ANALYSIS AND STATISTICS 2012

The French Automotive Industry

75%
OF VEHICLES PRODUCED
BY FRENCH MANUFACTURERS
ARE SOLD ABROAD

6.4 million
VEHICLES WERE PRODUCED
BY FRENCH MANUFACTURERS
WORLDWIDE

€ 6 billion
FRENCH AUTOMOTIVE INDUSTRY RESEARCH
AND DEVELOPMENT BUDGET IN 2009

10%
SHARE OF AUTOMOTIVE
PRODUCTS IN FRENCH
GOODS EXPORTS

Comité des Constructeurs Français d'Automobiles

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Patrick Blain, Chairman of CCFA

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STATISTICS

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"2011: French manufacturers continued to expand abroad, although problems of competitiveness in the industry and the automotive branch in France continue."

Patrick Blain,
Chairman of CCFA

Dear Sir/Madam,

Since mid-2009 the world economy has returned to a fast pace of growth, and in 2011 the world automotive industry reached a record production level of more than 80 million vehicles. The results are still very different by region: on the one hand, "historical" countries in the automotive industry, such as the European Union, the USA or Japan—severely affected by the consequences of the Fukushima accident—are still at lower levels than before the crisis; on the other hand, new automotive countries, such as China, Russia, India, and Latin America, are producing volumes that they have never achieved before. The geography of the automotive industry is shifting rapidly and, in 2011, 47% of the world's production took place in emerging economies.

Market evolution in 2011 was also highly variable, with dynamism in emerging economies, an upturn for turnover in the USA and a weakening of the European Union. The latter, with 14 million new vehicle registrations, only accounted for 19% of the world market in 2011, compared with 25% only five years earlier. Moreover, the countries in this region that are suffering from debt problems have seen their automotive markets collapse.

In this context, French manufacturers are seriously affected by the decline of the European markets. With a notable presence in Southern European countries which have very weak economic growth at best, and highly active in the small-car ranges, which no longer benefit from government subsidies, French manufacturers have seen their main markets contract strongly. However, their strength in the light commercial vehicle sector (37% of the European market) and their constant international expansion in recent years (more than 40% of their turnover outside the Eurozone in 2011) are factors for sustainable growth.

Overall, French manufacturers produced 6.45 million vehicles (up 1.5% from 2010), which is a new record in terms of volume.

In France, automotive output rose by 3% to more than 2.3 million vehicles. Since one unit of value added in the automobile creates 4.1 units of value added in the national economy, the activity of the automotive branch—including equipment manufacturers and other suppliers—has benefited from this increase. Nevertheless, production levels in the French automotive industry still remain low: measured by the INSEE, the industrial production index of the automotive industry with base 100 in 2005 increased by around 70 in 2011.

As regards the activity of the French sites of the manufacturers (assembly, mechanical construction, as well as research and development) and all their suppliers (the automotive industry made purchases worth €49 billion in France), competitiveness is a crucial issue. 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, as well as tax conditions for manufacturing. In 2011, these analyses were confirmed by the studies of the National Industry Convention, which stressed the weak margins of the French industry compared with those of its European counterparts.

In 2010, the margin rate of non-financial companies measured by Eurostat was 30% for the French industry, against 39% for that of the Eurozone.

Despite this difficulty, the automotive industry has continued to be the leading sector in terms of expenditure in research and development and patent applications in France. Respect for intellectual property, in particular "industrial designs", ensures a return on investment and feeds future innovation. Moreover, 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 highly efficient levers for the future of our industry. Future investments, including future transportation and therefore automobiles, complement this virtuous strategy. The outlook for 2012 is cautious, with continued international expansion by French manufacturers, but especially due to the ongoing effects of the weak European market and competitive issues in France. French industrial activity will therefore need to face a difficult context requiring the mobilization of all players. The Automotive Branch Platform (PFA - *Plateforme de la Filière Automobile*), set up during the crisis of 2009 by French automotive manufacturers (represented by CCFA), and their suppliers, has yielded results revolving around four priorities (lean manufacturing: tomorrow's expertise and businesses, better information and communication management, and a mid- and long-term strategy in terms of products and international development). In 2012, it should contribute even further to help structure the branch. As in the other leading automotive manufacturing countries, the public authorities are important partners: in France, their actions—for example in terms of labor market flexibility (short-time working) or assistance for financing SMEs in the branch (OSEO)—have already proven to be very useful.

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) and in coordination with the PFA, 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. On the international scene, it defends French interests in the International Organization of Motor Vehicle Manufacturers (OICA), which it presides for two years, and in the ACEA. Moreover, it actively contributes to the production of statistics and to the analytic capability of 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.

KEY FIGURES

6.4 million
VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE

351,000
PEOPLE
WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

61
FRENCH MANUFACTURERS' PRODUCTION AND ASSEMBLY PLANTS WORLDWIDE (INCLUDING 6 UNDER CONSTRUCTION)

75%
OF VEHICLES PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

22%
SHARE OF FRENCH MANUFACTURERS IN TURNOVER OF NEW PASSENGER CARS IN WESTERN EUROPE

37%
SHARE OF FRENCH MANUFACTURERS IN TURNOVER OF LIGHT COMMERCIAL VEHICLES IN WESTERN EUROPE

10%
OF ALL HEAVY TRUCKS SOLD IN WESTERN EUROPE ARE FRENCH

3 MILLION
VEHICLES ARE SOLD BY FRENCH MANUFACTURERS OUTSIDE OF WESTERN EUROPE

4 UNITS
OF VALUE ADDED GENERATED IN THE NATIONAL ECONOMY FOR EACH UNIT OF VALUE ADDED IN THE AUTOMOTIVE SECTOR IN FRANCE

€6 BILLION
AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN FRANCE IN 2009

10%
SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS

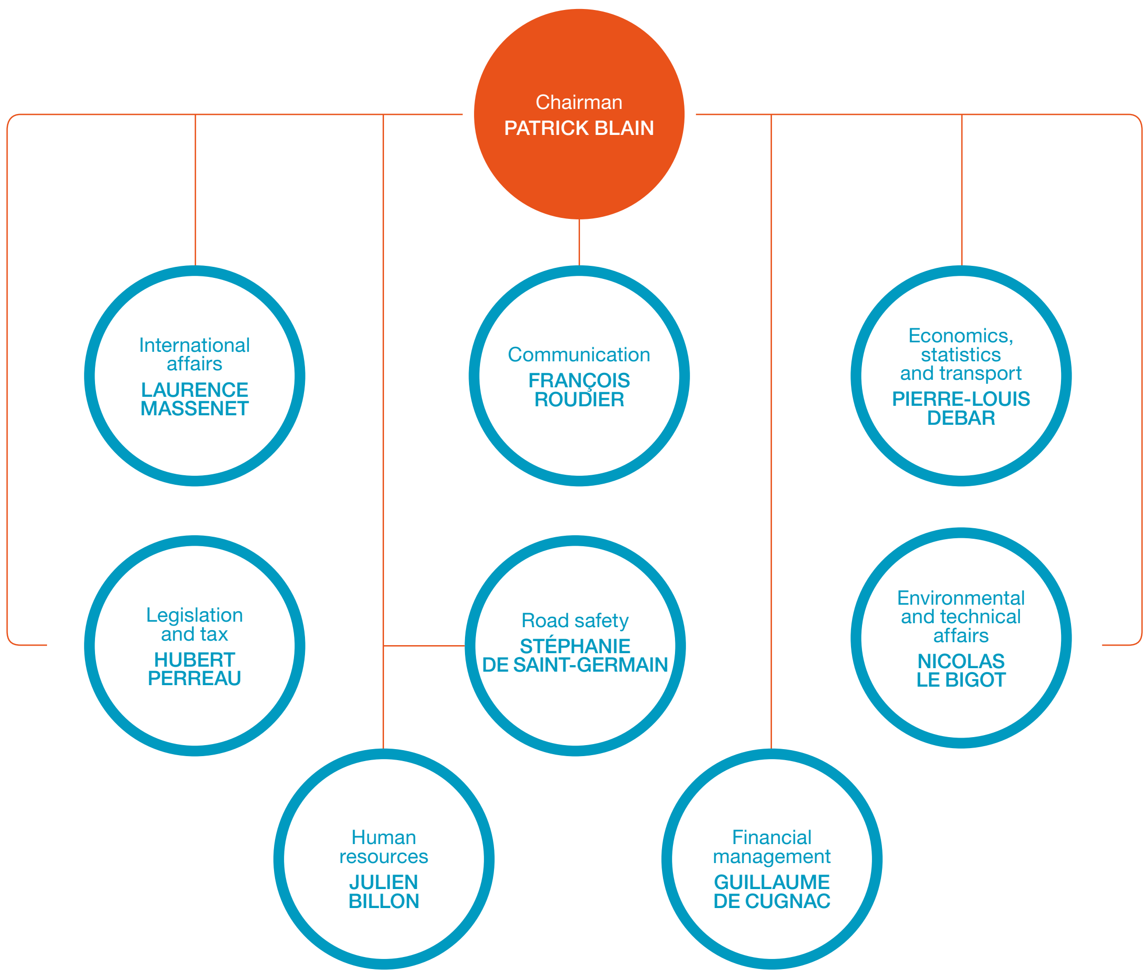
– 22 GRAMS
OF CO_2 PER KM REDUCTION OF AVERAGE CO_2 EMISSIONS OF NEW PASSENGER CARS IN FRANCE SINCE THE IMPLEMENTATION OF THE BONUS-MALUS SCHEME

– 25%
REDUCTION SINCE 1990 IN THE AMOUNT OF CO_2 EMITTED BY A HEAVY TRUCK TRANSPORTING ONE METRIC TON OF FREIGHT ONE KILOMETER ACROSS FRANCE

ORGANIZATIONAL CHART

The French Automobile Manufacturers' Association

Comité des Constructeurs Français d'Automobiles (CCFA) is the French automobile manufacturers' trade association. Its members are: Alpine, PSA (Automobiles Citroën - Automobiles Peugeot), 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, FFC, *Fédération des Industries Electriques, Electroniques 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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2011: The markets for French manufacturers outside of Western Europe have made up for the drop in their turnover within this region, which is their natural base market

Since the financial and economic crisis of 2008, the production of French manufacturers has increased by 4% in a world economic context that has been marked by considerable growth in emerging economies—which have already exceeded their pre-crisis levels—and by relative gloom in developed economies. Turnover outside of Western Europe have risen by almost 900,000 units since 2007, reaching 3 million vehicles in 2011. 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. In France, a country which benefits from demand support mechanisms (bonus-malus), turnover increased by 75,000 vehicles. In other European countries, the drop in the markets has had a major effect. To weather the development of overseas competition, French manufacturers continued to ensure the future through investment in France in research and development and also plants.

KEY DATA

In thousands

	1997	2007	2010	2011	Change 2011-2010	Change 2011-2007
World production of French manufacturers	**4,046**	**6,188**	**6,353**	**6,448**	**1.5%**	**4.2%**
Passenger cars	3,472	5,301	5,610	5,605	−0.1%	5.7%
Light commercial vehicles	507	830	711	802	12.8%	−3.3%
All light vehicles	3,979	6,131	6,321	6,407	1.4%	4.5%
Heavy trucks (at constant scope)	36	58	32	41	29.2%	−28.8%
Production of French manufacturers in France	**2,525**	**2,573**	**1,939**	**2,007**	**3.5%**	**−22.0%**
Passenger cars	2,235	2,165	1,666	1,678	0.8%	−22.5%
Light commercial vehicles	258	352	243	292	20.2%	−17.1%
All light vehicles	2,493	2,518	1,909	1,970	3.2%	−21.7%
Heavy trucks	30	55	30	37	23.4%	−33.9%
Automotive exports outside France	**2,822**	**4,697**	**4,786**	**4,893**	**2.2%**	**4.2%**
Passenger cars	2,526	4,110	4,306	4,337	0.7%	5.5%
Light commercial vehicles	276	549	460	530	15.4%	−3.4%
All light vehicles	2,802	4,659	4,766	4,867	2.1%	4.5%
Heavy trucks	20	38	21	26	25.8%	−31.1%
Automotive exports outside Europe (17 countries)	**659**	**2,110**	**2,717**	**2,977**	**9.6%**	**41.1%**
Passenger cars	563	1,914	2,525	2,732	8.2%	42.7%
Light commercial vehicles	88	178	180	230	28.0%	29.3%
All light vehicles	651	2,092	2,705	2,963	9.5%	41.6%
Heavy trucks	8	18	12	14	19.8%	−20.3%
Automotive registrations in France	**2,068**	**2,629**	**2,709**	**2,687**	**−0.8%**	**2.2%**
Passenger cars	1,713	2,110	2,252	2,204	−2.1%	4.5%
Light commercial vehicles	313	461	418	429	2.8%	−7.0%
All light vehicles	2,026	2,571	2,669	2,633	−1.3%	2.4%
Heavy trucks	39.3	52.5	34.2	47.4	38.4%	−9.9%
Coaches and buses	3.1	5.5	5.4	6.2	15.3%	13.0%
Automotive registrations for French groups in Europe (17 countries)	**3,300**	**3,906**	**3,678**	**3,431**	**−6.7%**	**−12.2%**
Passenger cars	2,841	3,181	3,081	2,814	−8.7%	−11.5%
Light commercial vehicles	432	690	577	591	2.4%	−14.3%
All light vehicles	3,273	3,871	3,658	3,405	−6.9%	−12.0%
Heavy trucks	27	35	20	26	28.3%	−26.0%

WORLD

	Units	2010	2011	Change 2011-2010
Market share of French groups (new light vehicles)				
In France (makes)	as a %	60.5%	58.0%	−2.5 points
In Europe outside France	as a %	17.3%	16.0%	−1.4 points
In Europe	as a %	25.3%	23.7%	−1.6 points
Market share of French makes (new heavy trucks)				
In Europe	as a %	9.5%	9.7%	+0.2 points
French manufacturers position in world production (PSA Peugeot Citroën, Renault-Dacia-Samsung and Renault Trucks)				
Passenger cars	as a %	9.6%	9.3%	−0.3 points
Commercial vehicles	as a %	3.8%	4.2%	+0.3 points
Total	as a %	8.2%	8.0%	−0.1 points
French automobile international trade				
Exports	in € billions	40.7	43.5	+6.9%
Imports	in € billions	44.2	48.3	+9.4%
Balance	in € billions	−3.5	− 4.9	−1.4
Automotive industry contribution to foreign trade goods balance				
Exports	as a %	10.4%	10.3%	−0.1 point
Imports	as a %	9.6%	9.5%	−0.1 point
World key figures for French manufacturers (PSA Peugeot Citroën + Renault)				
Turnover	in € billions	95.0	102.5	+7.9%
Capital expenditure	in € billions	2.8	3.8	+35.4%
No. of employees	in thousands of people	321	337	+5.1%
Jobs related to the automotive industry in France				
Automotive industry	in thousands of people		224	
As a % of the manufacturing and energy industry	as a %		7%	
Total (directly and indirectly related)	in thousands of people		2,375	
As a % of the employed working population	as a %		9%	

After the historic fall in 2009 caused by the economic and financial crisis, world GDP growth returned in 2010 to the high levels it enjoyed until 2007, before relaxing slightly to just over 4% in 2011. As in previous years, growth differed between OECD countries where GDP rose by 2% and developing countries (+ 7% to + 8%), driven by China and India in Asia and, to a lesser extent, Brazil and Argentina in South America. The recoveries in Eastern Europe—particularly in Russia—continued in 2011, only just cancelling out the drop in 2009. Raw material prices rose throughout 2010 and remained at almost historically high levels throughout 2011, near the peaks of 2008, as in the case of 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. In the business sector, continuing the trend started in 2010, investments continued to recover in 2011 in an increasingly uncertain context, in particular in Western Europe.
In addition to the collapse of the Western Europe base market compared with the levels observed prior to the crisis, French automobile manufacturers need to deal with consumer decisions about what to buy, the rising cost of raw materials for manufacturing processes, and dearer and/or less-accessible money, made worse by the crisis and the continuing strength of the euro against other main currencies (up until its recent drop, at the end of Q2 2012). Despite everything, they must continue to meet society's demands, which require considerable research and development expenditure. Moreover, this crisis has affected the entire automotive sector, both upstream—including suppliers—and downstream—including vehicle transport and turnover/maintenance.
In this economic and financial environment, in 2011 the world automotive market reached a new peak of 78.5 million vehicles; supported for the most part by the strong growth of developing countries and the recovery of the North American market. In Western Europe, new car markets fell due to the end of the various government plans for scrap incentives and the debt crisis, whilst commercial vehicle markets returned to growth. Faced with an unfavorable country mix effect (weaker markets in Southern Europe), the market share of French manufacturers dropped, although it remained greater than in 2007, in a context of even stiffer competition.
In Eastern Europe, the industry made a return 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. PSA Peugeot Citroën now produces with Mitsubishi in Russia and Renault is continuing to develop a strategic partnership with Russian manufacturer AvtoVAZ, now part of Nissan.
In Asia, automotive markets have continued to grow. 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-time highs, French manufacturers' turnover have enjoyed strong growth at nearly 750,000 vehicles, exceeding their turnover in Eastern Europe, including Turkey, for the second year running. New investments and renewed, adapted vehicle ranges have been voted by French manufacturers, in order to attempt to address the ongoing growth of the automotive market in this region. Finally, French manufacturers sold 230,000 vehicles in Africa.

+4%
INCREASE IN WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS SINCE 2007

World motor vehicle production

In 2011, world vehicle production grew by 3% to 80.1 million vehicles, a new record. This increase represented a volume of 2.4 million vehicles and followed an increase of almost 16 million units recorded the previous year.
In developed areas, production levels are below those of 2007 (Western Europe: – 14%, NAFTA (Canada, USA and Mexico): – 13%, Japan: – 28%) except for South Korea (+ 14%).
In emerging countries or regions which are currently the main areas for growth in the automotive industry, production is much higher than before the crisis. In 2011, it grew by 30% compared to 2007 levels in Asia-Pacific (more than doubling in China), 16% in Latin America and 12% in the new member states of the European Union.

WORLD PRODUCTION

	Passenger cars				Commercial vehicles				Total		Change
	2010		2011		2010		2011		2010	2011	2011/2010
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**17,342**	**29.7**	**18,326**	**30.6**	**2,549**	**13.2**	**2,864**	**14.2**	**19,891**	**21,190**	**6.5**
of which:											
Western Europe	12,139	20.8	12,451	20.8	1,687	8.7	1,859	9.2	13,826	14,309	3.5
Germany	5,552	9.5	5,872	9.8	354	1.8	439	2.2	5,906	6,311	6.9
Belgium (1)	529	0.9	562	0.9	26	0.1	n/a	0.0	555	562	1.3
Spain	1,914	3.3	1,819	3.0	474	2.5	534	2.6	2,388	2,354	–1.4
France	1,924	3.3	1,931	3.2	305	1.6	364	1.8	2,229	2,295	2.9
Italy	573	1.0	486	0.8	265	1.4	305	1.5	838	790	–5.7
United Kingdom	1,270	2.2	1,344	2.2	123	0.6	120	0.6	1,393	1,464	5.1
Sweden (1)	177	0.3	189	0.3	40	0.2	n/a	0.0	217	189	–13.0
Central and Eastern Europe	4,600	7.9	5,235	8.7	371	1.9	456	2.3	4,971	5,692	14.5
Turkey	603	1.0	640	1.1	491	2.5	549	2.7	1,095	1,189	8.6
North and South America	**8,228**	**14.1**	**8,766**	**14.6**	**8,139**	**42.0**	**9,020**	**44.7**	**16,367**	**17,787**	**8.7**
of which:											
NAFTA (2)	5,084	8.7	5,614	9.4	7,089	36.6	7,855	39.0	12,173	13,468	10.6
South America (1)	3,144	5.4	3,152	5.3	1,051	5.4	1,166	5.8	4,194	4,318	2.9
Asia-Pacific	**32,415**	**55.6**	**32,479**	**54.2**	**8,515**	**44.0**	**8,095**	**40.2**	**40,930**	**40,574**	**–0.9**
of which:											
Japan	8,310	14.2	7,159	11.9	1,319	6.8	1,240	6.2	9,629	8,399	–12.8
China	13,897	23.8	14,485	24.2	4,368	22.6	3,934	19.5	18,265	18,419	0.8
South Korea	3,866	6.6	4,222	7.0	406	2.1	435	2.2	4,272	4,657	9.0
India	2,832	4.9	3,038	5.1	726	3.7	888	4.4	3,557	3,927	10.4
Africa	**357**	**0.6**	**376**	**0.6**	**158**	**0.8**	**181**	**0.9**	**515**	**557**	**8.1**
TOTAL	58,342	100.0	59,947	100.0	19,362	100.0	20,161	100.0	77,704	80,108	3.1
CHANGE 2011-2010			+2.8%				+4.1%			+3.1%	

Double counting is eliminated in regional totals.
(1) The changes for 2011/2010 are not calculated on a comparable scope for Belgium, the Netherlands and Sweden, or for the totals that include these countries. See also the notes on page 56.
(2) NAFTA: Canada, USA and Mexico.
Sources: OICA, CCFA estimates for July 2012.

80.1 million

NEW RECORD OF THE NUMBER OF VEHICLES PRODUCED IN THE WORLD IN 2011

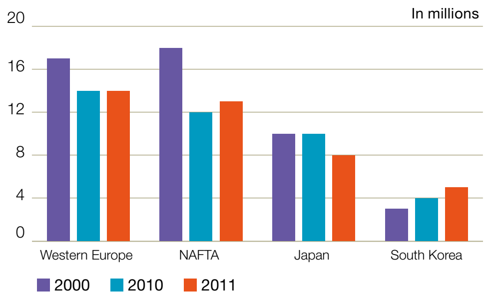
In 2011, production of passenger vehicles increased by 3%. Production of commercial vehicles, which was much more greatly affected by the crisis in 2009, grew at a faster rate (4%). This contrast can be found in Europe (respectively + 6% and + 12%), and in the Americas (respectively + 7% and + 11%), but not in Asia-Pacific, where a very slight increase in the production of passenger cars and a drop of 5% in the production of commercial vehicles was observed.
By country and including all vehicles, production slowed in several Western European countries: Finland (– 62%), Netherlands (– 22%), Italy (– 6%) and Spain (– 1%). On the other hand, the increase ranged from + 1% in Belgium to + 45% in Austria, with +7% in Germany and +5% in the United Kingdom. In the Americas, production grew in most countries, although growth was weak in Brazil.
In Asia-Pacific, which now represents over half the world's production, production continued to increase at a slower pace in Indonesia (+ 19%), India (+ 10%) and Iran (+ 3%). Production in China—the world's leading manufacturer since 2008—increased slightly by +1%. In Malaysia it dropped (– 6%) and Thailand's growth ground to a halt (– 11%).

World motor vehicle production

Between 2000 and 2011, the world's production of vehicles (80.1 million) grew by more than 20 million units representing growth of nearly 37% compared to 26% in 2007, which was the year with record production prior to the crisis. In developed regions or countries, production dropped by more than 7 million vehicles, reaching a level of 41 million units (– 15%). This only accounted for 51% of the world's production, more than 30 points less than in 2000. Within these regions, North American production dropped by 4 million vehicles (– 24%) and production in Western Europe dropped by almost 3 million (– 16%). Japanese production fell by around 500,000 units in 2010, but then lost an additional million vehicles in 2011, in particular due to the effects of the earthquake (– 17% compared to 2000). On the other hand, production in South Korea—a country which has benefitted from more favorable exchange rates—grew by more than 1.5 million units (+ 50%). In developing regions and countries, production grew by almost 29 million vehicles, mainly in the following five regions: China (+ 16.3 million), representing 23% of world production in 2011, against less than 4% in 2000; Turkey and Central and Eastern Europe (+ 3.8 million and a market share of 9%, against 5%), Indonesia, Iran, Malaysia and Thailand (+ 3.2 million and a market share of 6% against 2%), South America (+ 2.2 million and a market share of 5% against 4%) and India (+ 3.1 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.

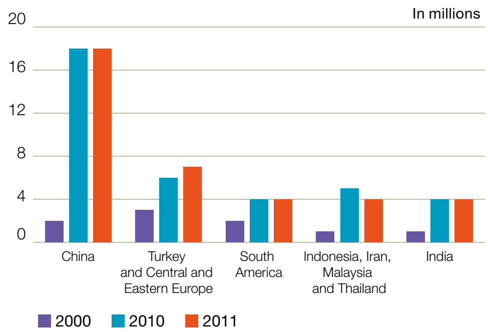
WORLD PRODUCTION OF ALL VEHICLES

DEVELOPED REGIONS AND COUNTRIES



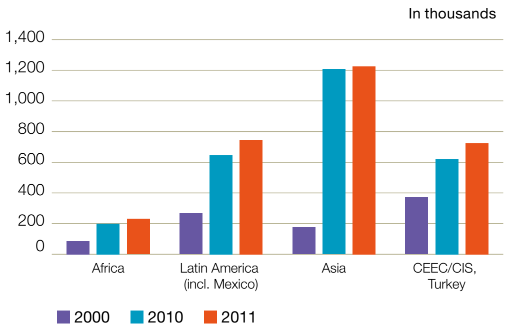
Sources: CCFA, OICA.

EMERGING REGIONS AND COUNTRIES



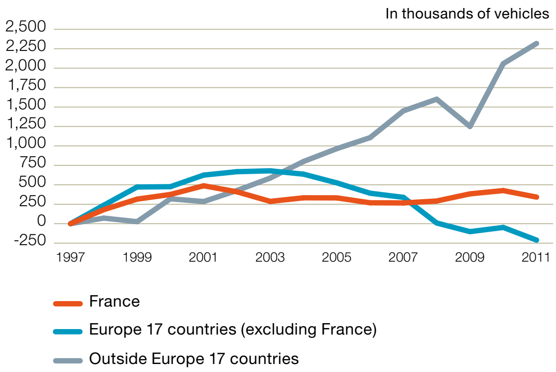
47%
MARKET SHARE OF EMERGING REGIONS AND COUNTRIES IN WORLD MOTOR VEHICLE PRODUCTION IN 2011

EVOLUTION OF MARKETS FOR FRENCH MANUFACTURERS OUTSIDE OF EUROPE 17 COUNTRIES: ALL VEHICLES



Sources: CCFA.

WORLD MARKETS OF FRENCH MANUFACTURERS: EVOLUTION COMPARED WITH 1997



Sources: CCFA.

In this context of changing world production, French manufacturers substantially increased exports to these regions. They grew by nearly two million units between 2000 and 2011, excluding Europe 17 countries, to reach 2.9 million vehicles. In this way, exports rose rapidly until they were interrupted by the crisis in 2009. Since then, they have started to rise again: + 376,000 units in Asia, + 324,000 in Turkey and Central and Eastern Europe, + 300,000 in Latin America, including Mexico, and + 51,000 in Africa. On the other hand, exports to Spain and Italy dropped by more than 310,000 and 130,000, respectively, compared to 2007 levels.

World ranking of automobile manufacturers

The 13 leading manufacturers—including French groups PSA Peugeot Citroën and Renault—account for three quarters of the world's production, with more than two million vehicles each. PSA Peugeot Citroën is ranked seventh in the world with a production of 3.6 million units, down 1%. Renault continued to develop synergies through its alliance with Nissan and manufactured nearly 2.8 million vehicles (+4%) and is ranked ninth. Production by French manufacturers represented 8% of world production, less than the peak reached in 2001 with 9.8% but more than the 7.3% recorded in 1997.

In thousands of vehicles

WORLD PRODUCTION IN 2011	World ranking	All vehicles (1)	Passenger cars	Commercial vehicles(2)
General Motors (Opel-Vauxhall-GM Daewoo-GM China)	1	9,081	6,736	2,346
Volkswagen Group (including Scania)	2	8,472	7,964	508
Toyota-Daihatsu-Hino (3)	3	8,050	6,794	1,256
Hyundai-Kia	4	6,617	6,118	499
Ford	5	5,030	2,239	2,790
Nissan	6	4,632	3,581	1,050
PSA Peugeot Citroën	**7**	**3,582**	**3,162**	**420**
Honda	8	2,909	2,886	23
Renault-Dacia-Samsung	**9**	**2,825**	**2,443**	**382**
Suzuki-Maruti	10	2,726	2,337	389
Fiat-Iveco-Irisbus	11	2,400	1,805	595
Daimler (including Evobus and Fuso)	12	2,173	1,443	730
Chrysler	13	2,005	508	1,497
BMW (including Mini)	14	1,738	1,738	–
Tata (Telco, Jaguar, Land Rover, Tata Daewoo)	15	1,203	736	467
Mazda	16	1,166	1,104	62
Mitsubishi	17	1,140	708	433
Dongfeng (excluding PSA, Honda, Kia)	18	1,095	376	719
Geely-Volvo	19	903	903	–
Beijing Automotive (excluding Daimler)	20	690	33	656
Chana Automobile Liability (excluding Ford)	21	682	542	139
Chery Auto	22	637	629	8
AvtoVAZ	23	636	633	3
FAW Group (excluding VW, Toyota)	24	621	357	264
Fuji (Subaru)	25	580	528	52
Great Wall Motor	26	487	366	120
Isuzu	27	481	–	481
Anhui Jac Automotive	28	479	218	260
Mahindra & Mahindra (Ssangyong)	29	471	345	126
Brilliance (excluding BMW)	30	456	189	267
SAIC-Nanjing (excluding GM, VW)	31	450	328	121
BYD	32	450	449	0
China Changan Automotive	33	265	219	46
Volvo-**Renault Trucks**-Mack-UD Trucks-Eicher	34	251		251
Chongqing Lifan	35	206	124	82
Proton	36	201	175	26
Jiangling Automotive	37	178	–	178
Fujian Motor	38	161	106	56
Kuozui	39	157	149	8
China National Heavy Duty Truck	40	152	–	152
MAN	41	150		150
Hunan Jiangnan Automobile	42	138	138	–
PACCAR	43	137		137
Porsche	44	127	127	–
GAZ	45	119	–	119
Total for manufacturers listed		**77,108**	**59,237**	**17,871**
Others manufacturers (China, India, Iran, Russia, Poland, Turkey, etc.)		3,000		
TOTAL PRODUCTION		80,108		

(1) There may be double counts between manufacturers. (2) Non-standard weight limits. (3) Of which Daihatsu had 994,000 and Hino 128,000.
Source: OICA, CCFA estimates for July 2012.

8%
MARKET SHARE OF FRENCH MANUFACTURERS IN WORLD AUTOMOBILE PRODUCTION IN 2011

In a context of continuing growth, the world's production rose by 3% thanks to the positive results from countries in Asia-Pacific and Latin America. Recent years were also marked by a number of steps towards consolidation, either at the initiative of manufacturers from emerging economies (Indian manufacturer Tata took over Jaguar and Land Rover in 2008 and Chinese manufacturer Geely acquired Volvo in 2010), or at the initiative of manufacturers from developed nations (in 2011: Fiat with Chrysler, or even Volkswagen with Scania and soon Man). The Toyota Group (– 6%) lost the first place it had held since 2006 to General Motors (+ 7%), mainly following the earthquake that affected Japan and seriously disrupted its industrial production. The Volkswagen Group, which has a major presence in emerging economies, has also overtaken the Japanese manufacturer.

The Ford Group (+ 3%) whose production no longer includes Jaguar, Land Rover and Volvo, was ranked fifth. Among the Asian manufacturers, Hyundai-Kia (+ 15%, 4th place) and Nissan (+16%, 6th place) maintained their ranks. However, Japanese manufacturers Honda (– 23%), and Suzuki-Maruti (– 6%) dropped one position in the ranking. The European groups have experienced different types of growth. The production of general manufacturers Fiat (– 2%) and PSA Peugeot Citroën (– 1%) dropped, while that of Renault (+ 4%) improved.

The German groups Daimler and BMW—specialists in premium ranges—are experiencing rapid growth after being greatly affected by the crisis. Manufacturers from developing countries (China, India, Iran) also had diverging growth rates. The production of Indian groups grew strongly.

World automotive markets

In 2011, the world automotive market continued to grow (+ 4% to 78.5 million vehicles), setting a new record level. While the markets grew in the emerging regions and in North America, new vehicle registrations were stable in Western Europe and fell off sharply in Japan.

China, whose access to vehicle ownership is continuously rising in line with its improving living conditions, saw its market grow by almost 3% to 18.8 million vehicles (compared to 9 million in 2008), despite the end of government measures supporting the market and the limitations on the number of new vehicles in large cities. Its status as the world's leading automotive market—reached in 2009—is affirmed once again.

Developing regions—South America and Asia excluding the three Asian powers (China, Japan and South Korea)—which fell in 2009, continued to grow, but at a slower pace than in 2010. On the other hand, despite continuing the recovery which started in 2010, Central and Eastern Europe remained below their 2008 levels.

In major industrialized countries where demand for cars is now mature, post-crisis situations vary greatly. In NAFTA (USA, Canada and Mexico), turnover recovered. Despite the continued recovery in the commercial vehicle sector, Western Europe remained stable, due to the end of government scrap incentive schemes and the debt crisis. The Japanese market fell in 2011, suffering the repercussions of the support systems implemented in 2010 and the consequences of Fukushima.

For these three areas, the markets remained well under the levels previously reached.

WORLD AUTOMOTIVE MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2010		2011		2010		2011		2010	2011	2011/2010
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
EUROPE	**16,463**	**29.4**	**17,145**	**29.5**	**2,447**	**12.7**	**2,791**	**13.7**	**18,910**	**19,936**	**+5.4**
of which:											
Western Europe	12,975	23.2	12,802	22.0	1,712	8.9	1,872	9.2	14,687	14,674	−0.1
Central and Eastern Europe	3,489	6.2	4,343	7.5	735	3.8	919	4.5	4,223	5,262	+24.6
NORTH AND SOUTH AMERICA	**11,099**	**19.8**	**11,925**	**20.5**	**8,475**	**44.1**	**9,545**	**46.8**	**19,574**	**21,470**	**+9.7**
of which:											
NAFTA (1)	6,829	12.2	7,357	12.7	7,373	38.4	8,239	40.4	14,202	15,596	+9.8
USA	5,635	10.1	6,089	10.5	6,137	31.9	6,951	34.1	11,772	13,041	+10.8
South America	4,270	7.6	4,568	7.9	1,102	5.7	1,307	6.4	5,372	5,874	+9.3
ASIA-PACIFIC	**27,450**	**49.1**	**28,028**	**48.3**	**7,896**	**41.1**	**7,640**	**37.4**	**35,346**	**35,668**	**+0.9**
of which:											
China	14,159	25.3	14,927	25.7	4,130	21.5	3,837	18.8	18,289	18,765	+2.6
South Korea	1,308	2.3	1,316	2.3	248	1.3	251	1.2	1,556	1,567	+0.7
Japan	4,203	7.5	3,509	6.0	753	3.9	701	3.4	4,956	4,210	−15.1
Other Asia-Pacific	7,779	13.9	8,276	14.3	2,765	14.4	2,850	14.0	10,545	11,126	+5.5
AFRICA	**922**	**1.6**	**976**	**1.7**	**407**	**2.1**	**425**	**2.1**	**1,328**	**1,401**	**+5.5**
TOTAL	**55,934**	**100.0**	**58,074**	**100.0**	**19,225**	**100.0**	**20,401**	**100.0**	**75,159**	**78,476**	**+4.4**
Change 2011-2010			3.8 %				6.1 %			4.4 %	

(1) NAFTA: Canada, USA and Mexico.
Source: CCFA.

In the United States, the consequences of the financial crisis—which had called a halt to household consumption—were less severe and the market recovered with 13 million vehicles, compared to over 17 million between 2004 and 2006. In Western Europe, after dropping for three consecutive years, the market remained stable at 14.7 million vehicles, compared to 17.3 million in 2007. The passenger car market fell by 1%, but the commercial vehicle market continued to recover by 9%, although it still remained below the record level of 2007. For all vehicles, country-to-country variations are great: from – 32% in Greece to + 16% in the Netherlands, including – 16% in Spain, – 10% in Italy, – 2% in the United Kingdom, – 1% in France and + 10% in Germany.

In Central and Eastern Europe, strong growth continued in Turkey at nearly 900,000 vehicles. The Russian market continued to recover to over 2.8 million vehicles, as did the Ukrainian market, whose level reached only one third of its pre-crisis level.

In Japan, due to the end of government scrap incentives and the events in Fukushima, turnover fell 15% to 4.2 million vehicles, which is a level similar to those observed during the 1970s. New vehicle registrations in South Korea continued to grow slightly in 2011, to more than 1.5 million vehicles. In the Asia-Pacific region, excluding the three Asian powers (China, Japan and South Korea), the slight drop in 2009 gave way to steady growth of 23%, slowing considerably in 2011 (+ 6%) with over 11 million vehicles. Growth rates were close to or higher than 10% in India, Indonesia and Thailand.

In South America, car ownership continues to expand and the markets rose by 9%. Turnover increased in Argentina by 26% and 3% in Brazil. These markets also reached new record highs.

In Africa, where volumes are lower, the markets continued to recover: while rapid growth was observed in South Africa and Algeria and, to a lesser extent in Morocco, the markets plummeted in Tunisia and Egypt, mainly due to the political instability.

24%
CHINA'S SHARE OF WORLD TURNOVER IN 2011

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

Leader for many years, since 2010 the European Union (27 countries) has become the world's second production zone, whilst remaining open. Production and exports continued to recover in 2011 without however returning to their pre-crisis levels. After falling for several years, imports rose in 2011, mainly reflecting an increase in exports from South Korea. In North America including Mexico, production—essentially for the local market—continued to recover but remained far below its pre-crisis levels. In a context marked by the strong yen and the nuclear accident at Fukushima, exports have remained the driving force for Japanese production: they represented 53%. Imports still only accounted for less than 5% of total car registrations. Outside these three historical areas, China, which became the leading producing country in 2010, essentially only produces to supply its domestic market: imports, like exports, represent less than 5% of its production.

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

	European Union [1]		Canada, USA and Mexico [2]		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
2011	15,695	123	5,614	79	7,159	73
IMPORTS [3]	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%
2011	1,950	12%	2,286	41%	204	3%
EXPORTS [3]	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%
2011	3,400	22%	800	14%	3,930	55%
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
2011	2,120	133	7,855	173	1,240	35
IMPORTS [3]	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%
2011	330	16%	1,240	16%	2	0%
EXPORTS [3]	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%
2011	360	17%	100	1%	535	43%

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

53%
PERCENTAGE OF VEHICLES MANUFACTURED FOR EXPORT IN JAPAN IN 2011

Trends in the world's three leading automotive regions have contrasted sharply since 1990.
In the European Union (27 countries) vehicle production increased by 24% (compared to + 38% in 2007) and trade—already important—appears up by nearly 65%.
In North America—including Mexico since 2009—production exceeded its 1990 level of 15%. Imports, which were already significant in 1990 and have since continued to grow, exceeded those of 1990 by 3% for a much smaller market. Exports only represented 7% of production (21% for the EU and 53% for Japan). Finally, in Japan, vehicle production fell by 37% due to the shrinking domestic and export markets. 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 2011 they were 23% lower, mainly due to the 2008 financial crisis, the production of plants belonging to Japanese manufacturers outside of Japan, the strong yen and the Fukushima accident.

World trade in automotive products

After the drop of 31% recorded in 2009, linked to the financial and economic crisis, world trade in automotive products, according to the WTO, made a recovery of 29% in 2010 to $1.09 trillion, remaining 12% above the record peak of 2008.

Only a handful of countries saw their exports rise past their pre-crisis levels: Argentina, benefitting mainly from the continuing growth of the Brazilian market; Mexico, with the upturn in NAFTA demand; India and Thailand, where industrial plants are being built; and, finally, South Korea, which benefitted from a weak won. While South Korea's surplus ($45 billion) was one third that of Japan, China's deficit rose to $25 billion in 2010.

WORLD 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(3)		
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**
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**
2010	99.5	189.8	**−90.3**	60.2	91.7	**−31.5**	9.7	33.6	**−23.9**	1.2	42.9	**−41.7**	28.4	21.5	**6.8**
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**
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**
2010	50.1	59.5	**−9.4**	49.1	46.2	**3.0**	0.3	4.5	**−4.2**	0.0	5.6	**−5.6**	0.7	3.3	**−2.6**
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**
2009	461.1	391.0	**70.2**	31.2	8.7	**22.5**	338.7	338.7	**0.0**	5.4	14.9	**−9.5**	85.8	28.6	**57.2**
2010	542.8	422.8	**119.9**	42.9	9.9	**33.0**	365.6	365.6	**0.0**	7.0	18.9	**−11.9**	127.3	28.4	**98.8**
GERMANY(4)															
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**
2009	153.1	75.7	**77.3**												
2010	195.7	79.3	**116.4**												
FRANCE(4)															
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**
2009	48.2	54.7	**−6.5**												
2010	54.1	58.7	**−4.7**												
ITALY(4)															
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**
2009	24.4	40.2	**−15.8**												
2010	29.1	39.7	**−10.6**												
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**
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**
2010	149.5	14.2	**135.4**	50.9	1.3	**49.6**	18.2	7.3	**10.9**				80.5	5.6	**74.9**
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**
2009	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**
2010	54.5	8.0	**46.5**												
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**
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**
2010	28.0	53.0	**−25.0**	7.0	5.4	**1.6**	4.2	25.7	**−21.6**	2.3	16.7	**−14.4**	14.6	5.2	**9.4**
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**
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**
2010	12.6	17.7	**−5.1**	1.6	2.4	**-0.7**	0.4	0.8	**−0.5**	0.0	1.2	**−1.2**	10.6	13.3	**−2.7**

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

In 2010, world trade in automotive products accounted for 7% of the world's goods exports and 11% of the world's manufactured product exports. The share of intraregional trade in world trade returned—at 62%—to its 2008 level. In NAFTA and Europe (excluding CIS) and South America, this share exceeded 70%. It reached just over 30% for Asia-Pacific. Germany remained the world's leading exporter (with a share of 18%), ahead of Japan, whose exports to China have exploded ($16.1 billion, + 51%). EU-27 automotive exports reached $543 billion. Trade within the EU accounted for over 67% of this total (73% in 2009).

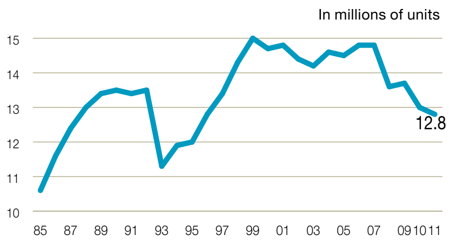
France represented 5% of the world's exports, with $54 billion, against almost 8% in 2004. The USA remained the world's leading importer of automotive products, at $190 billion. China's imports—up 72% to $53 billion in 2010—came from the EU-27 (49% against 42% in 2009), followed by Japan (31% against 36% in 2009), NAFTA (10%) and South Korea (8%).

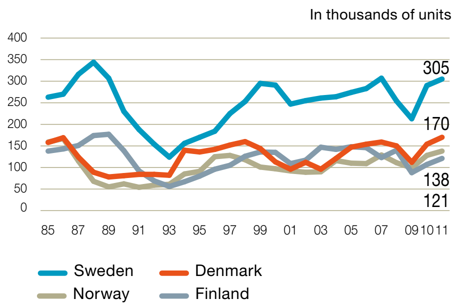
$25 billion
CHINA'S 2010 DEFICIT IN AUTOMOTIVE PRODUCTS

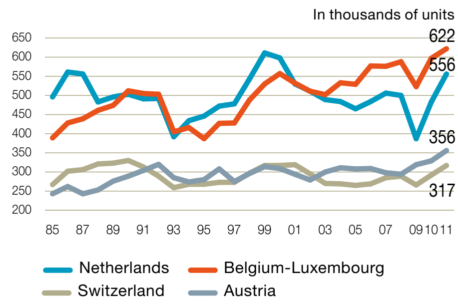
New passenger car registrations per country

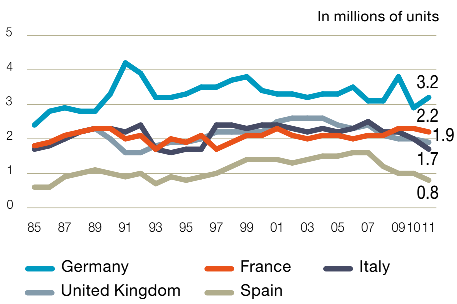
With 12.8 million new cars registered in Western Europe, the market dropped by 1.3% compared to 2010. It was under 14 million units for the fourth consecutive year, which represents one fifteenth of the total number of cars in use in Europe, or a level 14% lower than in 2007. Contrasting variations were observed in countries undergoing economic difficulties. The German market—near its pre-crisis levels—rose by 9% following a sudden drop in 2010.
In France, the gradual end to the scrap incentive scheme resulted in a slower fall in turnover at 2%; as in 2009 and 2010, the French market was the second European market ahead of Italy and the United Kingdom.
In Spain, the drop in volume reached more than 800,000 units compared with 2007 (– 50%). The Italian market contracted by 740,000 units compared with the year before the crisis struck, or a drop of 30%. In the same period under review, smaller countries were also heavily affected by the crisis: Greece and Ireland experienced drops of 182,000 (– 65%) and 96,000 (– 52%) units, respectively.

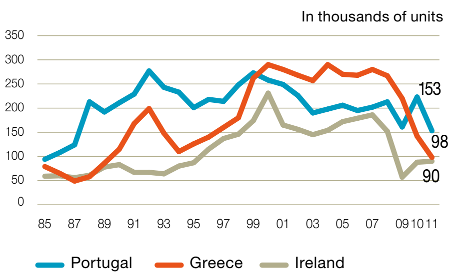
NEW PASSENGER CAR REGISTRATIONS IN EUROPE











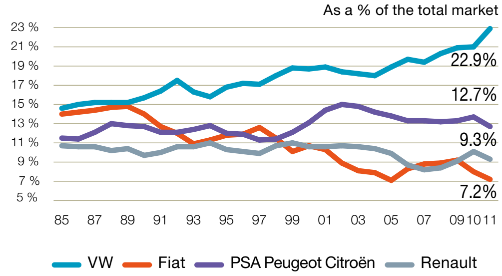
– 14%
DROP IN NEW PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE IN 2011 COMPARED WITH 2007

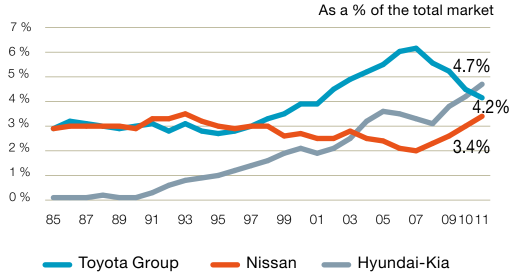
The European market covers 17 countries (the 15 European Union countries before 2004 plus Switzerland and Norway). These countries have similar environments and comparable economic conditions. Since 1990, this market has included the former East Germany.
Lower oil prices and the expansion of the European 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. It subsequently picked up to a steady pace, with registrations regularly exceeding 14 million units between 1998 and 2007, in a more or less favorable economic environment. For the last four months of 2008, the market reflected the 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 and 2011, it dropped by 5% and 1%, respectively, with the end of schemes designed to support demand in a complicated economic environment. However, the situation varied greatly between countries that had reached historic highs (Belgium, Austria) and others that had fallen off sharply from their pre-crisis levels (Spain, Greece, Ireland).

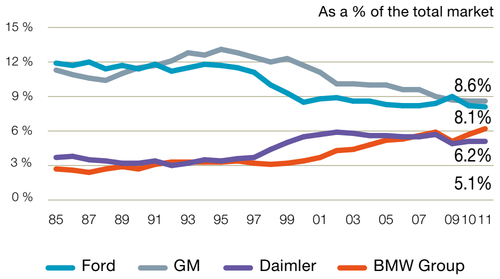
New passenger car registrations per group

After 3 years of falling, the French groups' share in the European market stabilized in 2008 before rising in the following two years. In 2011, it dropped by 22%, the same as in 2009. The numbers of French cars registered have dropped sharply due to market difficulties. They were also affected by intense competition, which has affected their share in the markets where they have a large presence: Germany (– 0.7 points to 10%), United Kingdom (– 1.8 points to 12%), Italy (– 1.8 points to 15%), Spain (– 2.2 points to 25%) and Belgium/Luxembourg (– 1.4 points to 29.1%).
Six major 'generalist' European automakers manufacturing a full line of vehicles held 7% of the market or more.

GROUP PENETRATION [(1)] IN EUROPE







(1) Based on the scope of consolidation as of 1/1/2012.
See page 61 for group definitions.

22%
OF NEW PASSENGER CARS SOLD IN WESTERN EUROPE ARE MANUFACTURED BY A FRENCH GROUP

The Volkswagen Group, with its four main makes, has maintained its position since 1999, and now accounts for more than 20% of the market. Benefitting from a dynamic German market (25% of the European market against 22% the previous year), it reached a record level of 23% in 2011.
The market share of French groups (22% for them both) stopped dropping in 2008, grew the next two years and dropped again in 2011. It returned to its 2009 level. It exceeded 25% between 2001 and 2003.
The GM group had a market share of 8.6%. The market shares of its makes Opel and Chevrolet were respectively stable at 7.3% and 1.2%. From 2000 to 2009, the market share of the Ford group was around 10%. In 2011, it rose to 8.1%. So, the Ford group is behind General Motors for the second year running. In the mid-1990s, the penetration of these two American groups was around 12% each.
The Fiat group—now the majority shareholder in Chrysler—after four consecutive years of rising market shares between 2006 and 2009, lost 0.8 points of market share to 8% (– 1.2 points in 2010); it was near 13% in 1997 and 15% in 1989.
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 turnover, were more affected by the crisis. In 2011, Daimler once again consolidated its growth which began in 1997 by diversifying its range of vehicles, before stabilizing the next year with a market share of 5.1%. BMW, including Mini, confirmed its growth that started in 1999, reaching a new peak; its penetration rose by 0.5 points to 6.2% (0.3 points compared to the peak in 2008).
Toyota's market share (including Daihatsu), which had risen continuously from 1995 to 2007, dropped for the fourth consecutive year and stood at 4.2%, a fall of 2 points compared to its highest point.
Hyundai-Kia returned to growth after dropping for three years between 2006 and 2008. Its market share, which was almost non-existent in 1990 and 2.1% in 2000, also rose by 0.6 points to 4.7%.

Range analysis in 2011

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, C4 Air Cross, Jumpy, Jumper	C5, DS5, C-Crosser	C8, C6
	PEUGEOT	i0n, 107, 206 +, 207, 208, Bipper, Partner	308, RCZ, 3008, 4008, 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			Patriot, Wrangler, Compass, Cherokee	(Grand) Voyager, 300C, Sebring, (Grand) Cherokee
	DODGE			Caliber, Journey, Nitro	
DAIMLER	MERCEDES		A, B, Vito classes	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, Freemont	
	LANCIA	Ypsilon, Musa	Delta		Thema, Voyager, 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, Volt	Epica, Cruze, Captiva	Corvette, Camaro
	OPEL	Agila, Corsa, Meriva, Tigra, Combo	Astra, Zafira	Insignia, Antara, Vivaro	
HONDA	HONDA	Jazz	Civic, FR-V, Insight	Accord, CR-V	
HYUNDAI	HYUNDAI	I10, I20, Getz, IX20	I30, Coupe, Matrix, Veloster, H1	Sonata, IX 35, I40, Santa Fe, Tucson, IX 55	Genesis, Grandeur
	KIA	Picanto, Soul, Venga	Rio, Cerato, 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
MAHINDRA & MAHINDRA	SSANGYONG			Korando, 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, RR Evoque	Discovery, Range Rover
TOYOTA	DAIHATSU	Charade, Cuore, Sirion, Terios			
	LEXUS		CT 200 H		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.

50 and 93

RESPECTIVE NUMBERS OF MODELS AND BODY STYLES OFFERED BY FRENCH MANUFACTURERS

Breakdown and rank by model

Of the 12 most sold models in Europe in 2011, five are made by Renault, Peugeot or Citroën, whereas in 1997, these makes were only represented by three models. Nevertheless, the market share of the French manufacturers dropped in one year due to the end of the government scrap incentive schemes and the weak market figures, in which the premium ranges had a small share.

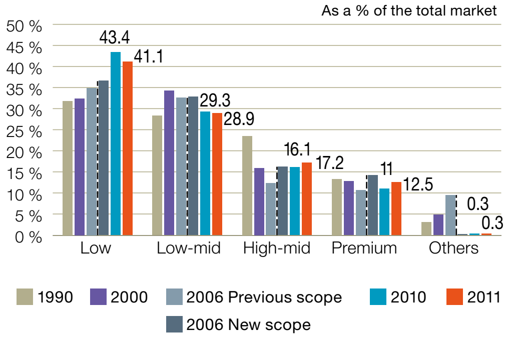
RANGES AND BODIES IN 2011

As a % of new registrations by country	Low range	Low-mid range	High-mid range	Premium range	Others
Germany	29	33	19	19	1
Austria	35	33	19	14	0
Belgium	39	30	17	14	0
Denmark	50	26	17	6	0
Spain	32	38	21	9	0
Finland	20	32	32	15	1
France	52	30	12	6	0
Greece	59	23	14	4	0
Ireland	27	36	26	10	1
Italy	59	20	14	7	0
Luxembourg	30	29	20	21	0
Netherlands	55	23	14	8	0
Portugal	45	30	14	11	0
United Kingdom	39	28	18	15	0
Sweden	18	26	26	29	0
European Union 15 countries	**41**	**29**	**17**	**12**	**0**
Norway	21	30	33	17	0
Switzerland	35	27	21	16	2
All 17 countries	**41**	**29**	**17**	**12**	**0**

	Sedans	Station wagons	Coupes	Cabriolets	MPVs	Others
Germany	42	20	2	3	15	18
Austria	43	16	1	1	21	18
Belgium	51	15	1	2	16	15
Denmark	57	23	0	0	14	5
Spain	61	6	1	1	13	18
Finland	43	28	1	0	10	18
France	58	7	2	1	18	14
Greece	80	2	1	1	6	11
Ireland	73	6	2	0	6	13
Italy	61	9	1	1	13	16
Luxembourg	46	13	3	1	13	23
Netherlands	61	17	1	1	12	9
Portugal	59	19	2	1	8	11
United Kingdom	61	8	3	3	11	14
Sweden	34	40	1	1	8	17
European Union 15 countries	**54**	**13**	**2**	**2**	**14**	**16**
Norway	36	29	0	0	9	26
Switzerland	41	17	2	3	15	22
All 17 countries	**53**	**13**	**2**	**2**	**14**	**16**

Source: CCFA.

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



RANKING FOR THE 15 LEADING MODELS IN 2011

Models	Rank	Market share
Volkswagen Golf	1	4.3%
Ford Focus	2	3.0%
Renault Mégane	**2**	**3.0%**
Volkswagen Polo	4	2.7%
Ford Fiesta	5	2.6%
Peugeot 206-207	**6**	**2.5%**
Opel Corsa	7	2.4%
Renault Clio	**8**	**2.2%**
Opel Astra	9	2.1%
Volkswagen Passat	10	1.9%
Citroën C3	**11**	**1.8%**
Citroën C4-Xsara	**12**	**1.6%**
Fiat G. Punto	13	1.6%
Nissan Qashqai	14	1.5%
Fiat Panda	15	1.4%
Peugeot 308		**1.1%**
Renault Twingo		**1.0%**
Dacia Duster		**1.0%**
Peugeot 3008		**0.9%**
Peugeot 107		**0.7%**
Citroën C1		**0.6%**
Peugeot 508		**0.6%**
Citroën DS3		**0.6%**
Peugeot 5008		**0.5%**
Dacia Sandero		**0.5%**
Citroën C5		**0.4%**

Source: CCFA.

In Europe, 70% of new passenger cars were in the low and low-mid range. The application of tax breaks to more environmentally friendly purchases, as well as a greater variety of the offer have driven the market towards the low range. However, because of the end of the scrap incentive schemes, the share dropped by more than two points in 2011 from the levels in the previous year, thus returning to its 2007 level.

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 station wagons, MPVs, convertibles, light vans and 4WD. 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 and again in 2011, stabilizing at 53%.

Each European country retained its own features until 2008 when Southern Europe continued to prefer low- and low-mid range vehicles, while premium cars and station wagons 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 lasted through 2010 and 2011, except in Germany, where the premium ranges had market shares that were more in line with the long-period structure (38%, or an increase of 3 points over the previous year).

+2.6 points

INCREASE IN THE MARKET SHARE OF THE PREMIUM RANGES IN THE EUROPEAN MARKET IN 2011

Technical characteristics of new passenger cars

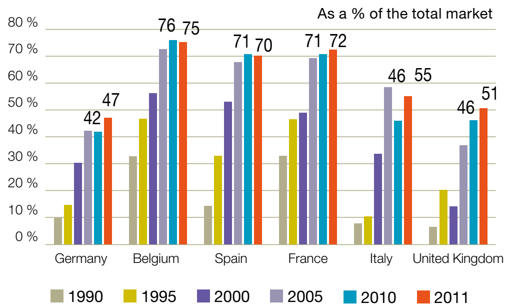
The proportion of new diesel-powered cars in Europe as a percentage of total registrations grew significantly between 1997 and 2007. The percentage of cars with diesel engines was only 22% in 1997, and reached 53% ten years later. After remaining almost stable in 2008, it fluctuated wildly.
On this market of 7.1 million units, the share of French manufacturers was 25% in 2011 (28% in 2010, 23% in 2007 and 29% in 2000) representing about 1.8 million new diesel cars. This volume represents 64% of the total turnover of new passenger cars from French manufacturers in Europe (17 countries). In terms of passenger cars, diesel vehicle ownership continued to grow, although at a slower rate than for previous years, reaching 36% in 2011, up by over one point.

TECHNICAL CHARACTERS FOR NEW PASSENGER CARS IN EUROPE IN 2010

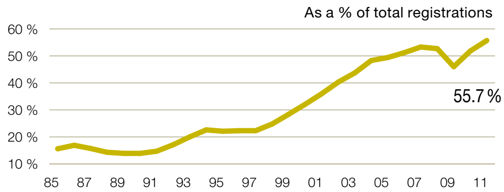
	Average displacement in cm^3	Average power in kW	4WD %	Diesel %
Germany	1,760	99	12.8	47.1
Austria	1,643	85	15.0	54.6
Belgium	1,628	82	6.3	75.3
Denmark	1,489	77	1.3	46.7
Spain	1,670	85	7.5	70.3
Finland	1,700	96	13.2	42.0
France	1,573	79	5.8	72.4
Greece	1,375		3.7	10.0
Ireland	1,580	79	3.2	70.0
Italy	1,526	78	11.0	55.2
Luxembourg	1,882	107	13.9	76.7
Netherlands	1,445	78	2.8	28.3
Portugal	1,536	80	2.1	69.6
United Kingdom	1,697	93	9.5	50.6
Sweden	1,788	102	19.5	61.4
European Union 15 countries	**1,643**	**88**	**9.5**	**56.1**
Norway	1,726	90	23.2	75.7
Switzerland	1,794	108	27.5	32.7
All 17 countries	**1,648**	**88**	**10.1**	**55.7**

Source: CCFA.

DIESEL MARKET SHARE BY COUNTRY



EUROPEAN DIESEL PASSENGER CAR MARKET



– 92 cm^3
REDUCTION BETWEEN 2007 AND 2011 IN THE AVERAGE DISPLACEMENT OF NEW PASSENGER CARS IN EUROPE

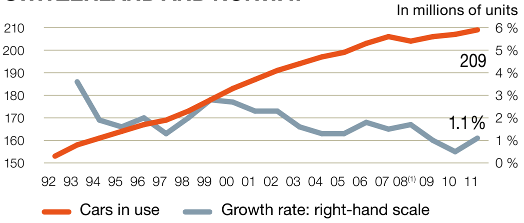
In Europe, the average displacement and power of car engines differ greatly from country to country. They depend mostly on the economic, tax and geographical conditions of each domestic market. In 2008 and 2009, the slow and regular upward trend in horsepower stopped, in particular with the gradual increase in the market share of low range cars. Displacement stopped increasing in 2006 as a result of downsizing (identical engine power with less displacement). Since 2010, these two elements have risen slightly because of the increased share of premium ranges, without however returning to 2008 levels.
The market share of 4WD, after trending downwards, grew for the second consecutive year (+ 1.3 points); it stood at 10.1% throughout the European market, or 1.3 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 turnover 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 2011, diesel car turnover rose by five points to 56%, although new registrations were still lower than in 2007. In Belgium, Spain, France, Ireland, Luxembourg, Portugal and Norway, over two thirds of new registered passenger cars are diesel. In Germany and Italy, the diesel share has risen again, reaching 47% (+ 5 points) and 46% (+ 9 points) respectively.
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. Since then, the share of turnover of diesel cars fluctuated at high levels. In 2011, it stood at 76% in Norway, 61% in Sweden, 47% in Denmark and 42% in Finland.

Passenger cars in use 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 (+ 1.1% in 2011, after + 0.5% in 2010).
In new European countries and in Turkey where levels of vehicle ownership are lower, the economic and financial crisis has extensively slowed growth: once again 3%, compared to 5% to 7% between 2005 and 2009. Demand for low-cost vehicles is partly satisfied by imports of used vehicles. After oscillating from 32% to 34% between 2000 and 2009, the share of cars over ten years old in Western Europe rose for the third consecutive year, reaching 36.1% in 2011, mainly due to the low numbers of new passenger car registrations. Western Europe is a replacement market.

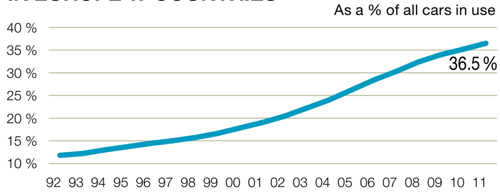
PASSENGER CARS IN USE, ON JANUARY 1ST OF EACH YEAR

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

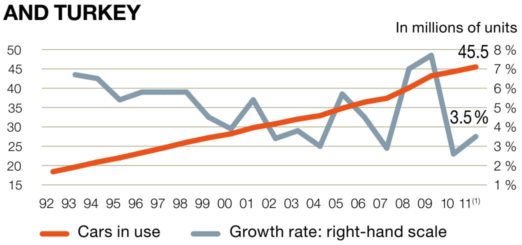


(1) The change for 2008 was calculated on a like-for-like basis.

DIESEL CAR OWNERSHIP IN EUROPE 17 COUNTRIES

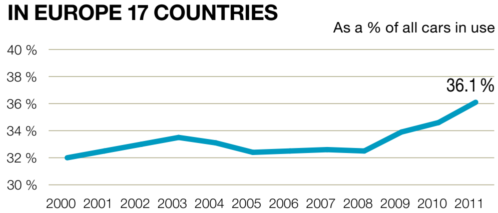


IN THE 12 NEW EU MEMBER STATES AND TURKEY



(1): The change was calculated on a like-for-like basis.
National sources: statistics organizations, French Transport and Interior Ministries, professional sources.

SHARE OF CARS OVER TEN YEARS OLD IN EUROPE 17 COUNTRIES



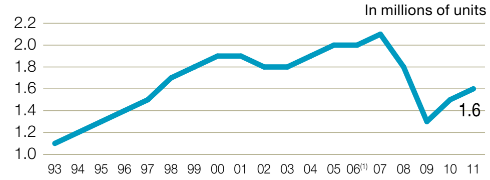
On January 1st, 2011 the number of passenger cars in Western Europe (EU-15, Switzerland and Norway) reached 209 million units. The financial and economic crisis worsened the slowdown in the growth of the number of cars in use (+ 1.1% in 2011 after + 0.5% in 2010), nearing that of the population. By country, after the drops observed in 2010, the numbers of cars in use in Spain and the UK returned, in 2011, to their respective 2009 levels. The number of cars in Ireland continued to drop. Growth in France (+ 0.8%) and Italy (+ 1.0%) was slower than in the main Northern European countries, such as Germany (+ 1.4%), the Netherlands, Austria, Belgium or Norway (+ 2.9%). After increasing by 2 points per year between 2002 and 2009, the share of diesel cars in Western Europe rose by more than 1 point per year and reached 36% on January 1st, 2011. In five countries, diesel cars became the majority: Austria, Belgium, Spain, France and Luxembourg. On the other hand, barely one quarter of the cars in Germany and the United Kingdom are diesel-powered.
In the new EU member states and Turkey, growth in car numbers, which had been high and regular during the 1990s, become weaker and irregular in recent years. By country, drops in car numbers were observed in Hungary and Latvia. In Poland, growth was lower than 5%, against 8% to 10% between 2007 and 2009. In the Czech Republic, growth reached 1.4% in 2011, against 3.3% and 0.3% in 2009 and 2010, respectively.

36%
OF VEHICLES IN USE IN WESTERN EUROPE WERE OVER TEN YEARS OLD IN 2011

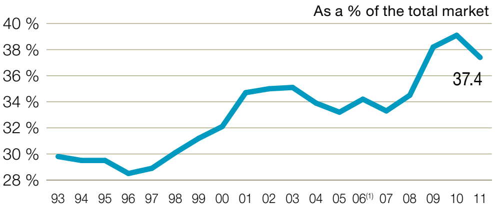
New light commercial vehicles in Europe

The European light commercial vehicle market increased by 7% in 2011 to 1.6 million units. After reaching a 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% in over two years, representing 800,000 fewer vehicles for a total of 1.3 million. In 2011, French manufacturers saw their turnover rise by 2% to 591,000 units, giving them 37% of the market. With a presence in every segment, French manufacturers were able to consolidate the growth of their turnover, despite losing 2% of market share compared with the previous year. This is explained by their large presence in markets affected by the crisis and by falling market shares, mainly in Belgium (– 4 points), the United Kingdom (– 1.3 points), Germany, and Spain (– 0.9 points). Nevertheless, their market share was still 4 points higher than in 2007.
In the van segment, market shares were maintained thanks to the success of the Renault Master, Peugeot Boxer and Citroën Jumper. In the small van segment, competition is stiff, but French manufacturers can rely on a broad offer (Citroën Berlingo and Nemo, Peugeot Partner and Bipper, and Renault Kangoo).

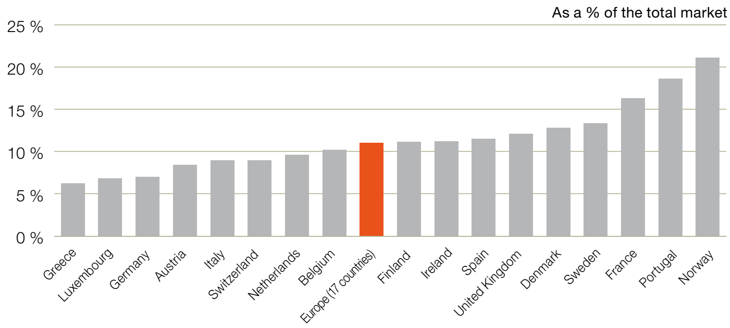
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (17 COUNTRIES)



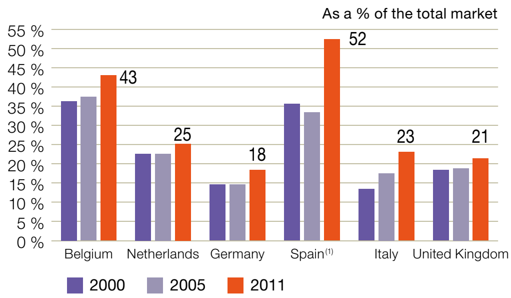
FRENCH MARKET SHARE



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



FRENCH MANUFACTURERS' SHARE IN THE MAIN EUROPEAN COUNTRIES



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

37%
SHARE OF FRENCH MANUFACTURERS IN TURNOVER OF LIGHT COMMERCIAL VEHICLES IN WESTERN EUROPE IN 2011

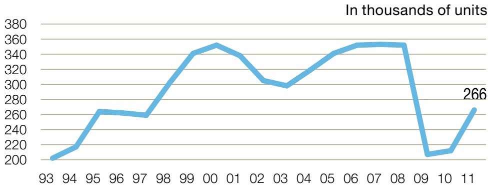
Light commercial vehicles are defined as freight carrying vehicles with a gross weight of less than five metric tons. They come in various categories: commercial vehicles derived from passenger cars, light vans, light trucks, large vans, pickups and 4WD. Since tax conditions are not the same in all European countries, the share of light commercial vehicles in total light vehicles ranges from 6% in Greece to around 21% in Norway. Globally, it stood at 11% in 2011 compared to over 12% in 2007. For many years, turnover 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 hit this market hard, and it had dropped to a level observed in 1996, before recovering in 2010 and continuing to rise in 2011. In Spain and Belgium, the market share of French manufacturers exceeded 40% in 2011. In Germany and Italy —countries with their own national manufacturers—the market share of the French manufacturers stood at 19% and 23% respectively, up since 2000.

France remains the leading European market (429,000 units) in front of the United Kingdom (267,000 units), Germany (239,000 units), Italy (172,000 units) and Spain (105,000 units).

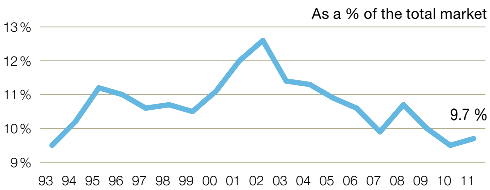
Heavy truck market and production in Europe

The European market for heavy trucks weighing more than 5 metric tons grew by 26% in 2011.
It stands at 266,000 units, a drop of 86,000 compared to 2008. After four years of growth between 2003 and 2007, and then leveling off at record levels in 2007-2008, the market plummeted in 2009; in 2011 it returned to a level comparable to that of 1995, which is two years after 1993, another dark year for heavy trucks.
European heavy truck production rose for the second consecutive year, increasing by 33% to 440,000 units, after the severe crisis of 2009 (64% down from 2008) following five years of high-level stability of the domestic market and the ongoing rise in exports of heavy trucks outside the EU-15, especially to Eastern Europe and Asia.
It was up 16% from 2003.

NEW HEAVY TRUCK REGISTRATIONS IN EUROPE



RENAULT TRUCKS' MARKET SHARE IN EUROPE



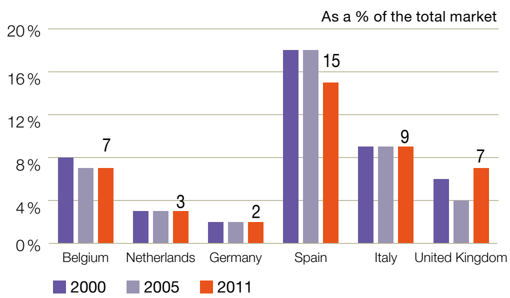
THE WESTERN EUROPEAN HEAVY TRUCK MARKET AND PRODUCTION

In thousands of units

	2003	2010	2011	Change 2011-2010
New heavy truck registrations				
5.1 t to 15.9 t	83	54	60	11.5%
16 t and over	214	158	206	30.3%
TOTAL	**298**	**212**	**266**	**25.6%**
Heavy truck production				
5.1 t to 15.9 t	102	77	–	–
16 t and over	279	254	–	–
TOTAL	**381**	**331**	**440**	**33%**

Source: CCFA.

MARKET SHARE OF RENAULT TRUCKS IN MAJOR EUROPEAN COUNTRIES



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 the impact of the financial crisis in 2009 and leveled out in 2011 at 16% above its 2003 figures, following two years of growth. 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. Compared with the dark years for heavy trucks —1993 and 2009—the market was up by 7% and 2% respectively one year later, and by 31% and 28% two years later.
Demand continued to focus on the 16 t-and-over segment, which accounted for 78% of total registrations, including both trucks and road tractors.
Within this climate, Renault Trucks registrations rose in 2011 and its market share stabilized at 10%, just under its 2007 levels. Renault Trucks' international expansion was affected by the collapse of the Southern Europe markets, and its European market share outside France (5%) remained slightly lower than that recorded in 2008 (6%).

+26%
INCREASE IN NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE IN 2011 COMPARED WITH 2010

French manufacturers in the new European Union member states

In 2011, vehicle production rose (+ 4% to 3.4 million vehicles) in relation to 2010, stabilizing at a record level that was higher than in the previous year, whilst new vehicle turnover rose at a slower rate (+1% to 994,000 units). The difference between production and turnover of new vehicles was therefore 2.4 million units. The local market is notably lower than its 2007 level (down by around 37%).
French manufacturers have had a commercial presence in this region for a number of years, and also have 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).
Part of these industrial plants enable the two manufacturers to meet automotive 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.

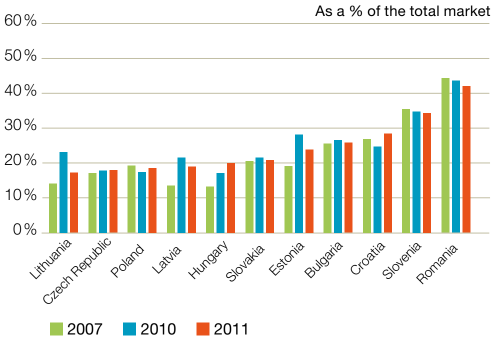
MARKET AND VEHICLE PRODUCTION IN THE MAIN CENTRAL AND EASTERN EUROPEAN COUNTRIES

New European Union member states [1] and Croatia — In thousands of units

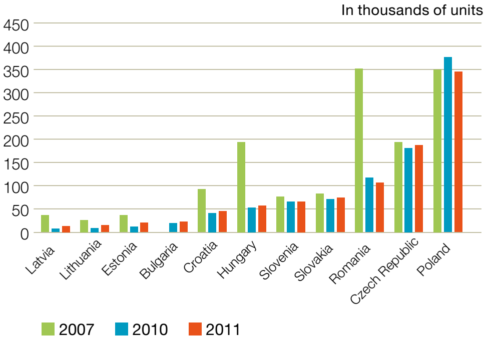
	2010	2011	Change 2011/2010
Vehicle production			
Passenger cars	3,150	3,244	3.0%
Light commercial vehicles	114	145	16.4%
Heavy trucks	10.2		
New vehicle registrations			
Passenger cars	857	841	–1.8%
Light commercial vehicles	95	108	14.2%
Heavy trucks	28.2	44.2	56.6%

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

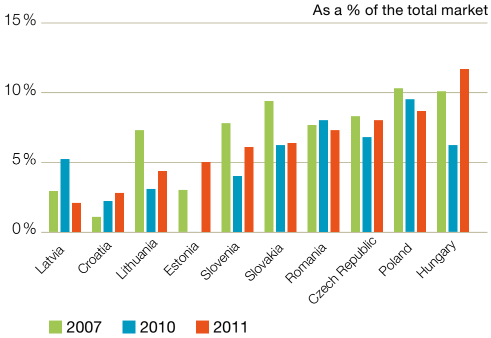
MARKET SHARES OF FRENCH MANUFACTURERS: NEW LIGHT VEHICLES



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



MARKET SHARES OF FRENCH MANUFACTURERS: NEW HEAVY TRUCKS



1 in 4
NEW LIGHT VEHICLES SOLD IN THE MAJOR NEW EU COUNTRIES IS MANUFACTURED BY A FRENCH GROUP

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 3.4 million vehicles in 2011. Their activity has grown as much as in Western Europe, unlike in recent years, in order to respond to the upturn in local demand with contrasting variations (– 2% for new passenger cars against + 14% and + 57% for light commercial vehicles and heavy trucks, respectively).
In 2011, because of the crisis, this production was higher for the third 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 2011, new vehicle turnover rose by 1% to 994,000 units after falling by 6% during the previous year. However, these results are different according to the country, with Poland and Romania suffering from lower turnover. Overall, the level in these countries is considerably lower than observed in 2007.

The automotive industry in the European Union

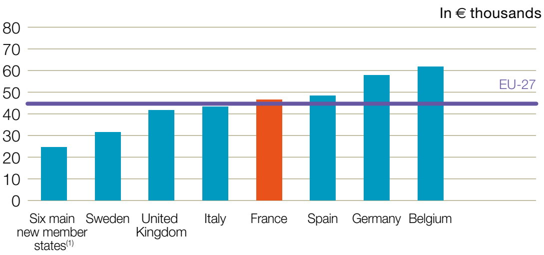
In 2009, 2.2 million people in the EU-27 worked in companies involved with the automotive industry. Value added per employee ranged from €25,000 a year in the six main new member states to almost €60,000 in Germany. In France, this figure was €47,000, considerably higher than the European average of €45,000. Per capita personnel costs ranged from €12,000 in the six main new member states to €62,000 in Germany; in France they were €51,000, above the European average of €41,000. Employer social contributions for personnel costs stood at 27% in France compared to 20% in Germany.

THE AUTOMOTIVE INDUSTRY IN THE EU-27 IN 2009 (1)

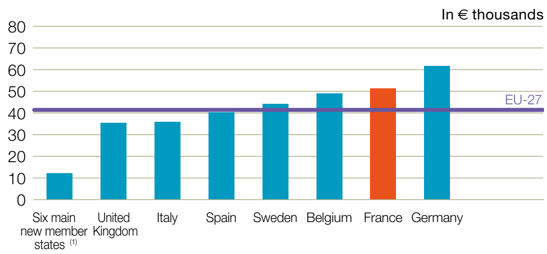
	Units	European Union (27 countries) (2)	Germany	France	Six main new member states (3)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**thousands**	**2,220**	**756**	**234**	**519**	**158**	**146**	**176**	**72**	**39**
Automotive manufacturing	thousands	1,000	472	145	132	68	65	68	42	22
Body and trailer manufacturers	thousands	170	41	25	–	23	12	16	8	6
Automotive equipment manufacturing	thousands	1,050	242	65	387	67	69	92	21	11
Turnover	**€ millions**	**625,000**	**272,009**	**88,799**	**72,121**	**43,284**	**46,025**	**49,156**	**16,321**	**13,286**
Production	**€ millions**	**522,000**	**229,042**	**54,105**	**69,658**	**36,669**	**42,081**	**39,247**	**15,640**	**12,749**
Production/Turnover	%	83.5	84.2	60.9	96.6	84.7	91.4	79.8	95.8	96.0
Value added (to factor costs)	**€ millions**	**99,000**	**43,639**	**10,914**	**12,720**	**6,565**	**7,071**	**7,602**	**2,266**	**2,391**
VA/Production	%	19.0	19.1	20.2	18.3	17.9	16.8	19.4	14.5	18.8
VA per employee	€ thousands	44.6	57.8	46.6	24.5	41.7	48.4	43.3	31.4	61.7
	Base 100: 6 main new member states	182	235	190	100	170	197	176	128	252
Goods and services purchased	**€ millions**	**521,000**	**224,924**	**75,007**	**59,877**	**35,992**	**39,533**	**40,808**	**15,434**	**10,732**
Purchases as a % of output	%	99.8	98.2	138.6	86.0	98.2	93.9	104.0	98.7	84.2
Personnel costs	**€ millions**	**91,800**	**46,639**	**12,031**	**6,278**	**5,577**	**5,886**	**6,309**	**3,193**	**1,895**
Personnel costs per employee	€ thousands	41.4	61.7	51.3	12.1	35.4	40.3	35.9	44.2	48.9
	Base 100: 6 main new member states	342	510	424	100	292	333	297	365	404
Gross Operating Surplus (GOS)	**€ millions**	7,200	**– 3,000**	**– 1,117**	**6,442**	**988**	**1,186**	**1,294**	**– 928**	**496**
GOS/VA	%	7.3	– 6.9	– 10.2	50.6	15.1	16.8	17.0	– 40.9	20.8

(1) Since 2008, data has been published in a new economic activity nomenclature, taking into account companies with fewer than 20 employees, involving in particular a change to the scope of the automotive industry (inclusion of electrical and electronic equipment manufacturers).
(2) Data for the EU (27 countries) has been reconsolidated by CCFA.
(3) Six main new member states: Czech Republic, Hungary, Poland, Romania, Slovakia and Slovenia.
Body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
Sources: Eurostat and CCFA estimates.

VALUE ADDED PER EMPLOYEE



PERSONNEL COSTS PER EMPLOYEE



The automotive industry is a key sector of the European economy, encompassing:
- automotive manufacturing;
- body and trailer manufacturing;
- automotive equipment manufacturing.

The data in the above table come from surveys of national companies and have been adjusted for consistency by Eurostat. Due to difficulties in collecting and standardizing statistics at both the national and European level, only data up to 2009 were available. In 2009, The European automotive industry employed 2.2 million people, 45% of whom worked in vehicle construction. Together, Germany and France accounted for over 40% of the employees in the industry, or 34% and 11% respectively. The percentage of people employed in the new six new member states (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) reached 23%.
In 2009, the number of employees in the automotive industry in Europe was substantially down from the previous year. It remained stable compared with 2000; however, it rose at a remarkable pace in the six new member states. Moreover, the crisis caused the value added per employee to drop from €56,000 to €45,000. The automotive industry differed significantly from country to country in terms of structure and wages.
In Germany, France and Sweden, the percentage of employees in the industry involved in automotive manufacturing was around 60%, compared with 25% in the six main new member states. It was between 39% and 45% in Italy, the United Kingdom, and Spain.
Personnel costs per person employed ranged from €12,000 in the six new member states to €62,000 in Germany, a ratio of 1 to 5.

2.2
MILLION PEOPLE WERE EMPLOYED IN THE AUTOMOTIVE INDUSTRY IN THE EU-27 IN 2009

French automobile manufacturers in 2011

FRENCH MANUFACTURERS IN 2011

	Units	PSA Peugeot Citroën	Renault
Turnover	€ millions	59,912	42,628
Capital expenditure	€ millions	2,253	1,567
Net income	€ millions	784	2,139
Employees worldldwide [(1)]	**No. of people**	**209,019**	**128,322**

	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
Turnover	€ millions	42,710	16,190	3,782	1,902	210	−4,892	40,389	2,358	−119
Operating income	€ millions	−92	651	223	532	7	−6	328	761	2
Capital expenditure[(2)]	€ millions	2,239			14			1,564	3	
Employees worldwide [(1)]	**No. of people**	**122,879**	**72,030**	**10,253**	**2,679**	**1 178**		**125,464**	**2,858**	

(1) On December 31st. (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.

351,000 people
WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

PSA Peugeot Citroën: www.psa.fr
In 2011, in a context of growth in the world market in which the base market was down following the end of demand incentive schemes, PSA Peugeot Citroën turnover dropped by 1.5%. The market share of the Group in Europe dropped due to its considerable presence in Spain, Italy, and the United Kingdom, but remains second (passenger cars and light commercial vehicles). Outside this region, the number of market outlets increased thanks to the positive results in Latin America, China and Russia; they represented 42% of total turnover, against 32% in 2007. The international expansion strategy is based essentially on lasting, targeted collaborations with other manufacturers. In 2006, a collaboration agreement was signed with Dongfeng Motor; it continued through 2011 with the construction of a third assembly plant, increasing its production capacity to 750,000 units. PSA collaborates with Mitsubishi in SUVs, electric vehicles and the assembly of vehicles in Russia (Kalouga). More recently, a collaboration agreement was signed with China Changan Automobile Group, which included 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. Finally, at the start of 2012, PSA Peugeot Citroën and General Motors announced the creation of a strategic global alliance based on two core pillars: platform sharing (vehicles, components and modules) and the creation of a worldwide joint venture for purchasing products and services. This agreement implies a capital increase of one billion euros for the PSA Group and GM taking a share of 7% in the Group.
The PSA Peugeot Citroën Group has a workforce of around 209,000 employees worldwide, including 100,000 in France, working at around twenty sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head offices, etc.). In the technological field, 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 has also been developed and industrialized in France since early 2012, to be installed in vehicles emitting less than 100 g of CO_2/km. The second Stop&Start generation—called e-HDi—is gradually being installed in the Group's ranges since late 2010. Finally, the first cars fitted with HYbrid4 technology have been on the market since Q4 2011.
The 2012 Action Plan, based on reducing costs, ongoing internationalization and product upgrading in order to meet global demand should enable the Group to overcome a difficult situation. 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, by labeling around one hundred major suppliers between now and 2015.

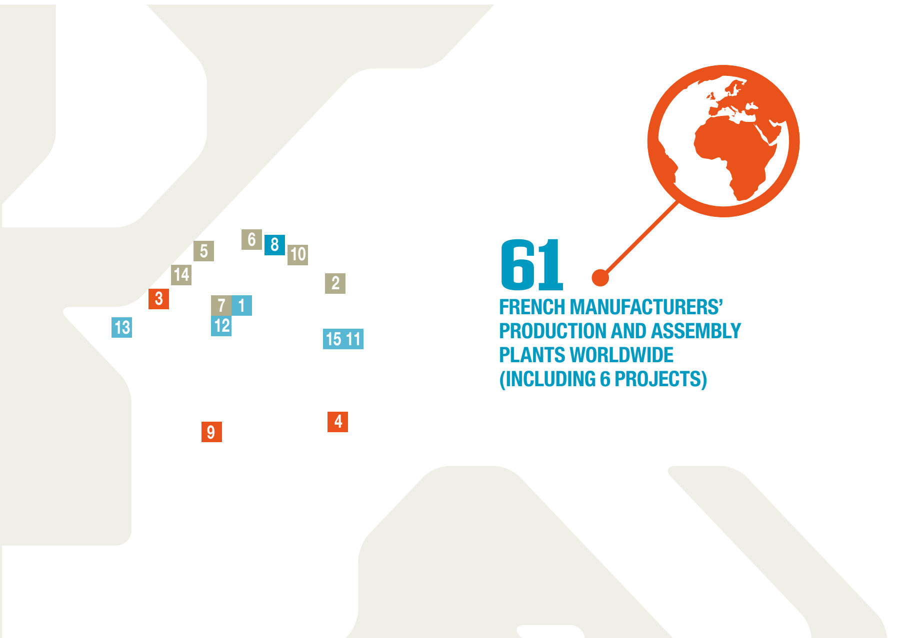
Renault: www.renault.com
Renault's international turnover rose by 3.6%, despite the fall of 5.7% recorded in an apathetic and highly competitive market. Outside Europe, they increased by almost 20% representing nearly 43% of turnover. The Renault make is ranked second in the European light vehicle market. 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 in early 2010) as well as purchasing, logistics, engineering, research and advanced studies. The Tangiers plant (Morocco), on which construction began in 2009, started operations in 2012. In addition, Renault and Nissan are collaborating on their electric vehicles. 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, with a majority shareholding from now to 2014, aims to speed up the growth of this manufacturer and strengthen its presence in Russia. The Renault Group has a workforce of around 128,000 employees worldwide, including 55,000 in France, working at around fifteen sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head offices, etc.).
In the context of their innovation policy, Renault and Nissan have invested €4 billion in electric vehicles in order to develop sustainable mobility. Furthermore, in 2011 the group launched the production of the 1.6 dCi 130 diesel engine at its Cléon plant, to continue improving the efficiency of heat engines.
In 2011, Renault launched a new strategic plan "Renault 2016 – Drive the change" with two main goals: Group growth and generation of free cash flow by 2016. This plan is based on seven levers, particularly focusing on quality (products and services) and profitability (cost reduction, R&D expenditure and investment optimization), whilst taking into account societal challenges for the automotive industry (sustainable mobility).

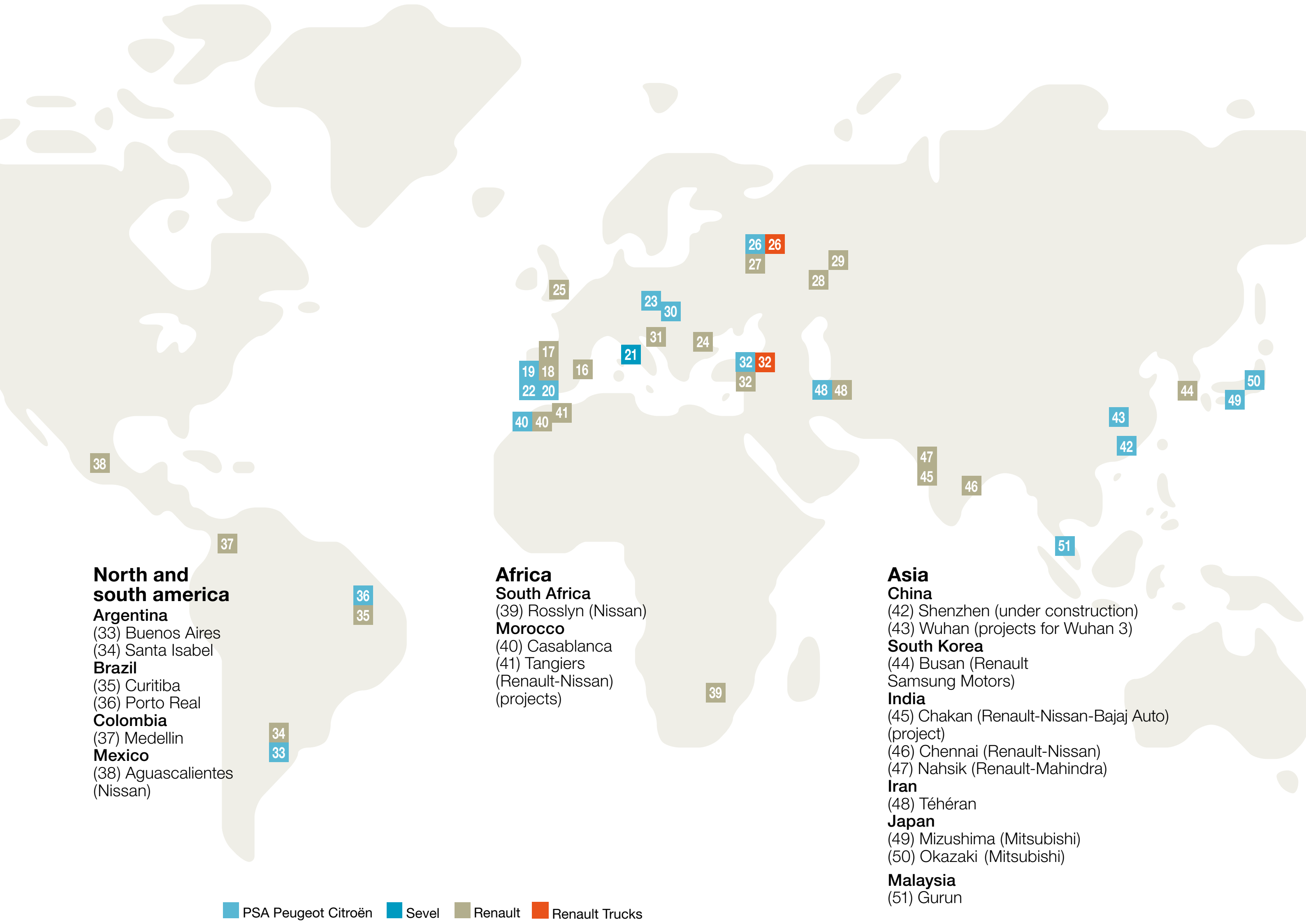
Renault Trucks: www.renault-trucks.com
The year 2011 was marked by a second year of growth in the European market for heavy trucks, in which Renault Trucks maintained its share of around 10%. Its activity grew substantially in Europe outside the EU and in Asia. Worldwide turnover of Renault Trucks were up by almost 60% from 2009.
Since 2009, Renault Trucks is using new sites outside Western Europe: the first in Turkey 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, Renault Trucks has ten assembly sites around the world.
Renault Trucks employs 14,000 people all over the world, of whom about 10,000 work in France (activities such as assembly, production of mechanical systems, research, etc.). Beyond industrial cooperation, synergies within the AB Volvo Group between the five makes (Renault, Volvo, Mack, UD Trucks—formerly Nissan Diesel—and Eicher) have continued.
The product offering is led by the current Euro V standards of October 2009 and Euro VI for the start of 2013 as well as the launch of solutions that aim to reduce heavy truck fuel consumption.

World production sites of French automobile manufacturers

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)
(27) Moscow
(28) Togliatti (AvtoVAZ)
(project)
(29) Ijevsk
Slovakia
(30) Trnava
Slovenia
(31) Novo Mesto
Turkey
(32) Bursa
(Tofas)
(Karsan)





North and south america

Argentina
(33) Buenos Aires
(34) Santa Isabel
Brazil
(35) Curitiba
(36) Porto Real
Colombia
(37) Medellin
Mexico
(38) Aguascalientes
(Nissan)

Africa

South Africa
(39) Rosslyn (Nissan)
Morocco
(40) Casablanca
(41) Tangiers
(Renault-Nissan)
(projects)

Asia

China
(42) Shenzhen (under construction)
(43) Wuhan (projects for Wuhan 3)
South Korea
(44) Busan (Renault
Samsung Motors)
India
(45) Chakan (Renault-Nissan-Bajaj Auto)
(project)
(46) Chennai (Renault-Nissan)
(47) Nahsik (Renault-Mahindra)
Iran
(48) Téhéran
Japan
(49) Mizushima (Mitsubishi)
(50) Okazaki (Mitsubishi)
Malaysia
(51) Gurun

World production of French manufacturers

In 2011, the global production of French manufacturers reached a record of 6.4 million vehicles, up 1.5% from 2010, when the previous record was reached. 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 70%, 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 slightly by 0.1% to 5.6 million units after recovering in 2010 (+ 17%); production of commercial vehicles (+ 12.8% to 802,000 units) and heavy trucks (+ 29.2% to 41,000 units), which had done well in 2008 before being heavily affected by the crisis in 2009, grew rapidly in 2010 and 2011.

PRODUCTION OR ASSEMBLY/PRODUCTION SITES PER MODEL

Group / Make	Model	Launch date	Production or assembly sites in 2011	Production (in units) Total at the end of 2011
PSA PEUGEOT CITROËN				
Peugeot, Citroën	i0n, C-ZERO	2010	Japan (Mitsubishi)	3,607/3,724
Peugeot, Citroën	107, C1	2005	Kolin (Czech Rep.)	666,917/639,760
Peugeot	206	1998	Mulhouse, Argentina, Iran	7,775,482
Peugeot	207	2006	Poissy, Villaverde (S), Trnava (Slovakia), Argentina, Brazil, China	2,369,549
Citroën	C2	2003	China	676,004
Citroën	C3, DS3	2002/2008/2009	Aulnay, Poissy, Villaverde (S), Porto Real (Br), Trnava (Slovakia)	3,113,192/147,254
Peugeot	307	2001	Argentina	3,677,711
Peugeot	308	2007	Mulhouse, Sochaux, Russia, China	1,072,551
Peugeot	RCZ	2010	Austria (Magna Steyr)	38,933
Peugeot	3008	2009	Sochaux	337,447
Peugeot	5008	2009	Sochaux	165,787
Citroën	Xsara Picasso	1997	Porto Real (Br)	3,362,154
Citroën	ZX	1991	China	2,526,363
Citroën	C4, DS4	2004/2010/2011	Mulhouse (DS4), Vigo (S), China, Russia, Argentina	2,512,111/34,902
Peugeot	405	1987/1993	Iran	4,518,350
Peugeot	407	2004	Rennes-la-Janais	860,956
Peugeot, Citroën	4007, C-Crosser	2007	Japan (Mitsubishi), Russia	46,658/45,430
Citroën	C5, DS5, C6	2008/2011/2006	Rennes-la-Janais (C6), Sochaux, China	1,120,615/4 773/22,004
Peugeot	408	2010	China, Argentina	124,689
Peugeot	508	2010	Rennes-la-Janais, China	138,043
Peugeot, Citroën	807, C8	2002	Hordain	185,190/143,761
Peugeot, Citroën	Bipper, Nemo	2008	Turkey (Tofas)	142,671/154,959
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (S), Mangualde (P), Turkey, Argentina	1,964,054/2,448,214
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	477,699/441,700
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (I)	782,012/683,112
RENAULT GROUP				
Renault	Twingo	1993/2007	Novo Mesto (SI), Colombia	2,488,210/671,920
Renault	Wind	2010	Novo Mesto (SI)	12,003
Renault	Pulse	2011	India	495
Renault	Clio	1998/2005	Flins, Turkey, Novo Mesto (SI), Valladolid (S), Dieppe, Argentina, Colombia, Mexico	5,556,606/2,618,747
Renault	Symbol	2008	Argentina, Turkey	296,213
Renault	Modus	2004	Valladolid (S)	634,146
Renault	Logan	2005	Russia, Brazil, Morocco, Colombia, Iran, India	1,053,215
Renault	Latitude	2010	South Korea	23,173
Renault	Sandero	2007	Brazil, Morocco, Colombia, South Africa (Rosslyn), Russia	495,635
Renault	Duster	2010	Russia, Brazil	28,989
Renault	Fluence	2009/2011	Turkey, India, Argentina	191,053/2,359
Renault	Mégane	2002/2008	Douai, Palencia (S), Turkey, Brazil, Russia, Iran	3,808,516/1,340,904
Renault	Laguna	2007	Sandouville	285,233
Renault	Espace	2002	Sandouville	351,880
Renault	Kangoo	1997/2007/2011	Maubeuge, Morocco, Argentina	2,574,062/507,166/2,468
Renault	Master	1997/2010	Batilly, Brazil	1,061,419/157,158
Renault	Trafic II	2001	Luton (UK, GM), Barcelona (S, Nissan)	549,929
Dacia	Logan	2004	Pitesti (Romania)	1,181,028
Dacia	Sandero	2008	Pitesti (Romania)	439,094
Dacia	Duster	2010	Pitesti (Romania)	247,694
RSM	SM3/Fluence	2002/2009	Busan (South Korea)	486,986/132,476
RSM	Latitude	2010	Busan (South Korea)	114,240
RSM	QM5 (Koleos)	2007	Busan (South Korea), India	199,159
RSM	SM7	2004/2011	Busan (South Korea)	119,256/10,630

Sources: CCFA, PSA Peugeot Citroën, Renault.

In 1996, French automobile manufacturers changed the way they reported output. They began reporting the number of vehicles assembled at the 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).*

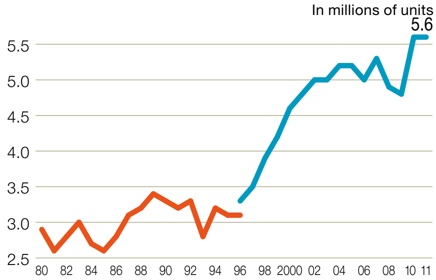
6.4 million
VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE IN 2011

Markets for new French vehicles

In 2011, after growing for three years, domestic markets for French manufacturers contracted (– 5%), while turnover outside of France rose by 2%.
In France, the end of the scrap incentive scheme, which benefitted segments in which French manufacturers have a large presence, greatly affected their turnover.
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.
Exports outside Europe (in other words outside the EU-27, Switzerland and Norway) stood in 2011 at almost 60% of the total markets of French manufacturers, against more than 50% in 2010 and less than 30% in 2000.

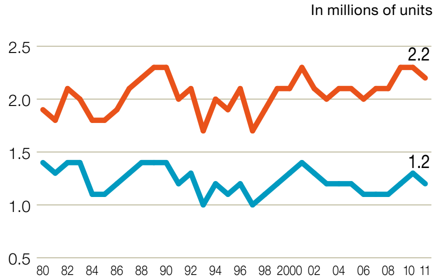
WORLD PRODUCTION OF FRENCH AUTOMOBILE MANUFACTURERS

New passenger cars



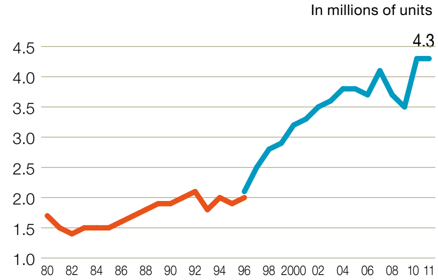
VEHICLE REGISTRATIONS IN FRANCE

New passenger cars

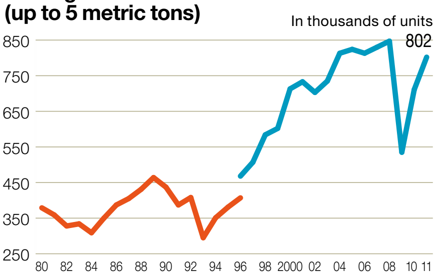


FRENCH CAR EXPORTS

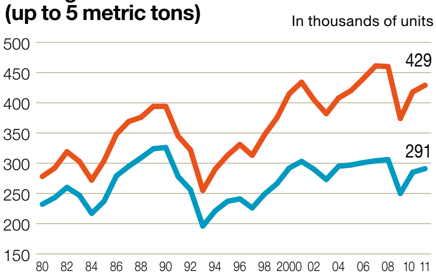
New passenger cars



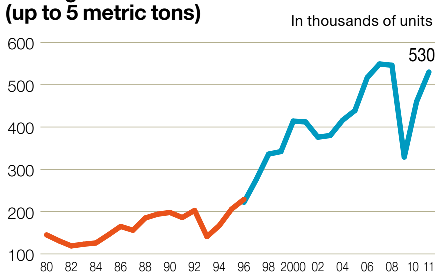
New light commercial vehicles (up to 5 metric tons)



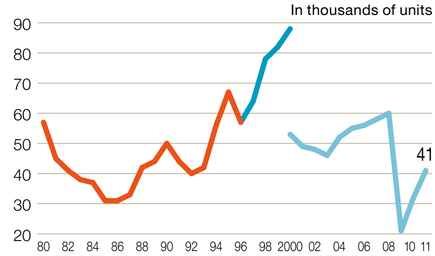
New light commercial vehicles (up to 5 metric tons)



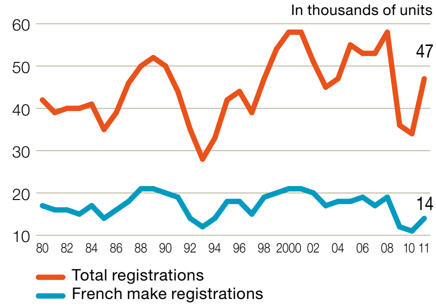
New light commercial vehicles (up to 5 metric tons)



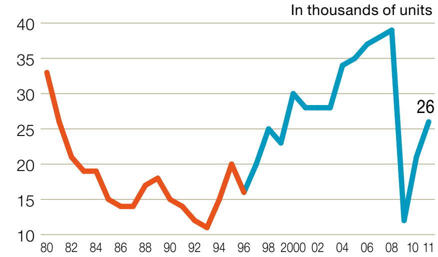
New heavy trucks over 5 metric tons



New heavy trucks over 5 metric tons



New heavy trucks over 5 metric tons



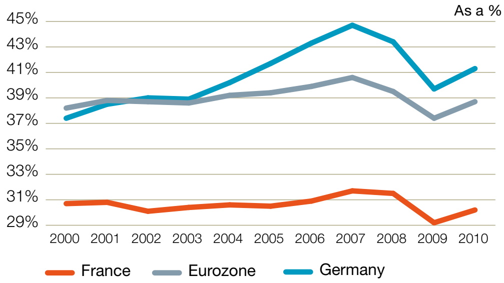
From 1997 to 2001, registrations of French vehicles in France followed a rising trend. An offer that was rich in new models, efficient and financially advantageous allowed them to gain market share over 1997 figures. The cycle reversed in the period 2002-2007. Increased competition and, subsequently, a selective turnover strategy implemented by French manufacturers had not allowed them to consolidate these gains. In 2008, the rise in volumes sold can be explained by the dynamic commercial vehicle market and the offer from French manufacturers that was rich in models with low CO_2 emissions in line with the "bonus/malus" system. In 2009 and 2010, this eco-scheme associated with the scrap incentive program supported general car turnover and particularly those of French groups adapted to the offer. In 2011, the end of the system for supporting the market implied a reduction in turnover, especially affecting French manufacturers. Since 2006, French car exports have included the Renault Trafic II and, since 2007, the exports of Renault Samsung Motors. French passenger car exports reached 4.3 million units, a rise of 1%. Commercial vehicle exports increased significantly for the second year running after being greatly affected by the recession. Light commercial vehicle production totaled 530,000 units (up 15%) and 26,000 units (a 26% rise) for heavy trucks.

6 out of 10
RATIO OF VEHICLES EXPORTED BY FRENCH MANUFACTURERS IN 2011 SOLD OUTSIDE THE EU-27, SWITZERLAND AND NORWAY

Competitive factors in the French automotive industry

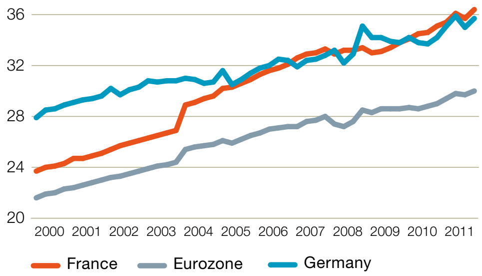
In a very competitive global market, French automobile manufacturers must be efficient, able to handle industry-wide factors such as the weight of social security contributions, taxes, the strong euro and also problems that represent serious issues for the automotive sector like the opening of the base market to competition, the difficulty of passing the rise in raw material costs on to the end customer, and more. All these factors affect margin rates (ratio of operating cash flow to value added). In 2010, industry conventions had already shown, compared to other Eurozone countries, the sustained weakness of margins in French industry and its impact on the financing of investments and the improvement of competition.

MARGIN RATE OF NON-FINANCIAL COMPANIES: RATIO OF GROSS OPERATING SURPLUS (1) OVER VALUE ADDED (GOS/VA)



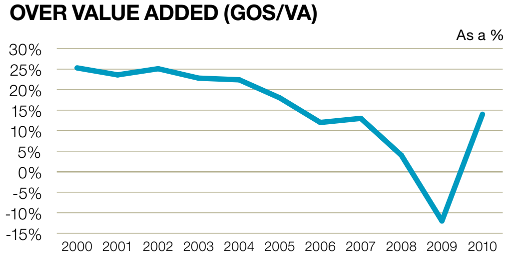
(1): Gross operating surplus and gross mixed income.
Source: Eurostat.

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



(1): Gross operating surplus and gross mixed income.
Source: Eurostat.

MARGIN RATE OF THE AUTOMOTIVE SECTOR: RATIO OF GROSS OPERATING SURPLUS OVER VALUE ADDED (GOS/VA)



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

€ 5

THE DIFFERENCE BETWEEN FRANCE AND GERMANY, TO GERMANY'S ADVANTAGE, IN THE INCREASE OF LABOUR COST PER HOUR IN MANUFACTURING BETWEEN 2000 AND 2011

According to INSEE, the margin rate for the automotive sector fell from 25% in the early 2000s to 14% in 2009. The margin rate depends mainly on cost competitiveness and is linked in the medium term to competitiveness exclusive of price.

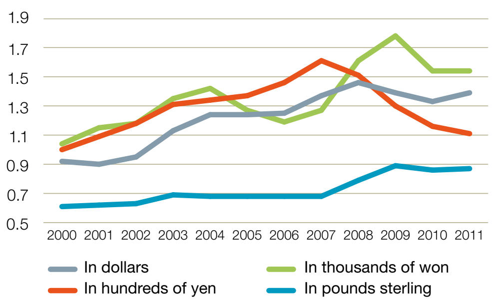
Furthermore, the prices of raw materials denominated in euros have risen substantially since 2001. Passing these price hikes on to consumers is extremely difficult in an environment of aggressive competition and declining purchasing power of households affected by significant price increases in a range of areas: food, energy, housing, etc.

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. Operating margin (operating income/turnover) is one of the tools that can be used to measure this performance of automotive groups. In 2011, it stood at 2.6% for Renault and 2.2% for PSA. And yet, the operating margin of the German groups stood at 7.1% for Volkswagen, 11.7% for BMW and 8.2% for Daimler.

Beyond the problems of global competition of economy 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 weight of social security contributions in the job factor. In France, it 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. However, compulsory levies on labor affect automotive manufacturing directly and indirectly through the chain of supply. Furthermore, the exchange rate can significantly alter trade terms because of the increasingly large share of production outside of the Eurozone.

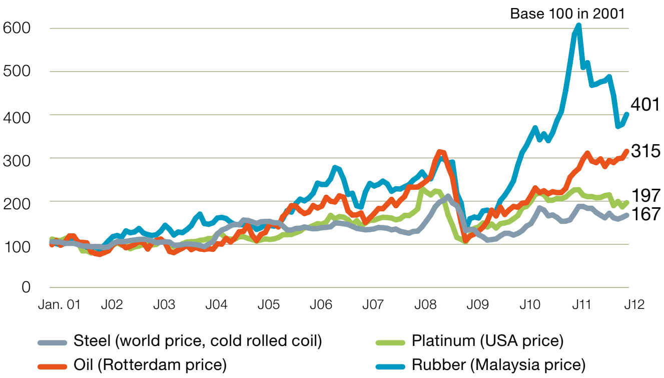
The prices of raw materials in euros have increased hugely since early 2001, despite the fall observed during the latest crisis. At the start of 2012, rubber was up 301%, oil 215% and steel 67%. It is difficult to pass price hikes on to consumers in the current climate of stiff competition. This is particularly 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.

EURO EXCHANGE RATE

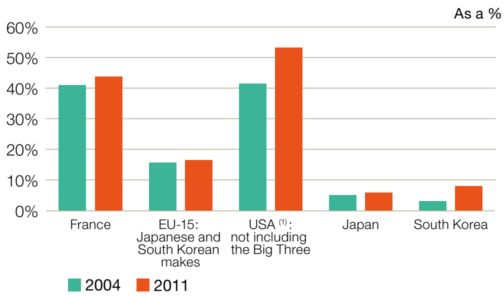


Source: IMF.

RAW MATERIAL PRICES IN EUROS

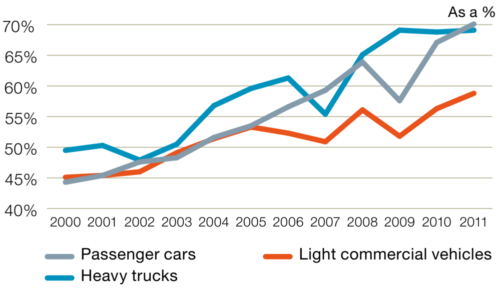


SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS



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

SHARE OF NON-EUROZONE COUNTRIES IN EXTERNAL MARKETS FOR FRENCH MANUFACTURERS



Source: CCFA.

Since early 2002, the euro's rise has affected French exports, forcing companies to bolster their turnover and production initiatives in order to continue to expand their markets outside the euro zone (66% of total markets).

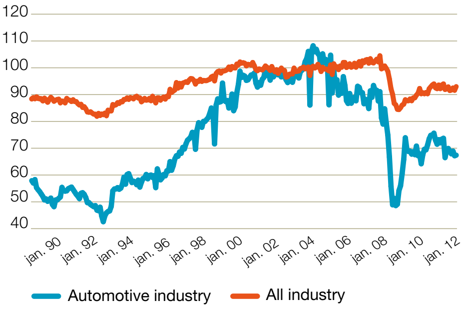
On the other hand, there are factors associated with opening up the market, whether internal or external. In general, the internal "base market" acts as a strong foundation for using international development and innovation to drive growth in foreign markets. The French automotive industry's base market 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, such as Japan or South Korea, market access is more difficult and local manufacturers therefore have a broader base market from which to develop internationally. This leads to asymmetry in the exchanges between the latter two countries and the European Union, which could be increased by a bilateral reduction of customs fees.

9 points
DIFFERENCE IN MARGIN RATE OF NON-FINANCIAL COMPANIES BETWEEN FRANCE AND THE EUROZONE

The automotive industry and the financial and economic crisis

Registrations of new light vehicles (passenger cars and light commercial vehicles) stood at 14.4 million units in 2011 against 16.9 million in 2007, which is a decrease of 15%. This drop in the market outlets can be seen in the industrial production index of the automotive industry in France, measured by the INSEE, which plummeted from 100 to 2005 to 71 in 2011. These fluctuations affected a large sector that has a major 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 implemented measures with short-term effects (training assistance, short-time working, scrapping premiums, 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 the modernization of automotive equipment manufacturers in 2009). All these tools are useful, but since the crisis is continuing, they must be adapted to this extremely capital-intensive 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. Following an initial active phase, the PFA should start to undertake new projects.

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	n/a	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 – L'essentiel no. 113 – May 2009
Seine-Aval	11,200	3,300	3,600	2006	Ile-de-France INSEE – *À la page* no. 291 – January 2008
Val-d'Oise and Yvelines	75,000	75,000	50,000 to 100,000	2006-2007	RAVY (Automotive Network of Val-d'Oise Yvelines) – Press release – 2008 Version
France	One unit of value added in the automotive sector generates 4.1 units of value added in the national economy.				INSEE – Outlook report – March 2012

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 €19 billion on December 31, 2011
Fund for the 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 equally distributed among PSA Peugeot Citroën, Renault SA and the FSI
Funds for the modernization of automotive equipment manufacturers (FMEA) Level 2	November 2009	Fund specifically aimed at smaller automotive suppliers (Level 2 and higher)	€50 million gathered by five leading automotive equipment manufacturers, the FSI, and the players of FMEA Level 1

Source: Strategic investment fund (FSI)

4.1

UNITS OF VALUE ADDED IN THE NATIONAL ECONOMY GENERATED FOR EACH UNIT OF VALUE ADDED IN THE AUTOMOTIVE SECTOR

The economic and financial crisis has important effects on the automotive sector, upstream starting with the suppliers and downstream as far as vehicle turnover/maintenance, including freight transport, manufacturers of equipment or services for companies, including research and development.

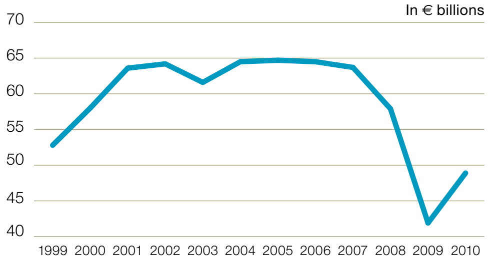
INSEE Outlook Report of March 2012 shows that one unit of value added in the automotive sector generates 4.1 units of value added in the national economy. In addition, industrial sites generate local economic activity that is not limited exclusively to their own employees (direct employment). Regional divisions of the INSEE have produced papers describing, on the one hand, indirect jobs made up of personnel employed by suppliers, sub-contractors 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. Economic policies for limiting the effects of sudden fluctuations in the automotive markets have benefits that extend well beyond the sector. During a crisis period, schemes such as CIR, future investments, loans from the European Investment Bank (EIB) or the Framework Program for Research and Technological Development (PCRD) of the European Union make it possible to guarantee effective stimulation of funding for R&D. As regards long-term financing difficulties, the Strategic Investment Fund (FSI) had invested by the end of 2011 in three companies in the automotive sector. As for the Fund for the modernization of automotive equipment manufacturers (FMEA) to which French manufacturers contributed €400 million, it has invested almost €300 million in 18 equipment manufacturing companies.

Oseo has also supported the financing of SMEs in the branch. 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). In addition, the PFA has organized trade days, in particular dealing with die stamping. On a local level, it has collaborated with the Public Authorities (DIRECCTE, the leading regional automotive company, the credit mediator, OSEO, CDC), the UIMM and other professional organizations, and with 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

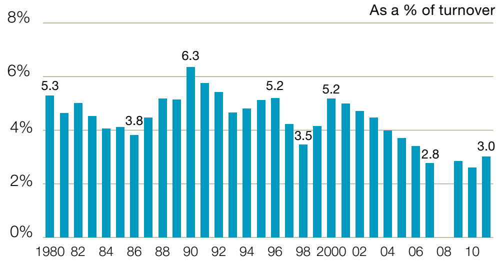
The automotive industry uses a wide variety of technologies, requiring significant investments: automotive production has invested almost 3% of its total annual turnover figures in technology since the crisis at the end of 2008. In a new scope of the industry (now including extractive industries, food industries and industrial companies with fewer than 20 employees), the automotive industry represented 4.5% of the gross fixed investments exclusive of contributions in 2010, against almost 7% in 2009. 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.

TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR

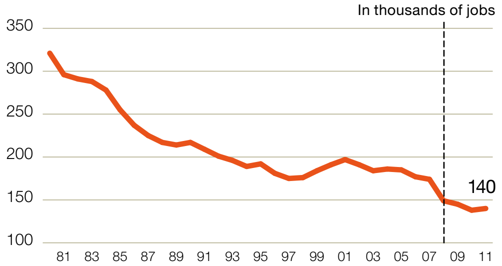


For this graphic only: Source: INSEE, National accounts base 2005 (see also page 52).

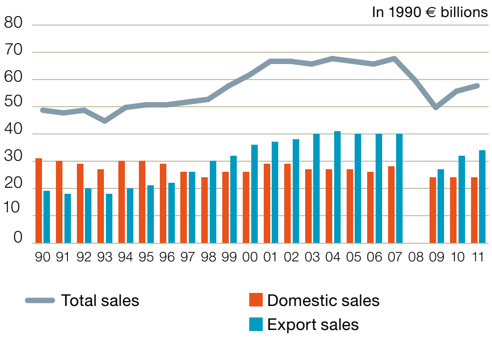
INVESTMENTS OF AUTOMOTIVE MANUFACTURING (1)



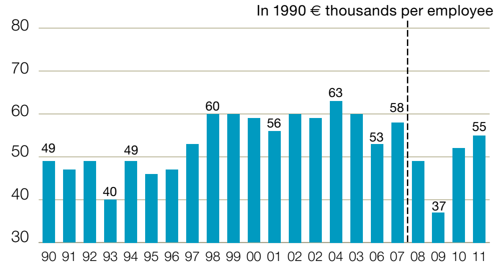
EMPLOYEES IN AUTOMOTIVE MANUFACTURING (1)



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



VALUE ADDED OF AUTOMOTIVE MANUFACTURING (1)



(1) : CCFA estimations for 2011 (see also pages 72 and 73, particularly for the concept changes)

Every year, the Service des Etudes et des Statistiques Industrielles (SESSI), formerly the Department for Industrial Studies and Statistics and now attached to the INSEE, produces annual surveys providing one of the main sources of information about 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 and in 2011, but did not climb higher than its pre-recession levels.

The automotive manufacturing industry dedicated 3% of turnover to capital expenditure (€2.5 billion) to develop new models and optimize its production capacity. These figures do not include research and development costs (see the next page).

Export turnover have increased constantly since 1990, when they reached 38%, oscillating around 60% until the crisis of 2008. After falling, they recovered to almost 58% in 2011, despite the bad figures for the European market.

7%
SHARE OF AUTOMOTIVE INDUSTRY EMPLOYEES IN THE FRENCH INDUSTRY IN 2011

Research and development expenditure in the automotive sector

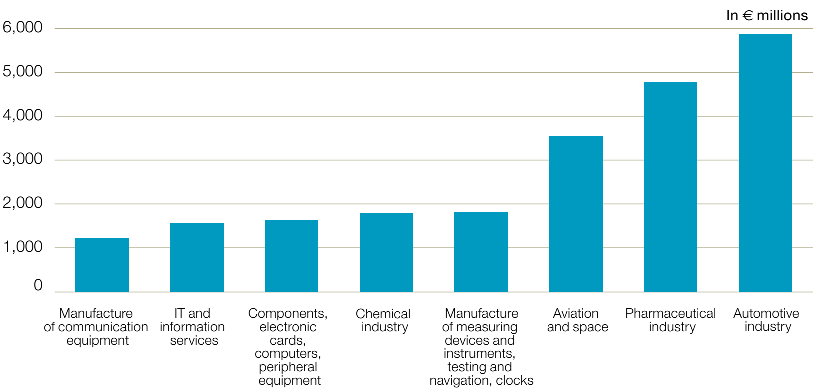
In 2009, the French automobile industry remainder the leader of all industries in France in terms of corporate research and development spending. Its expenditure was €5.9 billion, accounting for 18% of total corporate spending on research and development. After rising strongly between 2001 and 2006 (+ 24%), R&D expenditure in the automotive industry reached a ceiling of around €4 billion before growing by 10% in 2008 and the shrinking again in 2009 (– 2%). It represents 60% of the gross value added in the sector. The automobile leverages a wide variety of technologies and therefore requires significant research initiatives to ensure its reliability throughout its lifetime, user safety and environmental protection. The automotive industry's R&D budgets exceeded those of the pharmaceutical industry and the aviation and space industry.

GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2009

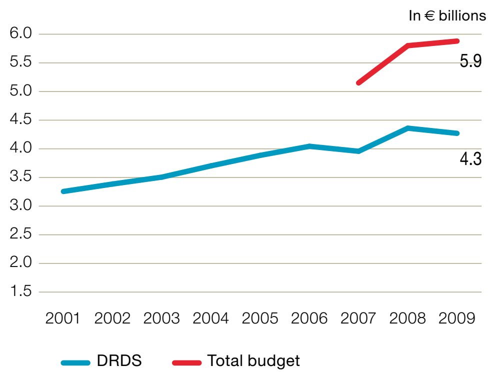
	DRDS (1)	ERDS (2)	Total budget		Of which public financing (3)	
	in € million	in € million	in € million	as a % of total	in € million	as a % of total
Automotive industry	4,269	1,608	5,877	17.6%	29	1.2%
Pharmaceutical industry	3,392	1,395	4,787	14.3%	70	2.8%
Aviation and space	2,546	997	3,543	10.6%	665	26.3%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,431	376	1,808	5.4%	348	13.8%
Chemical industry	1,446	339	1,785	5.3%	81	3.2%
Components, electronic cards, computers, peripheral equipment	1,414	217	1,631	4.9%	167	6.6%
IT and information services	1,446	105	1,551	4.6%	67	2.7%
Manufacture of communication equipment	984	243	1,227	3.7%	s	s
Other specialized, scientific and technical activities	923	176	1,099	3.3%	128	5.1%
Manufacture of machinery and equipment not included elsewhere	917	142	1,059	3.2%	31	1.2%
Manufacture of electrical equipment	856	124	980	2.9%	14	0.6%
Publishing, audiovisual, and broadcasting	724	102	826	2.5%	50	2.0%
Other branches	5,994	1,295	7,289	21.8%	873	34.6%
TOTAL	26,341	7,121	33,463	100.0%	2,525	100.0%

(1) DRDS: Domestic Research and Development Spending.
(2) ERDS: External Research and Development Spending.
(3) Excluding research tax credit.
s: statistical secret.
Source: French Education and Research Ministry (MEN-MESR-DEPP C2).

TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2009 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY SPENDING ON RESEARCH AND DEVELOPMENT



18%
SHARE OF THE AUTOMOTIVE INDUSTRY IN THE TOTAL RESEARCH AND DEVELOPMENT BUDGET OF COMPANIES IN 2009

The Office for research-related statistics 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 economic category. 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 2009, 18% 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 2009, 33,000 equivalent full-time employees (including 16,800 researchers) worked in automotive R&D. These figures were up 1% compared to 2003 (+ 22% for researchers). According to the French National Industrial Property Institute (INPI), PSA Peugeot Citroën Automobiles (including Faurecia) and Renault were among the largest patents applicants with the INPI in 2011. France has three major equipment manufacturers in the top twenty. The companies in the automotive sector are still the leading patent applicants.

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 productivity and improve the competitive edge of French companies.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2010 (1)

	Mov'eo	Véhicule du Futur	LUTB	iDforCAR
With a…	International vocation	National vocation	National vocation	National vocation
Number of companies with a business unit in a competitiveness cluster	200	113	104	86
Of which SMEs (under 250 employees)	136	54	54	50
Employees of business units involved in the cluster (number of people)	25,874	48,097	32,182	17,423
Spending by public bodies on cluster projects (in € thousands)	45,502	29,756	18,400	n/a
Spending by corporate bodies on cluster projects (in € thousands)	122,912	23,797	34,500	n/a
Total spending:	168,414	53,553	52,900	n/a
Number of labeled projects	**55**	**26**	**21**	**25**

(1) Information concerning the size of companies and employees corresponding to 2009.
Sources: DGCIS survey, INSEE, DIACT, competitiveness clusters

French manufacturers rely heavily on national territory in the field of research and development. Renault obtained 80% of the value added from R&D in France; PSA employs 90% of its research workers in France; and at Renault Trucks almost 1,400 of the 10,000 employees in France are working on research and development.

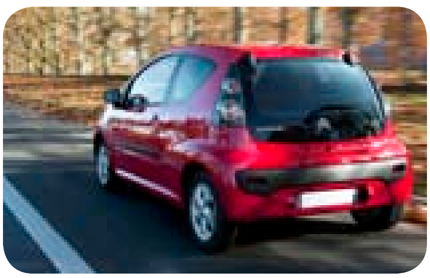
In 2011, the automotive industry continued to conduct its research and development efforts through clusters, where it works to meet the challenges of industrial excellence and durable mobility. This transverse action brings together automakers, equipment manufacturers, innovative small and mid-sized companies, research laboratories and training organizations including universities.

The internationally oriented Mov'eo cluster (www.pole-moveo.org) covers the Ile-de-France, Lower Normandy and Upper Normandy 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, involving small and mid-sized companies, by developing know-how in small series and specific vehicles, a field with stiff competition on the international stage.

In 2009 (semi-definitive data), the manufacturing industry received 64% of the total Research Tax Credits, representing €5.1 billion. The automotive industry was the third highest recipient of Research Tax Credits, representing 7.5% The €750 million package of investments for the future dedicated to the automotive sector concern vehicles for the future which must be more economical and more efficient in environmental terms. The automotive industry also benefits from sections which it can access among the other future investment programs, including a project relating to the creation of an internationally oriented "Institute for Excellence in Carbon-Free Energy" named "Véhicule Décarboné Communicant et sa Mobilité" (VeDeCoM – Communicating Carbon-Free Vehicle and its Mobility). VeDeCom is based on a single site in the Yvelines and is set to become a reference in the new eco-mobility branch. It groups together more than 40 members: large industrial groups including PSA and Renault, SMEs, research laboratories and centers, colleges and training centers, as well as local authorities.

503
NUMBER OF COMPANIES THAT HAVE A BUSINESS UNIT BELONGING TO A COMPETITIVENESS CLUSTER



French automotive foreign trade

2011 was a positive year for world trade after an unprecedented contraction in 2009. In this climate, exports of French automotive products rose by 7% to €42.4 billion. The automotive industry remains one of the leading export sectors alongside aeronautical, agri-food, etc. In 2010, three companies in this sector ranked among the ten leading export companies.
The balance of the automotive industry fell to € 4.9 billion, affected mainly by the weakness of the European market and low demand for premium ranges in Europe, which limit the market opportunities for the domestic plants of French manufacturers. Furthermore, the strength of imports of new passenger cars from Germany standing at €8.7 billion, which was an increase of 13% relative to the previous year, considerably affected the deficit.
The positive balance for parts rose to €5.3 billion, mainly due to the increase in production at French manufacturers' sites outside France, using French supplies, for example for thruster units (surplus of €1.9 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)									
2010	15.2	1.7	2.3	20.4	39.6	1.1	40.7	389.7	10.4%
2011	16.0	2.1	2.5	21.9	42.4	1.0	43.5	420.9	10.3%
% change 2011/2010	+5.0	+22.7	+7.6	+7.4	+7.1	−2.9	+6.9	+8.0	
IMPORTS									
(CIF)									
2010	22.4	2.9	2.4	15.3	43.0	1.2	44.2	455.0	9.7%
2011	24.6	3.0	3.0	16.6	47.3	1.1	48.3	507.8	9.5%
% change 2011/2010	+10.1	+2.9	+24.9	+8.7	+10.0	−9.1	+9.4	+11.6	
BALANCES									
2010	−7.1	−1.2	−0.1	+5.1	−3.4	−0.1	−3.5	−65.2	
2011	−8.6	−0.9	−0.5	+5.3	−4.8	−0.1	−4.9	−86.9	
COVERAGE RATE [2]									
2010	68	58	95	133	92	88	92	86	
2011	65	69	82	132	90	94	90	83	

(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, 2,000 base.

EXPORT RANKING – YEAR 2010

Rank	Company [1]
2	Peugeot Citroën Automobile SA
4	Renault SAS
9	Automobiles Peugeot
17	Renault Trucks

(1) In this ranking, Customs uses the company name, not the group.
Source: Customs.

10%
SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS IN 2011

In 2011, the automotive industry's share of all goods exports (imports) stood at 10%. In 1997, a crisis year for the French new vehicle market, they stood at 12% and 9% respectively.
The trade balance for passenger cars improved significantly between 1996 and 2004, from a deficit of €350 million in 1996 to healthy surpluses of more than €7 billion. Since 2005, a decrease in production in France and rising imports following the large-scale opening of the French markets to foreign manufacturers were reflected in a sharp decline in the surplus, which became a deficit in 2007, and worsened in 2008 and 2009, before improving in 2010. The slowdown of activity in 2011 increased the deficit.

The trade balance deficit for commercial vehicles improved to €0.9 billion in line with the rise in exports. After falling sharply in 2009, exports of light commercial vehicles and heavy trucks made a clear recovery in the following year. In 2011, they increased by 22.7% to €2.1 billion and by 7.6% to €2.5 billion, respectively. Trade in parts and engines increased: + 8.7% for imports and + 7.4% for exports. The trade surplus rose by 3.5% to €5.3 billion.
The Customs ranking of exporters regularly includes three French automotive manufacturers among the top ten exporters. Renault Trucks was the seventh largest exporter before the crisis.

French automotive foreign trade

The deficit in industrial automotive goods (excluding used vehicles) increased to – €4.8 billion (down by €3.4 billion in 2010). This represents a deficit of € 8.6 billion with the EU-27 and a €3.8 billion surplus with the rest of the world.
The rising deficit of the automotive industry is due to the results recorded within the EU-27, which dropped due to the weakness of the European automotive markets and the dynamism of new passenger car imports from Germany (€8.7 billion) and the United Kingdom (€1.7 billion).
The surplus with the rest of the world rose to €3.8 billion compared with €3.1 billion in 2010. The deficit with Turkey fell for the second consecutive year after three years of growth (– €98 million). Exchanges with many countries always result in important surplus figures: Algeria (€820 million), Switzerland (€720 million), Iran (€520 million), Brazil (€490 million), and China (€420 million).

INDUSTRIAL AUTOMOTIVE TRADE BALANCE

In € billions

	1985	1990	2000 (1)	2005	2008	2009	2010	2011
All	4.57	4.13	9.84	8.21	−3.19	−4.42	−3.36	−4.81
INTRA EC (12 countries)	**0.29**	**0.45**						
INTRA EU (15 countries)			**5.80**	**4.11**	**−5.04**	**−3.11**	**−3.45**	**−5.15**
INTRA EU (25 countries)				**4.42**	**−6.24**	**−5.41**	**−6.08**	**−8.22**
INTRA EU (27 countries)					**−6.06**	**−5.63**	**−6.49**	**−8.58**
of which: Germany	−1.62	−2.20	−3.75	−5.54	−8.07	−6.09	−6.78	−7.29
Austria			0.33	0.43	0.37	0.31	0.25	0.21
Belgium-Luxembourg	0.26	0.68	0.35	2.23	2.42	2.12	1.94	1.93
Denmark		0.12	0.23	0.34	0.29	0.10	0.23	0.31
Spain	−0.55	−0.14	1.55	0.46	−2.92	−1.62	−1.98	−2.81
Finland			0.17	0.23	0.13	0.06	0.11	0.12
Italy	0.59	0.13	0.58	1.56	0.21	0.77	0.69	0.80
Netherlands	0.34	0.57	1.54	0.37	0.27	−0.01	0.20	0.35
Poland				0.15	0.01	−0.38	−0.50	−0.57
Portugal	0.12	−0.12	0.50	0.51	0.26	0.04	0.02	−0.26
Czech Republic				−0.21	−0.69	−1.00	−1.08	−1.29
United Kingdom	0.98	1.21	3.56	2.81	2.04	1.06	1.66	1.60
Slovenia				0.05	−0.27	−0.46	−0.42	−0.36
Sweden			0.14	0.07	−0.43	−0.01	−0.02	−0.29
OUTSIDE EC (12 countries)	**4.27**	**3.69**						
OUTSIDE EU (15 countries)			**4.04**	**4.10**	**1.85**	**−1.31**	**0.09**	**0.34**
OUTSIDE EU (25 countries)				**3.79**	**3.05**	**0.99**	**2.72**	**3.41**
OUTSIDE EU (27 countries)					**2.87**	**1.21**	**3.13**	**3.77**
of which: Austria	0.15	0.22						
Finland		0.10						
Norway		0.06	0.13	0.20	0.12	0.08	0.17	0.22
Poland			0.25					
Czech Republic			−0.01					
Slovenia			0.15					
Sweden		0.05						
Switzerland	0.27	0.50	0.59	0.57	0.45	0.46	0.61	0.72
Turkey		0.17	0.55	0.13	−0.86	−0.94	−0.61	−0.51
Canada	0.12	0.15	−0.02	0.02	0.02	0.03	−0.01	0.01
USA	0.81	0.41	0.46	0.41	0.07	0.22	0.23	0.30
Mexico	0.00	−0.01	0.03	0.13	0.05	0.03	0.03	0.13
Argentina		0.06	0.38	0.17	0.27	0.19	0.32	0.32
Brazil		0.07	0.25	0.19	0.36	0.29	0.45	0.49
Algeria	0.56	0.47	0.29	0.52	0.81	0.77	0.82	0.82
Morocco		0.18	0.12	0.17	0.27	0.28	0.27	0.25
Nigeria		0.14	0.15	0.08	0.06	0.02	0.02	0.02
Tunisia		0.11	0.17	0.08	0.08	0.10	0.12	0.08
Saudi Arabia		0.06	0.06	0.06	0.08	0.06	0.07	0.09
China		0.05	0.09	0.26	0.16	0.19	0.30	0.42
South Korea		0.02	−0.22	−0.47	−0.40	−0.30	−0.23	−0.35
Iran		0.10	0.15	0.92	0.80	0.59	0.64	0.52
Japan	−0.43	−0.63	−1.04	−1.67	−1.42	−1.60	−1.50	−1.67
Taiwan	0.03	0.14	0.02	−0.02	−0.04	−0.03	−0.02	−0.03

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

Having exceeded €4 billion between 1997 and 2005, the trade surplus with the EU-15 gave way to a deficit of € 1.2 billion in 2007. This extended in 2008 to € 5 billion and dropped to €3.1 billion in 2009, before rising again to reach € 5.1 billion in 2011. Between 2010 and 2011, the deficit increase can be explained by downgrading exchange with Germany (from € 6.8 billion to €7.3 billion) and with Spain (from € 2 billion to € 2.8 billion), due to a very weak market in the latter country. Nevertheless, there are important trade surpluses with Belgium-Luxembourg (€ 1.9 billion), the United Kingdom (€ 1.6 billion) and Italy (€ 0.8 billion).With the 12 new EU member states, the heavy truck deficit was €3.4 billion in 2011—compared with €3 billion in 2010—on the one hand due to the rising importance of local plants and, on the other hand, the relative weakness of the local markets.
Outside the EU-27, the automotive manufacturing trade surplus stood at €3.8 billion. Trade with Latin America and Africa remains encouraging. The deficit with Japan and South Korea combined worsened again and stood at € 2 billion.

€3.8 BILLION
SURPLUS OF INDUSTRIAL AUTOMOBILE TRADE BETWEEN FRANCE AND COUNTRIES OUTSIDE THE EU-27 FOR 2011

Diesel passenger cars

Since 2002, there have been more diesel passenger car registrations than registrations of vehicles running on other fuels. In 2011, diesel cars accounted for 72% of total car registrations, which is higher than in 2010, mainly due to the shift in the sale mix towards premium ranges, which are generally fitted with diesel engines, and high fuel prices.
60% of cars in use on January 1, 2012 had diesel engines. In 2011, 2.2 million diesel cars were produced by French manufacturers, representing a drop of 9% compared to the record level of 2004. The share of diesel cars in total production (39%) has risen compared to 2010 but has fallen compared to 2004 (47%).

DIESEL PASSENGER CARS

	1990	1995	2000	2005	2009	2010	2011	% change 2011-2010
Production								
In units	804,007	1,036,796	1,648,448	2,328,108	1,823,626	2,178,408	2,213,668	+1.6
As a % of total production	24.4%	34.0%	35.8%	45.0%	37.9%	38.8%	39.5%	
Exports								
In units	292,061	472,087	975,038	1,500,989	1,003,562	1,346,022	1,373,140	+2.0
As a % of total exports	15.5%	25.5%	33.7%	39.1%	28.3%	31.3%	31.7%	
Registrations								
In units	762,054	897,698	1,046,485	1,466,296	1,628,495	1,593,173	1,596,155	+0.2
As a % of total registrations	33.0%	46.5%	49.0%	69.2%	70.7%	70.8%	72.4%	
Cars in use								
In units	3,775,000	6,938,000	9,980,000	14,348,000	17,458,000	18,165,000	18,865,000	+3.9
As a % of all cars in use	16.0%	27.6%	35.6%	47.7%	56.2%	58.0%	59.8%	

Source: CCFA.

MAIN NEW DIESEL PASSENGER CAR RANKING IN 2011

Rank	Make	Model	% diesel market
1	**Renault**	**Mégane**	**8.6**
2	**Peugeot**	**206-207**	**7.7**
3	**Citroën**	**C4-Xsara**	**5.5**
4	**Renault**	**Clio**	**5.2**
5	**Citroën**	**C3**	**4.5**
6	**Peugeot**	**308**	**3.5**
7	**Peugeot**	**3008**	**3.2**
8	Dacia	Duster	3.0
9	Ford	Focus	2.4
10	Volkswagen	Polo	2.2

Source: CCFA.

7 out of 10
NEW PASSENGER CARS REGISTERED IN FRANCE IN 2011 HAVE DIESEL ENGINES

In 2011, France was the world leader in diesel car ownership with 1,596,000 new diesel passenger cars, ahead of Germany with 1.5 million units. The new, quieter, more efficient diesel engines are still enjoying popular acclaim. In addition, since January 1, 2011, the Euro 5 standard applies to all new cars sold in Europe, requiring them to be fitted with a particle filter.

In Europe, the market share of new diesel cars has increased by nearly 5 points to 56%, representing 7.1 million units. In this market, French manufacturers hold a share of 25%. Due to high fuel prices, diesel car production and exports have respectively grown by 2% each.

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, before recovering to 12% in 2011. Between 2008 and 2010, the "bonus/malus" and government scrap incentive schemes encouraged the development of low ranges that today represent 85% of the market, compared to 80% in 2007. In 2011, the share dropped to 82%. The organization of cars by body has also changed since 1990. The sedan market share was over 90% of the market in 1990 compared to 72% in 2000 and 58% today. Having increased their offer in the economy and low ranges, French manufacturers are seeking to meet demand for vehicles with higher value added. On the one hand, Citroën expanded its DS range and Peugeot expanded its high-mid range with the 3008, 5008 and 508 models. On the other hand, Renault is relying on its Mégane and Dacia ranges, the latter yielding positive results with the Duster.

RANKING OF THE MAIN NEW PASSENGER CAR MODELS IN 2011

Rank	Make	Model	market share
1	**Renault**	**Clio**	**6.8**
2	**Renault**	**Mégane**	**7.0**
3	**Peugeot**	**206-207**	**6.7**
4	**Citroën**	**C3**	**5.0**
5	**Citroën**	**C4**	**4.2**
6	**Renault**	**Twingo**	**3.1**
7	**Peugeot**	**308**	**2.8**
8	Volkswagen	Polo	2.4
9	**Peugeot**	**3008**	**2.4**
10	Dacia	Duster	2.3

Rank	Make	Model	market share
11	Ford	Fiesta	2.0
12	Volkswagen	Golf	2.0
13	Opel	Corsa	1.8
14	**Citroën**	**DS3**	**1.5**
15	Nissan	Qashqai	1.3
16	**Peugeot**	**508**	**1.3**
17	**Peugeot**	**5008**	**1.3**
18	Dacia	Sandero	1.2
19	**Renault**	**Modus**	**1.2**
20	**Citroën**	**C5**	**1.2**

Rank	Make	Model	market share
21	**Renault**	**Laguna**	**1.1**
22	**Citroën**	**C1**	**1.0**
23	Mini	Mini	1.0
24	Toyota	Yaris	1.0
25	Seat	Ibiza	1.0
26	Nissan	Juke	0.9
27	Fiat	500	0.8
28	**Peugeot**	**107**	**0.8**
29	Ford	Focus	0.8
30	Volkswagen	Passat	0.8

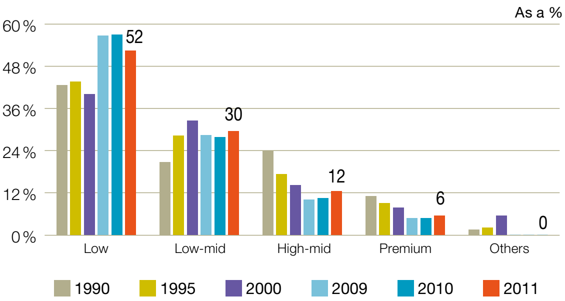
Source: CCFA.

NEW PASSENGER CAR REGISTRATIONS BY RANGE

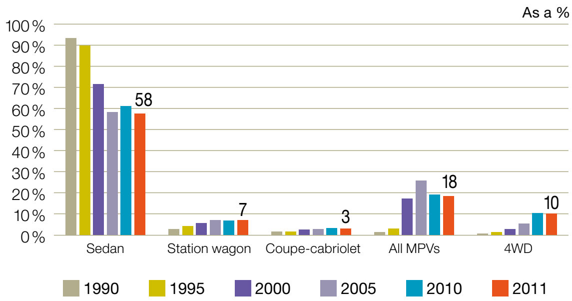
Ranges	1990		2000		2009		2010		2011	
	Units	%	Units	%	Units	%	Units	%	Units	%
Low	986,532	42.7	855,161	40.1	1,304,706	56.7	1,283,902	57.0	1,156,494	52.5
Low-mid	477,631	20.7	695,146	32.6	654,079	28.4	627,694	27.9	653,483	29.6
High-mid	555,053	24.0	303,028	14.2	233,460	10.1	234,664	10.4	272,395	12.4
Premium	256,381	11.1	163,293	7.7	110,104	4.8	105,313	4.7	121,782	5.5
Others	33,533	1.5	117,256	5.5	49	0.0	96	0.0	75	0.0
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,302,398**	**100.0**	**2,251,669**	**100.0**	**2,204,229**	**100.0**

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

MARKET SHARE BY RANGE



MARKET SHARE BY BODY STYLE



– 4.5 points

DROP IN THE MARKET SHARE OF THE LOW RANGE IN FRANCE IN 2011

NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Body	1990		1995		2000		2009		2010		2011	
	Units	%	Units	%	Units	%	Units	%	Units	%	Units	%
Sedan	2,155,724	93.4	1,731,191	89.7	1,527,676	71.6	1,446,314	62.8	1,377,498	61.2	1,269,780	57.6
Station wagon	61,418	2.7	78,278	4.1	119,739	5.6	172,800	7.5	153,476	6.8	153,705	7.0
Coupé-cabriolet	36,269	1.6	30,067	1.6	50,527	2.4	68,969	3.0	70,353	3.1	64,990	2.9
All MPVs	28,682	1.2	58,376	3.0	369,434	17.3	468,644	20.4	430,857	19.1	406,452	18.4
Of which compact MPVs	–	–	–	–	*241,190*	*11.3*	*240,828*	*10.5*	*233,363*	*10.4*	*222,131*	*10.1*
4WD	17,129	0.7	25,684	1.3	57,116	2.7	132,942	5.8	205,106	9.1	292,832	13.3
Others	9,908	0.4	6,908	0.4	9,392	0.4	12,729	0.6	14,379	0.6	16,470	0.7
TOTAL	**2,309,130**	**100.0**	**1,930,504**	**100.0**	**2,133,884**	**100.0**	**2,302,398**	**100.0**	**2,251,669**	**100.0**	**2,204,229**	**100.0**

Source: CCFA.

Used passenger cars

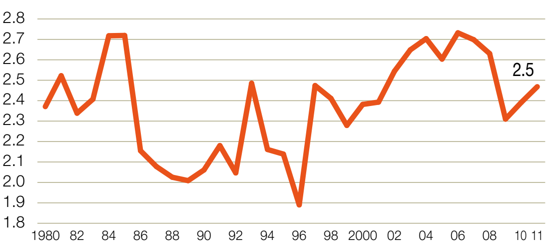
In 2011, as in previous years, registrations of used passenger cars exceeded 5 million units, reaching 5,441,000 (up by 1% compared to 2010).
Every year, two or three used cars are purchased for every new car. In relation to the number of cars on the road, 17% change hands every year. Households keep a vehicle for an average of five years. 58% of cars owned or used by households were bought used, versus 51% in 1991.
On average they had 68,000 kilometers on their odometers, and more than a quarter of used vehicles purchased by households had more than 100,000 kilometers on the odometer at the time of purchase. In addition, households that own a used vehicle and replace it with a used vehicle account for 49% of replaced vehicles.

USED PASSENGER CARS

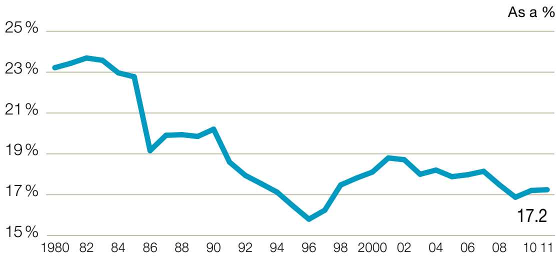
	Units	1980	1990	2000	2005	2008	2009	2010	2011
REGISTRATIONS									
New cars	Thousands	1,873	2,309	2,134	2,118	2,091	2,302	2,252	2,204
Used cars	Thousands	4,441	4,759	5,082	5,383	5,393	5,240	5,386	5,441
Used/new ratio		2.4	2.1	2.4	2.5	2.6	2.3	2.4	2.5
Cars less than 5 years old	**% used**		**52**	**40**	**40**	**37**	**38**	**37**	**36**
of which: cars less than 1 year old	% used		12	12	10	8	7	8	8
cars less than 1 year old	% new		25	29	25	21	17	19	21
Cars more than 5 years old	**% used**		**48**	**60**	**60**	**63**	**62**	**63**	**64**
Total (at 31/12)	**Thousands**	**19,130**	**23,550**	**28,060**	**30,100**	**30,850**	**31,050**	**31,300**	**31,550**
Used/total ratio	**%**	**23.2%**	**20.2%**	**18.1%**	**17.9%**	**17.5%**	**16.9%**	**17.2%**	**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 2011, demand for new cars dropped by 2.1% to 2.2 million units whilst demand for used cars increased by 1.0% to 5.4 million units. The new/used ratio increased to 2.5 (up 0.1 points). 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 total passenger cars in use and to increasing multi-car ownership in France. This share rose from 48% in 1990 to 64% in 2011.
Used cars 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 461,000 registrations or 21% of the new car market, an increase of two points for the second consecutive year compared to the previous year due to the lower effect of the scrap incentive on the price of new vehicles. The market share thus stood at its 2008 level. 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 2011, versus 12% in 2001.

58%
PERCENTAGE OF CARS OWNED BY HOUSEHOLDS BOUGHT USED

New vehicle registrations in French Overseas Departments (DOM)

The automotive market in the five French overseas Departments (Guadeloupe, French Guiana, Martinique, Mayotte and Reunion Island) has been developed more recently than in mainland France. They have accounted for 60,000 to 75,000 registrations since 1998.
Given the geographic environment, commercial vehicles over five metric tons account for a smaller proportion of registrations in overseas departments (0.9%) than in mainland France (2.0%). In contrast, the proportion of light commercial vehicles is slightly higher (17.1% versus 16.0% in mainland France). In 2011, the number of registrations of new light vehicles rose by 5.4% compared with the previous year. The overseas market rose considerably, whilst the French mainland dropped by 1.3%. The market recovered after being more heavily hit by the crisis than the mainland. French manufacturers suffer from intense competition in passenger cars; their market share has been below 50% since 2006. However, they faired 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). On the other hand, on the narrow heavy vehicle market, Renault Trucks has a market share of almost 33% (around 30% in mainland France).

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

New passenger cars	2000	2005	2009	2010	2011	Change 2011/2000	Change 2011/2010
Guadeloupe	13,691	14,359	14,084	13,438	13,695	0.0%	1.9%
French Guiana	4,031	4,085	4,446	4,382	4,719	17.1%	7.7%
Martinique	14,424	14,749	13,142	13,147	12,976	–10.0%	–1.3%
Mayotte (1)					780	–	–
Reunion Island	21,463	25,142	20,935	20,295	21,111	–1.6%	4.0%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**53,609**	**58,335**	**52,607**	**51,262**	**53,281**	**–0.6%**	**3.9%**

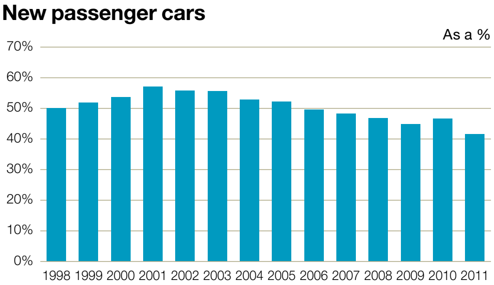
Light commercial vehicles (up to 5 metric tons)	2000	2005	2009	2010	2011	Change 2011/2000	Change 2011/2010
Guadeloupe	2,685	2,772	2,632	2,394	2,545	–5.2%	6.3%
French Guiana	1,143	1,169	1,355	1,239	1,246	9.0%	0.6%
Martinique	2,368	2,732	2,247	2,016	2,234	–5.7%	10.8%
Mayotte (1)					182	–	–
Reunion Island	5,200	6,021	4,412	4,166	4,882	–6.1%	17.2%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**11,396**	**12,694**	**10,646**	**9,815**	**11,089**	**–2.7%**	**13.0%**

Commercial vehicles including coaches and buses (over 5 metric tons)	2000	2005	2009	2010	2011	Change 2011/2000	Change 2011/2010
Guadeloupe	146	196	212	135	124	–15.1%	–8.1%
French Guiana	66	99	146	85	71	7.6%	–16.5%
Martinique	187	183	257	84	115	–38.5%	36.9%
Mayotte (1)					29	–	–
Reunion Island	362	464	492	293	275	–24.0%	–6.1%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**761**	**942**	**1,107**	**597**	**614**	**–19.3%**	**2.8%**

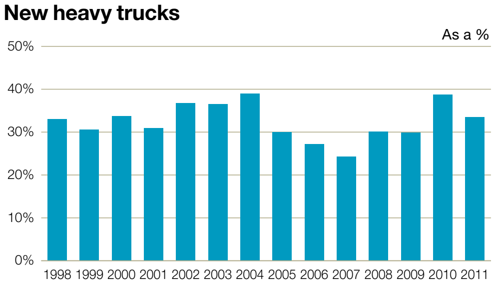
(1) From April 1st, 2011.
Source: CCFA.

FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

New passenger cars

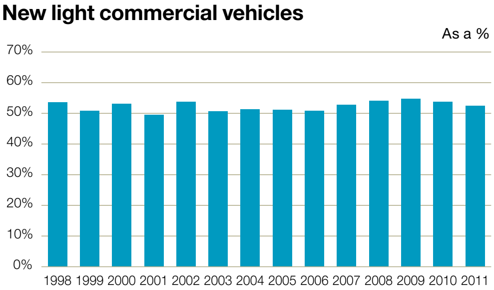


New heavy trucks

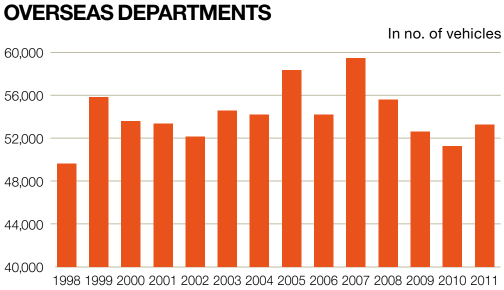


65,000
NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS IN 2011

New light commercial vehicles



NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



Household car ownership

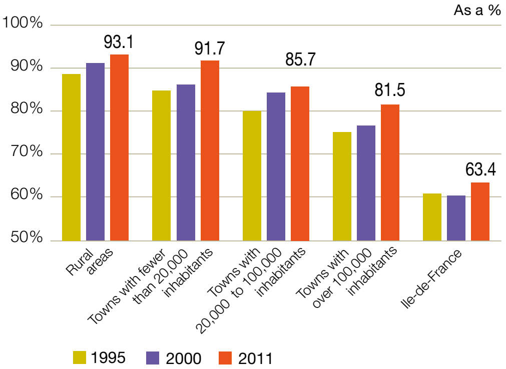
In 2011, multi-car households accounted for 35% of the total, compared with 26% in 1990 and 16% in 1980.
93% of rural and peri-urban households (peri-urban refers to the rural areas near towns) own a vehicle.
63% of households in the Paris region own at least one vehicle (60% in 2000).
72% of young households owned a vehicle in 2011 (49% in 2000).
77% of older households own a vehicle, compared with 69% in 2000.

CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR) BY SOCIO-PROFESSIONAL GROUP

	1980	1990	1995	2000	2005	2010	2011
BY SOCIO-PROFESSIONAL GROUP							
Farmers	87.3%	95.9%	98.9%	91.1%	100.0%	92.1%	94.4%
Farm workers	72.6%	74.7%	–	–	–	–	–
Tradesmen, craftsmen, business owners	91.1%	95.2%	89.4%	90.6%	91.2%	91.1%	91.0%
Self-employed professionals, executives	93.6%	94.4%	85.5%	84.6%	83.7%	84.1%	84.8%
Middle management	90.2%	93.3%	88.7%	90.8%	87.6%	89.8%	90.7%
White collar workers	75.4%	78.3%	75.9%	77.5%	80.9%	82.5%	80.7%
Blue collar workers	80.4%	87.2%	89.7%	88.7%	89.1%	91.2%	91.4%
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%	77.0%
of which retired persons	–	59.4%	70.9%	76.0%	76.2%	80.1%	79.8%
BY AREA OF RESIDENCE							
Rural areas	71.7%	82.1%	88.6%	91.1%	92.4%	92.7%	93.1%
Towns with fewer than 20,000 inhabitants	69.6%	76.6%	84.7%	86.1%	88.4%	90.2%	91.7%
Towns with 20,000 to 100,000 inhabitants	72.3%	77.3%	80.0%	84.2%	83.7%	87.1%	85.7%
Towns with over 100,000 inhabitants	69.5%	74.2%	75.1%	76.6%	78.5%	80.8%	81.5%
Greater Paris	69.3%	77.0%	60.8%	60.4%	61.5%	63.6%	63.4%
Inner Paris	48.8%	47.3%					
BY LOCATION OF RESIDENCE							
Town center	–	–	67.6%	69.4%	69.2%	73.0%	73.4%
Suburb	–	–	79.3%	80.5%	80.9%	83.2%	82.8%
Peri-urban area	–	–	88.5%	89.8%	91.2%	91.6%	92.7%
Rural area	–	–	85.3%	90.4%	92.6%	94.8%	93.6%
BY AGE OF HEAD OF HOUSEHOLD							
Under 25	–	–	51.2%	49.3%	63.3%	64.9%	71.8%
25 to 34	–	–	85.1%	82.4%	82.3%	83.9%	84.1%
35 to 44	–	–	86.7%	86.3%	87.5%	88.0%	87.7%
45 to 54	–	–	87.5%	87.4%	86.1%	88.1%	87.6%
55 to 64	–	–	84.9%	87.0%	86.7%	86.9%	85.4%
Over 65	–	–	61.9%	69.0%	70.8%	76.2%	77.3%
ALL	**69.3%**	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.5%**	**83.5%**
Vehicles with a woman as their main driver	–	–	–	40.4%	40.7%	41.5%	40.4%

Sources: INSEE up to 1993, PARCAUTO TNS-SOFRES as of 1994.

CAR OWNERSHIP BASED ON AREA OF RESIDENCE



96%
OF HOUSEHOLDS WITH AT LEAST THREE PEOPLE HAVE AT LEAST ONE CAR

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 group, 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 2011; 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: 82% of households owned vehicles in 2011, 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 (3.2 and 6.1 points respectively).

Household vehicles in use

Daily car use has dropped regularly in recent years: the number of vehicles used daily or near-daily was 71% in 2011, 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 continued to rise and now totals 101,000, i.e. 8,000 kilometers more than in 2000 and 32,000 kilometers more than in 1990. The rising trend reversed in recent years with the bonus-malus systems and the scrap incentive scheme, which made it possible to replace part of the vehicles in use.
79% of all cars in use belong to the low and mid-low ranges, compared with 60% in 1990.

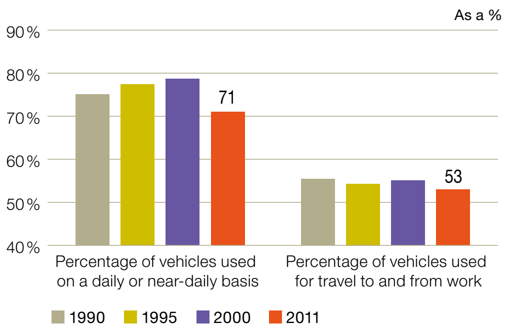
VEHICLES IN USE (OWNED, LEASED OR LOANED) BY HOUSEHOLDS

	Units	1980	1990	1995	2000	2005	2010	2011
Total	Millions	16.7	23.0	25.1	27.4	31.0	33.6	33.7
Average age	Years	5.8	5.8	6.6	7.3	7.7	8.0	8.1
BREAKDOWN BY MAKE								
Renault	%	36.2	33.3	33.3	33.3	30.2	28.6	28.4
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	38.2	37.8
Foreign makes	%	16.7	28.4	30.5	31.4	33.2	33.2	33.8
BREAKDOWN BY TAXABLE HORSEPOWER								
2 and 3 HP	%	12.3	3.4	1.6	0.7	43.3	44.4	45.8
4 and 5 HP	%	23.2	38.4	38.9	40.5			
6 and 7 HP	%	47.0	47.1	48.6	50.0	46.6	42.5	41.6
8 HP and above	%	17.5	12.8	10.9	8.8	10.1	13.1	12.6
BREAKDOWN BY RANGE								
Low range	%		39.4	43.4	45.1	44.5	46.8	48.2
Low-mid	%		20.8	24.3	27.3	32.2	30.9	30.9
High-mid	%		26.0	22.2	19.9	16.2	11.5	10.5
Premium range	%		8.7	7.0	7.0	5.7	5.0	4.0
Others	%		5.1	3.2	0.8	1.4	5.7	6.4
Percentage of vehicles purchased new	%	55.7	50.4	45.2	43.9	40.1	41.1	42.2
BREAKDOWN BY FUEL TYPE								
Premium unleaded	%		15.5	38.4	49.1	51.1	40.1	39.7
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	59.9	60.3
Average kilometers on odometer	km		69,500	84,080	93,140	99,460	103,470	101,170
Percentage of vehicles used on a daily or near-daily basis	%		75.1	77.4	78.7	75.7	71.8	71.0
Percentage of vehicles used for travel to and from work	%		55.4	54.3	55.1	55.2	53.7	53.0

(1) 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 by or available to households in France.
Most of these vehicles are passenger cars, but light commercial vehicles account for about 5% of the total.
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 to 8 years in 2009 before rising to 8.1 years in 2011.
The most common taxable horsepowers are in the 4 to 7 HP categories. Cars in the low and mid-low ranges have gained value after a couple of years and their share of the total population has once again increased to the detriment of the premium ranges: in 2011 they represented respectively 48% and 31% of the total, compared with 11% for the high-mid range.
Luxury or comfort equipment are increasingly distributed; in 2011, 67% of cars were fitted with air conditioning.
In terms of safety equipment, numbers have also risen; 63% of vehicles have ABS and 34% a speed-limiting device.

VEHICLE USE

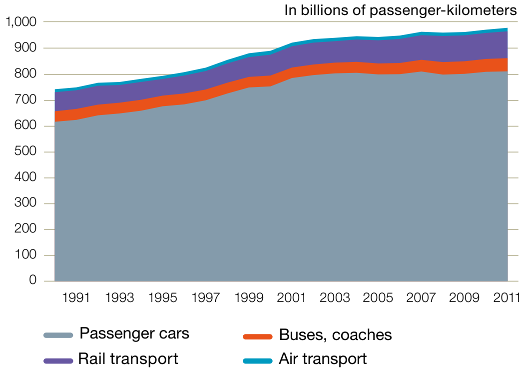


71% and 53%
RESPECTIVE SHARES OF VEHICLES USED ON A DAILY (OR NEAR-DAILY) BASIS AND FOR TRAVEL TO AND FROM WORK

Domestic passenger transport

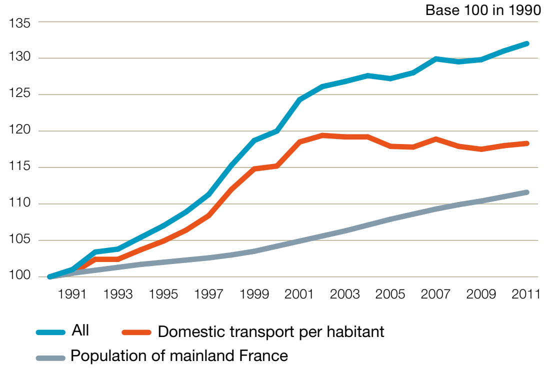
Personal mobility drives the economy: shaping economic and social exchanges, creating wealth, and underpinning whole sectors such as health and tourism.
When expressed as passenger-kilometers, which under-represents urban mobility and focuses on domestic transport to the exclusion of long-distance international transport, roads emerge as the dominant mode: 83% for passenger cars and 5% for coaches and buses in 2011.
Cars and light commercial vehicles enable people to carry their belongings, offering an appropriate solution to mobility 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: MEDDTL/SOeS, INSEE.

EVOLUTION OF DOMESTIC PASSENGER TRANSPORT



Sources: MEDDTL/SOeS, INSEE.

–1%

DECREASE FROM 2002 TO 2011 IN DOMESTIC PASSENGER TRANSPORT FOR ALL MODES PER INHABITANT IN PASSENGER-KILOMETERS

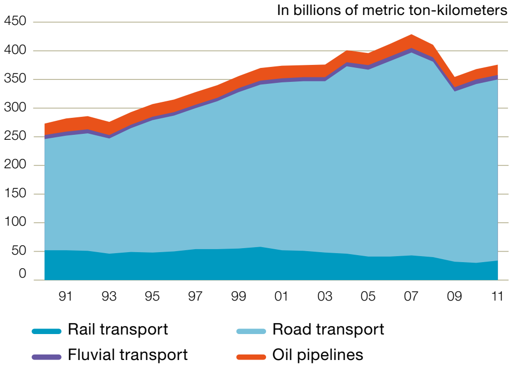
Personal mobility is obviously linked to the economy, as is the freight transport, but it also includes the vital social aspect of meeting people.
Whereas freight is more closely associated with industrial, agricultural and craft production, passenger transport covers a much broader economic sphere. While commuting between home and work is predominant, the development of the service economy, even tertiary, also depends on the mobility of people; this is particularly important in such personal services as health and tourism. People select their mode of transport on the basis of their starting point/destination, distance and time 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 public transport and other methods (bicycles, motorcycles, etc.) play an important role, or as passenger-kilometers for international long distance travel, showing the relevance of each mode of transport.

Domestic passenger transport per person expressed in passenger-kilometers rose continuously until 2002 (a rise of 19% compared to 1990). Since then, it appears to have leveled due to rising fuel prices, and dropped by 1% between 2002 and 2011.

Domestic freight transport

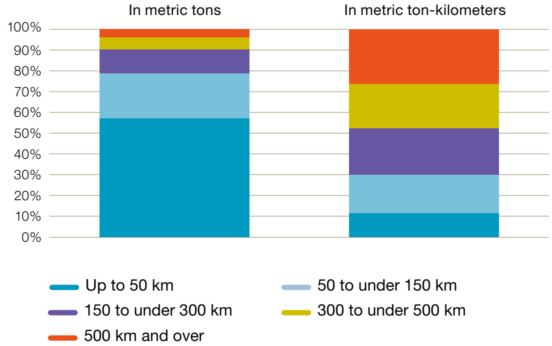
Transport freight drives the economy: enabling production sites to connect with each other and with consumer sites, which in turn link to reprocessing-recycling plants. The time dimension must be added to this spatial model, often associated with town and country planning.
Each mode of transport - road, 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 and it represented 84% of domestic freight transport in 2011. According to the Road Freight Haulage Survey from the French Ministry of Transport, 57% of the French freight loads are delivered within a radius of 50 kilometers, and 52% of metric ton-kilometers generated by these deliveries involve distances of under 300 kilometers.

DOMESTIC FREIGHT TRANSPORT IN FRANCE



Source: MEDDTL/SOeS.

BREAKDOWN OF ROAD TRANSPORT OF FREIGHT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2011



Source: Road Freight Haulage survey by MEDDTL/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, to the domestic demand of various economic players and, on the other hand, to exports of producing companies in the country. Some countries, such as Germany and France, act as key freight transit countries due to their geographical locations. In the case of road haulage, this also leads to the phenomenon of cabotage. The physical transfer of goods exported by a country is a major focus of economic competitiveness. The destination (the source for imports) and the type of freight or good traded are often critical when choosing the appropriate mode of transport. Some liquids can be transported via pipelines, thereby avoiding any disruptions in supply; ports are used for trade with distant countries. Domestic demand from economic players (households, businesses and administrations in the broadest sense) covers a very varied range of goods and properties. This demand is met either by domestic production or by imports, and transport provides a physical connection among production sites and with consumer markets, 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: the steel industry transports most of its products (coils of steel etc.) 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: metric tons (measured during loading) and metric ton-kilometers. The French Ministry of Transport's Road Freight Haulage Survey shows that nearly 60% of French freight metric tons move less than 50 km from their source, and that nearly 52% of metric ton-kilometers by French companies are generated less than 300 km from the source.

-12%
DECREASE FROM 2007 TO 2011 IN DOMESTIC FREIGHT TRANSPORT FOR ALL MODES IN BILLIONS OF METRIC TON-KILOMETERS

Road traffic

Road traffic increased by an annual average of 2% between 1990 and 2004, and has remained relatively stable since (+ 0.2% per year).
In 2011, the amount of traffic continued to rise (+ 0.8%), at a slower pace than in the previous year (+ 1.5%), slightly exceeding pre-crisis levels (2007).
As a reflection of economic activity, French heavy truck traffic rose by 3.8% although this was 16% lower than in 2007.
Traffic of passenger cars registered in France remained almost stable (+ 0.2%); this has been affected, among other factors, by the high prices of fuel. The average kilometers covered per year by a passenger car continued to drop (– 0.6%)

TRAFFIC STATISTICS (1)

	Units	1990	2000	2010	2011	Average annual change as a % 2000-1990	2010-2000	2011-2010
TOTAL VEHICLES (annual averages)	Thousands of vehicles	**28,106**	**33,464**	**37,625**	**37,941**	**+1.8**	**+1.2**	**+0.8**
Passenger cars		23,280	27,770	31,175	31,425	+1.8	+1.2	+0.8
of which: gasoline		19,760	18,150	13,364	12,910	–0.8	–3.0	–3.4
diesel		3,520	9,621	17,812	18,515	+10.6	+6.4	+3.9
Light commercial vehicles (LCV)		4,223	5,062	5,810	5,869	+1.8	+1.4	+1.0
of which: gasoline		2,279	1,302	631	539	–5.4	–7.0	–14.5
diesel		1,944	3,761	5,179	5,330	+6.8	+3.3	+2.9
Heavy trucks (> 5 t)		535	551	551	557	+0.3	+0.0	+1.0
Coaches and buses		68	81	88	90	+1.8	+0.9	+1.6
ANNUAL AVERAGE KILOMETERS	Thousands of km							
Passenger cars		13.4	13.5	12.8	12.7	+0.1	–0.6	–0.6
of which: gasoline		11.9	10.7	8.7	8.5	–1.1	–2.1	–2.1
diesel		21.3	18.8	15.8	15.6	–1.2	–1.7	–1.4
Light commercial vehicles (LCV)		14.6	15.5	15.6	15.9	+0.6	+0.0	+2.0
of which: gasoline		9.9	8.3	7.7	7.6	–1.7	–0.9	–0.5
diesel		20.2	18.0	16.6	16.7	–1.1	–0.8	1.1
Heavy trucks (> 5 t)		36.1	41.2	35.3	36.3	+1.3	–1.5	+2.8
Coaches and buses		31.0	30.2	35.9	36.2	–0.3	+1.7	+0.8
CONSUMPTION PER VEHICLE	Liters per 100 km							
Passenger cars: gasoline		8.68	8.12	7.82	7.66	–0.7	–0.4	–2.0
Passenger cars: diesel		6.73	6.74	6.56	6.45	+ 0.0	–0.3	–1.6
LCV: gasoline		9.39	9.29	8.44	8.27	–0.1	–1.0	–2.0
LCV: diesel		9.77	9.67	9.37	9.20	–0.1	–0.3	–1.8
Heavy trucks: diesel		36.23	36.62	35.33	35.11	+ 0.1	–0.4	–0.6
Buses and coaches: diesel		32.00	32.99	32.99	32.78	+ 0.3	+0.0	–0.6
FUEL CONSUMPTION (all road transport)	Millions of liters							
Gasoline		24,110	18,729	11,500	10,744	–2.5	–4.8	–6.6
Diesel		17,977	30,779	38,198	38,743	+5.5	+2.2	+1.4
Total		42,086	49,508	49,698	49,487	+1.6	+0.0	–0.4
TOTAL TRAFFIC	Billions of vehicle-km	**420**	**518**	**560**	**565**	**+2.1**	**+0.8**	**+0.8**
of which: French passenger cars and light commercial vehicles		373	455	489	492	+2.0	+0.7	+0.7
ROAD TRAFFIC								
Passengers in passenger cars (1)	Billions of passenger-km	617.3	754.4	810.8	812.7	+2.0	+0.7	+0.2
Passengers in coaches and buses	Billions of passenger-km	40.7	42.0	49.9	51.1	+0.3	+1.7	+2.4
Freight	Billions of metric ton-km	193.9	282.5	311.6	315.9	+3.8	+1.0	+1.4

(1) Including vehicles registered abroad and two-wheeled motor vehicles.
Source: National transport accounts MEDDTL/SOeS, INSEE.

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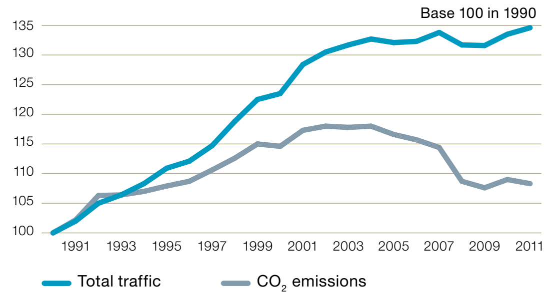
BILLION PASSENGER-KILOMETERS: A NEW RECORD FOR PASSENGER CAR TRAFFIC IN 2011

Automobile traffic is estimated by comparing vehicle counts on national, regional, local and urban roads with the average number of kilometers covered per year by the vehicles in use and fuel consumption data. It also includes data on traffic of vehicles registered abroad.
Road accounted for 88% of all domestic transport for passengers 2011 and 84% for freight.
In 2011, the total number of vehicles registered in France rose by 0.8%, at a pace that is comparable to previous years, but considerably lower than that observed during the 1990s. The number of light vehicles with diesel engines continued to increase, and 64% of these vehicles were equipped with diesel engines in 2011. In terms of traffic, diesel represented a share of 77% of all light vehicle traffic in France, compared with 55% in 2000 and 31% in 1990.
The consumption per vehicle given in the above table includes over-consumption associated with biofuels, which have a lower energy quotient than conventional fuels. Between 2010 and 2011, the objectives for biofuel use, measured in calorific value (NCV) remained stable at 7% (3.5% in 2007). Just over two thirds of vehicles were, on January 1, 2012, compatible with premium unleaded (95-E10).

Automobile traffic and CO_2 emissions

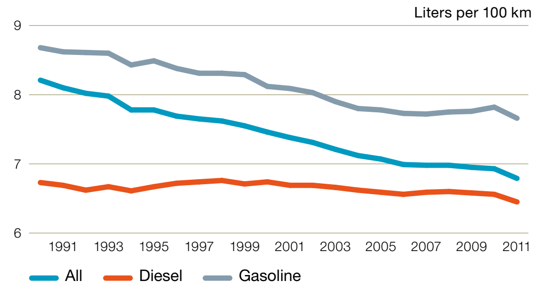
The number of French and foreign vehicles on French roads has increased by 35% since 1990, while the corresponding CO_2 emissions have risen by only 8%. The credit for enhanced energy efficiency stems from a variety of factors. The average consumption per registered vehicle on the road in France decreased by nearly 17% between 1990 and 2011, 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 a heavy truck transporting one metric ton of freight one kilometer across France have dropped by 25% between 1990 and 2011, despite the impact of the financial and economic crisis.

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



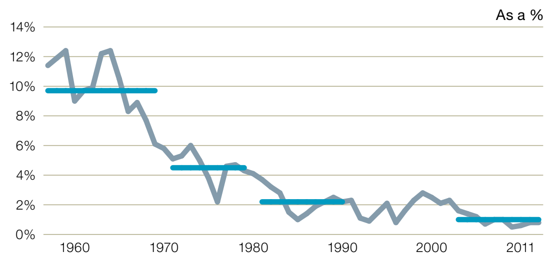
Sources: CITEPA and Traffic Statistics.

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



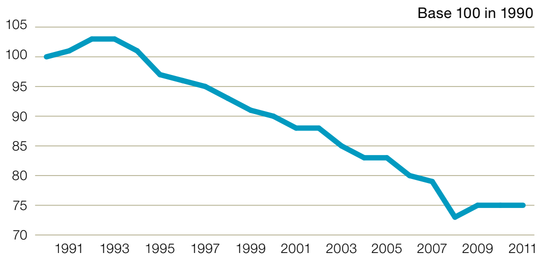
Source: Traffic Statistics.

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



Source: CCFA.

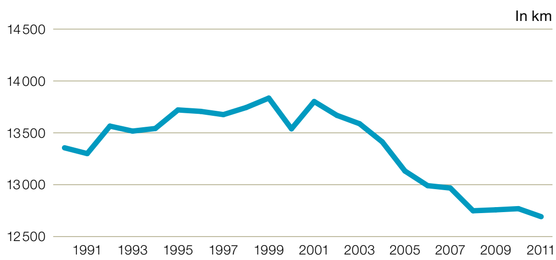
CHANGE IN THE AMOUNT OF CO_2 (2) EMITTED BY A HEAVY TRUCK TRANSPORTING ONE METRIC TON OF FREIGHT ONE KILOMETER ACROSS FRANCE



(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.
Source: MEDDTL/SOeS, CCFA calculations.

– 8%
DECREASE IN ROAD TRAFFIC CO_2 EMISSIONS BETWEEN 2004 AND 2011 ACCORDING TO CITEPA

AVERAGE KILOMETERS COVERED IN A YEAR BY A PASSENGER CAR



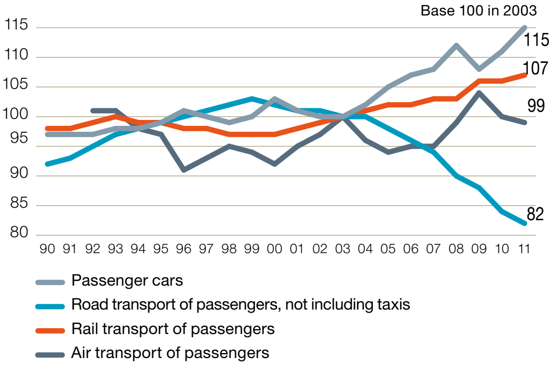
Source: Traffic Statistics.

Passenger car traffic has two components: passenger cars and their average annual kilometers driven. Over the long term, the increase of the number of cars in use 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 2011, the first estimates from the *Centre Interprofessionnel Technique d'études de la pollution atmosphérique* (CITEPA – Technical Interprofessional Center for Studies of Atmospheric Pollution) for road transport report CO_2 emissions net of renewable energy sources of 120 million metric tons, compared with 131 in 2004. 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 2010, CO_2 emissions net of renewable energy sources for road traffic can be broken down, according to CITEPA estimations, to 57% for cars, 18% for light commercial vehicles and 23% for heavy trucks, including coaches and buses.

Passenger transport price indices

In 2011, because of the increase in fuel prices, the price index for passenger cars (purchases and use) rose again by over 5%. The price index for rail passengers grew by 2%, which is a similar pace to that observed during previous years, which was between 2% and 3%.
The index of prices for air transport of passengers rose slightly by 1% following a reduction in 2010 after four years of growth. The price index for the road transport of passengers (not including taxis) continued on its steady downward trend, although at a slower rate (– 0.3%); the index for taxis rose by 2%.
Since 2003 the real price indices for the various passenger transport modes have changed in very different directions: from a fall of – 18% for road transport of passengers (not including taxis) to a + 15% increase for passenger cars, with relative stability for air transport and a + 7% 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

As a %

	Passenger cars	Road transport of passengers, not including taxis	Rail transport of passengers	Road transport of passengers	Taxis	Air transport of passengers
1992	2.1%	4.6%	3.4%	4.8%	5.3%	–
1993	3.0%	3.6%	2.9%	4.0%	5.8%	1.6%
1994	2.4%	3.6%	0.7%	3.5%	3.6%	−1.2%
1995	2.5%	2.6%	1.9%	2.6%	2.3%	0.8%
1996	3.6%	2.4%	1.6%	2.4%	2.4%	−3.9%
1997	0.9%	2.4%	0.5%	2.4%	2.2%	2.9%
1998	−0.5%	2.0%	−0.1%	2.1%	2.1%	3.0%
1999	1.2%	0.9%	0.9%	1.1%	1.7%	−0.8%
2000	5.1%	0.6%	1.4%	1.0%	2.3%	−0.5%
2001	−0.2%	1.4%	2.5%	1.8%	3.7%	5.2%
2002	0.8%	1.2%	2.6%	1.4%	1.9%	3.9%
2003	2.2%	1.5%	3.6%	1.7%	2.5%	5.6%
2004	3.9%	1.7%	2.7%	1.9%	2.5%	−2.0%
2005	5.1%	0.4%	2.8%	1.3%	3.5%	−0.4%
2006	3.5%	−1.2%	2.4%	0.1%	3.4%	2.8%
2007	2.5%	−0.4%	2.4%	0.4%	2.2%	2.0%
2008	6.2%	−1.6%	2.1%	−0.4%	2.6%	6.6%
2009	−3.4%	−1.7%	3.1%	−0.1%	3.7%	5.2%
2010	5.2%	−3.0%	2.1%	−1.6%	1.4%	−2.1%
2011	5.3%	−0.3%	2.3%	0.5%	2.1%	0.8%

Source: INSEE.

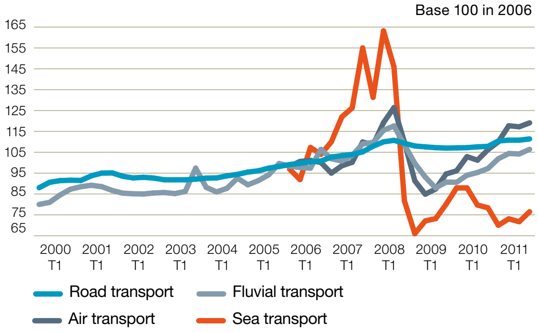
+10% and +4%
RESPECTIVE CHANGE BETWEEN 2010 AND 2011 IN THE REAL PRICE INDICES FOR PASSENGER CARS AND RAIL TRANSPORT OF PASSENGERS

The price indices of the various passenger transport modes show evolutions in prices inclusive of tax. Thus, 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 accounts for 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 (see graphic above).
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 2011, the real index associated with passenger cars (purchase and use of passenger cars) increased by 15%, 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 7%, continuing the growth started in 2000, while the index for road transport of passengers (excluding taxis) fell by 18%; it is important to remember that only the part paid directly by the households is taken into consideration.

Freight transport price indices

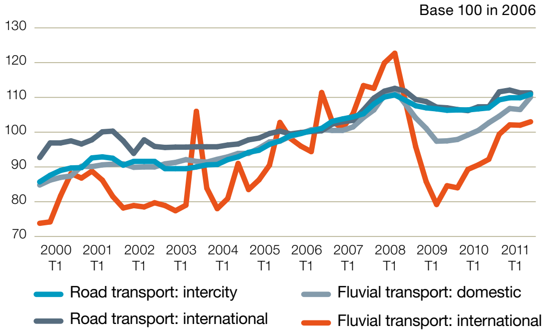
In 2011, the freight transport price index, whose variations were traditionally more moderate, rose by 3% after falling for two years. On the other hand, over the last quarters, changes in freight transport price indices other than for road became more extreme again. Since 2000, the price index of freight transport by road rose by 1.9% per year on average, from 1.4% for international to around 2% for intercity and proximity freight transport by road. In the same period, the fluvial index showed slightly greater change, rising by 2.1% per year, varying from 2.0% for domestic transport to 2.4% 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 8% gap (11% in 2010 and 13% in 2008). The high volatility of fuel prices is the cause; for river transport, the relationship between demand and supply is a more important factor.

FREIGHT TRANSPORT PRICE INDICES IN FRANCE



Source: MEDDTL/SOeS.

FREIGHT TRANSPORT PRICE INDICES



Source: MEDDTL/SOeS.

3%

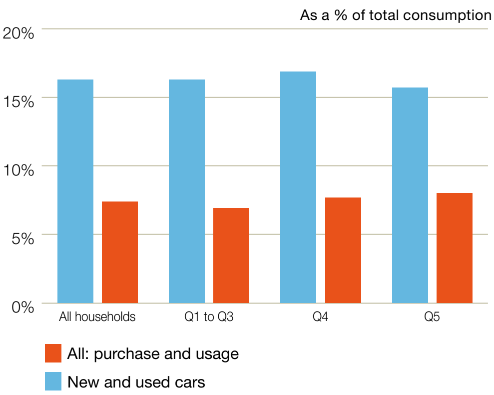
ANNUAL INCREASE IN 2011 OF THE ROAD HAULAGE PRICE INDEX FOR INTERCITY FREIGHT

Freight transport price indices are calculated by the statistics department of the French Transport Ministry (SOeS). For road and river transport, only outsourcing 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 relate to 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 13%, 11% and 8%. 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%) and 2011 (+ 14%).
The price index for maritime freight is very volatile, in line with the changes in bulk prices. On annual average, after growing 31% between 2006 and 2008, the index fell 44% in 2009 compared to the previous year, before increasing once again by 15% in 2010 and then dropping again sharply in 2011 (– 13%).
Available since 2000, the fluvial freight price index rose on average by 4% per year until 2008, more than 1% between 2009 and 2010 and 2.1% in 2011. 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 and especially in 2011, so for the period 2000-2011, it rose by 2.3% whereas the domestic index grew by 2.0%. To a lesser extent than with air transport, infra-annual variations are also found in fluvial transport, more often due to supply and demand.
The road haulage price index has increased on average by 1,9% per year since 2000. This can be broken down as 1.4% for international and 2.0% 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 *Comité National Routier* (CNR – National Road Commission) *(see page 47)*, in December 2011 fuel accounted for 29% and 19% respectively of the total cost of long-distance and regional road haulage.

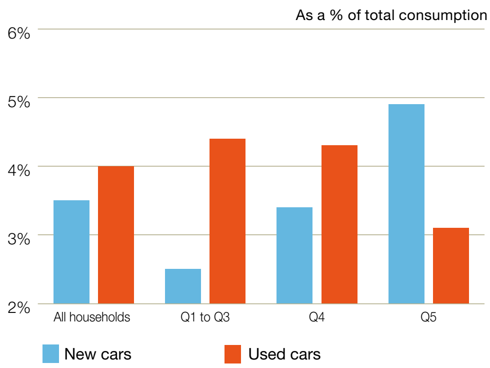
Household motoring costs

For all households, the smaller the district in which the household is, the more the fuel purchases increase.
For households with cars, fuel purchases comprise a lower share of overall consumption for the 20% of better-off households (3%), compared with over 4% for other households. The share of expenditure on repair and maintenance in household budgets is near 2%, regardless of the income level. It stands at 1.9% for higher-income households, 2.2% for households with “medium” incomes, and 2% for lower-income households.
In light of the tax component in the price of fuel and insurance, low-income households with cars pay more taxes, proportionally to their consumption, than the 20% of wealthier households.

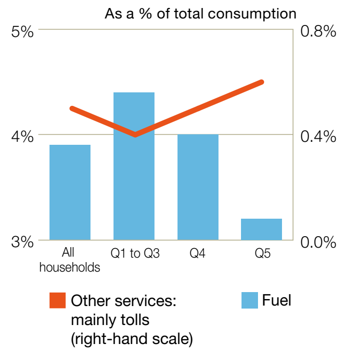
CAR BUDGET



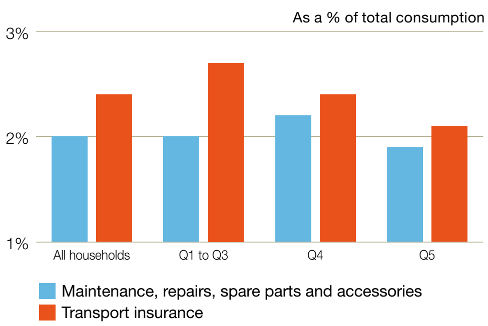
CAR PURCHASES



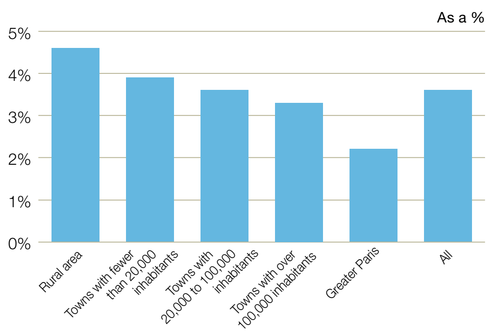
FUEL AND OTHER USE-RELATED SERVICES (mainly tolls)



MAINTENANCE, REPAIRS, SPARE PARTS AND TRANSPORT INSURANCE



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



Source: INSEE, Family budget survey 2006.

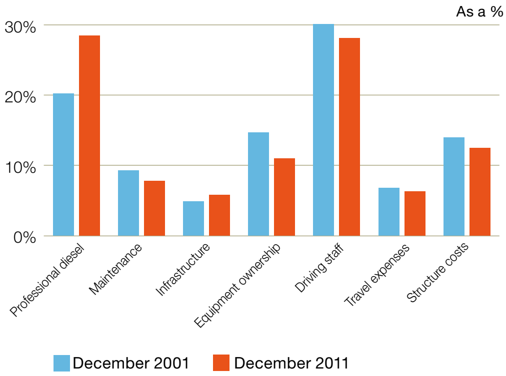
5%
SHARE OF FUEL IN THE TOTAL CONSUMPTION OF HOUSEHOLDS LIVING IN RURAL AREAS

The Family Budget surveys conducted every 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 on the various household categories: socio-professional group, age, income, residence area, etc.
There are two important differences for typical car items when compared to national figures. With respect to transport insurance costs, the full cost is factored into the surveys, while only the service (spending minus repayments) is recorded at the macro-economic level. When it comes to spending on used vehicles, the full cost is reflected in the surveys, while at the macro-economic level, this spending corresponds mainly with the margins made by professionals involved in a transaction, and does not include transactions between individuals.
Some charts show the breakdown of different car items as a percentage of total consumption, equivalent to individual consumption (excluding rent) based on income, broken down by 20% segments of the population: Q5 is the fifth quintile, i.e. 20% of households with the highest earners, ahead of Q4 and then the combination of Q1 to Q3. In 2005-2006, the vehicle budget for all households with cars amounted to just over 16% of their total consumption. New 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 purchases appear to play a higher role the smaller the town.
This means that households in the Paris area spend 2% of their consumption on fuel whereas people in rural areas spend 5%.

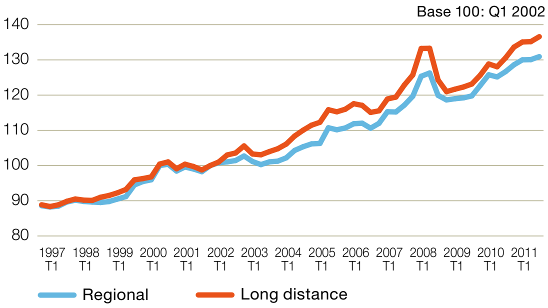
Road freight cost price

According to the CNR (Comité National Routier), between 2002 and 2011, the cost price for long distance road freight rose by 33%, an average of 3.2% a year. For this same period, cost price for regional transport rose by 29%, an average of 2.9% 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 by more than three points to 26% in 2010 and by more than two points to 29% in 2011, thus exceeding its 2007 record. For the period 2001-2011, the cost of equipment ownership (road tractors and semi-trailers) dropped by almost 4 points from 14.7% to 11%. At the same time, the share linked to infrastructures increased by 0.9 points to 5.8% in 2011.

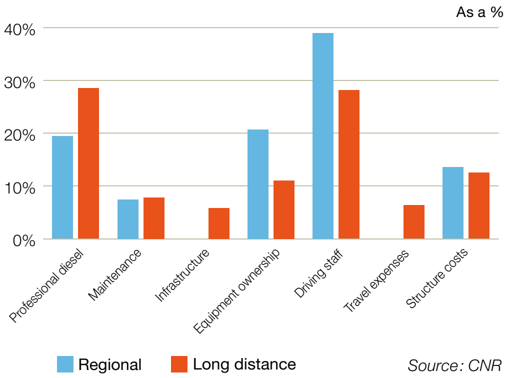
ROAD FREIGHT COST PRICE STRUCTURE: LONG DISTANCE



ROAD FREIGHT PRODUCTION COST



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2011



Source: CNR

29%

SHARE OF DIESEL IN THE CNR INDEX OF LONG-DISTANCE ROAD FREIGHT COSTS

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 metric 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 after the summer, its share fell to 22% before improving every year to reach 29% in 2011.

From 2001-2011, infrastructure costs increased by 0.9 points to 5.8%.

On the other hand, equipment ownership (road tractors and semi-trailers) and maintenance (upkeep and repairs) dropped by 3.7 and 1.5 percentage points respectively, more than the figure for driving staff (down 2.0 percentage points).

In the case of regional transport, fuel accounted for 19% of combined costs in December 2011; this lower percentage is one of the causes of the weaker growth of almost 4 points in the regional index between 2002 and 2011 when compared with the long-distance index. The share for equipment ownership rose by between 20% and 22% over the same period.

Automotive price indices

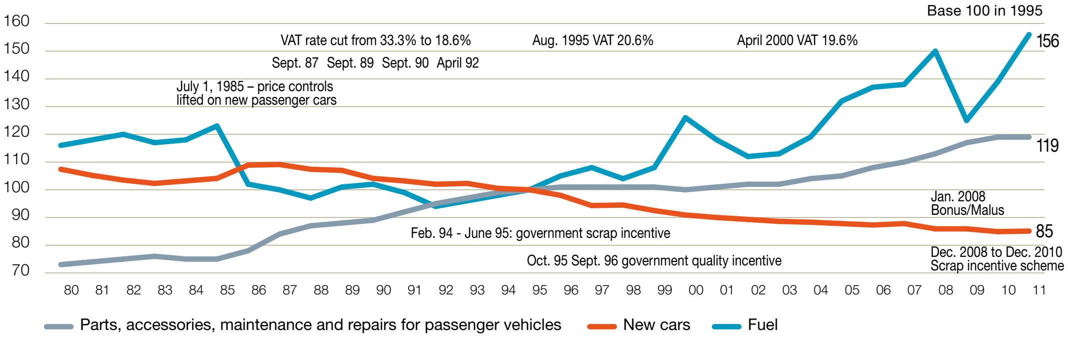
In 2011, the new passenger car price index rose by 2.4%, 0.3 percentage points beyond inflation.
Since 1995, the new car price index has decreased by 15% in real terms. This variation can also be seen across Europe. With the continuing increase of oil prices after falling during the second half of 2009, fuel prices rose sharply in 2011 (+ 14%) and the index of real fuel prices reached a record level of 156, compared with 150 in 2008. The parts, accessories, repairs and maintenance price index continued to rise by more than 2% in 2011, 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
2009	0.1%	0.2%	4.1%	–17.1%
2010	1.5%	0.3%	3.0%	13.4%
2011	**2.1%**	**2.4%**	**2.3%**	**14.3%**

Source: INSEE, CCFA calculations.

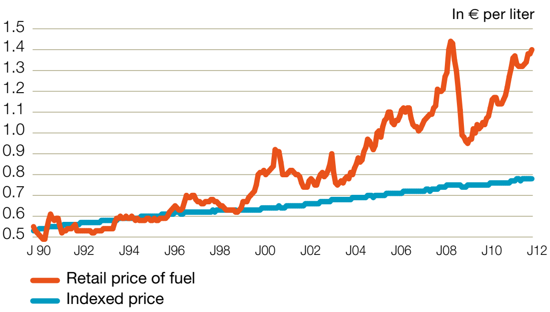
NEW PASSENGER CAR, FUEL, PARTS, ACCESSORIES, MAINTENANCE AND REPAIR PRICE INDICES, ADJUSTED FOR INFLATION



Source: INSEE, CCFA presentation

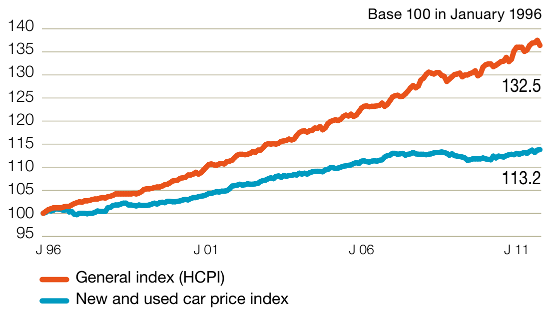
+13% and 21%
RESPECTIVE INCREASES IN THE PRICE INDICES OF NEW CARS AND ALL CONSUMER PRICES SINCE 2000

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



Sources: DGEMP, INSEE, CCFA calculations.

HARMONIZED PRICE INDICES FOR THE EUROZONE (17 COUNTRIES)



Source: Eurostat.

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 of real prices linked to the key components, 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. Since 2003, many factors linked to labor (cost of work, development of skills, etc.) and parts (improved reparability, raw material prices, increased quality of service, greater diversity of models requested by consumers) have led to an increase of the real price index. In 2011, the rate of growth slowed and the variations in the index approximated the variations in inflation.
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, of the general price index has shown intense pressure on prices, as in France, due to the hard competition. In 2011, the general price index rose 26% compared to 2000, whilst that of new and used car purchases only grew by 10%.

Consumer spending on private vehicles

The financial and economic crisis has affected the purchasing power of households, which increased by 0.5% in 2011 after rising by 0.9% in 2010. Considering population growth, it has even dropped slightly. Household consumption has even slightly risen (+ 0.3%), at a slower rate than the more than 2% observed between 2001 and 2007.
In this context, household car purchases rose by 3% due to the increased share of the mid ranges in total registrations and the drop in the share of the low ranges following the end of the schemes to support demand.
Household fuel purchases increased dramatically (+ 13% to €42 billion), in line with the considerable price fluctuations, a new record following that of 2008 (€41 billion). This expenditure accounts for amounts more than 10% higher than those for purchases of new and used cars, whereas in 1990 they were more than one quarter lower.

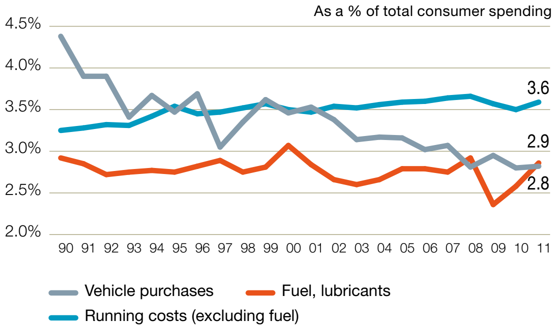
HOUSEHOLD CONSUMER SPENDING ON TRANSPORT

Amount and % of total consumer spending for the year

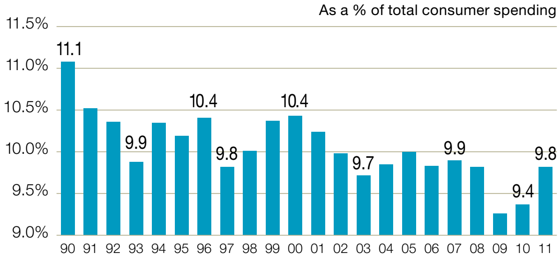
	Unit	1990		2000		2010 (1)		2011 (1)		Change 2011/2010
VEHICLE PURCHASES	€ Billions	31.9	4.4%	35.0	3.5%	40.2	2.8%	41.5	2.8%	+3.0%
– New and used cars		29.6	4.1%	31.8	3.1%	36.2	2.5%	37.2	2.5%	+2.9%
of which new cars		24.7	3.4%	23.6	2.3%	26.6	1.9%	27.2	1.8%	+2.3%
– Caravans, motorcycles, bicycles		2.3	0.3%	3.2	0.3%	4.0	0.3%	4.2	0.3%	+4.7%
RUNNING COSTS	€ Billions	44.9	6.2%	66.5	6.6%	88.8	6.2%	94.9	6.4%	+6.9%
– Upkeep, repairs, spare parts and accessories		19.3	2.6%	27.9	2.8%	40.7	2.8%	41.4	2.8%	+1.8%
Automotive equipment manufacturing		9.3	1.3%	14.3	1.4%	22.7	1.6%	23.2	1.6%	+2.1%
Including automotive service		8.1	1.1%	10.5	1.0%	14.2	1.0%	14.4	1.0%	–61.1%
– Fuel and lubricants		21.2	2.9%	31.1	3.1%	37.1	2.6%	42.1	2.9%	+13.4%
– Tolls, parking fees, rental, driving lessons		4.4	0.6%	7.5	0.7%	11.0	0.8%	11.4	0.8%	+3.6%
INSURANCE	€ Billions	3.9	0.5%	4.1	0.4%	5.6	0.4%	8.2	0.6%	+45.0%
TOTAL CONSUMER SPENDING ON PASSENGER VEHICLES	**€ Billions**	**80.7**	**11.1%**	**105.7**	**10.4%**	**134.7**	**9.4%**	**144.5**	**9.8%**	**+7.3%**
Public transport	€ Billions	10.3	1.4%	15.2	1.5%	24.0	1.7%	25.4	1.7%	+6.1%
TOTAL CONSUMER SPENDING FOR THE YEAR	**€ Billions**	**728**	**100%**	**1,013**	**100%**	**1,437**	**100%**	**1,472**	**100%**	**+2.4%**
NUMBER OF HOUSEHOLDS (mainland France)	Thousands	21,632		24,256		27,285		27,547		+1.0%
Spending on passenger vehicles per household	€	3,729		4,356		4,935		5,343		+3.2%
Spending on passenger vehicles per vehicle-owning household	€	4,855		5,425		5,910		6,282		+2.9%

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

PERCENTAGE OF HOUSEHOLD BUDGET ALLOCATED TO OWNING A CAR, 1990 TO 2011



TOTAL VEHICLE-RELATED EXPENDITURE



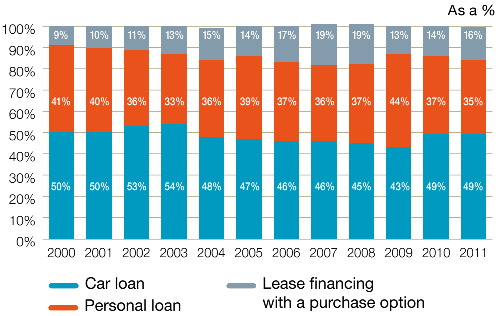
In 2011, households spent €144 billion (7%) on their individual transport, most frequently by car. This amount represents 85% of the total spending that households devote to transport (individual and public).
Consumer spending on cars, relative to total consumer spending, is expressed as the percentage 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 2011, the portion of the budget allocated to car purchases was 2.8%, which is equal to the lowest levels (2008 and 2010) observed since the start of the 1990s.
The budget percentage allocated to maintenance and repairs of private vehicles, which had increased during the 1990s, in line with the growth of car ownership and the increase of the average age of the cars in use, has been fluctuating between 2.8% and 2.9% since 2002.
Household spending on car insurance, which correspond to the service—namely spending minus reimbursements—rose to €8.2 billion.

9.8%
PERCENTAGE OF TOTAL HOUSEHOLD SPENDING SPENT ON CARS IN 2011

Automobile financing

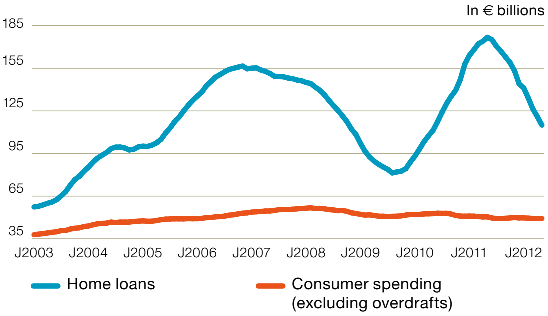
In 2011, 61% of new cars purchased by consumers were bought on credit (2 points higher than in 2010). After the end of the scrap incentive schemes, the level observed between 2003 and 2008 was regained. As in previous years, car (or conventional) loans were the most common source of financing (49%), ahead of personal loans (35%) and lease-financing with a purchase option (16%). Compared with 2007—the year before the financial crisis—car loans gained 4 points to the detriment of lease financing (– 3 points) and personal loans (– 1 point).
For new vehicles used by companies (both private cars and light commercial vehicles or heavy trucks), 2011 was marked by a continuation of the increase recorded in 2010; however, 2008 levels still have not been regained. Leasing with or without a purchasing option and long-term leases are increasingly being used by companies and professionals.

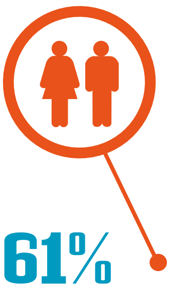
CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES



Sources: ASF, CCFA.

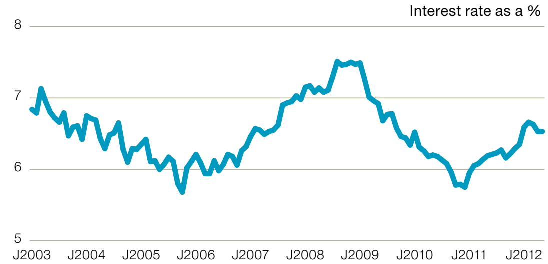
TOTAL AMOUNTS OF NEW LOANS GRANTED TO RESIDENTS OVER A 12-MONTH PERIOD





61%
NEW CARS PURCHASED ON CREDIT BY CONSUMERS IN FRANCE

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 84 months, i.e. seven 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 rose 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 billion 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. After dropping by 13% between January 2008 and July 2011, due to the financial and economic crisis, production of consumer loans fluctuated between €49 billion and €50 billion.
As regards home loans, low rates for nominal loans, which had led to many loan renegotiations, resulted in a new record production level of €177 billion in May 2011. The contraction observed since then has been almost as quick, with production falling to €115 billion in May 2012.

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 2011, motor vehicle turnover generated revenue of €84 billion (4.9% higher than in 2010). The fall in the passenger car market volume was more than made up for by the range effect, the increase in the light commercial vehicle market and the recovery of the heavy truck market.
Vehicle maintenance/repair, which rose on average by 4% per year between 2002 and 2007, has since recorded average annual growth of less than 1%.
According to INSEE results, vehicle turnover and repairs (categorized as J10) involved 77,035 companies on January 1, 2008, just over 6% of which worked for a manufacturer (apart from franchisees). They employed 47% of employees in this sector. The four leading groups (10 leaders respectively) employed 8% of the workforce (respectively 13%) and produced 7% value added on factor costs (respectively 14%).

LIGHT VEHICLE TURNOVER NETWORKS IN FRANCE ON JANUARY 1,2011

MAKES	Primary dealership
Renault	807
Peugeot	430
Citroën	435
French makes	***1,672***
Ford	312
Opel	280
Fiat	234
Volkswagen	373
BMW	177
Mercedes-Benz	159
Japanese makes	1,255
South Korean makes	471
Other makes	1,576
TOTAL	6,509

Sources: CNPA, CCFA.

STRUCTURE OF HEAVY TRUCK 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, Heavy truck trade and repair in France, March 2006, and CCFA.

REVENUE FROM VEHICLE TURNOVER AND REPAIRS

In current € billions, including VAT

Activity	2006	2007	2008	2009	2010	2011	Change 2011-2010
Automotive turnover	72.1	76.7	76.4	77.8	79.6	83.5	4.9%
Automotive maintenance and repairs	25.1	26.2	26.6	25.7	26.5	26.8	1.0%
Retail turnover of automotive equipment	7.2	7.5	7.7	7.8	8.2	8.3	1.5%
Motorcycle turnover and repairs	2.2	2.2	2.2	2.1	2.1	2.1	2.1%
Retail fuel turnover	15.7	15.9	18.2	13.2	14.8	16.7	12.5%
TOTAL	122.3	128.5	131.2	126.5	131.2	137.4	4.7%

Source: INSEE - National Accounts, base 2005 of national accounts: 2010 semi-definitive, 2011 provisional.

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 turnover and customer support, dealer networks are based on carefully selected distributors and repair specialists capable of meeting make and product requirements.

€84 billion
FRENCH MOTOR VEHICLE REVENUE IN 2011, INCLUDING VAT, ACCORDING TO INSEE

Production of the automotive industry and its economic impact

From 2000 to 2007, the production of the automotive industry ranged between €71 billion and €77 billion.
In 2008, it fell by 9% before dropping by 27% because of the global financial and economic crisis and then rising by 19% to €58 billion in 2010.
In a very difficult climate for the automotive market, the value added (VA) of the automotive industry also recovered, reaching €9 billion in 2010 (or 16% of total production). Its total purchases (or intermediate consumption)—up by 17%—represented five times its VA, at €49 billion, benefiting a number of economic sectors. The rate margin (ratio between Gross operating surplus and VA) was 14% in 2010, much lower than the average of the early 2000s (25%).
A capital-intensive industry, the investment rate (GFCF to VA ratio) for the automotive sector was 28% in 2009 (20% overall and 18% for the industry excluding energy).

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		2000	2005	2007	2008	2009	2010 (1)
PURCHASES FROM OTHER INDUSTRIES		75.4	80.6	79.9	78.8	81.4	81.3
Electrical, electronic and IT equipment; machines	%	19.8	19.9	18.7	18.1	18.3	18.6
of which: Manufacture of IT, electronic and optical products	%	4.8	4.8	4.0	3.8	3.8	4.0
Manufacture of electrical equipment		3.6	3.8	3.5	3.6	3.7	3.9
Manufacture of machinery and equipment not included elsewhere	%	11.4	11.2	11.2	10.7	10.8	10.7
Other industries (including coking and refining)		37.4	40.9	39.7	39.2	39.7	39.6
of which: metallurgy and metalworking		17.8	18.4	18.5	18.3	18.8	18.7
Manufacture of rubber, plastic and mineral products	%	9.4	11.0	10.4	10.2	10.1	10.2
Other manufacturing industries (including repairs and installations)	%	3.5	4.4	4.1	4.1	4.1	4.0
Chemical industry		2.2	2.4	2.3	2.2	2.3	2.3
Manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.7	1.5	1.5	1.4	1.5
Wood, paper and printing industries		1.5	1.5	1.5	1.6	1.7	1.7
Extraction, energy and water industries		1.3	1.2	1.5	1.5	1.6	1.6
of which: Electricity, gas, steam and air conditioning		0.6	0.6	0.8	0.8	0.8	0.8
Water, sanitation, waste management and depollution		0.6	0.6	0.6	0.6	0.7	0.7
Construction		0.5	0.6	0.5	0.5	0.6	0.6
Motorcycle and car turnover 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	0.6	0.7	0.7	0.7
Financial and insurance services		0.9	0.9	0.9	0.8	0.9	1.0
Real estate activities		0.2	0.3	0.3	0.3	0.3	0.3
Corporate services		11.6	12.9	14.2	14.4	16.0	15.7
of which: Legal, accounting, control and technical analysis, etc.	%	1.4	1.8	1.7	1.8	1.8	1.9
Research and development		4.1	5.4	6.9	7.0	9.5	8.8
Other specialized, scientific and technical activities		2.7	2.7	2.5	2.6	2.4	2.4
Administrative and support services		3.3	3.1	3.1	3.1	2.2	2.6
Other commercial sector industries		1.9	1.6	1.8	1.8	1.7	1.8
All commercial sector purchases		16.4	18.0	19.4	19.5	21.1	21.0
PURCHASES WITHIN THE INDUSTRY	%	24.6	19.4	20.1	21.2	18.6	18.7
Total production at base prices	current € billions	71.4	76.7	74.0	67.3	49.0	58.1
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL PURCHASES (2)	current € billions	58.0	64.7	63.7	57.9	41.9	48.9
As a % of production at base prices	%	81.3	84.4	86.2	86.1	85.4	84.2
Value added by the industry	current € billions	13.4	12.0	10.2	9.4	7.1	9.2
As a % of production at base prices	%	18.7	15.6	13.8	13.9	14.6	15.8
Operating Cash Flow (OCF)	current € billions	–	–	1.4	0.4	−0.8	1.3
As a % of value added (margin rate)	%	–	–	13.4	4.4	−11.8	14.4
Gross Fixed Capital Formation (GFCF)	current € billions	–	–	–	–	–	–
As a % of value added (investment rate), 2000 base	%	31.4	24.6	26.7	30.8	28.4	–

(1) Accounts for 2010 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 fixed.
Source: INSEE – National accounts (base 2005).

14%
MARGIN RATE OF THE AUTOMOTIVE INDUSTRY IN 2010

Total purchases as a percentage of production reached 84% in 2010, slightly lower than in 2006 to 2008 and equivalent to 2005 figures.
Total industry purchases in 2010 were split 19% within the industry and 81% from other industries. Intermediate goods accounted for 40% of purchases, including metallurgy and metalwork; the metalworking industry remained the leading supplier, accounting for 19% of total purchases. The tertiary sector accounted for 21% of purchases (18% in 2005): the most requested services were research and development (9%), administrative and support services (3%), and other specialized scientific and technical 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.
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 third in Europe.
The FIEV estimates the workforces of automotive suppliers belonging to the CLIFA for the year 2011 at 247,000 jobs, with turnover of €50 billion. In 2007, before the crisis, their estimates were of 315,000 jobs and turnover of €52 billion.

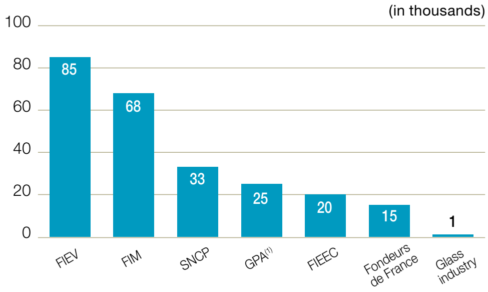
TURNOVER OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY (2011)

In € billions

FIEV	
Fédération des industries des équipements pour véhicules (French Automotive Equipment Industries Association)	18.7
FIM	
Fédération des industries mécaniques (Federation of Mechanical Industries)	13.2
SNCP	
Syndicat national du caoutchouc et des polymères (National Union of Rubber and Polymer Workers)	6.1
GPA	
Groupement plasturgie automobile (Automotive Plastic Converters Association)	5 (1)
FIEEC	
Fédération des industries électriques, électroniques et de communication (Federation of Electric, Electronic and Communication Industries)	4.0
Fondeurs de France	2.4
Glass industry	0.2

(1) 2010 data.
Sources: FIEV, Organisations professionnelles.

WORKFORCE OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY IN 2011



(1) 2010 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 Automotive Equipment Industries Association - FIEV). The automotive industry comprises automotive manufacturing and suppliers.
Suppliers have two types of markets: the first type with a total worth of €15.8 billion in 2011, producing original equipment for assembly chains, and the second type dealing with replacement parts, with a total worth of around €2.9 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 €49.6 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. According to the Groupement des Industries de la Sous-Traitance Mécanique (Association of Mechanical Subcontracting Industries – GIST), the automotive industry represents more than 40% of its activity in terms of turnover. 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 2011 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 224,000 people, representing more than 7% of all employment in the manufacturing and energy sector (including the extractive industries, food industries and industrial companies with fewer than 20 employees). 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. A certain consolidation was observed in 2011.

JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2011

In thousands of jobs

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 604,000 jobs either in production or through its purchases from other sectors. It is worth remembering 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 include those working for car seat and electrical equipment manufacturers for engines and vehicles,who previously were counted in purchases from manufacturing an energy industries.

According to figures published by the FIEV, employees for 2011 in the automotive industry stood at 247,000, including 85,000 for equipment (FIEV), 68,000 for mechanics (FIM), 33,000 for tires and rubber (SNCP) and 25,000 for plastics (GPA, figures 2009). Vehicle usage provided jobs for more than 653,000 people, particularly in the areas of vehicle-related services (turnover, repairs, automotive equipment retailing, etc.) and fuel and recycling (oil recovery, car breakers, etc.). These figures concern employees and also individual entrepreneurs (non-salaried employees).

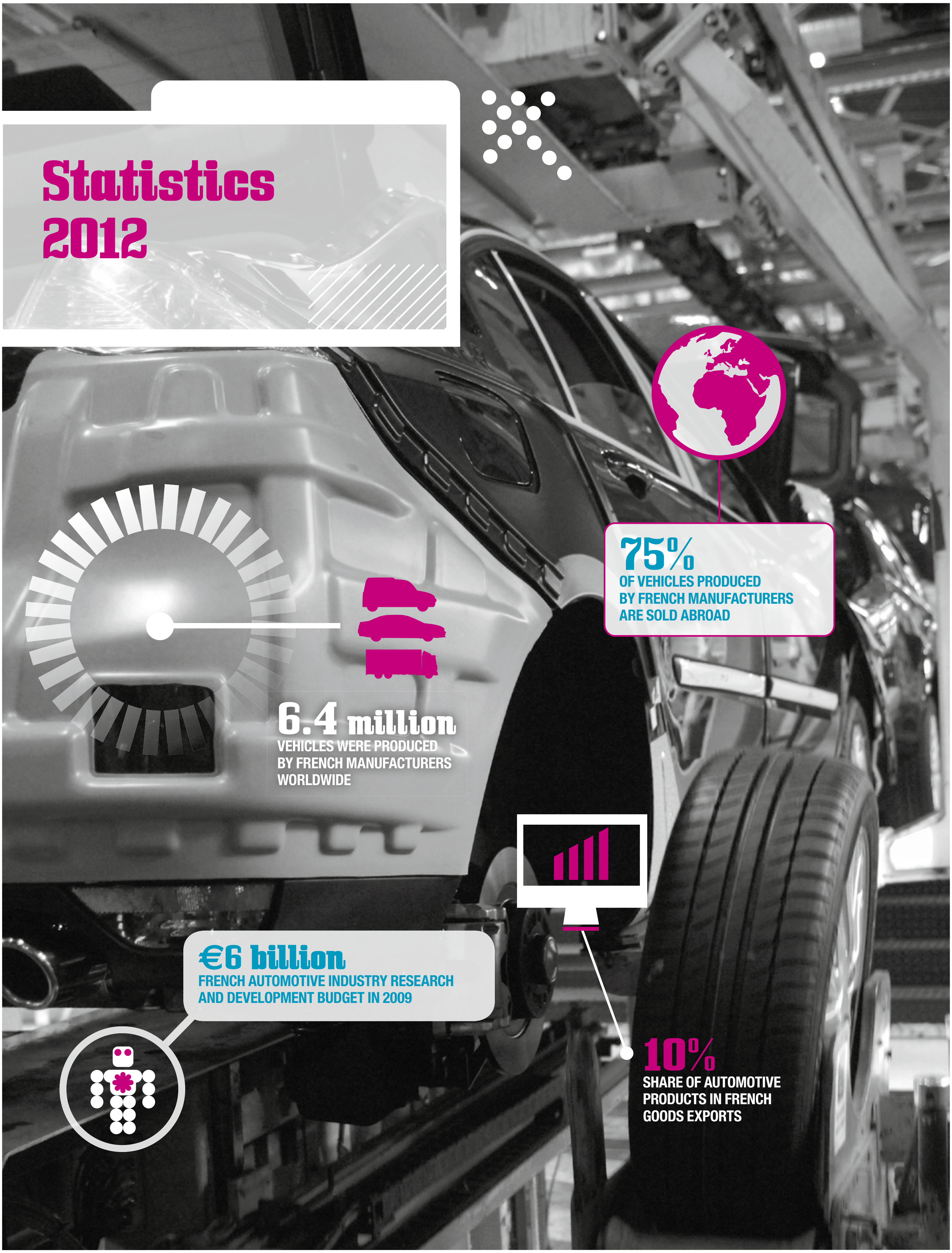
Finally, the road transport (passenger and freight) sector and its related infrastructure employed more than 1 million people. These include both outsourced and in-house transport operations.

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).

9%

FRENCH PEOPLE IN EMPLOYMENT WORKING IN THE AUTOMOTIVE INDUSTRY (DIRECT AND INDIRECT JOBS)



Comité des Constructeurs Français d'Automobiles

WORLD

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[1]	2007	2008	2009	2010	2011
EUROPE	**11,983,548**	**15,231,409**	**17,407,047**	**19,330,513**	**18,381,339**	**15,247,066**	**17,341,941**	**18,325,947**
WESTERN EUROPE	**10,401,320**	**13,061,853**	**14,778,879**	**14,216,262**	**12,849,218**	**11,037,669**	**12,138,971**	**12,450,756**
Germany	3,520,934	4,660,657	5,131,918	5,709,139	5,532,030	4,964,523	5,552,409	5,871,918
Belgium	882,001	1,160,412	912,233	789,674	680,131	524,595	528,996	562,386
Spain	1,028,813	1,679,301	2,366,359	2,195,780	1,943,049	1,812,688	1,913,513	1,819,453
France[2]	**2,938,581**	**3,294,815**	**2,879,810**	**2,550,869**	**2,145,935**	**1,819,497**	**1,924,171**	**1,931,030**
Italy	1,445,221	1,874,672	1,422,284	910,860	659,221	661,100	573,169	485,606
Netherlands	80,779	121,300	215,085	61,912	59,223	50,620	48,025	40,772
Portugal	61,000	60,221	178,509	134,047	132,242	101,680	114,563	141,779
United Kingdom	923,744	1,295,611	1,641,452	1,534,567	1,446,619	999,460	1,270,444	1,343,810
Sweden	235,320	335,853	259,959	316,850	252,287	128,738	177,084	188,969
CENTRAL AND EASTERN EUROPE	**1,582,228**	**2,002,000**	**2,330,692**	**4,479,368**	**4,910,554**	**3,698,466**	**4,599,576**	**5,235,457**
TURKEY	**31,529**	**167,556**	**297,476**	**634,883**	**621,567**	**510,931**	**603,394**	**639,734**
NORTH AND SOUTH AMERICA	**8,663,060**	**8,450,862**	**10,022,089**	**9,325,594**	**9,202,759**	**6,954,032**	**8,228,067**	**8,766,088**
NAFTA	**7,526,658**	**7,747,823**	**8,371,806**	**6,475,498**	**6,189,535**	**3,960,731**	**5,084,330**	**5,613,696**
of which: Canada	846,777	1,072,281	1,550,500	1,342,133	1,195,436	822,267	967,077	990,483
USA	6,376,825	6,077,449	5,542,217	3,924,268	3,776,641	2,195,588	2,731,105	2,966,133
Mexico	303,056	598,093	1,279,089	1,209,097	1,217,458	942,876	1,386,148	1,657,080
SOUTH AMERICA	**1,136,402**	**703,039**	**1,650,283**	**2,850,096**	**3,013,224**	**2,993,301**	**3,143,737**	**3,152,392**
of which: Argentina	218,516	81,107	238,921	350,735	399,236	380,067	508,401	577,233
Brazil[3]	977,697	663,097	1,351,998	2,391,354	2,545,729	2,575,418	2,584,690	2,534,534
ASIA-PACIFIC	**8,796,971**	**11,910,333**	**13,573,073**	**24,212,695**	**25,058,888**	**25,289,717**	**32,414,823**	**32,479,078**
of which: China	–	–	605,000	6,381,116	6,737,745	10,383,831	13,897,083	14,485,326
South Korea	55,000	986,751	2,602,008	3,723,482	3,450,478	3,158,417	3,866,206	4,221,617
India	30,538	176,015	517,957	1,713,479	1,846,051	2,175,220	2,831,542	3,038,332
Japan	7,038,108	9,947,972	8,359,434	9,944,637	9,928,143	6,862,161	8,310,362	7,158,525
AFRICA	**277,058**	**209,603**	**213,444**	**332,544**	**382,095**	**281,783**	**356,872**	**375,585**
of which: South Africa	277,058	209,603	230,577	276,018	321,124	222,981	295,394	312,265
TOTAL	**29,720,637**	**35,802,207**	**41,215,653**	**53,201,346**	**53,025,081**	**47,772,598**	**58,341,703**	**59,946,698**

COMMERCIAL VEHICLES

In units

	1980	1990	2000	2007	2008	2009	2010	2011
EUROPE	**2,563,596**	**2,688,509**	**2,783,468**	**3,522,065**	**3,396,455**	**1,808,776**	**2,549,317**	**2,864,260**
WESTERN EUROPE	**1,663,080**	**1,671,915**	**2,326,653**	**2,474,948**	**2,325,472**	**1,204,952**	**1,686,875**	**1,858,576**
Germany	357,619	315,895	394,697	504,321	513,700	245,334	353,576	439,400
Belgium	47,029	91,784	121,061	44,729	44,367	12,759	26,306	n/a
Spain	152,846	374,049	666,515	693,923	598,595	357,390	474,387	534,229
France[2]	**439,852**	**474,178**	**468,551**	**464,985**	**423,043**	**228,196**	**305,250**	**363,859**
Italy	166,635	246,178	316,031	373,452	364,553	182,139	265,017	304,742
Netherlands[4]	32,102	29,832	52,234	76,656	73,271	26,131	46,081	32,379
Portugal	58,000	77,466	68,215	42,195	42,913	24,335	44,166	50,463
United Kingdom	389,170	270,133	172,442	215,686	202,896	90,679	123,019	120,189
Sweden	63,080	74,415	41,384	49,170	56,012	27,698	40,000	n/a
CENTRAL AND EASTERN EUROPE	**900,516**	**975,000**	**323,203**	**582,587**	**545,440**	**245,150**	**371,279**	**456,287**
TURKEY	**19,352**	**41,594**	**133,471**	**464,530**	**525,543**	**358,674**	**491,163**	**549,397**
NORTH AND SOUTH AMERICA	**2,599,948**	**5,032,605**	**9,761,798**	**9,828,465**	**7,683,330**	**5,608,388**	**8,139,331**	**9,020,430**
NAFTA	**2,349,318**	**4,775,818**	**9,325,214**	**8,979,266**	**6,754,191**	**4,822,200**	**7,088,685**	**7,854,794**
of which: Canada	527,522	850,566	1,411,136	1,236,657	886,805	668,215	1,101,112	1,144,410
USA	1,634,846	3,702,787	7,257,640	6,856,461	4,916,900	3,535,809	5,031,439	5,687,427
Mexico	186,950	222,465	656,438	886,148	950,486	618,176	956,134	1,022,957
SOUTH AMERICA	**250,630**	**256,787**	**436,584**	**849,199**	**929,139**	**786,188**	**1,050,646**	**1,165,636**
of which: Argentina	63,153	5,337	100,711	193,912	197,850	132,857	208,139	251,538
Brazil[3]	187,477	251,450	329,519	585,796	670,247	607,505	797,038	871,616
ASIA-PACIFIC	**4,344,363**	**4,492,406**	**4,497,938**	**6,502,163**	**6,448,515**	**6,470,438**	**8,515,432**	**8,095,124**
of which: China	–	–	1,464,000	2,501,340	2,561,435	3,407,163	4,367,678	3,933,550
South Korea	65,012	334,879	512,990	362,826	376,204	354,509	405,535	435,477
India	83,379	186,640	283,403	540,250	486,277	466,330	725,531	888,185
Japan	4,004,776	3,538,824	1,781,362	1,651,690	1,647,501	1,071,896	1,318,558	1,240,129
AFRICA	**127,698**	**125,174**	**115,305**	**212,022**	**203,918**	**131,668**	**158,204**	**181,052**
of which: South Africa	127,698	125,174	126,787	258,472	241,841	150,942	176,655	220,280
TOTAL	**9,675,970**	**12,399,000**	**17,158,509**	**20,064,715**	**17,732,218**	**14,019,270**	**19,362,284**	**20,160,866**

(1) As of 2001, some passenger cars were reclassified as commercial vehicles.
(2) As of 1996, figures are based on the number of vehicles assembled in France by French manufacturers.
(3) Since 2010, Brazilian production does not include CKD (complete knock-downs).
(4) Production in the Netherlands did not include DAF in 2011.
Sources: OICA, CCFA estimates for July 2012.

WORLD

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 Asian, Pacific and African countries	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

Manufacturers/Economic areas	North America NAFTA	South America	European Union 27 countries	Other European countries and Turkey	Japan	South Korea	China	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**4%**	**13%**	**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	2007	2008 (1)	2009	2010	2011
Germany	2,426,187	3,349,788	3,378,343	3,148,163	3,090,040	3,807,175	2,916,259	3,173,634
Austria	227,548	288,618	309,427	298,182	293,697	319,403	328,563	356,145
Belgium	399,240	473,506	515,204	524,795	535,947	476,194	547,340	572,211
Denmark	73,774	80,654	112,688	159,341	150,143	112,199	153,583	169,744
Spain	504,051	988,270	1,381,515	1,614,835	1,161,176	952,772	982,015	808,051
Finland	103,167	139,095	134,646	123,163	139,611	88,344	107,346	121,171
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,109,672**	**2,091,368**	**2,302,398**	**2,251,669**	**2,204,229**
Greece	35,700	115,480	290,222	279,745	267,295	219,730	141,501	97,680
Ireland	93,563	82,584	230,989	186,335	151,603	57,455	88,445	89,927
Italy	1,717,432	2,307,055	2,415,600	2,492,774	2,161,673	2,159,436	1,961,578	1,749,085
Luxembourg	21,500	38,422	41,896	51,332	52,359	47,265	49,726	49,881
Norway	95,550	61,901	97,376	129,195	110,617	98,675	127,754	138,345
Netherlands	450,076	502,732	597,640	505,540	499,918	387,155	482,527	555,812
Portugal	58,357	210,924	257,834	201,816	213,389	161,013	223,464	153,404
United Kingdom	1,513,761	2,008,934	2,221,670	2,404,007	2,131,795	1,994,999	2,030,846	1,941,253
Sweden	192,588	229,941	290,529	306,799	253,982	213,408	289,684	304,984
Switzerland	279,764	329,899	316,519	284,688	288,557	266,049	292,453	316,846
European Union 15 countries	**9,690,146**	**13,125,133**	**14,312,087**	**14,406,499**	**13,193,996**	**13,298,946**	**12,554,546**	**12,347,211**
Europe 17 countries	**10,065,460**	**13,516,933**	**14,725,982**	**14,820,382**	**13,593,170**	**13,663,670**	**12,974,753**	**12,802,402**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**4,785,713**	**5,183,155**	**2,986,411**	**3,488,531**	**4,342,612**
Canada	948,967	886,217	849,132	841,585	872,720	729,023	694,349	681,956
USA	8,760,937	9,300,678	8,846,625	7,618,413	6,813,369	5,400,890	5,635,433	6,089,421
Mexico	286,000	353,000	603,010	641,394	589,051	439,103	499,567	586,056
Argentina	215,177	77,306	224,950	422,230	452,539	373,231	522,591	673,853
Brazil	793,028	532,791	1,188,818	2,086,681	2,341,709	2,645,013	2,859,000	2,902,326
South Korea	45,972	626,126	1,057,620	1,040,372	1,020,457	1,234,618	1,308,326	1,316,320
Japan	2,854,185	5,102,659	4,259,771	4,325,508	4,184,266	3,905,310	4,203,181	3,509,036
Turkey	31,000	215,000	456,696	357,465	305,998	369,819	509,784	593,519
WORLD	**28,500,000**	**34,825,967**	**38,689,767**	**49,515,309**	**49,876,618**	**49,761,464**	**55,933,978**	**58,074,277**

Source: CCFA.

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2007	2008 (1)	2009	2010	2011
Germany	175,687	203,389	314,804	334,116	334,999	242,178	282,157	334,820
Austria	21,821	29,211	36,457	41,509	42,303	31,026	34,001	40,510
Belgium	34,478	46,670	66,125	81,664	81,276	63,431	64,048	75,145
Denmark	19,469	23,031	38,108	66,867	41,465	19,585	19,980	28,775
Spain (1)	105,934	249,185	335,684	324,463	201,367	121,450	132,104	123,353
Finland	17,699	32,154	18,128	20,944	21,632	12,451	14,218	18,177
France	**323,291**	**446,983**	**477,204**	**519,492**	**523,432**	**416,183**	**457,215**	**482,823**
Greece	53,500	30,075	25,015	27,130	25,570	17,388	12,341	7,002
Ireland	11,905	28,087	46,261	50,013	34,010	10,566	11,544	12,532
Italy	122,293	159,322	268,057	276,548	260,412	198,390	199,350	193,571
Luxembourg	1,300	2,961	4,642	5,315	6,046	4,197	4,267	5,134
Norway	15,135	23,035	35,618	53,008	42,630	28,762	34,600	41,968
Netherlands	47,926	68,791	114,354	97,275	104,139	64,204	59,777	71,948
Portugal	46,967	71,904	161,045	74,790	61,730	42,747	49,290	37,958
United Kingdom	274,143	293,473	301,523	395,179	353,463	227,543	262,730	308,230
Sweden	19,684	33,133	38,474	51,923	47,477	34,105	44,450	54,082
Switzerland	22,418	28,165	29,345	30,720	32,789	28,675	30,371	36,002
European Union 15 countries	**1,276,097**	**1,718,369**	**2,245,881**	**2,367,228**	**2,139,321**	**1,505,444**	**1,647,472**	**1,794,060**
Europe 17 countries	**1,313,650**	**1,769,569**	**2,310,844**	**2,450,956**	**2,214,740**	**1,562,881**	**1,712,443**	**1,872,030**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**1,015,478**	**1,028,392**	**584,642**	**734,587**	**919,209**
Canada	335,827	416,041	736,951	848,760	800,802	753,209	889,039	938,265
USA	2,476,777	4,845,360	8,965,048	8,841,902	6,679,796	5,200,478	6,136,787	6,951,210
Mexico	166,000	198,000	302,944	510,290	486,712	337,279	347,314	349,037
Argentina	59,881	17,481	81,995	142,696	159,231	113,911	175,813	209,497
Brazil	187,233	180,000	302,288	376,047	478,641	496,227	656,064	730,922
South Korea	58,502	328,151	372,840	249,000	211,000	231,000	247,693	250,772
Japan	2,161,305	2,674,834	1,703,114	1,028,140	897,969	703,946	752,955	701,188
Turkey	19,000	43,015	199,825	276,741	220,546	206,050	283,388	317,348
WORLD	**9,150,000**	**13,410,615**	**18,723,143**	**21,573,201**	**18,687,337**	**15,942,023**	**19,224,875**	**20,401,246**

(1) Some light commercial vehicles have been reclassified as passenger cars.
Source: CCFA.

EUROPE

Production

PASSENGER CAR PRODUCTION BY ENGINE TYPE, DISPLACEMENT AND COUNTRY

In units

	Gasoline and others, except diesel and electric							Diesel						Electric
	TOTAL	Up to 1,000	1,001 to 1,500	1,501 to 2,000	2,001 to 2,500	Over 2,501	Not specified	TOTAL	Up to 1,500	1,501 to 2,000	2,001 to 2,500	Over 2,501	Not specified	
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			
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
2011	3,381,714	266,755	1,052,715	1,841,649	82,733	387	137,475	2,213,668	1,019,287	1,136,103	22,986	3,997	31,295	9,218
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	
2010	799,917		206,879	474,292	5,016	113,692	38	474,153	154,146	135,797	99,571	80,820	3,819	
2011	767,569		102,908	538,330	6,632	119,699		573,273	188,213	195,767	106,241	83,052		

DIESEL PASSENGER CAR PRODUCTION BY MAKE AND COUNTRY

In units

	1980	1990	2000	2007	2008	2009	2010	2011
French manufacturers								
Citroën	33,996	213,010	453,604	628,713	585,347	542,860	586,769	576,670
Peugeot	133,332	334,469	593,349	680,576	556,254	484,583	622,644	632,660
PSA Peugeot Citroën (1)	167,328	547,479	1,046,953	1,309,289	1,141,601	1,027,443	1,209,413	1,209,330
Renault	69,335	256,528	601,495	902,957	754,033	716,955	812,306	795,363
Dacia				95,358	81,153	66,948	132,548	173,917
Renault Samsung Motors				5,197	41,272	12,280	24,141	35,058
Renault-Dacia-Samsung				1,003,512	876,458	796,183	968,995	1,004,338
Total (2)	**236,663**	**804,007**	**1,648,448**	**2,312,801**	**2,018,059**	**1,823,626**	**2,178,408**	**2,213,668**
TOTAL GASOLINE + DIESEL	**2,938,581**	**3,294,815**	**4,598,617**	**5,300,597**	**4,900,579**	**4,806,612**	**5,610,340**	**5,604,600**
Diesel share	8.1%	24.4%	35.8%	43.6%	41.2%	37.9%	38.8%	39.5%
Germany								
Mercedes (2)	216,053	141,547	278,772	414,675	397,553	329,107	391,194	n/a
Opel	32,742	76,441	288,651	310,802	238,910	200,410	236,982	n/a
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,278,671	1,238,822	985,365	1,102,852	n/a
Ford	5,344	90,117	179,130	342,580	348,715	317,161	347,553	n/a
BMW	33,520	28,135	194,794	483,359	416,432	386,557	464,065	n/a
Total (2)	**465,788**	**662,007**	**1,788,999**	**2,830,087**	**2,640,456**	**2,227,276**	**2,552,693**	**n/a**
TOTAL GASOLINE + DIESEL	**3,520,934**	**4,660,657**	**5,131,918**	**5,709,139**	**5,532,030**	**4,964,509**	**5,552,330**	**5,871,918**
Diesel share	13.2%	14.2%	34.9%	49.6%	47.7%	44.9%	46.0%	n/a
Italy								
Alfa Romeo	3,851	11,176	77,532	114,212	72,405	49,822	60,095	n/a
Fiat	76,513	87,985	223,889	328,545	207,314	142,357	150,786	n/a
Lancia		17,679	40,891	31,002	36,817	31,229	28,571	n/a
Others	0	297	0	5,089	4,763	1,040	1,449	n/a
Total (2)	**80,364**	**117,137**	**342,312**	**478,848**	**321,299**	**224,448**	**240,901**	**n/a**
TOTAL GASOLINE + DIESEL	**1,445,221**	**1,874,672**	**1,422,243**	**910,860**	**659,221**	**661,100**	**573,169**	**485,606**
Diesel share	5.6%	6.2%	24.1%	52.6%	48.7%	34.0%	42.0%	n/a

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

Production

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

In units

Group, manufacturer and country	GVWR[1] from 3.5 t to 5 t inclusive	GVWR from 5 t to 16 t exclusive	GVWR 16 t and over, road tractors all weights	GVWR 3.5 t and over	GVWR over 5 t
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 3.5 t					
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	**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 new passenger car registrations as of 2004.

In thousands of units and as a % of total registrations

	1985	1990	2000	2007 (1)	2008	2009	2010	2011
PSA Peugeot Citroën	**1,225**	**1,719**	**1,930**	**1,970**	**1,792**	**1,818**	**1,776**	**1,620**
	11.5%	12.7%	13.1%	13.3%	13.2%	13.3%	13.7%	12.7%
Renault Group	**1,135**	**1,315**	**1,559**	**1,211**	**1,138**	**1,237**	**1,305**	**1,195**
	10.7%	9.7%	10.6%	8.2%	8.4%	9.1%	10.1%	9.3%
Fiat Group (including Chrysler)	1,488	1,890	1,575	1,309	1,210	1,252	1,035	916
	14.0%	14.0%	10.7%	8.8%	8.9%	9.2%	8.0%	7.2%
Ford Group	1,266	1,540	1,248	1,219	1,147	1,229	1,063	1,033
	11.9%	11.4%	8.5%	8.2%	8.4%	9.0%	8.2%	8.1%
General Motors	1,201	1,560	1,720	1,427	1,223	1,188	1,119	1,099
	11.3%	11.5%	11.7%	9.6%	9.0%	8.7%	8.6%	8.6%
Volkswagen Group	1,553	2,120	2,755	2,881	2,761	2,854	2,721	2,938
	14.6%	15.7%	18.7%	19.4%	20.3%	20.9%	21.0%	22.9%
Daimler	394	438	811	810	771	671	662	659
	3.7%	3.2%	5.5%	5.5%	5.7%	4.9%	5.1%	5.1%
BMW Group	290	364	499	834	804	695	735	792
	2.7%	2.7%	3.4%	5.6%	5.9%	5.1%	5.7%	6.2%
Nissan	306	395	392	290	314	349	384	436
	2.9%	2.9%	2.7%	2.0%	2.3%	2.6%	3.0%	3.4%
Toyota-Lexus-Daihatsu	303	406	576	912	756	715	582	531
	2.9%	3.0%	3.9%	6.2%	5.6%	5.2%	4.5%	4.2%
Other Japanese makes	534	789	701	905	806	769	651	563
	5.0%	5.8%	4.8%	6.1%	5.9%	5.6%	5.0%	4.4%
Hyundai-Kia	7	18	303	488	422	520	539	604
	0.1%	0.1%	2.1%	3.3%	3.1%	3.8%	4.2%	4.7%
Volvo	255	235	230	255	213	196	222	245
	2.4%	1.7%	1.6%	1.7%	1.6%	1.4%	1.7%	1.9%
Tata Group	21	44	112	136	110	87	97	94
	0.2%	0.3%	0.8%	0.9%	0.8%	0.6%	0.7%	0.7%
Other makes (including MG-Rover, Saab)	633	684	326	173	126	84	83	78
	6.0%	5.1%	2.2%	1.2%	0.9%	0.6%	0.6%	0.6%
TOTAL EUROPE (17 COUNTRIES)	**10,611**	**13,517**	**14,738**	**14,820**	**13,593**	**13,664**	**12,975**	**12,802**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		0.9%	– 2.1%	0.2%	– 8.3%	0.5%	– 5.0%	– 1.3%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN EUROPE

In thousands of units and as a % of total registrations

	1985	1990	2000	2007 (1)	2008	2009	2010	2011
PSA Peugeot Citroën	**186**	**251**	**349**	**387**	**365**	**299**	**326**	**330**
	16.9%	16.5%	18.1%	18.7%	19.9%	22.5%	22.1%	20.9%
Renault Group	**175**	**278**	**272**	**303**	**268**	**208**	**251**	**261**
	15.8%	18.3%	14.1%	14.6%	14.6%	15.6%	17.0%	16.5%
Fiat Group	115	163	275	303	280	200	214	225
	10.4%	10.7%	14.2%	14.6%	15.3%	15.1%	14.5%	14.3%
Ford Group	123	195	180	258	219	151	161	176
	11.1%	12.9%	9.3%	12.5%	11.9%	11.4%	10.9%	11.1%
General Motors	55	81	92	147	132	70	75	89
	5.0%	5.3%	4.8%	7.1%	7.2%	5.3%	5.1%	5.6%
Volkswagen Group	113	134	202	223	200	136	170	200
	10.2%	8.9%	10.5%	10.8%	10.9%	10.2%	11.5%	12.7%
Daimler	64	71	163	171	163	118	130	138
	5.8%	4.7%	8.4%	8.2%	8.9%	8.9%	8.8%	8.8%
Nissan	61	105	100	89	62	41	41	51
	5.5%	6.9%	5.2%	4.3%	3.4%	3.1%	2.8%	3.2%
Toyota-Lexus-Daihatsu	66	81	69	65	56	35	37	40
	6.0%	5.3%	3.6%	3.2%	3.1%	2.7%	2.5%	2.5%
Other Japanese makes	67	72	117	70	46	34	39	35
	6.1%	4.8%	6.0%	3.4%	2.5%	2.5%	2.6%	2.2%
Hyundai-Kia	1	0	44	13	9	5	5	5
	0.1%	0.0%	2.3%	0.6%	0.5%	0.4%	0.4%	0.3%
Other makes	78	85	69	42	34	31	27	31
	7.1%	5.6%	3.6%	2.0%	1.8%	2.3%	1.8%	1.9%
TOTAL EUROPE (17 COUNTRIES)	**1,104**	**1,516**	**1,931**	**2,069**	**1,833**	**1,327**	**1,475**	**1,580**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		–2.6%	5.6%	5.4%	–11.4%	–27.6%	11.1%	7.1%

(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 + Chrysler + Jeep + Dodge + 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-Benz + Smart + others / BMW Group = BMW + Mini + Rolls-Royce / Other Japanese makes: Mazda, Mitsubishi, Subaru, Suzuki, etc. / Tata Group = Jaguar + Land-Rover + Tata / The scope of the groups corresponds to their situation as of 01/01/2012.

Registrations

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY AND GROUP IN 2011

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	**3,174**	**150**	**67**	**83**	**160**	**100**	**1,139**	**231**	**285**	**298**	**315**	**300**	**129**
	100%	4.7%	2.1%	2.6%	5.1%	3.1%	35.9%	7.3%	9.0%	9.4%	9.9%	9.4%	4.1%
Austria	**356**	**29**	**13**	**16**	**24**	**20**	**122**	**24**	**31**	**19**	**12**	**41**	**29**
	100%	8.3%	3.8%	4.5%	6.8%	5.6%	34.2%	6.6%	8.6%	5.2%	3.5%	11.4%	8.2%
Belgium	**572**	**94**	**46**	**49**	**75**	**22**	**124**	**39**	**47**	**36**	**22**	**61**	**27**
	100%	16.5%	8.0%	8.5%	13.2%	3.8%	21.6%	6.8%	8.2%	6.3%	3.8%	10.6%	4.8%
Denmark	**170**	**30**	**13**	**17**	**9**	**7**	**31**	**16**	**19**	**4**	**4**	**33**	**16**
	100%	17.6%	7.8%	9.8%	5.1%	4.3%	18.3%	9.3%	10.9%	2.2%	2.1%	19.4%	9.3%
Spain	**808**	**123**	**59**	**64**	**79**	**25**	**199**	**65**	**76**	**37**	**26**	**110**	**51**
	100%	15.3%	7.3%	7.9%	9.8%	3.1%	24.7%	8.0%	9.4%	4.5%	3.2%	13.6%	6.3%
Finland	**121**	**7**	**3**	**4**	**3**	**3**	**34**	**11**	**7**	**4**	**5**	**29**	**10**
	100%	6.1%	2.8%	3.2%	2.1%	2.4%	28.0%	8.7%	5.4%	3.4%	4.2%	23.9%	8.5%
France	**2,204**	**693**	**323**	**370**	**545**	**81**	**278**	**115**	**118**	**68**	**50**	**182**	**49**
	100%	31.4%	14.7%	16.8%	24.7%	3.7%	12.6%	5.2%	5.3%	3.1%	2.3%	8.3%	2.2%
Greece	**98**	**7**	**4**	**3**	**2**	**8**	**20**	**6**	**13**	**3**	**4**	**25**	**7**
	100%	7.2%	3.7%	3.5%	2.4%	8.2%	20.2%	6.6%	13.6%	3.0%	3.7%	26.0%	7.4%
Ireland	**90**	**4**	**1**	**3**	**9**	**1**	**21**	**11**	**7**	**4**	**2**	**23**	**7**
	100%	4.5%	1.4%	3.1%	9.5%	1.2%	23.5%	11.7%	7.6%	4.3%	2.2%	25.9%	7.5%
Italy	**1,749**	**160**	**82**	**78**	**109**	**516**	**230**	**147**	**149**	**72**	**75**	**185**	**65**
	100%	9.1%	4.7%	4.5%	6.2%	29.5%	13.1%	8.4%	8.5%	4.1%	4.3%	10.6%	3.7%
Luxembourg	**50**	**6**	**3**	**3**	**5**	**2**	**14**	**3**	**2**	**5**	**3**	**3**	**3**
	100%	13.0%	6.0%	6.9%	9.2%	4.6%	29.0%	5.9%	4.5%	10.3%	6.5%	6.9%	5.3%
Netherlands	**556**	**75**	**29**	**46**	**49**	**37**	**119**	**41**	**50**	**20**	**12**	**85**	**47**
	100%	13.6%	5.3%	8.3%	8.8%	6.7%	21.4%	7.4%	9.1%	3.6%	2.2%	15.3%	8.4%
Portugal	**153**	**22**	**9**	**13**	**19**	**9**	**33**	**11**	**15**	**9**	**9**	**18**	**5**
	100%	14.3%	5.9%	8.4%	12.1%	6.1%	21.3%	6.9%	9.5%	5.9%	6.0%	11.8%	3.6%
United Kingdom	**1,941**	**163**	**68**	**95**	**68**	**59**	**375**	**266**	**247**	**167**	**87**	**293**	**117**
	100%	8.4%	3.5%	4.9%	3.5%	3.0%	19.3%	13.7%	12.7%	8.6%	4.5%	15.1%	6.0%
Sweden	**305**	**16**	**6**	**9**	**14**	**6**	**79**	**17**	**9**	**17**	**12**	**44**	**27**
	100%	5.1%	2.1%	3.0%	4.7%	2.0%	25.9%	5.6%	2.9%	5.7%	3.9%	14.3%	9.0%
EUROPEAN UNION 15 COUNTRIES	**12,347**	**1,580**	**727**	**853**	**1,170**	**897**	**2,818**	**1,001**	**1,075**	**763**	**638**	**1,432**	**589**
	100%	12.8%	5.9%	6.9%	9.5%	7.3%	22.8%	8.1%	8.7%	6.2%	5.2%	11.6%	4.8%
Norway	**138**	**11**	**4**	**7**	**1**	**1**	**36**	**13**	**5**	**7**	**5**	**39**	**8**
	100%	8.0%	2.6%	5.4%	0.6%	0.9%	25.9%	9.4%	3.4%	5.1%	3.4%	27.9%	5.9%
Switzerland	**317**	**28**	**13**	**15**	**24**	**18**	**84**	**18**	**19**	**22**	**16**	**59**	**14**
	100%	8.9%	4.1%	4.8%	7.6%	5.5%	26.6%	5.8%	6.2%	6.9%	5.1%	18.7%	4.5%
EUROPE 17 COUNTRIES	**12,802**	**1,620**	**744**	**876**	**1,195**	**916**	**2,938**	**1,033**	**1,099**	**792**	**659**	**1,530**	**611**
	100%	12.7%	5.8%	6.8%	9.3%	7.2%	22.9%	8.1%	8.6%	6.2%	5.1%	12.0%	4.8%
Bulgaria	**19**	**2**	**1**	**1**	**2**	**0**	**4**	**1**	**3**	**1**	**0**	**4**	**1**
	100%	9.6%	3.4%	6.2%	13.3%	1.5%	22.7%	7.5%	13.9%	3.7%	2.3%	19.1%	4.0%
Estonia	**17**	**2**	**1**	**1**	**2**	**0**	**4**	**1**	**1**	**0**	**0**	**6**	**1**
	100%	10.8%	3.5%	7.4%	8.9%	1.6%	23.0%	4.9%	5.3%	1.6%	1.2%	32.9%	7.1%
Hungary	**45**	**3**	**1**	**2**	**5**	**2**	**12**	**5**	**6**	**1**	**1**	**8**	**3**
	100%	6.3%	2.8%	3.5%	10.7%	3.3%	25.5%	11.0%	13.8%	2.5%	1.7%	16.7%	5.6%
Latvia	**11**	**1**	**0**	**1**	**1**	**0**	**3**	**1**	**0**	**0**	**0**	**3**	**1**
	100%	9.5%	2.6%	6.9%	8.4%	1.6%	30.4%	5.3%	3.8%	3.1%	1.8%	26.1%	5.5%
Lithuania	**13**	**2**	**0**	**1**	**1**	**1**	**3**	**1**	**1**	**1**	**0**	**4**	**1**
	100%	11.9%	1.7%	10.2%	4.4%	6.1%	23.5%	4.7%	6.2%	3.9%	1.2%	29.4%	5.9%
Poland	**298**	**23**	**11**	**12**	**24**	**21**	**67**	**23**	**30**	**6**	**5**	**60**	**32**
	100%	7.6%	3.6%	4.0%	8.2%	6.9%	22.6%	7.7%	9.9%	2.0%	1.6%	20.1%	10.9%
Czech Republic	**174**	**12**	**5**	**7**	**16**	**3**	**74**	**14**	**7**	**3**	**3**	**14**	**21**
	100%	7.1%	3.0%	4.2%	9.4%	1.6%	42.5%	8.2%	4.3%	1.9%	1.6%	7.8%	11.8%
Romania	**95**	**4**	**1**	**2**	**36**	**2**	**21**	**6**	**8**	**2**	**2**	**9**	**5**
	100%	3.8%	1.2%	2.6%	37.6%	2.3%	22.5%	5.9%	8.3%	2.3%	1.6%	9.8%	4.8%
Slovakia	**68**	**7**	**3**	**4**	**6**	**2**	**24**	**3**	**5**	**3**	**2**	**8**	**8**
	100%	10.0%	4.1%	5.9%	9.0%	2.8%	34.8%	4.1%	6.6%	4.0%	2.3%	12.3%	12.4%
Slovenia	**60**	**8**	**4**	**4**	**10**	**3**	**14**	**4**	**7**	**2**	**1**	**5**	**5**
	100%	14.1%	7.0%	7.1%	17.4%	4.2%	23.9%	6.1%	12.1%	3.6%	1.2%	8.0%	8.9%
10 new EU member states	**800**	**63**	**27**	**36**	**103**	**33**	**226**	**57**	**68**	**19**	**13**	**119**	**77**
	100%	7.9%	3.4%	4.5%	12.9%	4.1%	28.3%	7.2%	8.4%	2.4%	1.7%	14.9%	9.6%
EUROPE 27 COUNTRIES	**13,602**	**1,683**	**771**	**912**	**1,298**	**949**	**3,164**	**1,090**	**1,166**	**811**	**673**	**1,649**	**689**
	100%	12.4%	5.7%	6.7%	9.5%	7.0%	23.3%	8.0%	8.6%	6.0%	4.9%	12.1%	5.1%

Automobile manufacturers include the following makes: PSA Peugeot Citroën = Peugeot + Citroën / Renault Group = Renault + Dacia / Fiat Group = Alfa Romeo + Fiat + Lancia + Ferrari + Maserati + Chrysler + Jeep + Dodge + 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-Benz + Smart + others / BMW Group = BMW + Mini + Rolls-Royce / Japanese makes: Mazda, Mitsubishi, Nissan, Subaru, Suzuki, Toyota, etc. South Korean makes: Hyundai-Kia and Ssangyong.

Registrations

NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY

In units and as a % of total registrations

	1980	1990	2000	2007	2008	2009	2010	2011
Germany	**193,841**	**327,046**	**1,023,997**	**1,502,282**	**1,361,958**	**1,167,447**	**1,220,675**	**1,493,614**
	8.0%	9.8%	30.3%	47.7%	44.1%	30.7%	41.9%	47.1%
Austria	**7,425**	**74,197**	**191,402**	**176,752**	**160,465**	**146,949**	**167,106**	**194,519**
	3.3%	25.7%	61.9%	59.3%	54.6%	46.0%	50.9%	54.6%
Belgium	**54,897**	**154,804**	**290,301**	**404,297**	**422,681**	**358,400**	**415,728**	**431,059**
	13.8%	32.7%	56.3%	77.0%	78.9%	75.3%	76.0%	75.3%
Denmark	**2,352**	**3,305**	**14,898**	**61,825**	**69,347**	**50,729**	**72,670**	**81,415**
	3.2%	4.1%	13.2%	38.8%	46.2%	45.2%	47.3%	48.0%
Spain (1)	**–**	**140,740**	**734,256**	**1,144,265**	**804,499**	**668,022**	**693,905**	**568,246**
		14.2%	53.1%	70.9%	69.3%	70.1%	70.7%	70.3%
Finland	**–**	**7,215**	**–**	**34,780**	**69,291**	**40,852**	**44,574**	**50,905**
		5.2%		28.2%	49.6%	46.2%	41.5%	42.0%
France	186,050	762,054	1,046,485	1,563,061	1,620,980	1,628,495	1,593,173	1,596,155
	9.9%	33.0%	49.0%	74.1%	77.5%	70.7%	70.8%	72.4%
Greece	**–**	**60**	**2,006**	**8,116**	**9,590**	**7,237**	**5,661**	**9,722**
		0.1%	0.7%	2.9%	3.6%	3.3%	4.0%	10.0%
Ireland	**–**	**12,413**	**23,259**	**50,328**	**50,741**	**29,953**	**55,016**	**62,911**
		15.0%	10.1%	27.0%	33.5%	52.1%	62.2%	70.0%
Italy	**138,562**	**179,779**	**812,203**	**1,389,391**	**1,096,485**	**904,275**	**901,310**	**965,301**
	8.1%	7.8%	33.6%	55.7%	50.7%	41.9%	45.9%	55.2%
Luxembourg	**–**	**8,206**	**21,110**	**39,753**	**40,314**	**34,480**	**37,403**	**38,194**
		21.4%	50.4%	77.4%	77.0%	73.0%	75.2%	76.6%
Norway	**–**	**1,581**	**8,761**	**96,051**	**80,096**	**71,752**	**95,733**	**104,665**
		2.6%	9.0%	74.3%	72.4%	72.7%	74.9%	75.7%
Netherlands	**30,450**	**54,738**	**134,426**	**142,770**	**125,377**	**77,674**	**98,477**	**156,508**
	6.8%	10.9%	22.5%	28.2%	25.1%	20.1%	20.4%	28.2%
Portugal	**–**	**10,426**	**62,417**	**139,877**	**147,896**	**107,178**	**149,046**	**106,811**
		4.9%	24.2%	69.3%	69.3%	66.6%	66.7%	69.6%
United Kingdom	**5,850**	**128,160**	**313,149**	**965,517**	**928,737**	**832,590**	**936,448**	**981,516**
	0.4%	6.4%	14.1%	40.2%	43.6%	41.7%	46.1%	50.6%
Sweden	**–**	**1,335**	**18,325**	**106,382**	**91,874**	**87,518**	**147,802**	**187,605**
		0.6%	6.3%	34.7%	36.2%	41.0%	51.0%	61.5%
Switzerland	**–**	**9,998**	**29,466**	**92,568**	**93,493**	**78,307**	**88,760**	**104,227**
		3.0%	9.3%	32.5%	32.4%	29.4%	30.4%	32.9%
EUROPE 17 COUNTRIES (1)	619,427	1,866,021	4,726,461	7,918,015	7,173,824	6,291,858	6,723,487	7,133,373
% diesel in Europe	7.1%	13.9%	32.1%	53.4%	52.8%	46.0%	51.8%	55.7%
Year-on-year change		+0.7%	+10.7%	+4.4%	–9.4%	–12.3%	+6.9%	+6.1%

(1) See notes on page 61.

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

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Germany	2,527,580	3,475,172	3,590,633	3,376,019	3,320,059	3,981,805	3,118,705	3,412,932
Austria	243,021	310,157	336,670	330,703	326,633	345,132	356,693	388,822
Belgium	429,849	525,996	569,294	593,555	604,326	530,509	603,346	637,238
Denmark	89,485	100,303	145,780	219,047	184,582	128,060	170,431	194,625
Spain	592,093	1,218,091	1,680,761	1,891,243	1,328,219	1,060,263	1,098,785	912,749
Finland	115,741	166,602	149,702	140,778	156,913	97,898	118,896	136,336
France	**2,151,089**	**2,702,925**	**2,548,850**	**2,571,134**	**2,551,641**	**2,676,384**	**2,669,281**	**2,633,483**
Greece	80,824	144,960	313,230	304,262	290,091	234,647	152,436	104,139
Ireland	102,203	106,720	272,463	230,911	181,552	66,751	98,931	101,305
Italy	1,826,702	2,464,050	2,641,117	2,730,142	2,384,652	2,336,362	2,139,465	1,920,597
Luxembourg	22,514	40,285	44,979	54,874	56,447	50,368	53,017	53,547
Norway	106,945	82,483	129,003	175,835	146,716	123,196	158,176	175,375
Netherlands	483,574	555,812	694,210	586,575	584,881	438,710	532,390	614,782
Portugal	96,954	275,160	410,670	270,414	268,991	200,050	269,220	188,452
United Kingdom	1,725,803	2,256,662	2,466,833	2,752,187	2,431,300	2,189,726	2,262,385	2,208,176
Sweden	204,626	256,303	322,383	351,438	293,790	241,266	328,227	351,852
Switzerland	297,855	352,652	340,640	310,721	315,602	289,909	318,960	347,916
European Union (1)	9,358,799	14,523,790	16,187,575	16,403,282	14,964,077	14,577,931	13,972,208	13,859,035
EUROPE 17 COUNTRIES	**11,096,858**	**15,034,333**	**16,657,218**	**16,889,838**	**15,426,395**	**14,991,036**	**14,449,344**	**14,382,326**

(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 (UP TO 5 METRIC TONS) REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Germany	101,393	125,384	212,290	227,856	230,019	174,630	202,446	239,298
Austria	15,473	21,539	27,243	32,521	32,936	25,729	28,130	32,677
Belgium	30,609	52,490	54,090	68,760	68,379	54,315	56,006	65,027
Denmark	15,711	19,649	33,092	59,706	34,439	15,861	16,848	24,881
Spain (1)	88,042	229,821	299,246	276,408	167,043	107,491	116,770	104,698
Finland	12,574	27,507	15,056	17,615	17,302	9,554	11,550	15,165
France	**277,887**	**393,795**	**414,966**	**461,462**	**460,273**	**373,986**	**417,612**	**429,254**
Greece	45,124	29,480	23,008	24,517	22,796	14,917	10,935	6,459
Ireland	8,640	24,136	41,474	44,576	29,949	9,296	10,486	11,378
Italy	109,270	156,995	225,517	237,368	222,979	176,926	177,887	171,512
Luxembourg	1,014	1,863	3,083	3,542	4,088	3,103	3,291	3,666
Norway	11,395	20,582	31,627	46,640	36,099	24,521	30,422	37,030
Netherlands	33,498	53,080	96,570	81,035	84,963	51,555	49,863	58,970
Portugal	38,597	64,236	152,836	68,598	55,602	39,037	45,756	35,048
United Kingdom	212,042	247,728	245,163	348,180	299,505	194,727	231,539	266,923
Sweden	12,038	26,362	31,854	44,639	39,808	27,858	38,543	46,868
Switzerland	18,091	22,753	24,121	26,033	27,045	23,860	26,507	31,070
European Union (2)	790,064	1,398,657	1,875,488	1,996,783	1,770,081	1,278,985	1,417,662	1,511,824
EUROPE 17 (1) COUNTRIES	**1,031,398**	**1,517,400**	**1,931,236**	**2,069,456**	**1,833,225**	**1,327,366**	**1,474,591**	**1,579,924**

(1) See notes on page 61.

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

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Germany	59,061	73,770	96,830	101,320	99,907	62,518	75,014	90,902
Austria	5,642	7,222	8,508	8,289	8,506	4,691	5,138	7,257
Belgium	8,604	10,690	11,061	11,953	11,868	8,271	7,133	9,449
Denmark	3,179	3,539	4,597	6,798	6,563	3,175	2,682	3,560
Spain	23,208	30,432	33,700	44,384	31,226	11,675	13,215	15,790
Finland	4,497	4,218	3,072	3,081	4,018	2,572	2,368	2,794
France	**41,846**	**50,028**	**57,918**	**52,539**	**57,504**	**35,533**	**34,221**	**47,363**
Greece	1,178	497	1,633	2,071	2,344	1,578	1,081	459
Ireland	3,511	2,748	4,666	5,092	3,602	1,104	1,011	1,079
Italy	–	31,973	38,388	35,237	33,852	18,685	17,532	18,859
Luxembourg	690	1,136	1,451	1,609	1,742	898	803	1,274
Norway	3,056	2,106	3,564	5,650	5,729	3,429	3,126	3,933
Netherlands	13,346	14,804	16,835	15,099	18,023	11,692	9,390	12,551
Portugal	8,370	7,186	7,403	5,623	5,516	3,195	3,116	2,651
United Kingdom	57,489	45,794	51,864	43,111	49,558	28,539	27,988	37,925
Sweden	6,703	5,998	5,549	6,484	6,749	5,357	4,605	5,855
Switzerland	3,955	4,832	4,733	4,230	4,942	4,276	3,388	4,326
European Union (2)	187,726	272,597	343,475	342,690	340,978	199,483	205,297	257,768
EUROPE 17 COUNTRIES	**244,335**	**296,973**	**351,772**	**352,570**	**351,649**	**207,188**	**211,811**	**266,027**

NEW COACH AND BUS (OVER 5 METRIC TONS) REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Germany	6,058	4,235	5,684	4,940	5,073	5,030	4,697	4,620
Austria	676	450	706	699	861	606	733	576
Belgium	585	580	974	951	1,029	845	909	669
Denmark	579	311	419	363	463	549	450	334
Spain	1,511	2,376	2,738	3,671	3,098	2,284	2,119	2,865
Finland	625	429	–	248	312	325	300	218
France	**3,558**	**3,160**	**4,320**	**5,491**	**5,655**	**6,664**	**5,382**	**6,206**
Greece	–	625	374	542	430	893	325	84
Ireland	–	24	121	345	459	166	47	75
Italy	–	3,825	4,152	3,943	3,581	2,779	3,931	3,200
Luxembourg	53	57	108	164	216	196	173	194
Norway	684	380	427	718	802	812	1,052	1,005
Netherlands	1,082	1,069	949	1,141	1,153	957	524	427
Portugal	–	482	806	569	612	515	418	259
United Kingdom	5,792	3,324	4,496	3,888	4,400	4,277	3,203	3,382
Sweden	943	863	1,071	800	920	890	1,302	1,359
Switzerland	371	580	491	457	802	539	476	606
European Union (2)	17,707	20,068	26,918	27,755	28,262	26,976	24,513	24,468
EUROPE 17 COUNTRIES	**22,517**	**22,770**	**27,836**	**28,930**	**29,866**	**28,327**	**26,041**	**26,079**

(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	2005	2006	2007	2008	2009	2010	2011
Bulgaria			32,481	41,042	43,758	21,478	15,646	18,631
Estonia	10,600	19,640	25,363	30,912	24,579	9,946	10,295	17,070
Hungary	133,233	198,982	187,676	171,661	153,278	60,189	43,476	45,094
Latvia	7,300	16,602	25,582	32,771	19,831	5,367	6,365	10,980
Lithuania	6,158	10,467	14,234	21,606	22,217	7,515	7,970	13,234
Poland	478,752	235,522	238,993	293,305	320,040	320,206	333,490	297,937
Czech Republic	148,592	151,699	156,686	174,456	182,554	167,708	169,580	173,595
Romania			256,364	315,621	270,995	130,195	106,333	94,619
Slovakia	55,090	57,125	59,084	59,700	70,040	74,717	64,033	68,254
Slovenia	67,665	59,324	59,578	68,719	71,575	57,967	61,142	60,193
TOTAL NEW EU MEMBER (1) STATES	**907,400**	**749,361**	**1,056,041**	**1,209,793**	**1,178,867**	**855,288**	**818,330**	**799,607**
Romania	64,432	215,554						

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE

In units

	2000	2005	2006	2007	2008	2009	2010	2011
Bulgaria			9,959	10,697	11,478	4,275	3,211	2,979
Estonia	1,500	2,944	3,768	4,693	3,041	1,206	1,406	2,478
Hungary	26,686	20,479	21,604	21,920	21,559	10,619	9,337	11,564
Latvia	900	1,753	2,645	3,615	2,151	555	649	1,926
Lithuania	1,270	3,371	4,341	4,445	3,201	884	1,044	1,939
Poland	33,653	35,985	41,027	56,312	61,221	43,764	42,852	47,206
Czech Republic	14,786	16,024	16,229	19,722	20,648	13,258	11,318	13,149
Romania			32,702	36,431	40,876	15,397	10,404	11,791
Slovakia	5,812	14,428	19,518	23,618	26,907	15,722	6,953	5,717
Slovenia	6,274	6,897	6,080	6,860	7,331	4,452	4,744	5,791
TOTAL NEW EU MEMBER STATES (1)	**90,900**	**101,881**	**157,873**	**188,313**	**198,413**	**110,132**	**91,918**	**104,540**
Romania	14,789	35,842						

NEW LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN EUROPE

In units

	2000	2005	2006	2007	2008	2009	2010	2011
Bulgaria			42,440	51,739	55,236	25,753	18,857	21,610
Estonia	12,100	22,584	29,131	35,605	27,620	11,152	11,701	19,548
Hungary	159,919	219,461	209,280	193,581	174,837	70,808	52,813	56,658
Latvia	8,200	18,355	28,227	36,386	21,982	5,922	7,014	12,906
Lithuania	7,428	13,838	18,575	26,051	25,418	8,399	9,014	15,173
Poland	512,405	271,507	280,020	349,617	381,261	363,970	376,342	345,143
Czech Republic	163,378	167,723	172,915	194,178	203,202	180,966	180,898	186,744
Romania			289,066	352,052	311,871	145,592	116,737	106,410
Slovakia	60,902	71,553	78,602	83,318	96,947	90,439	70,986	73,971
Slovenia	73,939	66,221	65,658	75,579	78,906	62,419	65,886	65,984
TOTAL NEW EU MEMBER STATES (1)	**998,300**	**851,242**	**1,213,914**	**1,398,106**	**1,377,280**	**965,420**	**910,248**	**904,147**
Romania	79,221	251,396						

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

In units

	2000	2005	2006	2007	2008	2009	2010	2011
Bulgaria			2,000	3,600	3,400	800	1,000	1,300
Estonia	400	927	1,623	1,875	1,380	337	502	798
Hungary	2,900	4,400	4,900	5,400	5,500	1,800	2,408	4,335
Latvia	1,000	1,284	2,216	3,304	2,103	322	520	1,406
Lithuania	1,000	2,297	3,169	5,039	3,467	519	1,355	2,756
Poland	7,464	11,079	14,988	22,661	19,971	8,172	11,611	16,800
Czech Republic	6,400	8,200	10,716	12,860	12,249	5,824	5,750	8,201
Romania			8,096	14,766	12,220	2,370	2,686	4,014
Slovakia	1,796	3,754	4,917	5,776	5,431	2,322	2,870	3,962
Slovenia	1,876	1,635	2,178	2,819	2,725	867	985	1,467
TOTAL NEW EU MEMBER STATES (1)	**22,800**	**33,500**	**54,900**	**78,100**	**68,400**	**23,300**	**29,700**	**45,000**
Romania	3,113	5,019						

(1) New member states: eight countries in 2000; ten countries in 2006.

World production of French manufacturers

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

WORLD VEHICLE PRODUCTION BY MAKE

In units

	1980	1990	2000	2005	2007	2008	2009	2010	2011
Citroën	536,415	783,224	1,168,470	1,379,082	1,464,559	1,377,392	1,302,881	1,452,847	1,437,065
Peugeot	734,461	1,369,359	1,708,968	1,996,284	1,992,499	1,947,822	1,739,430	2,152,331	2,144,894
PSA Peugeot Citroën (1)	**1,647,221**	**2,152,583**	**2,877,438**	**3,375,366**	**3,457,058**	**3,325,214**	**3,042,311**	**3,605,178**	**3,581,959**
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	2,326,359	2,265,099	1,986,052	1,796,624	2,099,027	2,254,331
Renault	1,659,099	1,571,264	2,356,616	2,219,945	2,149,233	1,889,950	1,744,387	2,023,181	2,169,887
Renault Trafic II				106,414	115,866	96,102	52,237	75,846	84,444
Dacia	–	–	55,183	172,021	222,913	241,991	307,052	341,090	327,393
Renault Samsung Motors	–	–	14,517	118,438	181,028	189,308	192,333	276,169	243,365
Renault-Dacia-Samsung (2)	**1,659,099**	**1,571,264**	**2,426,316**	**2,616,818**	**2,669,040**	**2,417,351**	**2,296,009**	**2,716,286**	**2,825,089**
C.B.M.	*105*								
Renault Trucks (3)	54,086	60,263	96,040	63,961	62,227	65,328	24,314	31,874	41,169
of which Mack Trucks	–	15,423	34,562	–	–	–	–	–	–
Etalmobil (Sovam)	113	75	44	27	21	7	9	0	0
Unic	17,809								
Heuliez (4)	–	231	391	–	–	–	–	–	–
Irisbus-Renault (4)	–	–	2,547	–	–	–	–	–	–
TOTAL	3,378,433	3,784,416	5,402,776	6,056,172	6,188,346	5,807,900	5,362,643	6,353,338	6,448,217
KD and CKD units	**616,466**	**287,512**							

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

In units

	1980	1990	2000	2005	2007	2008	2009	2010	2011
Citroën	49,034	93,259	192,238	205,376	213,549	236,830	138,864	180,462	193,224
Peugeot	127,428	81,439	186,917	187,300	218,956	247,693	140,941	210,252	227,231
PSA Peugeot Citroën (1)	**200,979**	**174,698**	**379,155**	**392,676**	**432,505**	**484,523**	**279,805**	**390,714**	**420,455**
Renault (including Trafic II)	166,760	254,334	312,801	401,785	385,530	343,507	235,223	302,706	364,584
Renault	166,760	254,334	312,801	295,371	303,041	273,175	195,564	244,123	299,966
Renault Trafic II				106,414	82,489	70,332	39,659	58,583	64,618
Dacia	–	–	12,580	19,871	7,466	13,956	16,680	17,704	17,409
Renault–Dacia–Samsung (2)	**166,760**	**254,334**	**325,381**	**421,656**	**392,996**	**357,463**	**251,903**	**320,410**	**381,993**
C.B.M.	105								
Renault Trucks (3)	54,086	60,263	96,040	63,961	62,227	65,328	24,314	31,874	41,169
of which Mack Trucks	–	15,423	34,562	–	–	–	–	–	–
Etalmobil (Sovam)	113	75	44	27	21	7	9	0	0
Unic	17,809								
Heuliez (4)	–	231	391	–	–	–	–	–	–
Irisbus–Renault (4)	–	–	2,547	–	–	–	–	–	–
TOTAL	439,852	489,601	803,558	878,320	887,749	907,321	556,031	742,998	843,617
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. Since 2006, some Renault Trafic II vehicles have been classified as passenger cars.
(3) Between 1990 and 2000, Mack was integrated in Renault V.I. In 2001, the heavy trucks activity of Renault was combined with that of AB Volvo. Renault V.I. was renamed Renault Trucks.
(4) On January 1st, 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

VEHICLE PRODUCTION IN FRANCE BY FRENCH AND FOREIGN AUTOMOBILE MANUFACTURERS

In units

	1980	1990	2000	2005	2007	2008	2009	2010	2011
Foreign manufacturers									
Bugatti				5	72	82	38	0	0
Fiat	–	–	10,377	8,304	4,504	2,688	1,717	888	0
Heuliez–Opel				37,390	11,770	8,840	3,218	0	0
Lancia	–	–	2,265	5,713	4,238	4,068	1,996	1,561	0
Smart	–	–	101,365	77,015	102,588	140,072	115,469	97,373	103,560
Toyota	–	–	0	180,643	262,313	232,406	207,456	158,512	149,153
Passenger cars	**–**	**–**	**114,007**	**309,070**	**385,485**	**388,156**	**329,894**	**258,334**	**252,713**
Light commercial vehicles (Fiat)	**–**	**–**	**39,428**	**20,680**	**41,008**	**35,856**	**17,837**	**19,450**	**19,786**
Heavy trucks (Scania)	**–**	**–**	**10,710**	**9,391**	**12,002**	**12,629**	**4,724**	**9,594**	**n/a**
Irisbus–Heuliez	–	–	–	291	458	404	407	451	n/a
Irisbus	–	–	–	2,869	3,321	3,117	2,875	2,473	n/a
Evobus	–	–	535	527	557	630	742	551	n/a
Coaches and buses	**–**	**–**	**535**	**3,687**	**4,336**	**4,151**	**4,024**	**3,475**	**n/a**
TOTAL FOREIGN MAKES	–	–	164,680	342,828	442,831	440,792	356,479	290,853	287,819
French manufacturers									
TOTAL FRENCH MAKES	–	–	3,183,681	3,206,180	2,573,023	2,128,186	1,691,214	1,938,528	2,007,070
Foreign and French manufacturers									
OVERALL TOTAL	–	–	3,348,361	3,549,008	3,015,854	2,568,978	2,047,693	2,229,381	2,294,889

Source: CCFA.

World production of French manufacturers

PRODUCTION OF PASSENGER CARS BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Citroën	536,366	689,965	976,232	1,251,010	1,140,562	1,164,017	1,272,385	1,243,841
Peugeot	607,033	1,287,920	1,522,051	1,773,543	1,700,129	1,598,489	1,942,079	1,917,663
PSA Peugeot Citroën (1)	**1,446,242**	**1,977,885**	**2,498,283**	**3,024,553**	**2,840,691**	**2,762,506**	**3,214,464**	**3,161,504**
Renault	1,492,339	1,316,930	2,043,815	1,879,570	1,642,551	1,561,446	1,796,321	1,889,747
Dacia	–	–	42,603	215,447	228,035	290,372	323,386	309,984
Renault Samsung Motors	–	–	14,517	181,027	189,302	192,288	276,169	243,365
Renault-Dacia-Samsung (1)	**1,492,339**	**1,316,930**	**2,100,935**	**2,276,044**	**2,059,888**	**2,044,106**	**2,395,876**	**2,443,096**
TOTAL	2,938,581	3,294,815	4,599,218	5,300,597	4,900,579	4,806,612	5,610,340	5,604,600
KD and CKD units	**467,879**	**208,241**	**–**	**–**	**–**	**–**	**–**	**–**
of which production in France	–	–	2,765,803	2,165,384	1,757,779	1,489,603	1,665,797	1,678,317
Citroën	–	–	504,323	540,171	520,319	404,049	468,398	516,994
Peugeot	–	–	1,094,756	835,167	708,459	657,226	722,214	716,461
PSA Peugeot Citroën (1)	**–**	**–**	**1,599,079**	**1,375,338**	**1,228,778**	**1,061,275**	**1,190,612**	**1,233,455**
Renault	–	–	1,166,724	790,046	529,001	428,328	475,185	444,862
Renault-Dacia-Samsung (1)	**–**	**–**	**1,166,724**	**790,046**	**529,001**	**428,328**	**475,185**	**444,862**

(1) See notes on page 66.

PASSENGER CAR PRODUCTION BY MODEL IN 2011

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		3,161,504	1,233,455	1, 928 049
Citroën		1,243,841	516,994	726 847
	C-ZERO	3,377		3,377
	C1	88,575		88,575
	C2	10,403		10,403
	C3	340,007	193,702	146,305
	DS3	77,169	77,169	
	C4	396,073	134,620	261,453
	DS4	34,593	34,593	
	ZX	66,327		66,327
	XSARA	8,325		8,325
	C5	100,457	65,726	34,731
	DS5	4,424	4,424	
	C-CROSSER	7,135		7,135
	C6	1,029	1,029	
	C8	5,731	5,731	
	NEMO	14,770		14,770
	BERLINGO	85,446		85,446
Peugeot		1,917,663	716,461	1,201,202
	ION	3,257		3,257
	107	91,048		91,048
	206	439,290	92,939	346,351
	207	278,269	88,725	189,544
	307	67,174		67,174
	208	685	578	107
	308	198,045	198,045	
	RCZ	19,725		19,725
	3008	139,827	139,827	
	5008	74,469	74,469	
	405	282,399		282,399
	408	81,108		81,108
	407	734	734	
	508	131,658	114,768	16,890
	4007	6,957		6,957
	807	6,376	6,376	
	BIPPER	16,544		16,544
	PARTNER	80,098		80,098

Makes	Models	World production	Production in France	Production outside France
Renault-Dacia-Samsung		2,443,096	444,862	1,998,234
Renault		1,889,747	444,862	1,444,885
	TWINGO	141,618		141,618
	CLIO	473,511	136,382	337,129
	MODUS	48,590		48,590
	LOGAN	385,541		385,541
	SANDERO	97,073		97,073
	MEGANE	457,623	177,400	280,223
	LAGUNA	50,232	50,232	
	ESPACE	14,674	14,674	
	KANGOO	83,631	64,147	19,484
	TRAFIC	19,826		19,826
	MASTER	2,027	2,027	
	DUSTER	22,019		22,019
	FLUENCE	87,485		87,485
	OTHER	5,897		5,897
Dacia		309,984	0	309,984
	LOGAN	80,876		80,876
	SANDERO	60,554		60,554
	DUSTER	168,554		168,554
Renault Samsung Motors		243,365	0	243,365
	SM3/FLUENCE	99,218		99,218
	LATITUDE	64,032		64,032
	QM5 (KOLEOS)	61,003		61,003
	SM7	8,488		8,488
	NEW SM7	10,624		10,624
TOTAL		5,604,600	1,678,317	3,926,283

Source: CCFA.

World production of French manufacturers

LIGHT COMMERCIAL VEHICLE (UP TO 5 METRIC TONS) PRODUCTION BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Citroën	49,034	93,259	192,238	213,549	236,830	138,864	180,462	193,224
Peugeot	127,428	81,439	186,917	218,956	247,693	140,941	210,252	227,231
PSA Peugeot Citroën (1)	**200,979**	**174,698**	**379,155**	**432,505**	**484,523**	**279,805**	**390,714**	**420,455**
Renault (including Trafic II (2))	166,760	254,334	312,801	385,530	343,507	235,223	302,706	364,584
Renault	166,760	254,334	312,801	303,041	273,175	195,564	244,123	299,966
Renault Trafic II (2)				**82,489**	**70,332**	**39,659**	**58,583**	**64,618**
Dacia	–	–	12,580	7,466	13,956	16,680	17,704	17,409
Renault-Dacia-Samsung (1)	**166,760**	**254,334**	**325,381**	**392,996**	**357,463**	**251,903**	**320,410**	**381,993**
Renault Trucks (1)	11,632	7,464	8,321	4,439	5,271	3,405	0	0
Others	**86**	**71**	**42**	**17**	**3**	**5**	**0**	**0**
TOTAL	**379,457**	**436,567**	**712,899**	**829,957**	**847,260**	**535,118**	**711,124**	**802,448**
KD and CKD units	**68,587**	**79,271**	**–**	**–**	**–**	**–**	**–**	**–**
of which production in France	–	–	370,538	352,246	313,275	181,010	243,029	292,112
Citroën	–	–	53,561	63,887	67,348	33,037	42,882	48,540
Peugeot	–	–	67,629	66,012	52,675	26,348	38,514	42,115
PSA Peugeot Citroën (1)	**–**	**–**	**121,190**	**129,899**	**120,023**	**59,385**	**81,396**	**90,655**
Renault	–	–	240,985	217,891	187,978	118,215	161,633	201,457
Renault-Dacia-Samsung (1)	**–**	**–**	**240,985**	**217,891**	**187,978**	**118,215**	**161,633**	**201,457**
Renault Trucks (1)	**–**	**–**	**8,321**	**4,439**	**5,271**	**3,405**	**0**	**0**
Others	–	–	42	17	3	5	0	0

(1) See notes on page 66.
(2) Since 2006, some Renault Trafic II vehicles have been classified as passenger cars.

LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL, 2011

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**420,455**	**90,655**	**329,800**
Citroën		193,224	48,540	144,684
	C1	94		94
	C3	13,586	13,586	
	C4	5,329	5,329	
	NEMO	18,636		18,636
	BERLINGO	78,716		78,716
	JUMPY	29,625	29,625	
	JUMPER	47,238		47,238
Peugeot		227,231	42,115	185,116
	107	260		260
	206	10,163	4,963	5,200
	207	15,567		15,567
	208	9	7	2
	307	1	1	
	308	3,884	3,884	
	BIPPER	18,216		18,216
	PARTNER	87,270		87,270
	EXPERT	33,260	33,260	
	BOXER	58,601		58,601
Renault-Dacia-Samsung		**381,993**	**201,457**	**180,536**
Renault		364,584	201,457	163,127
	TWINGO	5,164		5,164
	CLIO	31,615	14,451	17,164
	MEGANE	6		6
	FLUENCE	2,089		2,089
	KANGOO	105,631	82,530	23,101
	TRAFIC	64,618		64,618
	MASTER	117,342	104,464	12,878
	OTHERS	38,119	12	38,107
Dacia		17,409		17,409
	LOGAN	17,409		17,409
TOTAL		**802,448**	**292,112**	**510,336**

Source: CCFA.

World production of French manufacturers

HEAVY TRUCK (OVER 5 METRIC TONS) PRODUCTION BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Renault Trucks (1)	39,475	50,493	87,719	57,788	60,057	20,909	31,874	41,169
of which Mack Trucks	–	15,423	34,562	–	–	–		
Others (2)	17,836	4	2	4	4	4	0	0
TOTAL	**57,311**	**50,497**	**87,721**	**57,792**	**60,061**	**20,913**	**31,874**	**41,169**
of which production in France	–	–	44,402	55,393	57,132	20,601	29,702	36,641
Renault Trucks (1)	–	–	44,400	55,389	57,128	20,597	29,702	36,641
Others (2)	–	–	2	4	4	4	0	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 5 METRIC TONS) PRODUCTION BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
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 sub-frames supplied by Renault V.I. are included in Heuliez production.
(2) On January 1, 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

HEAVY TRUCK (OVER 5 METRIC TONS) PRODUCTION, 2011

In units

	Models	World production	Production in France	Production outside France
Trucks				
Mid range: 7 to 16 tons		7,999	7,815	184
	Midlum	7,999	7,815	184
High range: over 16 metric tons		10,352	8,889	1,463
	Premium	3,858	3,602	256
	Magnum	158	158	–
	Kerax	3,778	3,355	423
	Lander	2,558	1,774	784
TOTAL RENAULT TRUCKS		**18,351**	**16,704**	**1,647**
Road tractors				
	Premium	16,222	13,562	2,660
	Magnum	3,644	3,644	–
	Kerax	1,240	1,240	–
	Lander	1,712	1,491	221
TOTAL RENAULT TRUCKS ROAD TRACTORS		**22,818**	**19,937**	**2,881**

Source: CCFA.

World production of French manufacturers

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

In units

		1980	1990	2000 (1)	2007	2008	2009	2010	2011
Up to 3.5 t		318,633	402,994	577,926	645,852	623,579	419,326	531,452	579,153
	G	281,031	128,422	55,883	45,533	49,354	50,212	61,998	75,209
	D	37,602	274,572	521,229	600,319	574,225	369,114	469,178	500,840
	EL			814	0	0	0	276	3,104
From 3.5 t to 5.1 t		60,824	33,573	134,973	184,105	223,681	115,793	179,672	223,181
	G	14,675	1,961	1,724	0	14	17	0	0
	D	46,149	31,612	133,249	184,105	223,667	115,776	179,672	223,181
From 5.1 t to 12 t	D	25,538	6,377	13,593	7,659	5,724	3,174	2,453	3,134
From 12 t to 16 t	D	12,541	8,251	5,009	4,212	4,562	2,483	3,066	3,504
From 16 t to 20 t	D	6,909	5,518	7,304	7,294	8,356	3,179	4,484	4,935
Over 20 t	D	3,054	3,650	6,255	10,678	10,690	3,437	5,543	6,892
Road tractors	D	9,269	11,278	20,998	27,949	30,729	8,639	16,328	22,818
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	45,533	49,368	50,229	61,998	75,209
Total diesel		144,097	343,806	710,243	842,216	857,953	505,802	680,724	765,304
Total electric		49	0	814	0	0	0	276	3,104
Total CNG or LPG				332	–	–	–	–	–
TOTAL ALL CATEGORIES		**439,852**	**474,189**	**768,996**	**887,749**	**907,321**	**556,031**	**742,998**	**843,617**

G: Gasoline. D: Diesel. EL: Electric. G: CNG or LPG.
(1) World production of French manufacturers as of 1997.

LIGHT COMMERCIAL VEHICLE (UP TO 5 METRIC TONS) PRODUCTION BY TYPE

In units

	1980	1990	2000 (1)	2007	2008	2009	2010	2011
Passenger car derivatives								
Citroën	26,904	22,942	29,449	26,689	26,314	13,139	14,972	19,009
Peugeot	69,411	55,208	41,451	34,075	30,979	22,864	33,403	29,884
PSA Peugeot Citroën (2)	103,229	78,150	70,900	60,764	57,293	36,003	48,375	48,893
Renault (3)	30,420	56,245	60,320	69,515	69,804	68,996	67,844	88,296
TOTAL	**133,649**	**134,395**	**131,220**	**130,279**	**127,097**	**104,999**	**116,219**	**137,189**
Small vans								
Citroën	45,573	67,257	100,832	91,874	112,254	80,729	98,042	97,352
Peugeot	27,002	18,537	70,443	87,932	113,638	73,525	97,608	105,486
PSA Peugeot Citroën (2)	90,178	85,794	171,275	179,806	225,892	154,254	195,650	202,838
Renault	126,779	129,335	147,670	120,457	108,734	74,476	97,142	105,631
TOTAL	**216,957**	**215,129**	**318,945**	**300,263**	**334,626**	**228,730**	**292,792**	**308,469**
Large vans								
Citroën	23,813	32,209	61,957	94,986	98,262	44,996	67,448	76,863
Peugeot	33,031	47,623	75,023	96,949	103,076	44,552	79,241	91,861
PSA Peugeot Citroën (2)	56,844	79,832	136,980	191,935	201,338	89,548	146,689	168,724
Renault	40,508	84,681	104,811	203,024	172,502	101,412	148,404	181,960
Renault Trucks	–	–	8,321	4,439	5,271	3,405	0	0
Sovam-Etalmobil	86	71	42	17	3	5	0	0
TOTAL	**97,438**	**164,584**	**250,154**	**399,415**	**379,114**	**194,370**	**295,093**	**350,684**
4WD								
Peugeot		1,730						
Pick-ups, small vans								
Dacia	–	–	12,580		6,423	7,019	7,020	6,106

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

Deliveries by French automobile manufacturers out of France

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

NEW PASSENGER CAR DELIVERIES BY DESTINATION

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Europe (1)	**1,202,834**	**1,645,276**	**2,636,150**	**2,777,968**	**2,266,279**	**2,120,054**	**2,331,256**	**2,239,833**
of which: European Union (2)	946,760	1,479,316	2,261,904	2,420,691	1,906,629	1,879,124	1,893,455	1,711,698
Germany	202,939	277,424	337,743	306,231	287,149	453,617	299,072	296,411
Austria	35,775	36,175	41,510	43,406	43,189	47,424	50,767	53,685
Belgium-Luxembourg	105,966	144,896	172,806	165,486	168,273	158,251	182,241	169,058
Denmark	4,059	13,919	30,239	37,827	31,722	14,857	27,801	32,647
Spain	100,640	297,846	556,934	519,017	326,495	299,407	302,663	242,557
Greece		11,458	54,270	31,769	26,713	13,136	10,744	7,325
Italy	381,626	324,952	353,616	388,295	293,976	339,196	317,851	264,073
Netherlands	84,063	95,340	120,438	105,103	99,265	79,864	108,951	127,494
Portugal	14,729	59,459	68,375	57,473	55,084	39,309	58,750	40,936
United Kingdom	156,071	245,989	432,507	376,050	262,015	225,536	280,244	230,494
Sweden	13,060	18,001	31,473	38,209	18,121	9,556	16,691	16,495
10 new member states				162,776	153,332	114,391	130,576	123,358
12 new member states				321,102	266,698	161,382	176,330	164,337
of which: CEEC/CIS (3)	23,619	31,569	164,814	195,460	224,787	100,240	206,868	280,527
Hungary		2,040	23,887	20,064	17,766	4,657	6,156	6,777
Poland		806	59,093	54,784	53,025	39,977	53,521	44,251
Romania			7,520	148,290	103,502	42,841	41,804	35,349
Russia			6,042	139,576	177,610	80,682	158,018	217,917
of which: Switzerland	51,821	43,832	45,654	40,352	38,812	38,840	50,740	50,150
of which: Turkey		13,069	148,264	108,890	87,572	96,204	168,456	184,505
Africa	**133,213**	**45,675**	**69,865**	**145,483**	**151,256**	**151,611**	**171,484**	**201,174**
of which: South Africa	22,439	0	13,913	11,686	5,637	7,804	14,711	15,291
North Africa	15,542	20,432	37,236	111,815	132,101	133,041	139,790	170,222
Nigeria	61,133	8,319	8,860	12,270	6,244	204	210	1,909
North and South America	**145,204**	**29,360**	**230,270**	**471,245**	**483,777**	**391,503**	**559,780**	**634,508**
of which: Argentina	11,899	516	97,605	121,282	122,942	93,781	149,746	189,560
Brazil			80,205	197,369	280,258	248,973	320,930	368,887
Colombia	11,885	9,112	16,659	5,819	2,807	3,510	6,329	7,146
Mexico		20	1,408	44,601	23,298	13,883	24,822	19,034
Asia (1)	**26,178**	**96,645**	**166,261**	**659,491**	**751,237**	**845,922**	**1,201,459**	**1,218,993**
of which: Japan	883	14,264	15,976	11,785	9,910	5,098	12,346	12,001
China		3,960	54,334	211,457	180,179	278,739	392,569	435,130
Iran	12,836	29,852	45,722	199,701	358,694	365,277	516,121	538,004
India				16,934	17,592	3,892	4,488	12,100
South Korea				120,013	104,028	133,977	157,824	112,161
Pacific	**6,290**	**5,761**	**9,984**	**20,320**	**15,591**	**8,100**	**14,079**	**13,830**
of which: Australia	2,398	820	2,765	15,063	10,762	4,937	9,761	8,928
TOTAL ALL CATEGORIES	1,529,652	1,881,998	3,174,447	4,109,972	3,736,921	3,542,282	4,306,065	4,336,759
KD and CKD units	**471,744**	**208,241**						

NEW COMMERCIAL VEHICLES BY DESTINATION

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Europe (1)	**88,235**	**174,998**	**379,289**	**490,820**	**473,705**	**251,928**	**357,998**	**404,818**
of which: European Union (2)	74,382	156,268	312,421	448,562	411,784	224,591	312,293	344,414
Germany	17,490	23,581	50,081	60,927	59,809	38,001	46,406	52,459
Austria	2,185	3,702	4,697	6,830	7,956	5,498	6,797	7,431
Belgium-Luxembourg	11,455	18,383	22,857	30,963	34,012	24,811	29,330	30,768
Spain	71	44,110	57,516	63,691	40,419	17,026	28,263	29,001
Italy	26,207	19,923	35,910	45,457	41,408	34,731	39,690	38,409
Netherlands	8,234	7,995	23,087	19,729	20,926	11,097	13,848	17,061
Portugal	2,805	14,291	34,551	22,334	19,242	13,397	18,557	15,514
United Kingdom	8,390	21,127	55,647	69,972	62,972	35,411	60,997	61,885
10 new member states				45,694	49,057	20,802	28,891	37,428
12 new member states				64,926	75,366	22,934	33,784	44,067
of which: CEEC/CIS (3)	361	2,781	25,100	13,392	20,370	4,042	16,121	24,544
Poland	301	97	5,624	19,019	21,606	10,546	14,258	17,529
of which: Switzerland	3,317	2,921	4,293	8,123	8,174	7,874	8,500	9,436
Africa	**75,802**	**18,320**	**16,074**	**24,055**	**30,466**	**27,146**	**27,769**	**29,007**
of which: North Africa	18,334	8,588	13,509	21,107	26,601	24,961	24,690	25,344
North and South America	**5,875**	**5,453**	**36,682**	**59,664**	**68,808**	**55,553**	**85,810**	**112,910**
of which: USA	**1,999**	**2,000**	**1,099**					
Asia (1)	**6,930**	**11,302**	**8,260**	**7,481**	**7,356**	**3,804**	**5,632**	**6,302**
Pacific	**776**	**1,364**	**1,797**	**3,512**	**3,238**	**1,611**	**2,208**	**2,238**
TOTAL ALL CATEGORIES	178,126	213,502	444,516	586,686	585,270	340,931	480,430	556,356
KD and CKD units	**39,428**	**12,207**						

(1) As of 2004, deliveries to Cyprus are included in Europe, rather than Asia.
(2) European Union: 9 countries in 1980; 10 countries in 1985; 12 countries between 1990 and 1994; 15 countries between 1995 and 2003; 25 countries from 2004 to 2005; 27 countries since 2006.
(3) Excluding the ten new countries that joined the European Union in 2004 and 2005, and the two 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, for *Enquêtes Annuelles d'Entreprise* or Annual Company Surveys) conducted every year 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. 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 nomenclature, taking into account 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	2007	2008	2009	2010	2011 (1)
PHYSICAL DATA									
Employees (2)	Units	320,922	216,848	190,830	173,621				
Employees on 31/12 (excluding temporary staff)						148,898	144,717	137,527	140,000
Production in France	Thousands			3,348	3,016	2,569	2,048	2,229	2,295
Production / employee				**17.5**	**17.4**	**17.3**	**14.1**	**16.2**	**16.4**
FINANCIAL DATA									
Net turnover	€ millions	19,251	49,472	73,684	91,770	82,838	69,854	78,969	83,000
Export turnover	€ millions	7,511	18,817	42,290	54,237		36,790	45,526	48,500
Exports as a % of total turnover	**%**	**39.0%**	**38.0%**	**57.4%**	**59.1%**		**52.7%**	**57.6%**	**58%**
Value added (VA) before tax	€ millions	5,883	10,650	13,282	13,456	10,076	7,423	10,112	11,000
Value added / turnover	**%**	**30.6%**	**21.5%**	**18.0%**	**14.7%**	**12.2%**	**10.6%**	**12.8%**	**13.3%**
Value added / employee	€ thousands	18	49	70	78	68	51	74	79
Social security costs	€ millions	1,452	1,860	2,153	2,597	2,271	2,015	2,302	
Social security costs / employee	€ thousands	4.5	8.6	11.3	15.0	15.3	13.9	16.7	
Wages and salaries	€ millions	3,254	4,271	5,093	6,511	5,972	5,808	5,696	
Wages and salaries / employee	€ thousands	10.1	19.7	26.7	37.5	40.1	40.1	41.4	
Personnel costs	€ millions	4,706	6,132	7,246	9,108	8,242	7,823	7,999	
Personnel costs / employee	€ thousands	14.7	28.3	38.0	52.5	55.4	54.1	58.2	
Personnel costs / VA	%	80.0%	57.6%	54.6%	67.7%	81.8%	105.4%	79.1%	
Operating cash flow	€ millions	928	3,855	5,201	3,374	886	–1,174	1,340	
Operating cash flow / VA	**%**	**15.8%**	**36.2%**	**39.2%**	**25.1%**	**8.8%**	**–15.8%**	**13.3%**	
Interest expense	€ millions	484	1,170	1,178	874		4,038	2,861	
Interest expense / VA	%	8.2%	11.0%	8.9%	6.5%		54.4%	28.3%	
Interest income	€ millions	207	1,095	2,508	1,851		3,444	2,191	
Interest income / VA	%	3.5%	10.3%	18.9%	13.8%		46.4%	21.7%	
Net interest income (expense)	€ millions	–276	–74	1,330	977		–594	–671	
Net interest income (expense) / VA	%	–4.7%	–0.7%	10.0%	7.3%		–8.0%	–6.6%	
Cash flow	€ millions	638	2,918	5,499	3,504		–2,218	S	
Cash flow / VA	%	10.8%	27.4%	41.4%	26.0%		–29.9%	S	
Net income (loss)	**€ millions**	**–26**	**969**	**2,851**	**160**	**–3,702**	**–4,900**	**293**	
Net income (loss)	%	–0.1%	2.0%	3.9%	0.2%	–4.5%	–7.0%	0.4%	
Capital expenditure	€ millions	1,018	3,139	3,807	2,545				
Gross fixed investments exclusive of contributions	€ millions						1,983	2,048	2,500
Capital expenditure / turnover	**%**	**5.3%**	**6.3%**	**5.2%**	**2.8%**		**2.8%**	**2.6%**	**3.0%**
Capital expenditure / VA	**%**	**17.3%**	**29.5%**	**28.7%**	**18.9%**		**26.7%**	**20.3%**	**22.7%**

S = Data subject to statistical secrecy.
(1) CCFA estimates.
(2) Up until 2007, this is the employed workforce: Average employee numbers, corrected by the balance of employees hired and rented on temporary basis.

Physical and financial data for the automotive equipment manufacturing 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 nomenclature (NAF1), 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 nomenclature has become the NAF2, still standardized throughout the European Union. OEM companies, electrical equipment manufacturers for engines and vehicles and car seat manufacturers are now included in this nomenclature.
Companies listed in the new “automotive equipment manufacturing” sector do not represent, therefore, all suppliers of the automotive industry. To these it should be added, among others, manufacturers of glass, tires, doors and locks and automotive springs, etc. In addition to these activities, the automotive manufacturing and automotive equipment manufacturing industries purchase from other sectors a number of intermediate products (metals, rubber, plastics, etc.), services (consulting, research, advertising, etc.) and capital goods.

	Units	1980	1990	2000	2007 (1)	2008	2009	2010	2011 (2)
PHYSICAL DATA									
No. of companies (> 20 employees until 2007)	Units	320	320	243	192	653	565	639	
Employees (3)	Units	143,347	112,963	94,171	73,110				
Employees on 31/12 (excluding temporary staff)						73,210	64,881	61,759	60,000
FINANCIAL DATA									
Net turnover	€ millions	5,637	14,452	17,766	18,149	20,464	14,898	16,056	17,000
Export turnover	€ millions	1,301	4,018	7,512	8,676		7,056	7,866	
Exports as a % of total turnover	**%**	**23.1%**	**27.8%**	**42.3%**	**47.8%**		**47.4%**	**49.0%**	
Percentage of production exported (source: FIEV)						**53%**	**54%**	**51%**	**53%**
Value added (VA) before tax	€ millions	2,251	4,530	4,643	4,276	4,403	3,479	3,885	
Value added / turnover before tax	**%**	**39.9%**	**31.3%**	**26.1%**	**23.6%**	**21.5%**	**23.4%**	**24.2%**	
Value added per employee before tax	€ thousands	16	40	49	58	60	54	63	
Social security costs	€ millions	503	867	902	880	1,046	939	937	
Social security costs / employee	€ thousands	3.5	7.7	9.6	12.0	14.3	14.5	15.2	
Wages and salaries	€ millions	1,239	2,060	2,213	2,086	2,489	2,300	2,302	
Wages and salaries / employee	€ thousands	8.6	18.2	23.5	28.5	34.0	35.4	37.3	
Personnel costs	€ millions	1,742	2,926	3,115	2,967	3,535	3,239	3,239	
Personnel costs / employee	€ thousands	12.2	25.9	33.1	40.6	48.3	49.9	52.4	
Personnel costs / VA	%	77.4%	64.6%	67.1%	69.4%	80.3%	93.1%	83.4%	
Operating cash flow	€ millions	418	1,337	1,206	1,014	541	7	412	
Operating cash flow / VA	**%**	**18.6%**	**29.5%**	**26.0%**	**23.7%**	**12.3%**	**0.2%**	**10.6%**	
Interest expense	€ millions	186	387	440	262		171	177	
Interest expense / VA	%	8.2%	8.5%	9.5%	6.1%		4.9%	4.6%	
Interest income	€ millions	36	213	337	268		226	217	
Interest income / VA	%	1.6%	4.7%	7.3%	6.3%		6.5%	5.6%	
Net interest income (expense)	€ millions	–150	–174	–103	5		55	40	
Net interest income (expense) / VA	%	–6.7%	–3.8%	–2.2%	0.1%		1.6%	1.0%	
Cash flow	€ millions	237	883	889	697		–46	341	
Cash flow / VA	%	10.5%	19.5%	19.2%	16.3%		–1.3%	8.8%	
Net income (loss)	**€ millions**	**54**	**400**	**–92**	**141**	**–248**	**–427**	**–17**	
Net income / turnover	%	1.0%	2.8%	–0.5%	0.8%	–1.2%	–2.9%	–0.1%	
Capital expenditure	€ millions	328	899	1,024	485				
Gross fixed investments exclusive of contributions	€ millions						1,117	413	
Capital expenditure / turnover	**%**	**5.8%**	**6.2%**	**5.8%**	**2.7%**		**7.5%**	**2.6%**	
Capital expenditure / VA	**%**	**14.6%**	**19.8%**	**22.0%**	**11.3%**		**32.1%**	**10.6%**	

(1) In 2007, a part of the reduction can be explained by the reclassification of certain companies under other business nomenclatures.
(2) Estimates of the Fédération des Industries d’Équipements pour Véhicules (FIEV)
(3) Employees Average employee numbers, corrected by the balance of employees hired and rented on temporary basis.

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	2007	2008	2009	2010	2011
Citroën	270,983	266,822	261,508	281,480	295,431	346,437	328,146	323,076
Peugeot (1)	414,335	498,481	397,547	373,303	364,523	391,944	400,663	369,761
Dacia				32,641	43,525	61,217	104,641	88,980
Renault	759,312	639,440	602,415	459,349	463,019	517,093	497,820	455,705
Others France	56	146	63	68	33	73	54	752
TOTAL FRANCE (2)	**1,444,686**	**1,404,889**	**1,261,533**	**1,146,841**	**1,166,531**	**1,316,764**	**1,331,324**	**1,238,274**
Alfa Romeo	25,380	15,916	12,774	13,959	10,316	11,732	13,033	16,232
Audi	17,455	32,762	34,937	48,121	47,871	49,109	50,936	58,970
BMW	17,239	29,580	31,576	49,602	49,194	43,414	46,074	46,305
Chevrolet				8,971	9,156	21,074	21,247	23,708
Chrysler	16	4,084	4,827	4,014	2,485	1,085	880	184
Daihatsu	–	0	1,043	2,848	1,853	1,914	1,083	217
Dodge				2,867	2,564	1,358	857	147
Fiat	53,147	128,822	95,983	53,119	73,504	82,290	72,717	57,326
Ford	68,426	159,575	117,061	103,078	112,128	133,079	114,810	115,357
Honda	8,293	14,002	8,716	15,653	12,382	14,669	11,251	8,793
Hyundai	–	0	11,019	26,835	18,454	21,516	18,785	20,204
Jaguar	269	1,290	1,939	1,567	1,678	1,169	1,126	1,001
Jeep	–	3,824	3,001	4,894	2,278	1,183	1,177	2,637
Kia	–	0	2,631	15,476	15,750	21,164	24,056	27,961
Lada	13,069	15,758	1,867	622	176	98	346	405
Lancia	6,801	18,225	5,864	4,260	4,765	4,839	3,368	4,000
Land Rover	237	3,611	7,570	7,480	3,177	2,419	2,735	4,317
Mazda	13,021	18,563	6,366	14,529	13,473	13,096	10,232	6,509
Mercedes	14,430	28,605	43,389	61,755	51,584	50,927	45,612	43,545
Mini	–	–	–	16,041	19,015	17,777	18,007	21,702
Mitsubishi	2,788	4,298	5,575	5,463	2,571	2,131	3,514	4,386
Nissan–Infiniti	17,700	25,707	31,330	32,821	38,302	46,070	54,351	72,212
Opel	32,709	113,490	133,576	99,680	89,790	89,265	94,877	94,102
Porsche	1,060	1,297	825	2,879	1,645	2,112	2,073	2,734
Rover	20,690	41,147	13,474	13	0	0	0	0
Saab	179	2,459	3,265	3,369	3,174	1,585	574	377
Santana	–	1,746	4,231	183	144	99	27	3
Seat	306	48,052	40,562	37,996	34,774	38,364	30,645	33,268
Skoda	1,636	1,825	11,570	18,367	17,399	19,003	18,533	21,185
Smart	–	–	6,645	8,062	8,669	7,920	6,408	6,810
Ssangyong	–	0	19	3,878	595	472	451	560
Subaru	–	0	2,312	1,791	1,234	1,405	1,146	831
Suzuki	–	0	11,355	30,874	25,353	29,056	22,070	19,233
Toyota-Lexus	13,095	15,839	43,698	103,460	92,279	90,320	67,311	70,192
Volkswagen	75,727	155,971	152,868	142,634	144,506	150,392	146,538	163,584
Volvo	8,207	12,415	6,777	13,772	11,001	12,007	11,841	15,192
TOTAL FOREIGN (2)	**428,516**	**904,241**	**872,351**	**962,831**	**924,838**	**985,634**	**920,345**	**965,955**
TOTAL ALL CATEGORIES	1,873,202	2,309,130	2,133,884	2,109,672	2,091,369	2,302,398	2,251,669	2,204,229
of which Temporary Transit	–	–	–	45,129	41,086	33,727	39,011	38,421
TOTAL FRANCE (as a %)	77.1%	60.8%	59.1%	54.4%	55.8%	57.2%	59.1%	56.2%
TOTAL FOREIGN (as a %)	22.9%	39.2%	40.9%	45.6%	44.2%	42.8%	40.9%	43.8%

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

USED PASSENGER CAR REGISTRATIONS

In units

	1980	1990	2000	2007	2008	2009	2010	2011
TOTAL ALL CATEGORIES	4,441,423	4,758,750	5,082,122	5,570,764	5,393,045	5,240,411	5,386,007	5,440,856
Used/new ratio	2.4	2.1	2.4	2.6	2.6	2.3	2.4	2.5

USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

In units

	1980	1990	2000	2007	2008	2009	2010	2011
TOTAL ALL CATEGORIES		644,925	651,033	768,538	781,720	766,764	806,398	799,058
Used/new ratio		1.6	1.6	1.7	1.7	2.1	1.9	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	2007	2008	2009	2010	2011
Citroën	24,158	111,881	138,628	217,725	239,593	256,454	243,841	238,010
Peugeot (1)	65,199	189,322	206,153	276,877	278,689	295,599	307,518	228,634
Dacia				21,603	33,846	35,483	53,737	73,642
Renault	45,862	205,374	257,909	332,703	369,788	377,769	352,530	316,841
TOTAL FRANCE (2)	**135,219**	**506,577**	**602,711**	**848,908**	**921,916**	**965,305**	**957,626**	**917,127**
Alfa Romeo	–	2,524	7,444	12,132	9,079	8,307	8,432	11,187
Audi	19,591	13,495	25,901	42,496	43,243	44,403	45,201	49,615
BMW-Mini	–	8,271	21,065	47,783	52,348	46,578	50,906	54,738
Chrysler-Dodge-Jeep	–	–	4,161	11,069	7,135	3,536	2,863	2,876
Fiat-Lancia	10,352	33,913	38,337	33,054	42,262	35,445	28,240	19,441
Ford	1,833	56,331	58,896	77,414	96,417	98,745	89,334	88,850
Honda			413	10,442	7,298	6,575	5,029	3,360
Hyundai	–	–	5,510	22,961	12,675	11,099	13,174	14,536
Kia			1,200	12,168	12,025	12,750	15,428	18,996
Land Rover	–	2,980	5,656	7,330	3,138	2,368	2,637	4,095
Mazda	–	5,200	3,204	9,480	8,615	8,519	6,768	4,671
Mercedes	10,635	15,676	30,007	55,140	46,859	46,125	41,460	39,645
Mitsubishi	–	1,623	3,227	4,730	2,053	1,370	3,102	4,249
Nissan-Infiniti	694	4,982	15,533	21,858	26,832	30,361	35,092	50,108
Opel	6,178	28,218	63,726	72,605	64,629	59,335	63,751	64,617
Rover	–	4,419	7,480	5	0	0	0	0
Seat	–	14,367	27,861	32,128	30,402	33,170	25,462	28,922
Skoda	–	–	7,741	15,146	15,548	15,362	14,781	16,531
Suzuki	–	–	3,165	17,544	14,240	13,282	9,263	9,044
Toyota-Lexus	–	3,594	12,282	64,843	55,623	43,266	35,744	38,576
Volkswagen	–	50,975	89,487	119,077	129,683	123,629	118,702	129,026
Volvo	1,198	4,097	4,786	12,717	10,590	11,799	11,614	14,937
TOTAL FOREIGN (2)	**50,815**	**255,477**	**443,774**	**714,153**	**699,064**	**663,190**	**635,547**	**679,028**
TOTAL ALL CATEGORIES	**186,034**	**762,054**	**1,046,485**	**1,563,061**	**1,620,980**	**1,628,495**	**1,593,173**	**1,596,155**
of which Temporary Transit	–	–	–	37,622	36,542	30,759	34,432	33,788
% diesel	9.9%	33.0%	49.0%	74.1%	77.5%	70.7%	70.8%	72.4%
FRANCE TOTAL AS A %	72.7%	66.5%	57.6%	54.3%	56.9%	59.3%	60.1%	57.5%
TOTAL FOREIGN AS A %	27.3%	33.5%	42.4%	45.7%	43.1%	40.7%	39.9%	42.5%

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

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

In units

	1980	1990	2000	2007 (3)	2008	2009	2010	2011
Citroën	53,245	80,958	77,048	71,901	78,593	66,833	70,838	75,876
Peugeot (1)	58,986	60,813	74,950	81,050	82,256	66,436	72,228	72,071
Dacia				2	53	5,237	5,434	5,298
Renault	116,602	162,549	139,752	150,532	144,750	116,498	135,591	137,360
Others France	256	415	40	488	460	532	528	486
TOTAL FRANCE	**229,089**	**304,735**	**291,790**	**303,973**	**306,112**	**255,536**	**284,619**	**291,091**
Fiat	8,326	10,139	25,253	33,071	36,403	32,373	34,659	37,152
Ford	9,099	16,080	18,110	26,458	24,765	20,197	20,437	20,473
Hyundai	–	–	588	996	659	374	237	182
Isuzu	–	–	108	2,280	1,950	1,711	1,961	1,904
Iveco	2,941	11,543	16,534	18,828	17,845	10,505	11,610	12,954
Land Rover	645	2,718	1,857	1,218	1,211	1,078	1,550	1,489
Mazda	579	1,067	916	760	620	424	482	424
Mercedes	5,495	11,156	23,139	23,422	22,509	16,929	19,051	20,073
Mitsubishi	–	–	3,392	3,766	2,916	2,111	2,639	2,776
Nissan	861	5,063	5,197	10,050	8,449	6,498	7,307	9,616
Opel	664	2,408	7,561	12,646	11,606	6,772	7,195	7,560
Toyota-Lexus	7,112	6,099	1,771	6,204	7,019	4,348	4,013	4,115
Volkswagen	8,091	9,673	13,819	13,178	13,713	11,506	13,249	14,895
TOTAL FOREIGN (2)	**48,798**	**89,060**	**123,176**	**157,489**	**154,161**	**118,450**	**132,993**	**138,163**
TOTAL ALL CATEGORIES	**277,887**	**393,795**	**414,966**	**461,462**	**460,273**	**373,986**	**417,612**	**429,254**
FRANCE TOTAL AS A %	82.4%	77.4%	70.3%	65.9%	66.5%	68.3%	68.2%	67.8%
TOTAL FOREIGN AS A %	17.6%	22.6%	29.7%	34.1%	33.5%	31.7%	31.8%	32.2%

(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 as “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	2007 (1)	2008	2009	2010	2011
Citroën	324,228	347,780	338,556	353,381	374,024	413,270	398,984	398,952
Peugeot	473,321	559,294	472,497	454,353	446,779	458,380	472,891	441,832
Dacia				32,643	43,578	66,454	110,075	94,278
Renault	875,914	801,989	742,167	609,881	607,769	633,591	633,411	593,065
TOTAL FRANCE	**1,673,775**	**1,709,624**	**1,553,323**	**1,450,814**	**1,472,643**	**1,572,300**	**1,615,943**	**1,529,365**
Fiat	61,473	138,961	121,236	86,190	109,907	114,663	107,376	94,478
Ford	77,525	175,655	135,171	129,536	136,893	153,276	135,247	135,830
Land Rover	882	6,329	9,427	8,698	4,388	3,497	4,285	5,806
Mercedes	19,925	39,761	66,528	85,177	74,093	67,856	64,663	63,618
Nissan-Infiniti	18,561	30,770	36,527	42,871	46,751	52,568	61,658	81,828
Opel	33,373	115,898	141,137	112,326	101,396	96,037	102,072	101,662
Rover	20,812	41,343	13,564	13	0	0	0	0
Seat	306	51,999	42,230	38,432	35,150	38,813	31,080	33,966
Toyota-Lexus	20,207	21,938	45,469	109,664	99,298	94,668	71,324	74,307
Volkswagen	83,818	165,644	166,687	155,812	158,219	161,898	159,787	178,479
TOTAL FOREIGN	**477,314**	**993,301**	**995,527**	**1,120,320**	**1,078,999**	**1,104,084**	**1,053,338**	**1,104,118**
TOTAL ALL CATEGORIES	**2,151,089**	**2,702,925**	**2,548,850**	**2,571,134**	**2,551,642**	**2,676,384**	**2,669,281**	**2,633,483**
FRANCE TOTAL AS A %	77.8%	63.3%	60.9%	56.4%	57.7%	58.7%	60.5%	58.1%
TOTAL FOREIGN AS A %	22.2%	36.7%	39.1%	43.6%	42.3%	41.3%	39.5%	41.9%

(1) 2006 and more recent data are not comparable to data from prior years because some models were reclassified to "Other France" and "Foreign".

NEW HEAVY TRUCK (OVER 5 METRIC TONS) REGISTRATIONS BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Renault Trucks	17,984	20,453	20,818	16,843	19,359	12,158	10,908	14,343
TOTAL FRANCE	**18,312**	**20,738**	**20,992**	**16,971**	**19,472**	**12,295**	**10,964**	**14,399**
DAF	1,881	3,460	4,365	5,995	6,579	3,752	4,464	6,240
Iveco	6,578	7,204	6,998	5,385	5,838	4,120	4,003	4,980
MAN	327	1,433	3,498	5,171	5,530	3,630	2,729	4,765
Mercedes	8,014	9,500	9,976	8,879	9,610	5,482	5,229	7,087
Scania	1,389	2,711	4,963	4,200	4,156	2,176	2,553	3,670
Volvo	3,724	4,647	6,739	5,522	5,739	3,615	3,938	5,825
TOTAL FOREIGN	**23,534**	**29,290**	**36,924**	**35,568**	**38,032**	**23,238**	**23,257**	**32,964**
TOTAL ALL CATEGORIES	**41,846**	**50,028**	**57,916**	**52,539**	**57,504**	**35,533**	**34,221**	**47,363**
FRANCE TOTAL AS A %	43.8%	41.5%	36.2%	32.3%	33.9%	34.6%	32.0%	30.4%
TOTAL FOREIGN AS A %	56.2%	58.5%	63.8%	67.7%	66.1%	65.4%	68.0%	69.6%

USED HEAVY TRUCK (OVER 5 METRIC TONS) REGISTRATIONS

In units

	1980	1990	2000	2007	2008	2009	2010	2011
TOTAL	**–**	**–**	**59,056**	**55,012**	**54,586**	**49,452**	**55,591**	**57,152**
Used/new ratio	–	–	1.0	1.0	0.9	1.4	1.6	1.2

NEW COACH AND BUS (OVER 5 METRIC TONS) REGISTRATIONS BY MAKE

In units

	1980	1990	2000	2007	2008	2009	2010	2011
Renault	2,126	1,692	1,633	–	–	–	–	–
Others France	107	255	367	–	–	–	–	–
Kässbohrer-Setra	479	392	261	–	–	–	–	–
Mercedes	554	245	602	–	–	–	–	–
TOTAL ALL CATEGORIES	**3,558**	**3,160**	**4,320**	**–**	**–**	**–**	**–**	**–**
Irisbus Group (1)	–	–	–	2,861	2,914	3,092	2,412	2,843
Evobus Group (2)	–	–	–	974	1,346	1,851	1,433	1,681
Neoman Bus Group (3)	–	–	–	550	527	658	559	515
Bova	–	–	–	262	155	150	116	86
Temsa	–	–	–	343	284	384	309	272
Van Hool	57	250	230	151	157	117	169	175
Others	–	–	–	349	272	412	384	634
GENERAL TOTAL	**–**	**–**	**–**	**5,491**	**5,655**	**6,664**	**5,382**	**6,206**

(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 January 1st

	1985	1995	2005	2010
European Union 27 countries	–	–	525	552
European Union 15 countries since 1995	380	473	577	587
12 new EU member states	–	–	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 (JANUARY 1, 2012)

In thousands

	All fuels	Diesel
PASSENGER CARS		
Up to 5 HP	13,628	7,464
6 to 10 HP	16,375	10,673
11 HP and over	1,547	728
Total passenger cars	**31,550**	**18,865**
LIGHT COMMERCIAL VEHICLES (LCV)		
Up to 2.5 t	3,698	3,232
From 2.5 t to 3.5 t	2,169	2,147
From 3.6 t to 5 t	13	12
TOTAL LCVs up to 5 t	**5,880**	**5,391**
Total passenger cars and light commercial vehicles	**37,430**	**24,256**
HEAVY TRUCKS OF MORE THAN 5 T		
Trucks		
5 t to 12 t	80	80
12 t to 16 t	50	50
16 t to 20 t	117	117
20 t and over	98	98
Total trucks	**345**	**345**
Road tractors	**206**	**206**
Total heavy trucks	**551**	**550**
Coaches and buses	**86**	**83**
Total commercial vehicles over 5 t	**637**	**633**
Total commercial vehicles all sizes	**6,517**	**6,025**
OVERALL TOTAL	38,067	24,889

Source: CCFA estimates.

VEHICLE OWNERSHIP

	Unit	1980	1990	2000	2007	2008	2009	2010	2011 (1)
Households without a vehicle	%	29.2%	23.2%	19.7%	17.6%	17.3%	16.8%	16.5%	16.5%
Households with a vehicle	%	70.8%	76.8%	80.3%	82.4%	82.7%	83.2%	83.5%	83.5%
Households with one vehicle	%	54.3%	50.5%	50.7%	46.6%	46.9%	47.5%	47.6%	48.2%
Households with two vehicles	%	14.8%	23.0%	25.4%	30.3%	30.5%	30.5%	30.7%	30.5%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.5%	5.3%	5.2%	5.2%	4.8%
Average vehicle age	years		5.90	7.25	8.2	8.1	8.0	8.0	8.1
Average ownership period	years		3.66	4.43	4.9	4.9	4.9	5.0	5.1
Used passenger cars	%		50.0	56.1	61.9	61.9	59.6	58.9	57.8
Total average kilometers	km	12,200	13,041	13,560	12,198	12,015	11,793	11,755	11,515
Total average gasoline	km	11,600	11,651	10,780	8,832	8,658	8,176	8,108	7,897
Total average diesel	km	26,200	20,950	18,140	15,590	15,106	14,819	14,542	14,265
DOMESTIC PASSENGER ROAD TRANSPORT									
By passenger car	billion passenger-km	482.3	617.3	754.4	812.0	800.0	802.9	810.8	812.7
By coach - bus	billion passenger-km	37.4	40.7	42.0	45.3	48.4	48.8	49.9	51.1
TOTAL TRAFFIC	billion passenger-km	588.0	743.3	892.2	965.8	962.6	964.8	974.0	981.2
Road transport as a % of total traffic	%	88.4	88.5	89.3	88.8	88.1	88.3	88.4	88.0
ANNUAL TRAFFIC VARIATION									
By passenger car	%	–	+2.6	+0.6	+1.3	–1.5	+0.4	+1.0	+0.2
By coach - bus	%	–	+2.7	+2.7	+4.8	+6.8	+0.7	+2.2	+2.4

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

TOTAL VEHICLES IN USE ON JANUARY 1ST

In thousands

	1980	1990	2000	2008	2009	2010	2011	2012
PASSENGER CARS								
Up to 5 HP	5,090	8,312	10,572	12,323	12,537	12,946	13,351	13,628
6 HP to 10 HP	11,460	13,385	15,723	16,864	16,789	16,583	16,422	16,375
Over 10 HP	1,890	1,313	1,186	1,513	1,523	1,521	1,528	1,547
TOTAL PASSENGER CARS	**18,440**	**23,010**	**27,480**	**30,700**	**30,850**	**31,050**	**31,300**	**31,550**
of which diesel	**730**	**3,265**	**9,261**	**15,922**	**16,753**	**17,458**	**18,165**	**18,865**
COMMERCIAL VEHICLES								
Up to 3.5 t	1,985	4,125	4,974	5,680	5,720	5,750	5,809	5,867
From 2.5 t to 3.5 t	103	20	12	10	10	10	11	13
From 5 t to 20 t	250	334	287	259	253	250	246	247
20 t and over	26	41	46	86	89	91	93	98
Road tractors	129	160	210	215	206	202	199	206
TOTAL COMMERCIAL VEHICLES	**2,493**	**4,680**	**5,529**	**6,250**	**6,278**	**6,303**	**6,358**	**6,431**
of which diesel	**976**	**2,342**	**4,202**	**5,410**	**5,538**	**5,632**	**5,777**	**5,941**
COACHES AND BUSES	**57**	**68**	**80**	**83**	**84**	**85**	**86**	**86**
OVERALL TOTAL	20,990	27,758	33,090	37,033	37,212	37,438	37,744	38,067
of which diesel	**1,763**	**5,675**	**13,543**	**21,413**	**22,373**	**23,172**	**24,025**	**24,889**

Source: CCFA estimates.

Fuel and taxation, emissions and CO_2

MOTOR FUEL CONSUMPTION, PRICES AND TAXES

	Units	1980	1990	2000	2007	2008	2009	2010	2011
FUEL CONSUMPTION									
Regular gasoline	millions of liters	4,216	959						
Premium leaded - AVSR	millions of liters	20,007	19,911	3,924	26	0			
Premium unleaded	millions of liters		3,406	14,329	13,037	12,054	10,871	9,501	8,582
Premium unleaded 95-E10	millions of liters						727	1,379	1,754
Total gasoline	**millions of liters**	**24,223**	**24,276**	**18,253**	**13,063**	**12,054**	**11,598**	**10,880**	**10,337**
Diesel	**millions of liters**	**11,415**	**20,664**	**32,373**	**39,004**	**38,849**	**38,913**	**39,749**	**40,327**
TOTAL ROAD FUEL	**millions of liters**	**35,638**	**44,940**	**50,627**	**52,067**	**50,902**	**50,510**	**50,629**	**50,664**

Source: CPDP.

	Units	1980	1990	2000	2007	2008	2009	2010	2011
RETAIL PRICES OF FUEL (ANNUAL AVERAGE)									
Regular gasoline	**€/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 octane	**€/liter**	**–**	**0.79**	**1.11**	**1.31**	**1.39**	**1.24**	**1.38**	**1.54**
Tax as a %	%	–	71	69	63	60	65	60	56
Gasoline	**€/liter**	**0.52**	**0.81**	**1.12**	**1.28**	**1.36**	**1.21**	**1.35**	**1.51**
Tax as a %	%	57	74	69	63	61	66	61	57
Diesel	**€/liter**	**0.37**	**0.54**	**0.85**	**1.10**	**1.27**	**1.00**	**1.15**	**1.34**
Tax as a %	%	46	61	62	55	50	59	54	49

Source: SOeS.

TOTAL AUTOMOBILE EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2011

Thousands of metric tons

	1990	1995	2000	2005	2008	2009	2010	2011 (1)	Change 2011-1990	Change 2011-2010
REGULATED POLLUTANTS										
SO_2	143	117	23	4	4	1	1	1	–99%	–
CO_2	6,394	4,554	2,597	1,462	924	775	697	581	–91%	–17%
NO_x	1,155	1,073	931	771	652	604	594	566	–51%	–5%
COVNM	1,080	817	513	264	154	131	111	91	–92%	–18%
Lead	3,868	1,131	10	2	2	2	2	2	–100%	–
PM10: particulates	89	103	91	75	66	62	64	61	–31%	–5%
OTHER EMISSIONS										Thousands of metric tons
CO_2	111	120	127	129	120	119	121	120	8%	–1%

(1) 2010 estimates.
Source: CITEPA/Secten data: updated in April 2012

CO_2 EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

In millions of metric tons of CO_2

	1990	1995	2000	2005	2006	2007	2008	2009	2010	2011 (1)
Power production	67	58	64	68	64	64	62	60	60	51
Industry	111	105	106	103	101	98	94	81	87	86
Residential/Commercial	85	87	89	96	90	84	90	89	90	74
Transport	118	127	135	136	135	133	127	125	127	126
of which road	***111***	***120***	***127***	***129***	***128***	***127***	***120***	***119***	***121***	***120***
of which other transportation	6.9	7.1	8.0	6.9	6.6	6.4	6.3	6.2	6.1	6.3
Agriculture/silviculture	9.4	9.8	10.1	10.4	10.2	9.7	10.6	9.9	9.5	8.4
TOTAL NOT INCLUDING (2) LULUCF	**390**	**386**	**403**	**413**	**401**	**390**	**383**	**365**	**372**	**346**
LULUCF (2)	–24	–33	–32	–48	–52	–52	–52	–44	–40	–40
TOTAL WITH LULUCF (2)	**366**	**353**	**371**	**365**	**349**	**338**	**332**	**320**	**332**	**305**

(1) 2010 estimates.
(2) LULUCF Land Use, Land Use Change and Forestry
Source: CITEPA/ CORALIE/ Secten format, April 2012.

AVERAGE CO_2 EMISSIONS OF NEW CARS IN FRANCE AND EUROPE

In grams of CO_2 per km

	1995	2000	2004	2005	2006	2007	2008	2009	2010	2011
France										
Gasoline	177	168	162	159	155	153	141	131	130	129
Diesel	175	155	149	149	147	148	139	134	130	127
TOTAL	**176**	**162**	**153**	**152**	**149**	**149**	**140**	**133**	**130**	**127**
European Union 15 countries										
TOTAL	**186**	**171**	**162**	**161**	**161**	**159**	**154**	**146**	**141**	**136**

Source: ADEME.

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%
2010	15,241	11%	1,684	20%	2,330	29%	20,361	22%	39,616	18%	1,051	8%	40,667	18%
2011	16,003	5%	2,066	23%	2,508	8%	21,865	7%	42,442	7%	1,021	−3%	43,463	7%
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%
2010	22,380	7%	2,901	38%	2,440	6%	15,254	19%	42,975	13%	1,196	−1%	44,171	13%
2011	24,638	10%	2,986	3%	3,048	25%	16,581	9%	47,252	10%	1,087	−9%	48,339	9%
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	
2010	−7,139		−1,217		−110		+5,107		−3,359		−144		−3,504	
2011	−8,634		−921		−540		+5,284		−4,810		−66		−4,876	
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	
2010	68		58		95		133		92		88		92	
2011	65		69		82		132		90		94		90	

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	2007	2008	2009	2010	2011
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	33,742	34,619	32,250	32,324	35,332
Automotive insurance tax	478	2,780	3,429	3,900	3,933	4,018	4,126	4,276
Tax on vehicle registration certificates	157	846	1,373	1,939	1,968	1,917	1,919	2,076
Road tax	866	1,901	539	0	0	0	0	0
Tax on company cars	199	345	644	1,140	1,086	1,098	992	928
Tax based on number of axles	59	75	223	216	226	172	168	170
Fixed rate police and traffic fines, sentence fines	154	317	720	1,163	1,435	1,201	1,255	1,572
Driver's license tax	88	86	4	–	–	–	–	–
Regional development tax	0	0	442	526	521	528	539	577
Government royalty	–	30	132	169	174	180	186	193
TOTAL	**11,079**	**27,716**	**38,136**	**42,795**	**43,962**	**41,364**	**41,509**	**45,124**
VAT on spending to acquire and use vehicles	–	–	15,300 (1)	–	–	–	–	–
Freeway tolls (including VAT)	610	2,592	5,330	8,838	9,078	9,305	9,700	10,106

(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
Direction des Relations Extérieures
15, boulevard 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
www.csiam–fr.org

Comité d'organisation des salons internationaux de l'Automobile, du Cycle, du Motocycle et des Sports (AMC Promotion)
39, avenue Franklin-Roosevelt – 75008 Paris
Tel.: 01 56 88 22 40 – Fax: 01 42 56 50 80
www.amcpromotion.com

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'Equipements 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

Groupement pour l'Amélioration des Liaisons dans l'Automobile (GALIA)
96, avenue du Général-Leclerc
92100 Boulogne-Billancourt
Tel: 01 41 31 68 68 – Fax: 01 41 31 68 60
www.galia.com

Plateforme de la Filière Automobile (PFA)
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 Véhicules de Loisirs (UNIVDL)
3, rue des Cordelières – 75013 Paris
Tel.: 01 43 37 86 61 – Fax: 01 45 35 07 39
www.univdl.fr

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)
9, rue de Berri – 75008 Paris
Tel.:01 44 13 37 17 – 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 (Belgique)
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, boulevard Haussmann – 75008 Paris
Tel.: 01 44 90 00 24 – Fax: 01 44 90 96 09
www.40millionsdautomobilistes.com

L'Automobile Club – French Driver's Association
Head office: 5, avenue de la Paix – 67000 Strasbourg
Paris office: 14, avenue de la Grande-Armée – 75017 Paris
Tel.: 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
Tel.: 01 41 44 93 70 – Fax: 01 41 44 93 79
www.sia.fr

AUTOMOTIVE INDUSTRY RESEARCH ORGANIZATIONS IN FRANCE

Association pour le développement du transport et de la mobilité électriques France (AVERE France)
14-16 rue de la Tour des Dames
75 009 Paris
Tel.: 01 53 25 00 60
www.avere-france.org

Fondation sécurité routière
www.fondationsecuriteroutiere.org

Groupe d'Etudes et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile (GERPISA)
École Normale Supérieure de Cachan
Bât. Desjardin
61, avenue du Président Wilson
94235 Cachan Cedex
Tel.: 01 47 40 20 00
www.leblog.gerpisa.org

IDforCAR
Technocampus EMC2 - ZI du Chaffault
44340 Bouguenais
Tel.: 02 28 44 36 50 – Fax: 02 99 34 10 61
www.id4car.org

Institut Français du Pétrole Energies nouvelles (IFPEN)
1 & 4, avenue de Bois Préau
92852 Rueil Malmaison Cedex
Tel.: 01 47 52 60 00 – Fax: 01 47 52 70 00
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)
2, rue de la Butte Verte
93166 Noisy-le-Grand Cedex
Tel.: 01 45 92 55 00 – Fax: 01 45 92 55 01
www.ifsttar.fr

IFSTTAR Head office
Siège de l'IFSTTAR
Boulevard Newton
Champs sur Marne
F77447 Marne la vallée Cedex 2

Lyon Urban Trucks&Bus (LUTB)
c/o CCI de Lyon
Place de la Bourse
69289 Lyon Cedex 02
Tel.: 04 72 40 57 00 – Fax: 04 72 40 58 60
www.lutb.fr

MOV'EO CLUSTER
Technopôle du Madrillet
50, rue Ettore Bugatti
76800 Saint Etienne du Rouvray
Tel.: 02 35 65 78 20 – Fax: 02 35 34 64 97
www.pole-moveo.org

VÉHICULE DU FUTUR CLUSTER
Head office: Étupes
Centre d'affaires Technoland
15, rue Armand Japy
25461 Etupes Cedex
General Secretariat: Mulhouse
Technopole de Mulhouse
BP 2118 – 40, rue Marc Seguin
68060 Mulhouse Cedex
Tel.: 03 89 32 76 44 – Fax: 03 89 32 76 45
www.vehiculedufutur.com

Programme National de Recherche et d'Innovation dans les Transports terrestres (PREDIT)
Tour Voltaire
92055 La Défense Cedex
Tel.: 01 40 81 14 17 – Fax: 01 40 81 15 22
www.predit.prd.fr

In the context of its communication actions, CCFA regularly publishes leaflets on various automobile-related subjects: press surveys, trend charts, etc.

All these publications can be consulted on our website
www.ccfa.fr