics, surveys) are used to estimate the percentage of new cars purchased 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 57 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. Between early 2008 and 2010, due to the financial and economic crisis, households 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). Then in the specific context of the European debt, credit ratings dropped sharply during 2010. Consumption credits did not benefit from this situation (–2% at €51 billion) but home loans beat historic records (+76% at €164 billion), supported by many renegotiated loans.

CAR AND MOTORCYCLE SALES AND REPAIRS

In France, all motor vehicles are sold and repaired through dealership networks, totaling 15,000 outlets, including around 10,000 for French makes. In 2010, motor vehicle sales generated revenue of €80 billion (+2.5% compared to 2009). Per vehicle type, the change is varied: an increase for passenger cars in a market greatly supported by government schemes, recovery for the light commercial vehicle market, but a sharp fall for heavy trucks. Vehicle repair and maintenance has moved on from the terrible year of 2009, marking a return to 2008 levels. According to INSEE, vehicle sales and repairs (categorized as J10) involved 77,035 companies at 1st January 2008, just over 6% of which worked for a manufacturer (apart from franchisees). They employed 47% of salaried employees in this sector. The 4 leading groups (10 leaders respectively) employed 8% of the salaried staff (respectively 13%) and produced 7% factor costs added value (respectively 14%).

LIGHT VEHICLE SALES NETWORKS IN FRANCE ON 1ST JANUARY 2010

MAKES	Primary dealership
Renault	759
Peugeot	433
Citroën	435
French makes	***1,627***
Ford	312
Opel	280
Fiat	232
Volkswagen	372
BMW	181
Mercedes-Benz	156
Japanese makes	1,287
South Korean makes	472
Other makes	1,616
TOTAL	**6,535**

Sources: CNPA, CCFA.

STRUCTURE OF INDUSTRIAL VEHICLE NETWORKS BY MAKE

MAKES	Distribution and service	Customer support 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, Industrial vehicle trade and repair in France, March 2006, and CCFA.

VEHICLE SALE AND REPAIR REVENUE

In current € billions, including VAT

Activity	2005	2006	2007	2008	2009	2010	Change 2010-2009
Automotive sales	71.3	72.4	77.1	76.8	78.1	80.1	2.5%
Automotive maintenance and repairs	18.5	19.3	20.1	20.4	19.7	20.4	3.5%
Retail automotive equipment sales	7.4	7.5	7.9	8.0	8.1	8.6	5.7%
Motorcycle sales and repairs	2.6	2.7	2.7	2.7	2.5	2.5	–0.4%
Retail fuel sales	14.1	14.8	14.9	17.2	12.4	14.0	13.0%
TOTAL	**113.9**	**116.7**	**122.7**	**125.1**	**120.9**	**125.6**	**3.9%**

Source: INSEE – National Accounts, base 2005 of national 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.

€80 billion
FRENCH MOTOR VEHICLE REVENUE IN 2010, INCLUDING VAT, ACCORDING TO INSEE

AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT

From 2000 to 2007, the production of the automotive industry has ranged between 71 and 77 billion euros.
In 2008, it fell by 9% before dropping 21% because of the global financial and economic crisis to €53 billion in 2009.
In a very difficult climate for the automotive market, the value added (VA) of the automotive industry has continued to fall, reaching €9 billion in 2009 (or 17% of total production). Its total purchases (or intermediate consumption) down by 24% represented five times its VA, at €44 billion, benefiting a number of economic sectors.
The operating margin (ratio between operating cash flow and VA) was 7% in 2009, much lower than the average of the early 2000s (25%).
A capital-intensive industry, the investment rate (GFCF (gross fixed capital formation) to VA ratio) for the automotive sector was 28% (20% overall and 18% for the industry excluding energy).

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		2000	2005	2006	2007	2008	2009 (1)
PURCHASES FROM OTHER INDUSTRIES	**%**	**75.4**	**80.6**	**79.9**	**79.9**	**78.8**	**80.5**
Electrical, electronic and IT equipment, machines	%	19.8	19.9	18.6	18.7	18.1	18.3
of which: Manufacture of IT, electronic and optical products	%	4.8	4.8	4.3	4.0	3.8	3.9
Manufacture of electrical equipment	%	3.6	3.8	3.5	3.5	3.6	3.6
Manufacture of machinery and equipment not included elsewhere	%	11.4	11.2	10.8	11.2	10.7	10.8
Extraction, energy and water industries	%	37.4	40.9	39.7	39.7	39.2	39.9
of which: Electricity, gas, steam and air conditioning	%	17.8	18.4	18.3	18.5	18.3	18.3
Water, sanitation, waste management and depollution	%	9.4	11.0	10.5	10.4	10.2	10.3
Other manufacturing industries (including repairs and installations)	%	3.5	4.4	3.9	4.1	4.1	4.2
Chemical industry	%	2.2	2.4	2.3	2.3	2.2	2.5
Manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.7	1.8	1.5	1.5	1.5
Wood, paper and printing industries	%	1.5	1.5	1.4	1.5	1.6	1.6
Extraction, energy and water industries	%	1.3	1.2	1.3	1.5	1.5	1.7
of which: Electricity, gas, steam and air conditioning	%	0.6	0.6	0.7	0.8	0.8	0.8
Water, sanitation, waste management and depollution	%	0.6	0.6	0.6	0.6	0.6	0.8
Construction	%	0.5	0.6	0.6	0.5	0.5	0.6
Motorcycle and car sales and repairs	%	0.6	0.9	0.9	0.9	0.9	0.8
Transport and storage	%	0.6	0.6	0.6	0.6	0.6	0.7
Information and communication	%	0.7	0.7	0.7	0.6	0.7	0.7
Financial and insurance services	%	0.9	0.9	0.9	0.9	0.8	0.8
Real estate activities	%	0.2	0.3	0.3	0.3	0.3	0.3
Corporate services	%	11.6	12.9	14.5	14.2	14.4	14.8
of which: Legal, accounting, control and technical analysis, etc.	%	1.4	1.8	1.8	1.7	1.8	1.9
research and development	%	4.1	5.4	7.0	6.9	7.0	8.0
Other specialized, scientific and technical activities	%	2.7	2.7	2.6	2.5	2.6	2.6
Administrative and support services	%	3.3	3.1	3.1	3.1	3.1	2.3
Other commercial sector industries	%	1.9	1.6	1.9	1.8	1.8	1.9
All commercial sector purchases	%	16.4	18.0	19.7	19.4	19.5	20.1
PURCHASES WITHIN THE INDUSTRY	**%**	**24.6**	**19.4**	**20.1**	**20.1**	**21.2**	**19.5**
Total production at base prices	€ billion	71.4	76.7	74.6	74.0	67.3	53.2
In % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL PURCHASES (2)	**€ billion**	**58.0**	**64.7**	**64.5**	**63.7**	**57.9**	**44.1**
In % of production at base prices	%	81.3	84.4	86.5	86.2	86.1	82.9
Value added by the industry	€ billion	13.4	12.0	10.1	10.2	9.4	9.1
In % of production at base prices	%	18.7	15.6	13.5	13.8	13.9	17.1
Operating cash flow (OCF)	€ billion	–	–	1.2	1.4	0.4	0.6
In % of value added (margin rate)	%	–	–	11.7	13.4	4.4	6.9
Gross Fixed Capital Formation (GFCF)	€ billion	–	–	–	–	–	–
In % of value added (investment rate), 2000 base	%	31.4	24.6	26.1	26.7	30.8	28.4

(1) Accounts for 2009 are semi-definitive.
(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 (base 2005).

–50%
FALL IN MARGIN BETWEEN 2007 AND 2009

In 2009, total purchases as a percentage of production reached 83%, slightly lower than 2006 to 2008 and equivalent to 2001 figures. In 2009, 20% of total purchases in the automotive industry were from within the branch and 80% from outside. Intermediate goods accounted for 40% of purchases, including metallurgy and metalwork; the metalworking industry remained the leading supplier, accounting for 18% of total purchases. The commercial sector accounted for 20% of purchases: the most requested corporate services were research and development (8%), other specialized scientific and technical services (3%), and administrative and support services (2%). Purchases from manufacturers of machines and equipment (excluding electrical, electronic and IT products) accounted for 11% of total purchases in the automotive industry.

AUTOMOTIVE OEMS AND SUPPLIERS

Automobile manufacturing acts as a structure for its suppliers and the French economy as a whole.
In 2010, the FIEV estimated the workforce of the automotive suppliers represented by the CLIFA to be 260,000 jobs.
The development of French automotive manufacturing drives the sector of OEMs and other suppliers such as plastic converters, industrial rubber, the casting business, industrial metalworking services, and so on.
According to Eurostat, while French automotive manufacturers are second in Europe in terms of turnover, the French OEM industry is also the second in Europe.

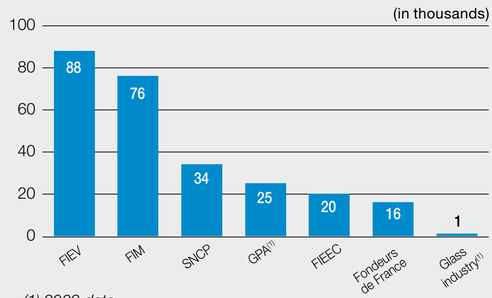
TURNOVER OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY (2010)

In € billions

FIEV	
French Vehicle Equipment Industries	17.9
FIM	
Federation of Mechanical Industries	8.7
SNCP	
National Union of Rubber and Polymer Workers	5.5
GPA	
Automotive Plastic Converters Association	5.0(1)
FIEEC	
Federation of Electric, Electronic and Communication Industries	4.0
French Casting Industry	2.2
Glass industry	0.21(1)

(1) 2009 data.
Sources: FIEV, professional organizations.

WORKFORCE OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY IN 2010



(1) 2009 data.
Sources: FIEV, professional organizations.

1st
THE FRENCH AUTOMOTIVE INDUSTRY IS THE LARGEST CUSTOMER OF THE PLASTICS, INDUSTRIAL RUBBER AND INDUSTRIAL METALWORKING SERVICES SECTORS

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 Etudes et des Statistiques Industrielles (Department for Industrial Studies and Statistics – SESSI) in 2006 on the automotive supplier chain and the current work by the Fédérations des Industries des équipements pour véhicules (French Vehicle Equipment Industries – FIEV).
The automotive industry comprises automotive manufacturing and suppliers. Suppliers have two types of markets: the first type with a total worth of €15.1 billion in 2010, producing equipment for assembly chains, and the second type dealing with spare parts, with a total worth of around €2.8 billion. 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).
The French automotive industry still relies on its French industrial base; the FIEV has estimated the turnover of suppliers to the automotive industry to have reached €43.5 billion. It accounts for a major share of the engineered plastics parts business, the 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.
To show the total industrial weight of the automotive branch, we should add to these automotive suppliers represented by the Comité de liaison des fournisseurs de l'automobile (Automotive Suppliers' Liaison Committee – CLIFA) the business represented, for example, by purchases the automotive industry makes in France from other branches such as steelworks, chemistry or even power generation *(see page 54).*

EMPLOYMENT

In the broadest sense, in 2010 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 220,000 people, representing more than 8% 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 2010

In thousands of jobs

Manufacturing and energy sector
220

Services
153

TOTAL RAW MATERIALS AND SERVICES
373

Automotive manufacturing
137

Equipment and accessories
60

Bodywork, trailers, caravans
23

TOTAL AUTOMOTIVE INDUSTRY
220

TOTAL PRODUCTION OPERATIONS
593

Sales, repairs, equipment sales, vehicle inspections, short-term rentals, breakers and recycling
495

Insurance, experts and financing
85

Fuel retailing
34

Driving schools, licensing
26

Motor sport, media, publishing, other
13

TOTAL USE OF AUTOMOBILES
653

Road transport (passengers and freight, outsourced and in-house), related services
947

Police, health service, education, non-commercial administration
34

Road building and maintenance
132

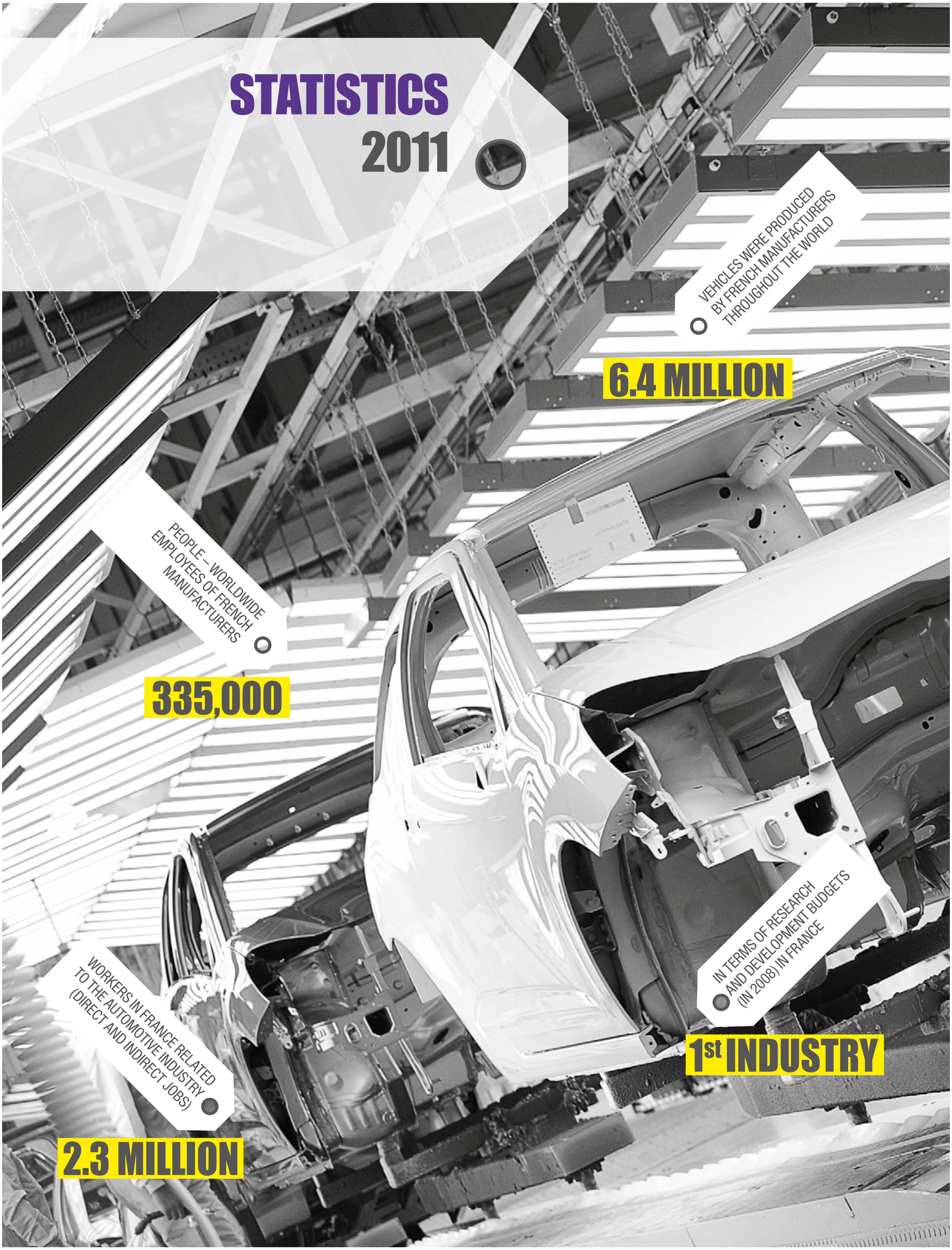
TOTAL TRANSPORT
1,113

TOTAL JOBS
2,359

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

As the driving force behind industrial output in France, the automotive industry and its suppliers directly and indirectly created 593,000 jobs either in production or through its purchases from other sectors. It is worth noting that today, employee figures for the automotive industry do not include temporary positions as they are now included in the purchase of new services. Also, following the change in category *(see page 73)*, OEM employees join those working for car seat and electrical equipment manufacturers for engines and vehicles, that previously were included in purchases from manufacturing and energy industries.
According to figures published by the FIEV (French Vehicle Equipment Industries), employees for 2010 in the automotive industry stood at 259,000, including 88,000 for equipment (FIEV), 76,000 for mechanics (FIM), 34,000 for tires and rubber (SNCP) and 25,000 for plastics (GPA, 2009 figures).
Vehicle usage provided jobs for more than 653,000 people, particularly in the areas of vehicle-related services (sales, repairs, automotive equipment retailing, etc.), fuel and recycling (oil recovery, car breakers, etc.). These figures concern employees and also individual entrepreneurs and non-salaried employees. Finally, the road transport (passenger and freight) sector and its related infrastructure employed more than 1 million people. These include both outsourced and in-house transport operations.
In a broader sense of freight transport and logistics (storage and related services), the French Transport 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 (including automotive equipment) were located in the Greater Paris area. The industry has since become more decentralized, with only 12% of employees still based in the Paris region in 2007, according to data from surveys of companies (EAE) in the former SESSI. The other main automotive regions were Nord-Pas-de-Calais (13%), Franche-Comté (10%), Upper and Lower Normandy (10%), Rhône-Alpes (10%), and Alsace and Lorraine (8% each).



Comité des Constructeurs Français d'Automobiles

PRODUCTION

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

PASSENGER CARS

In units

	1980	1990	2000 (2)	2006	2007	2008	2009	2010
EUROPE	11,983,548	15,231,409	17,407,047	18,099,954	19,330,513	18,381,339	15,247,066	17,266,098
WESTERN EUROPE	10,401,320	13,061,853	14,778,879	13,934,905	14,216,262	12,849,218	11,037,669	12,138,971
Germany	3,520,934	4,660,657	5,131,918	5,398,508	5,709,139	5,532,030	4,964,523	5,552,409
Belgium	882,001	1,160,412	912,233	881,929	789,674	680,131	524,595	528,996
Spain	1,028,813	1,679,301	2,366,359	2,078,639	2,195,780	1,943,049	1,812,688	1,913,513
France (1)	2,938,581	3,294,815	2,879,810	2,723,196	2,550,869	2,145,935	1,819,497	1,924,171
Italy	1,445,221	1,874,672	1,422,284	892,502	910,860	659,221	661,100	573,169
Netherlands	80,779	121,300	215,085	87,332	61,912	59,223	50,620	48,025
Portugal	61,000	60,221	178,509	143,478	134,047	132,242	101,680	114,563
United Kingdom	923,744	1,295,611	1,641,452	1,442,085	1,534,567	1,446,619	999,460	1,270,444
Sweden	235,320	335,853	259,959	288,583	316,850	252,287	128,738	177,084
CENTRAL AND EASTERN EUROPE	1,582,228	2,002,000	2,330,692	3,619,367	4,479,368	4,910,554	3,698,466	4,523,733
TURKEY	31,529	167,556	297,476	545,682	634,883	621,567	510,931	603,394
AMERICA	8,663,060	8,450,862	10,022,089	9,302,895	9,325,594	9,202,759	6,954,032	8,477,448
NAFTA	7,526,658	7,747,823	8,371,806	6,892,197	6,475,498	6,189,535	3,960,731	5,090,128
of which: Canada	846,777	1,072,281	1,550,500	1,427,582	1,342,133	1,195,436	822,267	968,860
USA	6,376,825	6,077,449	5,542,217	4,366,996	3,924,268	3,776,641	2,195,588	2,731,105
Mexico	303,056	598,093	1,279,089	1,097,619	1,209,097	1,217,458	942,876	1,390,163
SOUTH AMERICA	1,136,402	703,039	1,650,283	2,410,698	2,850,096	3,013,224	2,993,301	3,387,320
of which: Argentina	218,516	81,107	238,921	263,120	350,735	399,236	380,067	508,401
Brazil	977,697	663,097	1,351,998	2,092,029	2,391,354	2,545,729	2,575,418	2,828,273
ASIA-PACIFIC	8,796,971	11,910,333	13,573,073	22,175,957	24,212,695	25,058,888	25,289,717	32,388,885
of which: China	-	-	605,000	5,233,132	6,381,116	6,737,745	10,383,831	13,897,083
South Korea	55,000	986,751	2,602,008	3,489,136	3,723,482	3,450,478	3,158,417	3,866,206
India	30,538	176,015	517,957	1,473,235	1,713,479	1,846,051	2,175,220	2,814,584
Japan	7,038,108	9,947,972	8,359,434	9,754,903	9,944,637	9,928,143	6,862,161	8,307,382
AFRICA	277,058	209,603	213,444	339,772	332,544	382,095	281,783	346,379
of which: South Africa	277,058	209,603	230,577	334,482	276,018	321,124	222,981	295,394
TOTAL	29,720,637	35,802,207	41,215,653	49,918,578	53,201,346	53,025,081	47,772,598	58,478,810

COMMERCIAL VEHICLES

In units

	1980	1990	2000 (2)	2006	2007	2008	2009	2010
EUROPE	2,563,596	2,688,509	2,783,468	3,299,335	3,522,065	3,396,455	1,808,776	2,556,528
WESTERN EUROPE	1,663,080	1,671,915	2,326,653	2,341,198	2,474,948	2,325,472	1,204,952	1,687,073
Germany	357,619	315,895	394,697	421,106	504,321	513,700	245,334	353,576
Belgium	47,029	91,784	121,061	36,127	44,729	44,367	12,759	26,306
Spain	152,846	374,049	666,515	698,796	693,923	598,595	357,390	474,387
France (1)	439,852	474,178	468,551	446,023	464,985	423,043	228,196	305,250
Italy	166,635	246,178	316,031	319,092	373,452	364,553	182,139	265,231
Netherlands	32,102	29,832	52,234	72,122	76,656	73,271	26,131	46,081
Portugal	58,000	77,466	68,215	83,847	42,195	42,913	24,335	44,160
United Kingdom	389,170	270,133	172,442	207,707	215,686	202,896	90,679	123,019
Sweden	63,080	74,415	41,384	44,489	49,170	56,012	27,698	40,000
CENTRAL AND EASTERN EUROPE	900,516	975,000	323,203	516,039	582,587	545,440	245,150	378,292
TURKEY	19,352	41,594	133,471	442,098	464,530	525,543	358,674	491,163
AMERICA	2,599,948	5,032,605	9,761,798	9,761,754	9,828,465	7,683,330	5,608,388	8,163,968
NAFTA	2,349,318	4,775,818	9,325,214	9,016,810	8,979,266	6,754,191	4,822,200	7,087,462
of which: Canada	527,522	850,566	1,411,136	1,143,784	1,236,657	886,805	668,215	1,102,166
USA	1,634,846	3,702,787	7,257,640	6,925,127	6,856,461	4,916,900	3,535,809	5,030,335
Mexico	186,950	222,465	656,438	947,899	886,148	950,486	618,176	954,961
SOUTH AMERICA	250,630	256,787	436,584	744,944	849,199	929,139	786,188	1,076,506
of which: Argentina	63,153	5,337	100,711	168,981	193,912	197,850	132,857	208,139
Brazil	187,477	251,450	329,519	519,005	585,796	670,247	607,505	820,085
ASIA-PACIFIC	4,344,363	4,492,406	4,497,938	6,013,551	6,502,163	6,448,515	6,470,438	8,511,694
of which: China	–	-	1,464,000	2,044,767	2,501,340	2,561,435	3,407,163	4,367,584
South Korea	65,012	334,879	512,990	350,966	362,826	376,204	354,509	405,735
India	83,379	186,640	283,403	543,276	540,250	486,277	466,330	722,199
Japan	4,004,776	3,538,824	1,781,362	1,729,330	1,651,690	1,647,501	1,071,896	1,318,558
AFRICA	127,698	125,174	115,305	229,757	212,022	203,918	131,668	146,705
of which: South Africa	127,698	125,174	126,787	253,237	258,472	241,841	150,942	176,655
TOTAL	9,675,970	12,399,000	17,158,509	19,304,397	20,064,715	17,732,218	14,019,270	19,378,895

(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, CICA.

PRODUCTION

WORLD MOTOR VEHICLE PRODUCTION BY MANUFACTURER AND ECONOMIC AREA, 2010

In thousands

Manufacturers/Economic areas	North America, NAFTA	South America	European Union: 27 countries	Other European countries and Turkey	Japan	South Korea	China	Other countries in Asia, Asia-Pacific and Africa	TOTAL
European manufacturers	**823**	**2,588**	**12,210**	**751**	**188**	**276**	**2,286**	**855**	**19,977**
BMW	159		1,217				56	49	1,481
Fiat-Iveco-Irisbus		866	1,254	156			110	24	2,410
MAN		68	59	1					128
Daimler	209	101	1,371	15	140		51	54	1,940
Porsche			96						96
PSA Peugeot Citroën		273	2,344	107	18		376	487	3,606
Renault-Dacia-Samsung		327	1,622	394		276		96	2,716
Scania		20	48						68
Volkswagen	428	913	4,110	78			1,693	120	7,341
Volvo	26	19	90		30			25	192
American manufacturers	**6,898**	**1,283**	**2,588**	**405**	**0**	**744**	**2,673**	**599**	**15,189**
Chrysler	1,572	1	5						1,578
Ford	2,402	449	1,304	242			407	183	4,988
General Motors	2,809	832	1,247	163		744	2,266	416	8,476
Navistar	71								71
Paccar	45		31						76
Japanese manufacturers	**4,018**	**367**	**1,244**	**106**	**9,520**	**0**	**3,066**	**4,374**	**22,696**
Fuji Heavy (Subaru)	158				492				650
Honda	1,288	134	139	20	993		677	393	3,643
Isuzu	13	13		2	204		38	219	488
Mazda	54	13			913		229	98	1,308
Mitsubishi	29	36	29		660		124	296	1,174
Nissan	1,018	18	528		1,134		941	343	3,982
Suzuki-Maruti			170		1,078		287	1,358	2,893
Toyota-Daihatsu-Hino	1,458	151	378	83	4,047		772	1,667	8,557
South Korean manufacturers	**454**	**0**	**430**	**77**	**0**	**3,160**	**1,043**	**600**	**5,765**
Hyundai-Kia	454		430	77		3,160	1,043	600	5,765
Chinese manufacturers	**0**	**0**	**367**	**0**	**0**	**80**	**700**	**2**	**1,149**
Geely (Volvo cars)			367				433	2	802
SAIC (Ssangyong)						80	266		347
Indian manufacturers	**0**	**0**	**241**	**0**	**0**	**9**	**0**	**761**	**1,011**
Tata (Telco, Jaguar, Land Rover)			241			9		761	1,011
ALL MANUFACTURERS	**12,178**	**4,464**	**17,102**	**2,720**	**9,626**	**4,272**	**18,265**	**9,231**	**77,858**
									As % of total production
European manufacturers	**4%**	**13%**	**61%**	**4%**	**1%**	**1%**	**11%**	**4%**	**100%**
BMW	11%		82%				4%	3%	100%
Fiat-Iveco-Irisbus		36%	52%	6%			5%	1%	100%
MAN		53%	46%	1%					100%
Daimler	11%	5%	71%	1%	7%		3%	3%	100%
Porsche			100%						100%
PSA Peugeot Citroën		8%	65%	3%	1%		10%	14%	100%
Renault-Dacia-Samsung		12%	60%	15%		10%		4%	100%
Scania		30%	70%						100%
Volkswagen	6%	12%	56%	1%			23%	2%	100%
Volvo	14%	10%	47%		16%			13%	100%
American manufacturers	**45%**	**8%**	**17%**	**3%**	**0%**	**5%**	**18%**	**4%**	**100%**
Chrysler	100%	0%	0%						100%
Ford	48%	9%	26%	5%			8%	4%	100%
General Motors	33%	10%	15%	2%		9%	27%	5%	100%
Navistar	100%								100%
Paccar	59%		41%						100%
Japanese manufacturers	**18%**	**2%**	**5%**	**0%**	**42%**	**0%**	**14%**	**19%**	**100%**
Fuji Heavy (Subaru)	24%				76%				100%
Honda	35%	4%	4%	1%	27%		19%	11%	100%
Isuzu	3%	3%		0%	42%		8%	45%	100%
Mazda	4%	1%			70%		17%	8%	100%
Mitsubishi	3%	3%	2%		56%		11%	25%	100%
Nissan	26%	0%	13%		28%		24%	9%	100%
Suzuki-Maruti			6%		37%		10%	47%	100%
Toyota-Daihatsu-Hino	17%	2%	4%	1%	47%		9%	19%	100%
South Korean manufacturers	**8%**	**0%**	**7%**	**1%**	**0%**	**55%**	**18%**	**10%**	**100%**
Hyundai-Kia	8%		7%	1%		55%	18%	10%	100%
Chinese manufacturers	**0%**	**0%**	**32%**	**0%**	**0%**	**7%**	**61%**	**0%**	**100%**
Geely (Volvo cars)			46%				54%	0%	100%
SAIC (Ssangyong)						23%	77%		100%
Indian manufacturers	**0%**	**0%**	**24%**	**0%**	**0%**	**1%**	**0%**	**75%**	**100%**
Tata (Telco, Jaguar, Land Rover)			24%			1%		75%	100%
ALL MANUFACTURERS	**16%**	**6%**	**22%**	**3%**	**12%**	**5%**	**23%**	**12%**	**100%**

Sources: CCFA, OICA.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2006	2007	2008 (2)	2009	2010
Germany	2,426,187	3,349,788	3,378,343	3,467,961	3,148,163	3,090,040	3,807,175	2,916,259
Austria	227,548	288,618	309,427	308,594	298,182	293,697	319,403	328,563
Belgium	399,240	473,506	515,204	526,141	524,795	535,947	476,194	547,340
Denmark	73,774	80,654	112,688	154,383	159,341	150,143	112,199	153,583
Spain [1]	504,051	988,270	1,381,515	1,634,608	1,614,835	1,161,176	952,772	982,015
Finland	103,167	139,095	134,646	145,689	123,163	139,611	88,344	107,346
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,045,745**	**2,109,672**	**2,091,368**	**2,302,398**	**2,251,669**
Greece	35,700	115,480	290,222	267,669	279,745	267,295	219,730	141,501
Ireland	93,563	82,584	230,989	178,766	186,335	151,603	57,455	88,445
Italy	1,717,432	2,307,055	2,415,600	2,325,718	2,492,774	2,161,673	2,159,436	1,961,578
Luxembourg	21,500	38,422	41,896	50,837	51,332	52,359	47,265	49,726
Norway	95,550	61,901	97,376	109,164	129,195	110,617	98,675	127,754
Netherlands	450,076	502,732	597,640	483,970	505,540	499,918	387,155	482,527
Portugal	58,357	210,924	257,834	194,702	201,816	213,389	161,013	223,464
United Kingdom	1,513,761	2,008,934	2,221,670	2,344,864	2,404,007	2,131,795	1,994,999	2,030,846
Sweden	192,588	229,941	290,529	282,766	306,799	253,982	213,408	289,684
Switzerland	279,764	329,899	316,519	269,452	284,688	288,557	266,049	292,453
European Union 15 countries	**9,690,146**	**13,125,133**	**14,312,087**	**14,412,413**	**14,406,499**	**13,193,996**	**13,298,946**	**12,554,546**
Europe 17 countries	**10,065,460**	**13,516,933**	**14,725,982**	**14,791,029**	**14,820,382**	**13,593,170**	**13,663,670**	**12,974,753**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**3,892,851**	**4,785,713**	**5,179,431**	**2,975,649**	**3,482,461**
Canada	948,967	886,217	849,132	858,826	841,585	872,720	729,023	694,349
USA	8,760,937	9,300,678	8,846,625	7,820,854	7,618,413	6,813,369	5,400,890	5,635,432
Mexico	286,000	353,000	603,010	680,942	641,394	589,051	439,103	503,775
Argentina	215,177	77,306	224,950	336,296	422,230	452,539	373,231	524,514
Brazil	793,028	532,791	1,188,818	1,634,396	2,086,681	2,341,709	2,645,013	2,859,000
South Korea	45,972	626,126	1,057,620	976,211	1,040,372	1,020,457	1,234,618	1,308,326
Japan	2,854,185	5,102,659	4,259,771	4,612,318	4,325,508	4,184,266	3,905,310	4,203,181
Turkey	31,000	215,000	456,696	373,219	357,465	305,998	369,819	509,784
WORLD	**28,500,000**	**34,825,967**	**38,689,767**	**46,602,403**	**49,515,309**	**49,872,894**	**49,738,317**	**55,851,007**

Source: CCFA.

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2006	2007	2008 (2)	2009	2010
Germany	175,687	203,389	314,804	304,433	334,116	334,999	242,178	282,157
Austria	21,821	29,211	36,457	38,793	41,509	42,303	31,026	34,001
Belgium	34,478	46,670	66,125	72,079	81,664	81,276	63,431	64,048
Denmark	19,469	23,031	38,108	71,965	66,867	41,465	19,585	19,980
Spain [1]	105,934	249,185	335,684	318,526	324,463	201,367	121,450	132,104
Finland	17,699	32,154	18,128	20,941	20,944	21,632	12,451	14,218
France	**323,291**	**446,983**	**477,204**	**498,397**	**519,492**	**523,432**	**416,183**	**457,215**
Greece	53,500	30,075	25,015	26,391	27,130	25,570	17,388	12,341
Ireland	11,905	28,087	46,261	46,957	50,013	34,010	10,566	11,544
Italy	122,293	159,322	268,057	273,021	276,548	260,412	198,390	199,350
Luxembourg	1,300	2,961	4,642	4,675	5,315	6,046	4,197	4,267
Norway	15,135	23,035	35,618	49,243	53,008	42,630	28,762	34,600
Netherlands	47,926	68,791	114,354	84,713	97,275	104,139	64,204	59,777
Portugal	46,967	71,904	161,045	70,472	74,790	61,730	42,747	49,290
United Kingdom	274,143	293,473	301,523	389,496	395,179	353,463	227,543	262,730
Sweden	19,684	33,133	38,474	47,194	51,923	47,477	34,105	44,450
Switzerland	22,418	28,165	29,345	28,932	30,720	32,789	28,675	30,371
European Union 15 countries	**1,276,097**	**1,718,369**	**2,245,881**	**2,268,053**	**2,367,228**	**2,139,321**	**1,505,444**	**1,647,472**
Europe 17 countries	**1,313,650**	**1,769,569**	**2,310,844**	**2,346,228**	**2,450,956**	**2,214,740**	**1,562,881**	**1,712,443**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**888,951**	**1,015,478**	**1,028,883**	**584,017**	**737,660**
Canada	335,827	416,041	736,951	807,182	848,760	800,802	753,209	888,923
USA	2,476,777	4,845,360	8,965,048	9,228,127	8,841,902	6,679,796	5,200,478	6,136,787
Mexico	166,000	198,000	302,944	507,180	510,290	486,712	337,279	343,106
Argentina	59,881	17,481	81,995	124,182	142,696	159,231	113,911	173,785
Brazil	187,233	180,000	302,288	293,342	376,047	478,641	496,227	656,064
South Korea	58,502	328,151	372,840	244,000	249,000	211,000	231,000	248,000
Japan	2,161,305	2,674,834	1,703,114	1,127,202	1,028,140	897,969	703,946	752,955
Turkey	19,000	43,015	199,825	292,296	276,741	220,546	206,050	283,388
WORLD	**9,150,000**	**13,410,615**	**18,723,143**	**21,309,891**	**21,573,201**	**18,687,828**	**15,927,470**	**19,259,777**

(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 1,500,000 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

	Petrol 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		
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
2010	2,999,637	9,939	783,251	1,283,682	135,894	786,871		2,552,693	128,774	1,903,064	228,026	292,829		79
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	
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	
2010	970,295		735,069	220,815		5,027	9,384	981,086	410,136	515,706	41,418	6,050	7,776	
FRANCE														
1990	2,490,808	259,104	1,315,307	853,195	21,266	41,936		804,007	50,851	547,002	206,154			
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	
2010	3,431,186	296,091	1,186,775	1,698,814	62,074	916	186,516	2,178,408	1,054,837	1,097,072	20,235	6,231	33	746
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
2009	436,652		402,604	20,389	1,558	12,101		224,448	111,146	109,935	3,367			
2010	332,268		300,198	16,578	1,096	14,396		240,901	129,262	109,729	1,910			
UNITED KINGDOM														
1990	1,173,660	56,860	489,355	449,008		68,744	109,693	121,951		93,644	8,610		19,697	
2009	658,558		215,580	373,377	4,598	64,886	117	340,730	116,372	100,733	71,350	52,232	43	
2010	799,917		206,879	474,292	5,016	113,692	38	474,153	154,146	135,797	99,571	80,820	3,819	

DIESEL PASSENGER CAR PRODUCTION BY MAKE AND COUNTRY

In units

	1980	1990	2000	2006	2007	2008	2009	2010
French manufacturers								
Citroën	33,996	213,010	453,604	567,042	628,713	585,347	542,860	586,769
Peugeot	133,332	334,469	593,349	709,440	680,576	556,254	484,583	622,644
PSA Peugeot Citroën (1)	167,328	547,479	1,046,953	1,276,482	1,309,289	1,141,601	1,027,443	1,209,413
Renault	69,335	256,528	601,495	867,011	902,957	754,033	716,955	812,306
Dacia				61,777	95,358	81,153	66,948	132,548
Renault Samsung Motors				0	5,197	41,272	12,280	24,141
Renault-Dacia-Samsung				928,788	1,003,512	876,458	796,183	968,995
Total (2)	**236,663**	**804,007**	**1,648,448**	**2,205,270**	**2,312,801**	**2,018,059**	**1,823,626**	**2,178,408**
TOTAL GASOLINE + DIESEL	**2,938,581**	**3,294,815**	**4,598,617**	**5,047,274**	**5,300,597**	**4,900,579**	**4,806,612**	**5,610,340**
Diesel share	8.1%	24.4%	35.8%	43.7%	43.6%	41.2%	37.9%	38.8%
Germany								
Mercedes (2)	216,053	141,547	278,772	391,758	414,675	397,553	329,107	391,194
Opel	32,742	76,441	288,651	310,346	310,802	238,910	200,410	236,982
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,131,175	1,278,671	1,238,822	985,365	1,102,852
Ford	5,344	90,117	179,130	333,022	342,580	348,715	317,161	347,553
BMW	33,520	28,135	194,794	388,577	483,359	416,432	386,557	464,065
Total (2)	**465,788**	**662,007**	**1,788,999**	**2,554,878**	**2,830,087**	**2,640,456**	**2,227,276**	**2,552,693**
TOTAL GASOLINE + DIESEL	**3,520,934**	**4,660,657**	**5,131,918**	**5,398,508**	**5,709,139**	**5,532,030**	**4,964,509**	**5,552,330**
Diesel share	13.2%	14.2%	34.9%	47.3%	49.6%	47.7%	44.9%	46.0%
Italy								
Alfa Romeo	3,851	11,176	77,532	111,896	114,212	72,405	49,822	60,095
Fiat	76,513	87,985	223,889	306,414	328,545	207,314	142,357	150,786
Lancia		17,679	40,891	32,699	31,002	36,817	31,229	28,571
Divers	0	297	0	115	5,089	4,763	1,040	1,449
Total (2)	**80,364**	**117,137**	**342,312**	**451,124**	**478,848**	**321,299**	**224,448**	**240,901**
TOTAL GASOLINE + DIESEL	**1,445,221**	**1,874,672**	**1,422,243**	**892,502**	**910,860**	**659,221**	**661,100**	**573,169**
Diesel share	5.6%	6.2%	24.1%	50.5%	52.6%	48.7%	34.0%	42.0%

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

PRODUCTION

LIGHT COMMERCIAL VEHICLE AND INDUSTRIAL VEHICLE PRODUCTION BY WEIGHT, MANUFACTURER AND COUNTRY IN 2010, EXCLUDING COACHES AND BUSES

In units

Group, manufacturer and country	GVWR (1) 3.5t to 5t	GVWR over 5t to 16t	GVWR 16t and over, road tractors all weights	GVWR 3.5t and over	GVWR over 5t
Renault	78,837			78,837	–
Renault Trucks	0	5,447	24,255	29,702	29,702
Scania			9,594	9,594	9,594
Etalmobil	0	0		0	0
TOTAL FRANCE	**78,837**	**5,447**	**33,849**	**118,133**	**39,296**
Daimler	113,873	21,548	57,095	192,516	78,643
MAN			29,891	29,891	29,891
Iveco Magirus			7,762	7,762	7,762
Volkswagen	30,333			30,333	–
Multicar	1,273			1,273	–
TOTAL GERMANY	**145,479**	**21,548**	**94,748**	**261,775**	**116,296**
MAN - OAF – Steyr		11,912	6,867	18,779	18,779
TOTAL AUSTRIA		**11,912**	**6,867**	**18,779**	**18,779**
Volvo Trucks		2,300	22,972	25,272	25,272
Others			66	66	66
TOTAL BELGIUM		**2,300**	**23,038**	**25,338**	**25,338**
Iveco	32,920	23,000	4,948	60,868	27,948
TOTAL ITALY (including others)	**32,955**	**23,000**	**4,948**	**60,903**	**27,948**
Ford	2,569			2,569	–
Leyland Trucks. Foden (DAF)		4,981	4,309	9,290	9,290
Dennis DSV			826	826	826
LDV	0			0	–
TOTAL UNITED KINGDOM	**2,569**	**4,981**	**5,135**	**12,685**	**10,116**
Volvo Trucks			21,300	21,300	21,300
Scania			9,700	9,700	9,700
TOTAL SWEDEN			**31,000**	**31,000**	**31,000**
DAF			22,168	22,168	22,168
Scania			21,715	21,715	21,715
Others			881	881	881
TOTAL NETHERLANDS			**44,764**	**44,764**	**44,764**
Iveco	10,350	3,540	9,599	23,489	13,139
TOTAL SPAIN	**10,350**	**3,540**	**9,599**	**23,489**	**13,139**
Commercial vehicles					
Daimler (including FUSO)	116,773	24,477	57,095	198,345	81,572
Iveco	43,270	26,540	22,309	92,119	48,849
MAN	0	11,912	36,758	48,670	48,670
Volvo Trucks	0	2,300	44,272	46,572	46,572
Scania	0	0	41,009	41,009	41,009
DAF	0	4,981	26,477	31,458	31,458
Renault Trucks	0	5,447	24,255	29,702	29,702
Light commercial vehicles over 3.5t					
Renault	78,837	–	–	78,837	–
Volkswagen	30,333	–	–	30,333	–
Ford	2,569	–	–	2,569	–
Others	3,198	1,311	2,053	6,562	3,364
GENERAL TOTAL EU–15 COUNTRIES	**274,980**	**76,968**	**254,228**	**606,176**	**331,196**

(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 thousands of units and as a % of total registrations

	1985	1990	2000	2006,(1)	2007	2008	2009	2010
PSA Peugeot Citroën	**1,225**	**1,719**	**1,930**	**1,971**	**1,970**	**1,792**	**1,818**	**1,776**
	11.5%	12.7%	13.1%	13.3%	13.3%	13.2%	13.3%	13.7%
Renault Group	**1,135**	**1,315**	**1,559**	**1,281**	**1,211**	**1,138**	**1,237**	**1,305**
	10.7%	9.7%	10.6%	8.7%	8.2%	8.4%	9.1%	10.1%
Fiat Group	1,487	1,854	1,477	1,120	1,195	1,121	1,200	1,000
	14.0%	13.7%	10.0%	7.6%	8.1%	8.2%	8.8%	7.7%
Ford Group	1,266	1,540	1,248	1,214	1,219	1,147	1,229	1,063
	11.9%	11.4%	8.5%	8.2%	8.2%	8.4%	9.0%	8.2%
General Motors	1,201	1,560	1,720	1,415	1,427	1,223	1,1883	1,119
	11.3%	11.5%	11.7%	9.6%	9.6%	9.0%	8.7%	8.6%
Volkswagen Group	1,553	2,120	2,755	2,921	2,881	2,761	2,854	2,721
	14.6%	15.7%	18.7%	19.7%	19.4%	20.3%	20.9%	21.0%
Daimler	394	438	811	815	810	771	671	662
	3.7%	3.2%	5.5%	5.5%	5.5%	5.7%	4.9%	5.1%
BMW Group	290	364	499	784	834	804	695	735
	2.7%	2.7%	3.4%	5.3%	5.6%	5.9%	5.1%	5.7%
Nissan	306	395	392	311	290	314	349	384
	2.9%	2.9%	2.7%	2.1%	2.0%	2.3%	2.6%	3.0%
Toyota-Lexus-Daihatsu	303	406	576	893	912	756	715	582
	2.9%	3.0%	3.9%	6.0%	6.2%	5.6%	5.2%	4.5%
Other Japanese makes	534	789	701	886	905	806	769	651
	5.0%	5.8%	4.8%	6.0%	6.1%	5.9%	5.6%	5.0%
Hyundai-Kia	7	18	303	519	488	422	520	539
	0.1%	0.1%	2.1%	3.5%	3.3%	3.1%	3.8%	4.2%
Volvo	255	235	230	236	255	213	196	222
	2.4%	1.7%	1.6%	1.6%	1.7%	1.6%	1.4%	1.7%
Tata Group	21	44	112	127	136	110	97	97
	0.2%	0.3%	0.8%	0.9%	0.9%	0.8%	0.7%	0.7%
Other makes (including MG-Rover, Saab)	634	720	424	299	287	215	136	118
	6.0%	5.3%	2.9%	2.0%	1.9%	1.6%	1.0%	0.9%
TOTAL EUROPE 17 COUNTRIES	**10,611**	**13,517**	**14,738**	**14,791**	**14,820**	**13,593**	**13,664**	**12,975**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		0.9%	–2.1%	1.8%	0.2%	–8.3%	0.5%	–5.0%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN EUROPE

In thousands of units and as a % of total registrations

	1985	1990	2000	2006,(1)	2007	2008	2009	2010
PSA Peugeot Citroën	**186**	**251**	**349**	**369**	**387**	**365**	**299**	**326**
	16.9%	16.5%	18.1%	18.8%	18.7%	19.9%	22.5%	22.1%
Renault Group	**175**	**278**	**272**	**304**	**303**	**268**	**208**	**251**
	15.8%	18.3%	14.1%	15.5%	14.6%	14.6%	15.6%	17.0%
Fiat Group	114	156	262	270	299	277	198	212
	10.3%	10.3%	13.6%	13.8%	14.4%	15.1%	14.9%	14.4%
Ford Group	123	195	180	236	258	219	151	161
	11.1%	12.9%	9.3%	12.0%	12.5%	11.9%	11.4%	10.9%
General Motors	55	81	92	144	147	132	70	75
	5.0%	5.3%	4.8%	7.3%	7.1%	7.2%	5.3%	5.1%
Volkswagen Group	113	134	202	204	223	200	136	170
	10.2%	8.9%	10.5%	10.4%	10.8%	10.9%	10.2%	11.5%
Daimler	64	71	163	149	171	163	118	130
	5.8%	4.7%	8.4%	7.6%	8.2%	8.9%	8.9%	8.8%
Nissan	61	105	100	98	89	62	41	41
	5.5%	6.9%	5.2%	5.0%	4.3%	3.4%	3.1%	2.8%
Toyota-Lexus-Daihatsu	66	81	69	51	65	56	35	37
	6.0%	5.3%	3.6%	2.6%	3.2%	3.1%	2.7%	2.5%
Other Japanese makes	67	72	117	75	70	46	34	39
	6.1%	4.8%	6.0%	3.8%	3.4%	2.5%	2.5%	2.6%
Hyundai-Kia	1	0	44	20	13	9	5	5
	0.1%	0.0%	2.3%	1.0%	0.6%	0.5%	0.4%	0.4%
Other makes	80	91	82	44	45	36	34	29
	7.2%	6.0%	4.2%	2.3%	2.2%	2.0%	2.5%	2.0%
TOTAL EUROPE 17 COUNTRIES	**1,104**	**1,516**	**1,931**	**1,964**	**2,069**	**1,833**	**1,327**	**1,475**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		–2.6%	5.6%	–2.0%	5.4%	–11.4%	–27.6%	11.1%

(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 America + others Ford/General Motors = Opel + Vauxhall + 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./Groupe Tata = Jaguar + Land Rover + Tata
These scopes are defined on the basis of their situation in 2011.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY AND GROUP IN 2010

In thousands of units and as a % of total registrations

	Total	PSA Peugeot Citroën	Citroën	Peugeot	Renault Group	Fiat Group	Volkswagen Group	Ford Group	General Motors	BMW-Mini	Daimler	Japanese makes	South Korean makes
Germany	**2,916**	**153**	**68**	**84**	**154**	**90**	**1,024**	**198**	**259**	**267**	**310**	**287**	**111**
	100%	5.2%	2.3%	2.9%	5.3%	3.1%	35.1%	6.8%	8.9%	9.1%	10.6%	9.9%	3.8%
Austria	**329**	**29**	**14**	**15**	**22**	**20**	**106**	**20**	**30**	**16**	**13**	**42**	**25**
	100%	8.8%	4.2%	4.6%	6.6%	6.0%	32.2%	6.0%	9.3%	4.7%	3.8%	12.8%	7.7%
Belgium	**547**	**101**	**49**	**53**	**69**	**24**	**109**	**38**	**46**	**35**	**22**	**59**	**20**
	100%	18.5%	8.9%	9.6%	12.5%	4.3%	19.9%	7.0%	8.4%	6.4%	3.9%	10.8%	3.6%
Denmark	**154**	**27**	**13**	**14**	**5**	**8**	**24**	**17**	**18**	**3**	**3**	**31**	**13**
	100%	17.5%	8.4%	9.1%	3.4%	5.3%	15.5%	11.3%	12.0%	2.2%	2.2%	20.1%	8.5%
Spain	**982**	**164**	**81**	**83**	**103**	**30**	**233**	**78**	**95**	**41**	**31**	**133**	**52**
	100%	16.7%	8.3%	8.4%	10.5%	3.0%	23.8%	7.9%	9.7%	4.2%	3.2%	13.5%	5.3%
Finland	**107**	**7**	**3**	**4**	**2**	**3**	**29**	**9**	**6**	**3**	**5**	**29**	**7**
	100%	6.8%	3.2%	3.7%	1.9%	2.7%	26.8%	8.5%	5.2%	3.0%	4.3%	27.2%	6.3%
France	**2,252**	**729**	**328**	**401**	**602**	**90**	**247**	**115**	**116**	**64**	**52**	**171**	**43**
	100%	32.4%	14.6%	17.8%	26.8%	4.0%	11.0%	5.1%	5.2%	2.8%	2.3%	7.6%	1.9%
Greece	**142**	**11**	**6**	**5**	**4**	**11**	**27**	**10**	**16**	**4**	**5**	**39**	**12**
	100%	7.9%	4.3%	3.6%	2.7%	8.0%	19.3%	7.2%	11.3%	2.7%	3.6%	27.3%	8.4%
Ireland	**88**	**4**	**1**	**3**	**10**	**2**	**20**	**11**	**7**	**3**	**2**	**22**	**6**
	100%	4.6%	1.2%	3.4%	11.1%	1.9%	22.5%	12.7%	7.9%	3.4%	2.5%	25.3%	6.3%
Italy	**1,962**	**211**	**106**	**105**	**128**	**591**	**227**	**182**	**164**	**72**	**80**	**200**	**56**
	100%	10.8%	5.4%	5.4%	6.5%	30.1%	11.6%	9.3%	8.4%	3.7%	4.1%	10.2%	2.9%
Luxembourg	**50**	**7**	**3**	**4**	**6**	**2**	**14**	**3**	**2**	**5**	**3**	**3**	**3**
	100%	13.4%	5.8%	7.5%	11.2%	4.6%	28.2%	5.9%	3.8%	9.8%	6.4%	6.6%	5.9%
Netherlands	**483**	**65**	**25**	**40**	**39**	**31**	**95**	**39**	**43**	**17**	**12**	**91**	**34**
	100%	13.4%	5.2%	8.2%	8.0%	6.5%	19.6%	8.2%	8.9%	3.5%	2.5%	18.9%	7.0%
Portugal	**223**	**31**	**13**	**18**	**28**	**14**	**45**	**15**	**24**	**11**	**12**	**32**	**7**
	100%	14.1%	6.0%	8.1%	12.5%	6.1%	20.1%	6.9%	10.6%	5.1%	5.2%	14.3%	3.2%
United Kingdom	**2,031**	**183**	**73**	**109**	**96**	**64**	**350**	**280**	**261**	**154**	**83**	**330**	**118**
	100%	9.0%	3.6%	5.4%	4.7%	3.2%	17.2%	13.8%	12.9%	7.6%	4.1%	16.3%	5.8%
Sweden	**290**	**16**	**6**	**10**	**16**	**3**	**67**	**18**	**8**	**15**	**11**	**48**	**23**
	100%	5.6%	2.1%	3.5%	5.4%	1.1%	23.1%	6.2%	2.9%	5.1%	3.7%	16.5%	8.1%
EUROPEAN UNION 15 COUNTRIES	**12,265**	**1,721**	**784**	**938**	**1,267**	**979**	**2,549**	**1,017**	**1,087**	**695**	**633**	**1,471**	**507**
	100%	14.0%	6.4%	7.6%	10.3%	8.0%	20.8%	8.3%	8.9%	5.7%	5.2%	12.0%	4.1%
Norway	**128**	**11**	**3**	**7**	**1**	**2**	**33**	**12**	**4**	**6**	**5**	**38**	**6**
	100%	8.3%	2.7%	5.6%	0.6%	1.3%	25.5%	9.3%	3.3%	4.7%	3.6%	29.8%	4.5%
Switzerland	**292**	**28**	**13**	**15**	**22**	**16**	**73**	**16**	**19**	**20**	**14**	**60**	**10**
	100%	9.6%	4.5%	5.1%	7.5%	5.6%	24.8%	5.4%	6.6%	6.7%	4.9%	20.4%	3.4%
EUROPE 17 COUNTRIES	**12,975**	**1,776**	**806**	**970**	**1,305**	**1,000**	**2,721**	**1,063**	**1,119**	**735**	**662**	**1,617**	**546**
	100%	13.7%	6.2%	7.5%	10.1%	7.7%	21.0%	8.2%	8.6%	5.7%	5.1%	12.5%	4.2%
Bulgaria	**16**	**1**	**0**	**1**	**2**	**0**	**3**	**1**	**2**	**1**	**0**	**4**	**0**
	100%	9.3%	2.9%	6.4%	12.6%	1.9%	20.2%	7.9%	13.1%	3.6%	2.3%	23.6%	2.6%
Estonia	**10**	**1**	**0**	**1**	**1**	**0**	**2**	**1**	**0**	**0**	**0**	**4**	**1**
	100%	10.4%	4.7%	5.7%	13.7%	0.3%	18.2%	5.7%	3.5%	1.1%	1.8%	34.6%	6.7%
Hungary	**43**	**2**	**1**	**1**	**4**	**2**	**11**	**5**	**6**	**1**	**1**	**9**	**2**
	100%	5.7%	2.4%	3.2%	9.2%	4.4%	24.2%	11.8%	13.4%	2.0%	1.5%	20.9%	4.5%
Latvia	**6**	**1**	**0**	**0**	**1**	**0**	**2**	**0**	**0**	**0**	**0**	**2**	**0**
	100%	7.9%	2.2%	5.7%	12.4%	1.1%	28.4%	5.8%	3.2%	2.9%	1.8%	27.4%	5.2%
Lithuania	**8**	**1**	**0**	**1**	**1**	**0**	**2**	**0**	**0**	**0**	**0**	**2**	**0**
	100%	12.8%	1.5%	11.2%	10.8%	3.1%	22.5%	4.1%	3.8%	2.9%	1.5%	31.3%	4.4%
Poland	**333**	**28**	**13**	**14**	**24**	**28**	**74**	**27**	**31**	**6**	**5**	**71**	**32**
	100%	8.3%	4.0%	4.3%	7.2%	8.3%	22.3%	8.1%	9.3%	1.9%	1.4%	21.3%	9.4%
Czech Republic	**170**	**13**	**6**	**7**	**15**	**4**	**71**	**14**	**6**	**3**	**3**	**15**	**18**
	100%	7.8%	3.7%	4.1%	8.8%	2.6%	41.8%	8.2%	3.7%	1.7%	1.6%	8.9%	10.6%
Romania	**106**	**4**	**1**	**3**	**43**	**3**	**20**	**8**	**11**	**2**	**1**	**9**	**5**
	100%	3.9%	1.4%	2.5%	40.3%	2.5%	18.6%	7.1%	10.6%	1.6%	1.2%	8.3%	4.8%
Slovakia	**64**	**7**	**4**	**4**	**5**	**2**	**20**	**3**	**4**	**2**	**2**	**10**	**8**
	100%	11.7%	5.5%	6.2%	8.4%	3.5%	31.1%	4.2%	5.9%	3.4%	2.5%	15.6%	11.9%
Slovenia	**61**	**9**	**5**	**4**	**11**	**3**	**13**	**4**	**7**	**2**	**1**	**6**	**5**
	100%	14.4%	7.4%	6.9%	18.1%	5.2%	21.3%	5.8%	11.9%	2.5%	1.3%	9.9%	8.8%
10 new EU countries	**818**	**68**	**32**	**36**	**107**	**43**	**217**	**62**	**68**	**16**	**12**	**132**	**71**
	100%	8.3%	3.9%	4.4%	13.1%	5.2%	26.5%	7.6%	8.4%	2.0%	1.5%	16.1%	8.7%
EUROPE 27 COUNTRIES	**13,793**	**1,844**	**838**	**1,006**	**1,412**	**1,043**	**2,938**	**1,125**	**1,188**	**752**	**675**	**1,748**	**617**
	100%	13.4%	6.1%	7.3%	10.2%	7.6%	21.3%	8.2%	8.6%	5.4%	4.9%	12.7%	4.5%

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 + others/General Motors = Opel + Vauxhall + 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	2006	2007	2008	2009	2010
Germany	**193,841**	**327,046**	**1,023,997**	**1,535,886**	**1,502,282**	**1,361,958**	**1,167,447**	**1,220,675**
	8.0%	9.8%	30.3%	44.3%	47.7%	44.1%	30.7%	41.9%
Austria	**7,425**	**74,197**	**191,402**	**191,766**	**176,752**	**160,465**	**146,949**	**167,106**
	3.3%	25.7%	61.9%	62.1%	59.3%	54.6%	46.0%	50.9%
Belgium	**54,897**	**154,804**	**290,301**	**392,328**	**404,297**	**422,681**	**358,400**	**415,728**
	13.8%	32.7%	56.3%	74.6%	77.0%	78.9%	75.3%	76.0%
Denmark	**2,352**	**3,305**	**14,898**	**41,365**	**61,825**	**69,347**	**50,729**	**72,670**
	3.2%	4.1%	13.2%	26.8%	38.8%	46.2%	45.2%	47.3%
Spain (1)	**–**	**140,740**	**734,256**	**1,143,512**	**1,144,265**	**804,499**	**668,022**	**693,905**
		14.2%	53.1%	70.0%	70.9%	69.3%	70.1%	70.7%
Finland	**–**	**7,215**	**–**	**29,487**	**34,780**	**69,291**	**40,852**	**44,574**
		5.2%		20.2%	28.2%	49.6%	46.2%	41.5%
France	186,050	762,054	1,046,485	1,463,666	1,563,061	1,620,980	1,628,495	1,593,177
	9.9%	33.0%	49.0%	71.5%	74.1%	77.5%	70.7%	70.8%
Greece	**–**	**60**	**2,006**	**5,852**	**8,116**	**9,590**	**7,237**	**5,661**
		0.1%	0.7%	2.2%	2.9%	3.6%	3.3%	4.0%
Ireland	**–**	**12,413**	**23,259**	**43,620**	**50 328**	**50 741**	**29 953**	**55,016**
		15.0%	10.1%	24.4%	27.0%	33.5%	52.1%	62.2%
Italy	**138,562**	**179,779**	**812,203**	**1,352,585**	**1,389,391**	**1,096,485**	**904,275**	**901,310**
	8.1%	7.8%	33.6%	58.2%	55.7%	50.7%	41.9%	45.9%
Luxembourg	**–**	**8,206**	**21,110**	**39,280**	**39,753**	**40,314**	**34,480**	**37,403**
		21.4%	50.4%	77.3%	77.4%	77.0%	73.0%	75.2%
Norway	**–**	**1,581**	**8,761**	**52,770**	**96,051**	**80,096**	**71,752**	**95,733**
		2.6%	9.0%	48.3%	74.3%	72.4%	72.7%	74.9%
Netherlands	**30,450**	**54,738**	**134,426**	**129,292**	**142,770**	**125,377**	**77,674**	**98,477**
	6.8%	10.9%	22.5%	26.7%	28.2%	25.1%	20.1%	20.4%
Portugal	**–**	**10,426**	**62,417**	**126,704**	**139,877**	**147,896**	**107,178**	**149,046**
		4.9%	24.2%	65.1%	69.3%	69.3%	66.6%	66.7%
United Kingdom	**5,850**	**128,160**	**313,149**	**897,374**	**965,517**	**928,737**	**832,590**	**936,448**
	0.4%	6.4%	14.1%	38.3%	40.2%	43.6%	41.7%	46.1%
Sweden	**–**	**1,335**	**18,325**	**55,805**	**106,382**	**91,874**	**87,518**	**147,802**
		0.6%	6.3%	19.7%	34.7%	36.2%	41.0%	51.0%
Switzerland	**–**	**9,998**	**29,466**	**80,732**	**92,568**	**93,493**	**78,307**	**88,760**
		3.0%	9.3%	30.0%	32.5%	32.4%	29.4%	30.4%
EUROPE 17 COUNTRIES (1)	619,427	1,866,021	4,726,461	7,582,024	7,918,015	7,173,824	6,291,858	6,723,491
% diesel in Europe	7.1%	13.9%	32.1%	51.3%	53.4%	52.8%	46.0%	51.8%
Year-on-year change		+0.7%	+10.7%	+5.3%	+4.4%	–9.4%	–12.3%	+6.9%

(1) See notes on page 61.

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Germany	2,527,580	3,475,172	3,590,633	3,670,406	3,376,019	3,320,059	3,981,805	3,118,705
Austria	243,021	310,157	336,670	339,078	330,703	326,633	345,132	356,693
Belgium	429,849	525,996	569,294	587,125	593,555	604,326	530,509	603,346
Denmark	89,485	100,303	145,780	220,003	219,047	184,582	128,060	170,431
Spain	592,093	1,218,091	1,680,761	1,909,241	1,891,243	1,328,219	1,060,263	1,098,785
Finland	115,741	166,602	149,702	163,074	140,778	156,913	97,898	118,896
France	**2,151,089**	**2,702,925**	**2,548,850**	**2,485,776**	**2,571,134**	**2,551,641**	**2,676,384**	**2,669,281**
Greece	80,824	144,960	313,230	291,765	304,262	290,091	234,647	152,436
Ireland	102,203	106,720	272,463	219,748	230,911	181,552	66,751	98,931
Italy	1,826,702	2,464,050	2,641,117	2,559,006	2,730,142	2,384,652	2,336,362	2,139,465
Luxembourg	22,514	40,285	44,979	53,958	54,874	56,447	50,368	53,017
Norway	106,945	82,483	129,003	153,028	175,835	146,716	123,196	158,176
Netherlands	483,574	555,812	694,210	548,830	586,575	584,881	438,710	532,390
Portugal	96,954	275,160	410,670	259,279	270,414	268,991	200,050	269,220
United Kingdom	1,725,803	2,256,662	2,466,833	2,678,943	2,752,187	2,431,300	2,189,726	2,262,385
Sweden	204,626	256,303	322,383	322,745	351,438	293,790	241,266	328,227
Switzerland	297,855	352,652	340,640	293,142	310,721	315,602	289,909	318,960
European Union (1)	9,358,799	14,523,790	16,187,575	16,308,977	16,403,282	14,964,077	14,577,931	13,972,208
EUROPE 17 COUNTRIES	**11,096,858**	**15,034,333**	**16,657,218**	**16,755,147**	**16,889,838**	**15,426,395**	**14,991,036**	**14,449,344**

(1) European Union: nine countries in 1980; ten countries in 1985; twelve countries between 1990 and 1994; fifteen countries from 1995.

REGISTRATIONS

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Germany	101,393	125,384	212,290	202,445	227,856	230,019	174,630	202,446
Austria	15,473	21,539	27,243	30,484	32,521	32,936	25,729	28,130
Belgium	30,609	52,490	54,090	60,984	68,760	68,379	54,315	56,006
Denmark	15,711	19,649	33,092	65,620	59,706	34,439	15,861	16,848
Spain (1)	88,042	229,821	299,246	274,633	276,408	167,043	107,491	116,770
Finland	12,574	27,507	15,056	17,385	17,615	17,302	9,554	11,550
France	**277,887**	**393,795**	**414,966**	**440,031**	**461,462**	**460,273**	**373,986**	**417,612**
Greece	45,124	29,480	23,008	24,096	24,517	22,796	14,917	10,935
Ireland	8,640	24,136	41,474	40,982	44,576	29,949	9,296	10,486
Italy	109,270	156,995	225,517	233,288	237,368	222,979	176,926	177,887
Luxembourg	1,014	1,863	3,083	3,121	3,542	4,088	3,103	3,291
Norway	11,395	20,582	31,627	43,864	46,640	36,099	24,521	30,422
Netherlands	33,498	53,080	96,570	64,860	81,035	84,963	51,555	49,863
Portugal	38,597	64,236	152,836	64,577	68,598	55,602	39,037	45,756
United Kingdom	212,042	247,728	245,163	334,079	348,180	299,505	194,727	231,539
Sweden	12,038	26,362	31,854	39,979	44,639	39,808	27,858	38,543
Switzerland	18,091	22,753	24,121	23,690	26,033	27,045	23,860	26,507
European Union (2)	790,064	1,398,657	1,875,488	1,896,564	1,996,783	1,770,081	1,278,985	1,417,662
EUROPE 17 COUNTRIES (1)	**1,031,398**	**1,517,400**	**1,931,236**	**1,964,118**	**2,069,456**	**1,833,225**	**1,327,366**	**1,474,591**

(1) See notes on page 61.

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Germany	59,061	73,770	96,830	96,747	101,320	99,907	62,518	75,014
Austria	5,642	7,222	8,508	7,548	8,289	8,506	4,691	5,138
Belgium	8,604	10,690	11,061	10,282	11,953	11,868	8,271	7,133
Denmark	3,179	3,539	4,597	5,924	6,798	6,563	3,175	2,682
Spain	23,208	30,432	33,700	40,424	44,384	31,226	11,675	13,215
Finland	4,497	4,218	3,072	3,290	3,081	4,018	2,572	2,368
France	**41,846**	**50,028**	**57,918**	**53,123**	**52,539**	**57,504**	**35,533**	**34,221**
Greece	1,178	497	1,633	1,899	2,071	2,344	1,578	1,081
Ireland	3,511	2,748	4,666	5,563	5,092	3,602	1,104	1,011
Italy		31,973	38,388	35,409	35,237	33,852	18,685	17,532
Luxembourg	690	1,136	1,451	1,392	1,609	1,742	898	803
Norway	3,056	2,106	3,564	4,835	5,650	5,729	3,429	3,126
Netherlands	13,346	14,804	16,835	19,075	15,099	18,023	11,692	9,390
Portugal	8,370	7,186	7,403	5,403	5,623	5,516	3,195	3,116
United Kingdom	57,489	45,794	51,864	50,776	43,111	49,558	28,539	27,988
Sweden	6,703	5,998	5,549	6,052	6,484	6,749	5,357	4,605
Switzerland	3,955	4,832	4,733	4,733	4,230	4,942	4,276	3,388
European Union (2)	187,726	272,597	343,475	342,907	342,690	340,978	199,328	205,297
EUROPE 17 COUNTRIES	**244,335**	**296,973**	**351,772**	**352,475**	**352,570**	**351,649**	**207,188**	**211,811**

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Germany	6,058	4,235	5,684	5,241	4,940	5,073	5,030	4,697
Austria	676	450	706	761	699	861	606	733
Belgium	585	580	974	813	951	1,029	845	909
Denmark	579	311	419	421	363	463	549	450
Spain	1,511	2,376	2,738	3,469	3,671	3,098	2,284	2,119
Finland	625	429		266	248	312	325	300
France	**3,558**	**3,160**	**4,320**	**5,243**	**5,491**	**5,655**	**6,664**	**5,382**
Greece		625	374	396	542	430	893	325
Ireland		24	121	412	345	459	166	47
Italy		3,825	4,152	4,324	3,943	3,581	2,779	3,931
Luxembourg	53	57	108	162	164	216	196	173
Norway	684	380	427	544	718	802	812	1,052
Netherlands	1,082	1,069	949	778	1,141	1,153	957	524
Portugal		482	806	492	569	612	515	418
United Kingdom	5,792	3,324	4,496	4,641	3,888	4,400	4,277	3,203
Sweden	943	863	1,071	1,163	800	920	890	1,302
Switzerland	371	580	491	509	457	802	539	476
European Union (2)	17,707	20,068	26,918	28,582	27,755	28,262	26,976	24,513
EUROPE 17 COUNTRIES	**22,517**	**22,770**	**27,836**	**29,635**	**28,930**	**29,866**	**28,327**	**26,041**

(2) European Union: nine countries in 1980; ten countries in 1985; twelve countries between 1990 and 1994; fifteen countries from 1995.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS IN EUROPE

In units

	2000	2004	2005	2006	2007	2008	2009	2010
Bulgaria				32,481	41,042	43,758	21,478	15,646
Estonia	10,600	16,436	19,640	25,363	30,912	24,579	9,946	10,295
Hungary	133,233	207,055	198,982	187,676	171,661	153,278	60,189	43,476
Latvia	7,300	11,217	16,602	25,582	32,771	19,831	5,367	6,365
Lithuania	6,158	9,493	10,467	14,234	21,606	22,217	7,515	7,970
Poland	478,752	318,111	235,522	238,993	293,305	320,040	320,206	333,490
Czech Republic	148,592	143,622	151,699	156,686	174,456	182,554	167,708	169,580
Romania				256,364	315,621	270,995	130,195	106,333
Slovakia	55,090	57,430	57,125	59,084	59,700	70,040	74,717	64,033
Slovenia	67,665	62,002	59,324	59,578	68,719	71,575	57,967	61,142
TOTAL NEW EU COUNTRIES (1)	**907,400**	**825,366**	**749,361**	**1,056,041**	**1,209,793**	**1,178,867**	**855,288**	**818,330**
Romania	64,432	145,130	215,554					

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

In units

	2000	2004	2005	2006	2007	2008	2009	2010
Bulgaria				9,959	10,697	11,478	4,275	3,211
Estonia	1,500	2,429	2,944	3,768	4,693	3,041	1,206	1,406
Hungary	26,686	23,595	20,479	21,604	21,920	21,559	10,619	9,337
Latvia	900	1,437	1,753	2,645	3,615	2,151	555	649
Lithuania	1,270	2,347	3,371	4,341	4,445	3,201	884	1,044
Poland	33,653	37,025	35,985	41,027	56,312	61,221	43,764	42,852
Czech Republic	14,786	17,288	16,024	16,229	19,722	20,648	13,258	11,318
Romania				32,702	36,431	40,876	15,397	10,404
Slovakia	5,812	10,204	14,428	19,518	23,618	26,907	15,722	6,953
Slovenia	6,274	7,034	6,897	6,080	6,860	7,331	4,452	4,744
TOTAL NEW EU COUNTRIES (1)	**90,900**	**101,359**	**101,881**	**157,873**	**188,313**	**198,413**	**110,132**	**91,918**
Romania	14,789	31,012	35,842					

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

In units

	2000	2004	2005	2006	2007	2008	2009	2010
Bulgaria				42,440	51,739	55,236	25,753	18,857
Estonia	12,100	18,865	22,584	29,131	35,605	27,620	11,152	11,701
Hungary	159,919	230,650	219,461	209,280	193,581	174,837	70,808	52,813
Latvia	8,200	12,654	18,355	28,227	36,386	21,982	5,922	7,014
Lithuania	7,428	11,840	13,838	18,575	26,051	25,418	8,399	9,014
Poland	512,405	355,136	271,507	280,020	349,617	381,261	363,970	376,342
Czech Republic	163,378	160,910	167,723	172,915	194,178	203,202	180,966	180,898
Romania				289,066	352,052	311,871	145,592	116,737
Slovakia	60,902	67,634	71,553	78,602	83,318	96,947	90,439	70,986
Slovenia	73,939	69,036	66,221	65,658	75,579	78,906	62,419	65,886
TOTAL NEW EU COUNTRIES (1)	**998,300**	**926,725**	**851,242**	**1,213,914**	**1,398,106**	**1,377,280**	**965,420**	**910,248**
Romania	79,221	176,142	251,396					

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

In units

	2000	2004	2005	2006	2007	2008	2009	2010
Bulgaria				2,000	3,600	3,400	800	600
Estonia	400	631	927	1,623	1,875	1,380	337	502
Hungary	2,900	4,600	4,400	4,900	5,400	5,500	1,800	2,408
Latvia	1,000	1,095	1,284	2,216	3,304	2,103	322	520
Lithuania	1,000	1,714	2,297	3,169	5,039	3,467	519	1,355
Poland	7,464	11,865	11,079	14,988	22,661	19,971	8,172	11,611
Czech Republic	6,400	7,324	8,200	10,716	12,860	12,249	5,824	5,750
Romania				8,096	14,766	12,220	2,370	2,686
Slovakia	1,796	3,105	3,754	4,917	5,776	5,431	2,322	2,870
Slovenia	1,876	1,567	1,635	2,178	2,819	2,725	867	985
TOTAL NEW EU COUNTRIES (1)	**22,800**	**31,900**	**33,500**	**54,900**	**78,100**	**68,400**	**23,300**	**29,300**
Romania	3,113	4,809	5,019					

(1) New member states: eight countries in 2000; ten 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 PRODUCTION BY MAKE

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Citroën	536,415	783,224	1,168,470	1,406,485	1,464,559	1,377,392	1,302,881	1,452,847
Peugeot	734,461	1,369,359	1,708,968	1,950,374	1,992,499	1,947,822	1,739,430	2,152,331
PSA Peugeot Citroën (1)	**1,647,221**	**2,152,583**	**2,877,438**	**3,356,859**	**3,457,058**	**3,325,214**	**3,042,311**	**3,605,178**
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	2,142,710	2,265,099	1,986,052	1,796,624	2,099,027
Dacia	–	–	55,183	188,461	222,913	241,991	307,052	341,090
Renault Samsung Motors	–	–	14,517	161,299	181,028	189,308	192,333	276,169
Renault-Dacia-Samsung (2)	**1,659,099**	**1,571,264**	**2,426,316**	**2,492,470**	**2,669,040**	**2,417,351**	**2,296,009**	**2,716,286**
C.B.M.	105							
Renault Trucks,(3)	54,086	60,263	96,040	67,593	62,227	65,328	24,314	31,874
of which Mack Trucks	–	*15,423*	*34,562*	–	–		–	
Etalmobil (Sovam)	113	75	44	28	21	7	9	0
Unic	17,809							
Heuliez (4)	–	231	391	–	–		–	–
Irisbus-Renault (4)	–	–	2,547	–	–		–	–
TOTAL	3,378,433	3,784,416	5,402,776	5,916,950	6,188,346	5,807,900	5,362,643	6,353,338
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	2006	2007	2008	2009	2010
Citroën	49,034	93,259	192,238	200,111	213,549	236,830	138,864	180,462
Peugeot	127,428	81,439	186,917	195,311	218,956	247,693	140,941	210,252
PSA Peugeot Citroën (1)	**200,979**	**174,698**	**379,155**	**395,422**	**432,505**	**484,523**	**279,805**	**390,714**
Renault (including Trafic II)	166,760	254,334	312,801	395,126	385,530	343,507	235,223	302,706
Dacia	–	–	12,580	11,507	7,466	13,956	16,680	17,704
Renault-Dacia-Samsung (2)	**166,760**	**254,334**	**325,381**	**406,633**	**392,996**	**357,463**	**251,903**	**320,410**
C.B.M.	105							
Renault Trucks (3)	54,086	60,263	96,040	67,593	62,227	65,328	24,314	31,874
of which Mack Trucks	–	15,423	34,562	–	–		–	–
Etalmobil (Sovam)	113	75	44	28	21	7	9	0
Unic	17,809							
Heuliez (4)	–	231	391	–	–		–	–
Irisbus-Renault (4)	–	–	2,547	–	–		–	–
TOTAL	439,852	489,601	803,558	869,676	887,749	907,321	556,031	742,998
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. Renault V.I. was renamed Renault Trucks.
(4) On 1st 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	2006	2007	2008	2009	2010
Foreign manufacturers								
Bugatti				44	83	82	38	40
Fiat	–	–	10,377	5,321	4,504	2,688	1,717	888
Heuliez-Opel				14,470	11,770	8,840	3,218	0
Lancia	–	–	2,265	4,825	4,238	4,068	1,996	1,561
Smart	–	–	101,365	68,672	102,588	140,072	115,469	97,373
Toyota	–	–	0	249,934	262,313	232,406	207,456	158,512
Passenger cars	**–**	**–**	**114,007**	**343,266**	**385,496**	**388,156**	**329,894**	**258,374**
Light commercial vehicles (Fiat)	**–**	**–**	**39,428**	**20,874**	**41,008**	**35,856**	**17,837**	**19,450**
Heavy trucks (Scania)	**–**	**–**	**10,710**	**10,133**	**12,002**	**12,629**	**4,724**	**9,594**
Irisbus-Heuliez	–	–	–	420	458	404	407	451
Irisbus	–	–	–	3,130	3,321	3,117	2,875	2,473
Evobus	–	–	535	522	557	630	742	551
Coaches and buses	**–**	**–**	**535**	**4,072**	**4,336**	**4,151**	**4,024**	**3,475**
TOTAL FOREIGN MAKES	–	–	164,680	378,345	442,842	440,792	356,479	290,893
French manufacturers								
TOTAL FRENCH VEHICLES	–	–	3,183,681	2,790,918	2,573,023	2,128,186	1,691,214	1,938,528
Foreign and French manufacturers								
OVERALL TOTAL	–	–	3,348,361	3,169,263	3,015,865	2,568,978	2,047,693	2,229,421

Source: CCFA.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

PRODUCTION OF PASSENGER CARS BY MAKE

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Citroën	536,366	689,965	976,232	1,206,374	1,251,010	1,140,562	1,164,017	1,272,385
Peugeot	607,033	1,287,920	1,522,051	1,755,063	1,773,543	1,700,129	1,598,489	1,942,079
PSA Peugeot Citroën (1)	**1,446,242**	**1,977,885**	**2,498,283**	**2,961,437**	**3,024,553**	**2,840,691**	**2,762,506**	**3,214,464**
Renault	1,492,339	1,316,930	2,043,815	1,747,584	1,879,570	1,642,551	1,561,446	1,796,321
Dacia	–	–	42,603	176,954	215,447	228,035	290,372	323,386
Renault Samsung Motors	–	–	14,517	161,299	181,027	189,302	192,288	276,169
Renault-Dacia-Samsung (1)	**1,492,339**	**1,316,930**	**2,100,935**	**2 085,837**	**2,276,044**	**2,059,888**	**2,044,106**	**2,395,876**
TOTAL	2,938,581	3,294,815	4,599,218	5,047,274	5,300,597	4,900,579	4,806,612	5,610,340
KD and CKD units	**467,879**	**208,241**	**–**	**–**	**–**		**–**	**–**
of which Production in France	–	–	2,765,803	2,379,974	2,165,384	1,757,779	1,489,603	1,665,797
Citroën	–	–	504,323	583,919	540,171	520,319	404,049	468,398
Peugeot	–	–	1,094,756	906,878	835,167	708,459	657,226	722,214
PSA Peugeot Citroën (1)	**–**	**–**	**1,599,079**	**1,490,797**	**1,375,338**	**1,228,778**	**1,061,275**	**1,190,612**
Renault	–	–	1,166,724	889,177	790,046	529,001	428,328	475,185
Renault-Dacia-Samsung (1)	**–**	**–**	**1,166,724**	**889,177**	**790,046**	**529,001**	**428,328**	**475,185**

(1) See notes on page 66.

PASSENGER CAR PRODUCTION BY MODEL IN 2010

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		3,214,464	1,190,612	2,023,852
Citroën		1,272,385	468,398	803,987
	C-ZERO	347		347
	C1	102,247		102,247
	C2	8,158		8,158
	C3	375,249	224,406	150,843
	DS3	68,391	68,391	
	DS4	233	233	
	C4	363,778	89,623	274,155
	ZX	72,001		72,001
	XSARA	34,628		34,628
	XANTIA	4,032		4,032
	C5	112,374	79,106	33,268
	C-CROSSER	8,609		8,609
	C6	1,114	1,114	
	C8	5,525	5,525	
	NEMO	20,450		20,450
	BERLINGO	95,249		95,249
Peugeot		1,942,079	722,214	1,219,865
	ION	350		350
	107	110,554		110,554
	1007	15	15	
	206	464,024	127,080	336,944
	207	328,382	128,322	200,060
	307	87,739		87,739
	308	223,480	222,946	534
	RCZ	19,065		19,065
	3008	132,543	132,543	
	5008	69,345	69,345	
	405	302,235		302,235
	407	28,898	28,898	
	408	43,581		43,581
	4007	8,975		8,975
	508	6,385	6,385	
	607	956	956	
	807	5,724	5,724	
	BIPPER	22,926		22,926
	PARTNER	86,902		86,902

Makes	Models	World production	Production in France	Production outside France
Renault-Dacia-Samsung		2,395,876	475,185	1,920,691
Renault		1,796,321	475,185	1,321,136
	TWINGO	159,201		159,201
	WIND	6,388		6,388
	CLIO	504,479	145,732	358,747
	MODUS	47,251		47,251
	LOGAN	192,535		192,535
	SANDERO	159,057		159,057
	MEGANE	487,838	194,191	293,647
	FLUENCE	63,402		63,402
	LAGUNA	52,267	52,267	
	ESPACE	16,876	16,876	
	KANGOO	84,201	64,189	20,012
	TRAFIC	17,263		17,263
	MASTER	1,915	1,915	
	DIVERS	3,648	15	3,633
Dacia		323,386	0	323,386
	LOGAN	95,446		95,446
	SANDERO	141,661		141,661
	DUSTER	86,130		86,130
	DIVERS	149		149
Renault Samsung Motors		276,169	0	276,169
	SM3	66,811		66,811
	FLUENCE	58,139		58,139
	SM5	14,945		14,945
	LATITUDE	73,381		73,381
	QM5 (KOLEOS)	48,599		48,599
	SM7	14,288		14,288
	DIVERS	6		6
TOTAL		5,610,340	1,665,797	3,944,543

Source: CCFA, manufacturer data.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Citroën	49,034	93,259	192,238	200,111	213,549	236,830	138,864	180,462
Peugeot	127,428	81,439	186,917	195,311	218,956	247,693	140,941	210,252
PSA Peugeot Citroën [1]	**200,979**	**174,698**	**379,155**	**395,422**	**432,505**	**484,523**	**279,805**	**390,714**
Renault (including Trafic II [2])	166,760	254,334	312,801	395,126	385,530	343,507	235,223	302,706
Dacia	–	–	12,580	11,507	7,466	13,956	16,680	17,704
Renault-Dacia-Samsung [1]	**166,760**	**254,334**	**325,381**	**406,633**	**392,996**	**357,463**	**251,903**	**320,410**
Renault Trucks [1]	11,632	7,464	8,321	11,378	4,439	5,271	3,405	0
Others	**86**	**71**	**42**	**26**	**17**	**3**	**5**	**0**
TOTAL	379,457	436,567	712,899	813,459	829,957	847,260	535,118	711,124
Small collections	**68,587**	**79,271**	**–**	**–**	**–**		**–**	**–**
of which production in France	–	–	370,538	365,638	352,246	313,275	181,010	243,029
Citroën	–	–	53,561	64,794	63,887	67,348	33,037	42,882
Peugeot	–	–	67,629	62,903	66,012	52,675	26,348	38,514
PSA Peugeot Citroën [1]	**–**	**–**	**121,190**	**127,697**	**129,899**	**120,023**	**59,385**	**81,396**
Renault	–	–	240,985	226,537	217,891	187,978	118,215	161,633
Renault-Dacia-Samsung [1]	**–**	**–**	**240,985**	**226,537**	**217,891**	**187,978**	**118,215**	**161,633**
Renault Trucks [1]	**–**	**–**	**8,321**	**11,378**	**4,439**	**5,271**	**3,405**	**0**
Others	–	–	42	26	17	3	5	0

(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, 2010

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**390,714**	**81,396**	**309,318**
Citroën		180,462	42,882	137,580
	C3	13,042	13,042	
	C4	1,930	1,930	
	NEMO	22,753		22,753
	BERLINGO	75,289		75,289
	JUMPY	27,910	27,910	
	JUMPER	39,538		39,538
Peugeot		210,252	38,514	171,738
	206	13,791	6,533	7,258
	207	16,524		16,524
	308	3,088	3,088	
	BIPPER	19,926		19,926
	PARTNER	77,682		77,682
	EXPERT	28,893	28,893	
	BOXER	50,348		50,348
Renault-Dacia-Samsung		**320,410**	**161,633**	**158,777**
Renault		302,706	161,633	141,073
	TWINGO	3,851		3,851
	CLIO	32,697	7,693	25,004
	MEGANE	6,340		6,340
	KANGOO	97,142	75,054	22,088
	TRAFIC	58,583		58,583
	MASTER	89,821	78,872	10,949
	DIVERS	14,272	14	14,258
Dacia		17,704		17,704
	LOGAN	17,704		17,704
TOTAL		711,124	243,029	468,095

Source: CCFA.

WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

INDUSTRIAL VEHICLE (5T AND OVER) PRODUCTION BY MAKE

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Renault Trucks [1]	39,475	50,493	87,719	56,215	57,788	60,057	20,909	31,874
of which Mack Trucks	–	15,423	34,562	–	–	–	–	-
Others [2]	17,836	4	2	2	4	4	4	0
TOTAL	**57,311**	**50,497**	**87,721**	**56,217**	**57,792**	**60,061**	**20,913**	**31,874**
of which Production in France	–	–	44,402	45,306	55,393	57,132	20,601	29,702
Renault Trucks [1]	–	–	44,400	45,304	55,389	57,128	20,597	29,702
Others [2]	–	–	2	2	4	4	4	0

(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 5T) PRODUCTION BY MAKE

In units

	1980	1990	2000	2006	2007	2008	2009	2010
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 1st January 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

HEAVY TRUCK (OVER 5T) PRODUCTION, 2010

In units

	Models	Production World vocation	Production France	Production Outside France
Trucks				
Mid range: 7 to 16T		7,505	6,789	716
	Midlum	7,505	6,789	716
High range: Over 16T		8,041	7,157	884
	Premium	3,322	3,218	104
	Magnum	144	144	
	Kerax	2,907	2,615	292
	Lander	1,668	1,180	488
TOTAL RENAULT TRUCKS		**15,546**	**13,946**	**1,600**
Road tractors				
	Premium	10,197	9,643	554
	Magnum	2,658	2,658	
	Kerax	1,329	1,329	
	Lander	2,144	2,126	18
TOTAL RENAULT TRUCKS ROAD TRACTORS		**16,328**	**15,756**	**572**

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)	2006	2007	2008	2009	2010
Up to 3.5T		318,633	402,994	577,926	624,579	645,852	623,579	419,326	531,452
	P	281,031	128,422	55,883	42,191	45,533	49,354	50,212	61,998
	D	37,602	274,572	521,229	582,388	600,319	574,225	369,114	469,178
	EL			814	0	0	0	0	276
3.5T to 5.1T		60,824	33,573	134,973	188,880	184,105	223,681	115,793	179,672
	P	14,675	1,961	1,724	134	0	14	17	0
	D	46,149	31,612	133,249	188,746	184,105	223,667	115,776	179,672
From 5.1T to 12T	D	25,538	6,377	13,593	10,192	7,659	5,724	3,174	2,453
From 12T to 16T	D	12,541	8,251	5,009	4,912	4,212	4,562	2,483	3,066
From 16T to 20T	D	6,909	5,518	7,304	6,999	7,294	8,356	3,179	4,484
Over 20t	D	3,054	3,650	6,255	10,591	10,678	10,690	3,437	5,543
Road tractors	D	9,269	11,278	20,998	23,523	27,949	30,729	8,639	16,328
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	42,325	45,533	49,368	50,229	61,998
Total diesel		144,097	343,806	710,243	827,351	842,216	857,953	505,802	680,724
Total electric		49	0	814	0	0	0	0	276
Total CNG or LPG				332	–	–	–	–	–
TOTAL ALL CATEGORIES		**439,852**	**474,189**	**768,996**	**869,676**	**887,749**	**907,321**	**556,031**	**742,998**

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

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

In units

	1980	1990	2000 (1)	2006	2007	2008	2009	2010
Passenger car derivatives								
Citroën	26,904	22,942	29,449	27,866	26,689	26,314	13,139	14,972
Peugeot	69,411	55,208	41,451	35,462	34,075	30,979	22,864	33,403
PSA Peugeot Citroën (2)	103,229	78,150	70,900	63,328	60,764	57,293	36,003	48,375
Renault (3)	30,420	56,245	60,320	52,737	69,515	69,804	68,996	67,844
TOTAL	**133,649**	**134,395**	**131,220**	**116,065**	**130,279**	**127,097**	**104,999**	**116,219**
Small vans								
Citroën	45,573	67,257	100,832	90,230	91,874	112,254	80,729	98,042
Peugeot	27,002	18,537	70,443	79,106	87,932	113,638	73,525	97,608
PSA Peugeot Citroën (2)	90,178	85,794	171,275	169,336	179,806	225,892	154,254	195,650
Renault	126,779	129,335	147,670	118,219	120,457	108,734	74,476	97,142
TOTAL	**216,957**	**215,129**	**318,945**	**287,555**	**300,263**	**334,626**	**228,730**	**292,792**
Large vans								
Citroën	23,813	32,209	61,957	82,015	94,986	98,262	44,996	67,448
Peugeot	33,031	47,623	75,023	80,743	96,949	103,076	44,552	79,241
PSA Peugeot Citroën (2)	56,844	79,832	136,980	162,758	191,935	201,338	89,548	146,689
Renault	40,508	84,681	104,811	224,469	203,024	172,502	101,412	148,404
Renault Trucks	–	–	8,321	11,378	4,439	5,271	3,405	0
Sovam-Etalmobil	86	71	42	26	17	3	5	0
TOTAL	**97,438**	**164,584**	**250,154**	**398,631**	**399,415**	**379,114**	**194,370**	**295,093**
4x4								
Peugeot		1,730						
Pick-ups, small vans								
Dacia	–	–	12,580	11,208	–	6,423	7,019	7,020

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

EXPORTS OF FRENCH AUTOMOBILE MANUFACTURERS

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 exports 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). Also, certain deliveries are assigned to regions but not countries.

NEW PASSENGER CAR DELIVERIES BY DESTINATION

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Europe (1)	**1,202,834**	**1,645,276**	**2,636,150**	**2,660,616**	**2,777,968**	**2,266,279**	**2,120,054**	**2,331,256**
of which: European Union (2)	946,760	1,479,316	2,261,904	2,343,310	2,420,691	1,906,629	1,879,124	1,893,455
Germany	202,939	277,424	337,743	316,509	306,231	287,149	453,617	299,072
Austria	35,775	36,175	41,510	42,720	43,406	43,189	47,424	50,767
Belgium-Luxembourg	105,966	144,896	172,806	173,205	165,486	168,273	158,251	182,241
Denmark	4,059	13,919	30,239	38,020	37,827	31,722	14,857	27,801
Spain	100,640	297,846	556,934	523,571	519,017	326,495	299,407	302,663
Greece		11,458	54,270	32,723	31,769	26,713	13,136	10,744
Italy	381,626	324,952	353,616	341,043	388,295	293,976	339,196	317,851
Netherlands	84,063	95,340	120,438	97,673	105,103	99,265	79,864	108,951
Portugal	14,729	59,459	68,375	58,732	57,473	55,084	39,309	58,750
United Kingdom	156,071	245,989	432,507	364,967	376,050	262,015	225,536	280,244
Sweden	13,060	18,001	31,473	34,518	38,209	18,121	9,556	16,691
10 new member States				142,234	162,776	153,332	114,391	130,576
12 new member States				283,512	321,102	266,698	161,382	176,330
of which: CEEC/CIS (3)	23,619	31,569	164,814	154,964	195,460	224,787	100,240	206,868
Hungary		2,040	23,887	26,660	20,064	17,766	4,657	6,156
Poland		806	59,093	46,373	54,784	53,025	39,977	53,521
Romania			7,520	135,140	148,290	103,502	42,841	41,804
Russia			6,042	110,308	139,576	177,610	80,682	158,018
of which: Switzerland	51,821	43,832	45,654	38,113	40,352	38,812	38,840	50,740
of which: Turkey		13,069	148,264	111,852	108,890	87,572	96,204	168,456
Africa	**133,213**	**45,675**	**69,865**	**133,996**	**145,483**	**151,256**	**151,611**	**171,484**
of which: South Africa	22,439	0	13,913	28,216	11,686	5,637	7,804	14,711
North Africa	15,542	20,432	37,236	85,805	111,815	132,101	133,041	139,790
Nigeria	61,133	8,319	8,860	11,091	12,270	6,244	204	210
North and South America	**145,204**	**29,360**	**230,270**	**363,711**	**471,245**	**483,777**	**391,503**	**559,780**
of which: Argentina	11,899	516	97,605	98,588	121,282	122,942	93,781	149,746
Brazil			80,205	160,949	197,369	280,258	248,973	320,930
Colombia	11,885	9,112	16,659	49,853	5,819	2,807	3,510	6,329
Mexico		20	1,408	28,623	44,601	23,298	13,883	24,822
Asia (1)	**26,178**	**96,645**	**166,261**	**499,791**	**659,491**	**751,237**	**845,922**	**1,201,459**
of which: Japan	883	14,264	15,976	14,534	11,785	9,910	5,098	12,346
China		3,960	54,334	205,247	211,457	180,179	278,739	392,569
Iran	12,836	29,852	45,722	235,652	199,701	358,694	365,277	516,121
India					16,934	17,592	3,892	4,488
South Korea				121,106	120,013	104,028	133,977	157,824
Pacific	**6,290**	**5,761**	**9,984**	**16,532**	**20,320**	**15,591**	**8,100**	**14,079**
of which: Australia	2,398	820	2,765	12,614	15,063	10,762	4,937	9,761
TOTAL ALL CATEGORIES	1,529,652	1,881,998	3,174,447	3,738,684	4,109,972	3,736,921	3,542,282	4,306,065
KD and CKD units	**471,744**	**208,241**						

NEW COMMERCIAL VEHICLES BY DESTINATION

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Europe (1)	**88,235**	**174,998**	**379,289**	**471,483**	**490,820**	**473,705**	**251,928**	**357,998**
of which: European Union (2)	74,382	156,268	312,421	414,855	448,562	411,784	224,591	312,293
Germany	17,490	23,581	50,081	56,511	60,927	59,809	38,001	46,406
Austria	2,185	3,702	4,697	6,131	6,830	7,956	5,498	6,797
Belgium-Luxembourg	11,455	18,383	22,857	30,049	30,963	34,012	24,811	29,330
Spain	71	44,110	57,516	77,179	63,691	40,419	17,026	28,263
Italy	26,207	19,923	35,910	36,882	45,457	41,408	34,731	39,690
Netherlands	8,234	7,995	23,087	16,574	19,729	20,926	11,097	13,848
Portugal	2,805	14,291	34,551	24,738	22,334	19,242	13,397	18,557
United Kingdom	8,390	21,127	55,647	75,574	69,972	62,972	35,411	60,997
10 new member States				35,439	45,694	49,057	20,802	28,891
12 new member States				55,569	64,926	75,366	22,934	33,784
of which: CEEC/CIS (3)	361	2,781	25,100	25,932	13,392	20,370	4,042	16,121
Poland	301	97	5,624	14,762	19,019	21,606	10,546	14,258
of which: Switzerland	3,317	2,921	4,293	7,371	8,123	8,174	7,874	8,500
Africa	**75,802**	**18,320**	**16,074**	**26,118**	**24,055**	**30,466**	**27,146**	**27,769**
of which: North Africa	18,334	8,588	13,509	20,141	21,107	26,601	24,961	24,690
North and South America	**5,875**	**5,453**	**36,682**	**42,367**	**59,664**	**68,808**	**55,553**	**85,810**
Asia (1)	**6,930**	**11,302**	**8,260**	**7,622**	**7,481**	**7,356**	**3,804**	**5,632**
Pacific	**776**	**1,364**	**1,797**	**2,377**	**3,512**	**3,238**	**1,611**	**2,208**
TOTAL ALL CATEGORIES	178,126	213,502	444,516	553,680	586,686	585,270	340,931	480,430
KD and CKD units	**39,428**	**12,207**						

(1) As of 2004, exports by 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. Since 2008, they have been replaced by the ESANE information system, combining both survey and administrative data.
These 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, reorganization, acquisition or sale of companies can result in significant variations from one year to another.
The introduction of a new economic category, jointly using administrative and survey data (particularly for comparison) and new statistical regulations (decision-makers, etc.) are the cause of a slight reduction in the sector's scope between 2007 and 2008.

	Units	1980	1990	2000	2006	2007	2008	2009	2010 [1]
PHYSICAL DATA									
No. of employees [2]	units	320,922	216,848	190,830	176,803	173,621			
Employees on 31/12 (excluding temporary staff)							148,898	145,000	137,000
Production in France	thousand			3,348	3,169	3,016	2,569	2,048	2,229
Production/employee				**17.5**	**17.9**	**17.4**	**17.3**	**14.1**	**16.3**
FINANCIAL DATA									
Net sales	€ million	19,251	49,472	73,684	87,085	91,770	82,838	69,800	82,000
Export sales	€ million	7,511	18,817	42,290	52,577	54,237			
Exports as a % of total sales	**%**	**39.0%**	**38.0%**	**57.4%**	**60.4%**	**59.1%**			
Value added (VA) before tax	€ million	5,883	10,650	13,282	12,516	13,456	10,076	7,391	9,500
Value added/sales	**%**	**30.6%**	**21.5%**	**18.0%**	**14.4%**	**14.7%**	**12.2%**	**10.6%**	**11.6%**
Value added/employee	€ thousand	18	49	70	71	78	68	51	69
Social security costs	€ million	1,452	1,860	2,153	2,550	2,597	2,271		
Social security costs/employee	€ thousand	4.5	8.6	11.3	14.4	15.0	15.3		
Wages and salaries	€ million	3,254	4,271	5,093	6,331	6,511	5,972		
Wages and salaries/employee	€ thousand	10.1	19.7	26.7	35.8	37.5	40.1		
Personnel costs	€ million	4,706	6,132	7,246	8,881	9,108	8,242		
Personnel costs/employee	€ thousand	14.7	28.3	38.0	50.2	52.5	55.4		
Personnel costs/VA	%	80.0%	57.6%	54.6%	71.0%	67.7%	81.8%		
Operating cash flow	€ million	928	3,855	5,201	2,522	3,374	886	–1,196	
Operating cash flow / VA	**%**	**15.8%**	**36.2%**	**39.2%**	**20.2%**	**25.1%**	**8.8%**	**–16.2%**	
Interest expense	€ million	484	1,170	1,178	704	874			
Interest expense / VA	%	8.2%	11.0%	8.9%	5.6%	6.5%			
Interest income	€ million	207	1,095	2,508	1,157	1,851			
Interest income / VA	%	3.5%	10.3%	18.9%	9.2%	13.8%			
Net interest income (expense)	€ million	–276	–74	1,330	453	977			
Net interest income (expense) / VA	%	–4.7%	–0.7%	10.0%	3.6%	7.3%			
Cash flow	€ million	638	2,918	5,499	1,682	3,504			
Cash flow / VA	%	10.8%	27.4%	41.4%	13.4%	26.0%			
Net income (loss)	**€ million**	**–26**	**969**	**2,851**	**–243**	**160**	**–3,702**	**–4,900**	
Net income / sales	%	–0.1%	2.0%	3.9%	–0.3%	0.2%	–4.5%	–7.0%	
Capital expenditure	€ million	1,018	3,139	3,807	2,967	2,545	2,500	1,800	1,500
Capital expenditure / sales	**%**	**5.3%**	**6.3%**	**5.2%**	**3.4%**	**2.8%**	**3.0%**	**2.6%**	**1.8%**
Capital expenditure / VA	**%**	**17.3%**	**29.5%**	**28.7%**	**23.7%**	**18.9%**	**24.8%**	**24.4%**	**15.8%**

(1) CCFA estimations, the same for variable employee figures in 2009 and investments since 2008:
(2) Average employee numbers, corrected by the balance of employees hired (temporary staff) and quoted as hired staff.

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 and from 2008, from the new ESANE information system.
In 1993, a new French business category, standardized throughout the European Union, was put in place. A number of companies were reclassified in the metalworking, electrical equipment and car seating industries, resulting in a statistical break in data.
Since 2008, this category has become the NA F2, still standardized throughout the European Union. OEM companies, electrical equipment manufacturers for engines and vehicles and car seat m=anufacturers are now included in this category.
Companies listed in the new "automotive equipment manufacturing" sector do not represent, therefore, all suppliers of the automotive industry. Added to these should be manufacturers of glass, tires, doors and locks and automotive springs...
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	2006	2007 (1)	2008	2009	2010 (2)
PHYSICAL DATA									
No. of companies (> 20 employees)	units	320	320	243	200	192	653	556	
No. of employees (3)	units	143,347	112,963	94,171	82,273	73,110			
Employees on 31/12 (excluding temporary staff) (2)							73,210	66,000	60,000
FINANCIAL DATA									
Net sales	€ million	5,637	14,452	17,766	19,372	18,149	20,464	14,741	16,800
Export sales	€ million	1,301	4,018	7,512	8,452	8,676			
Exports as a % of total sales	**%**	**23.1%**	**27.8%**	**42.3%**	**43.6%**	**47.8%**			
Percentage of production exported (source: FIEV)							**53%**	**54%**	**51%**
Value added (VA) before tax	€ million	2,251	4,530	4,643	4,691	4,276	4,403	3,442	
Value added/sales before tax %	**%**	**39.9%**	**31.3%**	**26.1%**	**24.2%**	**23.6%**	**21.5%**	**23.3%**	
Value added/employee before tax	€ thousand	16	40	49	57	58	60	52	
Social security costs	€ million	503	867	902	996	880	1,046		
Social security costs/employee	€ thousand	3.5	7.7	9.6	12.1	12.0	14.3		
Wages and salaries	€ million	1,239	2,060	2,213	2,354	2,086	2,489		
Wages and salaries/employee	€ thousand	8.6	18.2	23.5	28.6	28.5	34.0		
Personnel costs/VA	Value added	1,742	2,926	3,115	3,350	2,967	3,535		
Personnel costs/employee	€ thousand	12.2	25.9	33.1	40.7	40.6	48.3		
Personnel costs	%	77.4%	64.6%	67.1%	71.4%	69.4%	80.3%		
Operating cash flow	€ million	418	1,337	1,206	979	1,014	541	3	
Operating cash flow/VA	**%**	**18.6%**	**29.5%**	**26.0%**	**20.9%**	**23.7%**	**12.3%**	**0.1%**	
Interest expense	€ million	186	387	440	288	262			
Interest expense/VA	%	8.2%	8.5%	9.5%	6.1%	6.1%			
Interest income	€ million	36	213	337	336	268			
Interest income/VA	%	1.6%	4.7%	7.3%	7.2%	6.3%			
Net interest income (expense)	€ million	–150	–174	–103	48	5			
Net interest income (expense)/VA	%	–6.7%	–3.8%	–2.2%	1.0%	0.1%			
Cash flow	€ million	237	883	889	777	697			
Cash flow/VA	%	10.5%	19.5%	19.2%	16.6%	16.3%			
Net income (loss)	**€ million**	**54**	**400**	**–92**	**103**	**141**	**–248**	**–466**	
Net income/sales	%	1.0%	2.8%	–0.5%	0.5%	0.8%	–1.2%	–3.2%	
Capital expenditure	€ million	328	899	1,024	651	485			
Capital expenditure/sales	**%**	**5.8%**	**6.2%**	**5.8%**	**3.4%**	**2.7%**			
Capital expenditure/VA	**%**	**14.6%**	**19.8%**	**22.0%**	**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 estimations, the same for variable employee figures in 2009.
(3) Average employee numbers, corrected by the balance of employees hired (temporary staff) and quoted as hired staff.

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	2006	2007	2008	2009	2010
Citroën	270,983	266,822	261,508	262,048	281,480	295,431	346,437	328,146
Peugeot (1)	414,335	498,481	397,547	380,869	373,303	364,523	391,944	400,663
Dacia				18,753	32,641	43,525	61,217	104,641
Renault	759,312	639,440	602,415	487,969	459,349	463,019	517,093	497,820
Others France	56	146	63	84	68	33	73	54
TOTAL FRANCE (2)	**1,444,686**	**1,404,889**	**1,261,533**	**1,149,723**	**1,146,841**	**1,166,531**	**1,316,764**	**1,331,324**
Alfa Romeo	25,380	15,916	12,774	14,909	13,959	10,316	11,732	13,033
Audi	17,455	32,762	34,937	44,021	48,121	47,871	49,109	50,936
BMW	17,239	29,580	31,576	40,749	49,602	49,194	43,414	46,074
Chrysler	16	4,084	4,827	4,877	4,014	2,485	1,085	880
Daewoo	–	–	11,731	1				
GM Daewoo				3				
Chevrolet				7,617	8,971	9,156	21,074	21,247
Daihatsu	–	0	1,043	1,902	2,848	1,853	1,914	1,083
Dodge				1,323	2,867	2,564	1,358	857
Fiat	53,147	128,822	95,983	50,405	53,119	73,504	82,290	72,717
Ford	68,426	159,575	117,061	96,123	103,078	112,128	133,079	114,810
Honda	8,293	14,002	8,716	11,720	15,653	12,382	14,669	11,251
Hyundai	–	0	11,019	26,812	26,835	18,454	21,516	18,785
Jaguar	269	1,290	1,939	1,769	1,567	1,678	1,169	1,126
Jeep	–	3,824	3,001	3,561	4,894	2,278	1,183	1,177
Kia	–	0	2,631	15,021	15,476	15,750	21,164	24,056
Lada	13,069	15,758	1,867	1,043	622	176	98	346
Lancia	6,801	18,225	5,864	4,011	4,260	4,765	4,839	3,368
Land Rover	237	3,611	7,570	5,320	7,480	3,177	2,419	2,735
Mazda	13,021	18,563	6,366	13,869	14,529	13,473	13,096	10,232
Mercedes	14,430	28,605	43,389	58,881	61,755	51,584	50,927	45,612
Mini	–	–	–	9,621	16,041	19,015	17,777	18,007
Mitsubishi	2,788	4,298	5,575	3,118	5,463	2,571	2,131	3,514
Nissan-Infiniti	17,700	25,707	31,330	31,418	32,821	38,302	46,070	54,351
Opel	32,709	113,490	133,576	99,266	99,680	89,790	89,265	94,877
Porsche	1,060	1,297	825	2,305	2,879	1,645	2,112	2,073
Rover	20,690	41,147	13,474	239	13	0	0	0
Saab	179	2,459	3,265	3,037	3,369	3,174	1,585	574
Santana	–	1,746	4,231	101	183	144	99	27
Seat	306	48,052	40,562	35,017	37,996	34,774	38,364	30,645
Skoda	1,636	1,825	11,570	16,305	18,367	17,399	19,003	18,533
Smart	–	–	6,645	10,080	8,062	8,669	7,920	6,408
Ssangyong	–	0	19	4,509	3,878	595	472	451
Subaru	–	0	2,312	1,509	1,791	1,234	1,405	1,146
Suzuki	–	0	11,355	25,536	30,874	25,353	29,056	22,070
Toyota-Lexus	13,095	15,839	43,698	97,217	103,460	92,279	90,320	67,311
Volkswagen	75,727	155,971	152,868	140,803	142,634	144,506	150,392	146,538
Volvo	8,207	12,415	6,777	10,616	13,772	11,001	12,007	11,841
FOREIGN TOTAL (2)	**428,516**	**904,241**	**872,351**	**896,022**	**962,831**	**924,838**	**985,634**	**920,345**
TOTAL ALL CATEGORIES	1,873,202	2,309,130	2,133,884	2,045,745	2,109,672	2,091,369	2,302,398	2,251,669
of which Temporary Transit	–	–	–	45,196	45,129	41,086	33,727	39,011
TOTAL FRANCE as a %	77.1%	60.8%	59.1%	56.2%	54.4%	55.8%	57.2%	59.1%
FOREIGN TOTAL AS A %	22.9%	39.2%	40.9%	43.8%	45.6%	44.2%	42.8%	40.9%

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

USED PASSENGER CAR REGISTRATIONS

In units

	1980	1990	2000	2006	2007	2008	2009	2010
TOTAL ALL CATEGORIES	4,441,423	4,758,750	5,082,122	5,465,603	5,570,764	5,393,045	5,240,411	5,386,007
Used/new ratio	2.4	2.1	2.4	2.7	2.6	2.6	2.3	2.4

USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

In units

	1980	1990	2000	2006	2007	2008	2009	2010
TOTAL ALL CATEGORIES		644,925	651,033	742,366	768,538	781,720	766,764	806,398
Used/new ratio		1.6	1.6	1.7	1.7	1.7	2.1	1.9

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	2006	2007	2008	2009	2010
Citroën	24,158	111,881	138,628	182,296	217,725	239,593	256,454	243,841
Peugeot (1)	65,199	189,322	206,153	277,412	276,877	278,689	295,599	307,518
Dacia				9,329	21,603	33,846	35,483	53,737
Renault	45,862	205,374	257,909	344,627	332,703	369,788	377,769	352,530
TOTAL FRANCE (2)	**135,219**	**506,577**	**602,711**	**813,697**	**848,908**	**921,916**	**965,305**	**957,626**
Alfa Romeo	–	2,524	7,444	12,436	12,132	9,079	8,307	8,432
Audi	19,591	13,495	25,901	40,085	42,496	43,243	44,403	45,201
BMW-Mini	–	8,271	21,065	37,648	47,783	52,348	46,578	50,906
Chrysler-Dodge-Jeep	–	–	4,161	8,278	11,069	7,135	3,536	2,863
Fiat-Lancia	10,352	33,913	38,337	30,580	33,054	42,262	35,445	28,240
Ford	1,833	56,331	58,896	72,572	77,414	96,417	98,745	89,334
Honda			413	7,586	10,442	7,298	6,575	5,029
Hyundai	–	–	5,510	22,628	22,961	12,675	11,099	13,174
Kia			1,200	10,493	12,168	12,025	12,750	15,428
Land Rover	–	2,980	5,656	5,110	7,330	3,138	2,368	2,637
Mazda	–	5,200	3,204	9,189	9,480	8,615	8,519	6,768
Mercedes	10,635	15,676	30,007	51,120	55,140	46,859	46,125	41,460
Mitsubishi	–	1,623	3,227	2,332	4,730	2,053	1,370	3,102
Nissan-Infiniti	694	4,982	15,533	18,101	21,858	26,832	30,361	35,092
Opel	6,178	28,218	63,726	69,812	72,605	64,629	59,335	63,751
Rover	–	4,419	7,480	154	5	0	0	0
Seat	–	14,367	27,861	28,882	32,128	30,402	33,170	25,462
Skoda	–	–	7,741	12,627	15,146	15,548	15,362	14,781
Suzuki	–	–	3,165	16,514	17,544	14,240	13,282	9,263
Toyota-Lexus	–	3,594	12,282	58,789	64,843	55,623	43,266	35,744
Volkswagen	–	50,975	89,487	114,029	119,077	129,683	123,629	118,702
Volvo	1,198	4,097	4,786	9,845	12,717	10,590	11,799	11,614
FOREIGN TOTAL (2)	**50,815**	**255,477**	**443,774**	**649,969**	**714,153**	**699,064**	**663,190**	**635,547**
TOTAL ALL CATEGORIES	186,034	762,054	1,046,485	1,463,666	1,563,061	1,620,980	1,628,495	1,593,173
of which Temporary Transit	–	–	–	35,969	37,622	36,542	30,759	34,432
% diesel	9.9%	33.0%	49.0%	71.5%	74.1%	77.5%	70.7%	70.8%
TOTAL FRANCE as a %	72.7%	66.5%	57.6%	55.6%	54.3%	56.9%	59.3%	60.1%
FOREIGN TOTAL AS A %	27.3%	33.5%	42.4%	44.4%	45.7%	43.1%	40.7%	39.9%

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

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

In units

	1980	1990	2000	2006 (3)	2007	2008	2009	2010
Citroën	53,245	80,958	77,048	74,786	71,901	78,593	66,833	70,838
Peugeot,(1)	58,986	60,813	74,950	75,295	81,050	82,256	66,436	72,228
Dacia					2	53	5,237	5,434
Renault	116,602	162,549	139,752	151,058	150,532	144,750	116,498	135,591
Others France	256	415	40	300	488	460	532	528
TOTAL FRANCE	**229,089**	**304,735**	**291,790**	**301,439**	**303,973**	**306,112**	**255,536**	**284,619**
Fiat	8,326	10,139	25,253	24,321	33,071	36,403	32,373	34,659
Ford	9,099	16,080	18,110	25,024	26,458	24,765	20,197	20,437
Hyundai	–	–	588	1,614	996	659	374	237
Isuzu			108	1,654	2,280	1,950	1,711	1,961
Iveco	2,941	11,543	16,534	16,175	18,828	17,845	10,505	11,610
Land Rover	645	2,718	1,857	1,090	1,218	1,211	1,078	1,550
Mazda	579	1,067	916	745	760	620	424	482
Mercedes	5,495	11,156	23,139	20,177	23,422	22,509	16,929	19,051
Mitsubishi	–	–	3,392	3,263	3,766	2,916	2,111	2,639
Nissan	861	5,063	5,197	11,647	10,050	8,449	6,498	7,307
Opel	664	2,408	7,561	12,936	12,646	11,606	6,772	7,195
Toyota-Lexus	7,112	6,099	1,771	3,232	6,204	7,019	4,348	4,013
Volkswagen	8,091	9,673	13,819	11,939	13,178	13,713	11,506	13,249
FOREIGN TOTAL (2)	**48,798**	**89,060**	**123,176**	**138,592**	**157,489**	**154,161**	**118,450**	**132,993**
TOTAL ALL CATEGORIES	277,887	393,795	414,966	440,031	461,462	460,273	373,986	417,612
TOTAL FRANCE as a %	82.4%	77.4%	70.3%	68.5%	65.9%	66.5%	68.3%	68.2%
FOREIGN TOTAL AS A %	17.6%	22.6%	29.7%	31.5%	34.1%	33.5%	31.7%	31.8%

(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	2006 (1)	2007	2008	2009	2010
Citroën	324,228	347,780	338,556	336,834	353,381	374,024	413,270	398,984
Peugeot	473,321	559,294	472,497	456,164	454,353	446,779	458,380	472,891
Dacia				18,753	32,643	43,578	66,454	110,075
Renault	875,914	801,989	742,167	639,027	609,881	607,769	633,591	633,411
TOTAL FRANCE	**1,673,775**	**1,709,624**	**1,553,323**	**1,451,162**	**1,450,814**	**1,472,643**	**1,572,300**	**1,615,943**
Fiat	61,473	138,961	121,236	74,726	86,190	109,907	114,663	107,376
Ford	77,525	175,655	135,171	121,147	129,536	136,893	153,276	135,247
Land Rover	882	6,329	9,427	6,410	8,698	4,388	3,497	4,285
Mercedes	19,925	39,761	66,528	79,058	85,177	74,093	67,856	64,663
Nissan-Infiniti	18,561	30,770	36,527	43,065	42,871	46,751	52,568	61,658
Opel	33,373	115,898	141,137	112,202	112,326	101,396	96,037	102,072
Rover	20,812	41,343	13,564	239	13	0	0	0
Seat	306	51,999	42,230	35,464	38,432	35,150	38,813	31,080
Toyota-Lexus	20,207	21,938	45,469	100,449	109,664	99,298	94,668	71,324
Volkswagen	83,818	165,644	166,687	152,742	155,812	158,219	161,898	159,787
FOREIGN TOTAL	**477,314**	**993,301**	**995,527**	**1,034,614**	**1,120,320**	**1,078,999**	**1,104,084**	**1,053,338**
TOTAL ALL CATEGORIES	2,151,089	2,702,925	2,548,850	2,485,776	2,571,134	2,551,642	2,676,384	2,669,281
FRANCE TOTAL as a %	77.8%	63.3%	60.9%	58.4%	56.4%	57.7%	58.7%	60.5%
FOREIGN TOTAL as a %	22.2%	36.7%	39.1%	41.6%	43.6%	42.3%	41.3%	39.5%

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

NEW HEAVY TRUCK (OVER 5T) REGISTRATIONS BY MAKE

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Renault Trucks	17,984	20,453	20,818	18,805	16,843	19,359	12,158	10,908
TOTAL FRANCE	**18,312**	**20,738**	**20,992**	**18,966**	**16,971**	**19,472**	**12,295**	**10,964**
DAF	1,881	3,460	4,365	5,464	5,995	6,579	3,752	4,464
Iveco	6,578	7,204	6,998	5,795	5,385	5,838	4,120	4,003
MAN	327	1,433	3,498	3,763	5,171	5,530	3,630	2,729
Mercedes	8,014	9,500	9,976	9,119	8,879	9,610	5,482	5,229
Scania	1,389	2,711	4,963	3,893	4,200	4,156	2,176	2,553
Volvo	3,724	4,647	6,739	5,691	5,522	5,739	3,615	3,938
FOREIGN TOTAL	**23,534**	**29,290**	**36,924**	**34,157**	**35,568**	**38,032**	**23,238**	**23,257**
TOTAL ALL CATEGORIES	41,846	50,028	57,916	53,123	52,539	57,504	35,533	34,221
FRANCE TOTAL as a %	43.8%	41.5%	36.2%	35.7%	32.3%	33.9%	34.6%	32.0%
FOREIGN TOTAL as a %	56.2%	58.5%	63.8%	64.3%	67.7%	66.1%	65.4%	68.0%

USED HEAVY TRUCK (OVER 5T) REGISTRATIONS

In units

	1980	1990	2000	2006	2007	2008	2009	2010
TOTAL	–	–	59,056	55,946	55,012	54,586	49,452	55,591
Used/new ratio	–	–	1.0	1.1	1.0	0.9	1.4	1.6

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

In units

	1980	1990	2000	2006	2007	2008	2009	2010
Renault	2,126	1,692	1,633	–	–	–	–	–
Divers 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)	–	–	–	2,793	2,861	2,914	3,092	2,412
Evobus Group (2)	–	–	–	915	974	1,346	1,851	1,433
Neoman Bus Group (3)	–	–	–	475	550	527	658	559
Bova	–	–	–	217	262	155	150	116
Ponticelli	–	–	–	29	1	0	0	0
Temsa	–	–	–	371	343	284	384	309
Van Hool	57	250	230	212	151	157	117	169
Others	–	–	–	231	349	272	412	384
GENERAL TOTAL	–	–	–	5,243	5,491	5,655	6,664	5,382

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

VEHICLE OWNERSHIP

DENSITY (INTERNATIONAL COMPARISONS)

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

	1985	1995	2005	2009
European Union 27 countries		–	525	552
European Union 15 countries from 1995	380	473	577	587
12 new EU countries		–	333	421
Germany	450	529	593	545
Belgium	**363**	**463**	**531**	**562**
Spain	276	430	569	610
France	**446**	**520**	**596**	**599**
Italy	412	541	656	688
United Kingdom	379	474	567	570
Sweden	400	445	507	525
Poland	117	229	378	509
Turkey	27	65	111	142
Canada	559	562	584	619
USA	708	759	819	814
South Korea	25	177	315	359
Japan	375	527	586	592
Argentina	173	167	182	222
Brazil	86	89	121	153
China	3	8	21	47
India	3	6	13	16

Source: CCFA.

TOTAL VEHICLES IN USE (1ST JANUARY 2011)

In thousands

	All fuels	Diesel
PASSENGER CARS		
Up to 5hp	13,351	7,130
6 to 10hp	16,422	10,354
11hp and over	1,528	681
Total passenger cars	**31,300**	**18,165**
LIGHT COMMERCIAL VEHICLES (LCV)		
Up to 2.5T	3,708	3,156
From 2.5T to 3.5T	2,101	2,073
From 3.6T to 5T	11	11
Total LCVs up to 5T	**5,820**	**5,240**
Total passenger cars and light commercial vehicles	**37,120**	**23,405**
HEAVY TRUCKS OF MORE THAN 5T		
Trucks		
5T to 12T	80	80
12T to 16T	50	50
16T to 20T	116	116
20T and over	93	93
Total	**339**	**339**
Road tractors	**199**	**199**
Total heavy trucks	**538**	**537**
Coaches and buses	**86**	**83**
Total commercial vehicles over 5T	**624**	**620**
Total commercial vehicles all sizes	**6,444**	**5,861**
OVERALL TOTAL	**37,744**	**24,025**

Source: CCFA estimates.

VEHICLE OWNERSHIP

	Unit	1980	1990	2000	2006	2007	2008	2009	2010 (1)
Households without a vehicle	%	29.2%	23.2%	19.7%	18.0%	17.6%	17.3%	16.8%	16.5%
Households with a vehicle	%	70.8%	76.8%	80.3%	82.0%	82.4%	82.7%	83.2%	83.5%
Households with one vehicle	%	54.3%	50.5%	50.7%	46.3%	46.6%	46.9%	47.5%	47.6%
Households with two vehicles	%	14.8%	23.0%	25.4%	30.2%	30.3%	30.5%	30.5%	30.7%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.5%	5.5%	5.3%	5.2%	5.2%
Average age of vehicle	years		5.90	7.25	7.9	8.2	8.1	8.0	8.0
Average ownership period	years		3.66	4.43	4.9	4.9	4.9	4.9	5.0
Used passenger cars	%		50.0	56.1	60.8	61.9	61.9	59.6	58.9
Total average kilometers	km	12,200	13,041	13,560	12,430	12,198	12,015	11,793	11,755
Total average petrol	km	11,600	11,651	10,780	9,122	8,832	8,658	8,176	8,108
Total average diesel	km	26,200	20,950	18,140	15,917	15,590	15,106	14,819	14,542
DOMESTIC PASSENGER ROAD TRANSPORT									
By passenger car	billion pass./km	443.8	568.1	686.9	718.0	723.9	716.9	721.4	727.3
By coach - bus	billion pass./km	38.0	41.3	43.0	44.8	47.0	48.5	48.9	49.9
TOTAL TRAFFIC	billion pass./km	549.5	712.2	838.5	874.0	882.3	881.7	884.8	889.2
Road transport as a % of total traffic	%	87.7	85.6	87.1	87.3	87.4	86.8	87.1	87.4
ANNUAL TRAFFIC VARIATION									
By passenger car	%	–	+2.6	+0.1	–0.3	0.8	–1.0	0.6	0.8
By coach – bus	%	–	+2.7	+3.2	1.6	5.0	3.1	0.8	2.2

(1) Provisional data.
Sources: PARCAUTO TNS-SOFRES, calculations by IFSTTAR-ADEME, INSEE and SOeS.

TOTAL VEHICLES IN USE ON 1ST JANUARY

In thousands

	1980	1990	2000	2007	2008	2009	2010	2011
PASSENGER CARS								
Up to 5hp	5,090	8,312	10,572	12,236	12,323	12,537	12,946	13,351
6 hp to 10hp	11,460	13,385	15,723	16,720	16,864	16,789	16,583	16,422
Over 10hp	1,890	1,313	1,186	1,444	1,513	1,523	1,521	1,528
TOTAL PASSENGER CARS	**18,440**	**23,010**	**27,480**	**30,400**	**30,700**	**30,850**	**31,050**	**31,300**
of which diesel	**730**	**3,265**	**9,261**	**15,143**	**15,922**	**16,753**	**17,458**	**18,165**
COMMERCIAL VEHICLES								
Up to 3.5T	1,985	4,125	4,974	5,609	5,680	5,720	5,750	5,809
From 3.5T to 5T	103	20	12	11	10	10	10	11
From 5T to 20T	250	334	287	264	259	253	250	246
20T and over	26	41	46	81	86	89	91	93
Road tractors	129	160	210	213	215	206	202	199
TOTAL COMMERCIAL VEHICLES	**2,493**	**4,680**	**5,529**	**6,178**	**6,250**	**6,278**	**6,303**	**6,358**
of which diesel	**976**	**2,342**	**4,202**	**5,273**	**5,410**	**5,538**	**5,632**	**5,777**
COACHES AND BUSES	**57**	**68**	**80**	**83**	**83**	**84**	**85**	**86**
OVERALL TOTAL	**20,990**	**27,758**	**33,090**	**36,661**	**37,033**	**37,212**	**37,438**	**37,744**
of which diesel	**1,763**	**5,675**	**13,543**	**20,497**	**21,413**	**22,373**	**23,172**	**24,025**

Source: CCFA estimates.

FUEL AND TAXATION, EMISSIONS AND CO_2

MOTOR FUEL CONSUMPTION, PRICES AND TAXES

	Units	1980	1990	2000	2006	2007	2008	2009	2010
FUEL CONSUMPTION									
Regular gasoline	millions of liters	4,216	959						
Premium leaded – AVSR	millions of liters	20,007	19,911	3,924	112	26	0	0	0
Premium unleaded	millions of liters		3,406	14,329	13,566	13,037	12,054	10,871	9,501
Premium unleaded 95-E10	millions of liters							727	1,379
Total gasoline	**millions of liters**	**24,223**	**24,276**	**18,253**	**13,678**	**13,063**	**12,054**	**11,598**	**10,880**
Diesel	**millions of liters**	**11,415**	**20,664**	**32,373**	**37,740**	**39,004**	**38,849**	**38,913**	**39,749**
TOTAL ROAD FUEL	millions of liters	35,638	44,940	50,627	51,419	52,067	50,902	50,510	50,629

Source: CPDP.

	Units	1980	1990	2000	2006	2007	2008	2009	2010
FUEL PRICES (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**	**–**	**–**	**–**	**–**	**–**
Tax as a %	%	57	74	71	–	–	–	–	–
Premium unleaded 98	**€/liter**	**–**	**0.79**	**1.11**	**1.27**	**1.31**	**1.39**	**1.24**	**1.38**
Tax as a %	%	–	71	69	62	63	60	65	60
Gasoline	**€/liter**	**0.52**	**0.81**	**1.12**	**1.24**	**1.28**	**1.36**	**1.21**	**1.35**
Tax as a %	%	57	74	69	63	63	61	66	61
Diesel	**€/liter**	**0.37**	**0.54**	**0.85**	**1.08**	**1.10**	**1.27**	**1.00**	**1.15**
Tax as a %	%	46	61	62	55	55	50	59	54

Source: SOeS.

AUTOMOBILE FLEET EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2010

Thousands of tons

	1990	1995	2000	2005	2007	2008	2009	2010 (1)	Variation 2010-1990	Change 2010-2009
REGULATED POLLUTANTS										
SO_2	140	114	22	4	4	4	1	1	–99%	0%
CO	6,237	4,470	2,599	1,411	1,032	883	745	616	–90%	–17%
NO_x	1,133	1,048	908	753	703	643	598	557	–51%	–7%
COVNM	1,039	791	497	252	180	149	126	101	–90%	–20%
Lead	3,881	1,139	7	0	0	0	0	0	–100%	–
PM10: particulates	68	80	68	53	49	46	44	42	–38%	–4%
OTHER EMISSIONS										Millions of tons
CO_2	109	117	125	127	125	119	117	116	7%	–1%

(1) 2010 estimates.
Source: CITEPA / Secten data, updated April 2011.

CO_2 EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

In millions of tons of CO_2

	1990	1995	2000	2004	2005	2006	2007	2008	2009	2010 (1)
Power production	68	59	64	63	68	64	64	62	59	60
Industry	110	104	105	100	100	97	96	92	82	85
Residential/Commercial	85	88	89	98	99	92	86	90	87	93
Transport	116	125	133	137	135	134	133	126	125	124
of which road	***109***	***117***	***125***	***128***	***127***	***126***	***125***	***119***	***117***	***116***
of which other transportation	7.6	7.9	8.4	8.3	8.2	8.0	8.0	7.9	7.8	7.8
Agriculture/silviculture	9.4	9.8	10.1	10.2	10.2	9.9	9.8	10.1	9.7	9.7
TOTAL EXCLUDING LULUCF (2)	389	386	401	408	411	397	388	381	364	372
LULUCF (2)	–44	–56	–56	–71	–73	–77	–76	–77	–72	–75
TOTAL WITH LULUCF (2)	344	331	345	337	339	320	312	304	292	297

(1) 2010 estimates.
(2) LULUCF: Land Use, Land Use Change and Forestry
Source: CITEPA/CORALIE/ Secten format, April 2011.

AVERAGE CO_2 EMISSIONS OF NEW CARS IN FRANCE AND EUROPE

In grams of CO_2 per km

	1995	2000	2003	2004	2005	2006	2007	2008	2009	2010
France										
Gasoline	177	168	163	162	159	155	153	141	131	130
Diesel	175	155	151	149	149	147	148	139	134	130
TOTAL	176	162	155	153	152	149	149	140	133	130
European Union 15 countries										
TOTAL	186	171	164	162	161	161	159	154	146	141

Source: ADEME (May 2011).

AUTOMOTIVE TAXES AND FOREIGN TRADE

FRENCH AUTOMOTIVE FOREIGN TRADE IN VALUE

In € millions 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%
2009	13,679	–24%	1,405	–43%	1,809	–51%	16,704	–21%	33,597	–26%	973	–19%	34,570	–26%
2010	15,241	11%	1,684	20%	2,330	29%	20,361	22%	39,616	18%	1,051	8%	40,667	18%
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%
2009	20,836	–14%	2,100	–39%	2,300	–40%	12,785	–26%	38,022	–22%	1,204	23%	39,226	–21%
2010	22,380	7%	2,901	38%	2,440	6%	15,254	19%	42,975	13%	1,196	–1%	44,171	13%
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	
2009	–7,157		–695		–491		+3,919		–4,425		–232		–4,656	
2010	–7,139		–1,217		–110		+5,107		–3,359		–144		–3,504	
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	
2009	66		67		79		131		88		81		88	
2010	68		58		95		133		92		88		92	

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 € millions

	1980	1990	2000	2006	2007	2008	2009	2010
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	33,294	33,742	34,619	32,260	31,301
Automotive insurance tax	478	2,780	3,429	3,898	3,900	3,933	3,934	4,096
Tax on vehicle registration certificates	157	846	1,373	1,832	1,939	1,968	1,917	1,919
Road tax	866	1,901	539	19	0	0	0	0
Tax on company cars	199	345	644	1,126	1,140	1,086	1,098	996
Tax based on number of axles	59	75	223	215	216	226	172	168
Fixed rate police and traffic fines, sentence fines	154	317	720	1,162	1,163	1,435	1,201	1,255
Driver's license tax	88	86	4	–	–	–	–	–
Regional development tax	0	0	442	512	526	521	528	539
Government royalty	–	30	132	163	169	174	180	186
TOTAL	**11,079**	**27,716**	**38,136**	**42,221**	**42,795**	**43,962**	**41,290**	**40,460**
VAT on spending to acquire and use vehicles	–	–	15,300 (1)	–	–	–	–	–
Motorway tolls (including VAT)	610	2,592	5,330	8,193	8,838	9,078	9,305	9,700

(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 ORGANIZATIONS 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

Plateforme de la Filière Automobile
96, avenue du Général-Leclerc
92154 Boulogne-Billancourt Cedex
Tel.: 01 41 31 68 68 – Fax: 01 41 31 68 60
www.pfa–auto.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 ORGANIZATIONS

Association des constructeurs européens d'automobiles (ACEA)
85, avenue des Nerviens – 1040 Bruxelles (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 Drivers' Association
Head office: 5, avenue de la Paix – 67000 Strasbourg
Paris office: 14, avenue de la Grande Armée – 75017 Paris
Tel.: 0821 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
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Fondation sécurité routière
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Groupe d'études et de recherches permanent sur l'industrie et les salariés de l'automobile (Gerpisa)
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www.leblog.gerpisa.org

Institut français du pétrole énergies nouvelles (IFPEN)
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www.ifpenergiesnouvelles.fr

Institut français des sciences et technologies des transports, de l'aménagement et des réseaux (IFSTTAR)
Département économie et sociologie des transports (DEST)
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Programme national de recherche et d'innovation dans les transports terrestres (PREDIT)
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