THE FRENCH AUTOMOTIVE INDUSTRY

Analysis and statistics 2013

5.6 million

VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE

€5.4 billion

FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN 2010

78%

OF VEHICLES PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

9.5%

SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS

Comité des Constructeurs Français d'Automobiles

CONTENT

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EDITORIAL

PATRICK BLAIN,
Chairman of CCFA

> In 2012, despite the crisis affecting the European automotive industry and the specific threats to which it is exposed, the French automotive industry is looking to the future. It is continuing to invest, restructuring its industrial branch in France, and expanding outside of Western Europe.

Dear Sir/Madam,

Since mid-2009, the world economy has returned to a rapid pace of growth. In 2012, the automotive industry reached a new production record, with over 84 million vehicles produced. Therefore, the results by geographical area are highly contrasted, with a gloomy climate in crisis-hit Western Europe and dynamism in the rest of the world. Emerging economies all have fairly similar situations, with many new players in the automotive industry, such as China, Russia, India and Latin America, which are producing record volumes. Other countries, such as the USA and Japan are coming out of a deep crisis. Due to this major growth, the weight of the Western European countries has fallen: today they only account for 15% of world production, against 29% in 2000.

Market growth in 2012 is mainly due to this shift. The crisis has not hindered the progress towards vehicle ownership in emerging economies, and the demand among first-time car purchasers also remains robust. On the other hand, in Southern European countries, which are suffering from a combination of debt problems and low demand for renewing the vehicles in use, the markets have fallen sharply since 2007: –44% for Italy, –57% for Spain and –79% for Greece.

Since 2007, the disappearance of 4 million vehicles in the Western European market, which was the main outlet for French manufacturers, has had a terrible effect on the entire branch, in terms of production as well as trade. In France it was necessary, on the one hand to contain the collapse of industrial activity, which was down –40% (Industrial production index of the INSEE) and on the other hand to promote actions aimed at improving national competitiveness. In this rather depressing climate, it is still encouraging to see that the globalization of sales outside of Western Europe (17 countries) has been particularly favorable for French manufacturers. They now account for 48% of sales in 2012. This strategy, which has been underway for a number of years, has thus paid off.

In 2012, French manufacturers produced 5.6 million vehicles worldwide. Nevertheless, this was a considerable drop of –13% compared to the 2011 record level, but of only –7% compared to the 2005 level.

In France, automotive output contracted by –12%, to around 2 million vehicles. Various factors are to blame for this, including the decline of the natural markets of Western Europe's natural markets and the unfortunate lack of competitiveness in French industry. This affects manufacturers at their assembly and mechanical construction plants, as well as their research and development plants. In France it also affects all sites and their suppliers. Manufacturers purchase automotive equipment worth €53 billion from these suppliers. The schedule of condition drawn up in the context of the General Industry Report and, more recently, the Gallois Report, stressed that the high tax burden was responsible for the poor performance of French production. They recommend measures for restoring margins in French industry, which have been falling for several years compared with those of their European counterparts.
Within this gloomy context more storm clouds are gathering for the French automotive industry. The threat of reviewing industrial property is very real in the case of bodywork parts: its disappearance would sound the death knell for returns on investment in technological innovations. The plans to increase taxes on diesel, in addition to negative social impacts and considerable environmental inefficiency, have the risk of weakening one of the leading fields of French manufacturers, which is that of diesel engines.

Despite all this, the automotive industry is continuing to invest in the future. Its annual expenditure on research and development stood at €5.4 billion, making it the leading sector in terms of R&D and patent applications in France. The development of electric and hybrid vehicles means that French manufacturers rank very highly in the technological race for new energy sources.

Today, the automotive industry has organized its branch by structuring its *Plateforme de la Filière Automobile* (PFA – Automotive Branch Platform), created during the 2009 crisis. The four priorities of lean manufacturing, the skills and jobs of tomorrow, better management of information/communication, and the medium- and long-term strategy for products, and international expansion, are now combined with the field of research with the creation of the *Comité Technique Automobile* (CTA – Automotive Technical Committee), the *Comité de Standardisation Technique Automobile* (CSTA – Automotive Technical Standardization Committee) and the *Comité de Recherche Automobile* (CRA – Automotive Research Committee). The automotive sector wants to look at its future together.

In this unstable, highly complex universe, CCFA has maintained its position and consolidated its ability to produce quality work, aimed at analyzing and aiding the understanding of the automotive industry in France and the world.
In France, CCFA is an active partner of other professional associations in the sector, including the CNPA for distribution and repairs, the FIEV for equipment and the CSIAM for foreign makes. In large projects that affect the automotive industry and its general environment, CCFA is always actively involved in collective discussions. With the support of its members, it works with large organizations that represent the economic world: the MEDEF, the UIMM and the GFI, as well as with specialized organizations such as the URF or the GERPISA.
Internationally, it defends French interests in OICA and EAMA, and contributes actively to the analytical capabilities and statistical data produced by these organizations.

This new edition of Analysis and Statistics should be enough to convince you of our know-how. We remain at your disposal. Do not hesitate to contact us *via* our website (www.ccfa.fr) with any questions you may have.

Best regards

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, during the crisis, French automobile manufacturers and their suppliers came together within the Liaison Committee of Automotive Suppliers (CLIFA – *Comité de Liaison des Fournisseurs de l'Automobile*) to establish the Automotive Branch Platform (PFA – *Plateforme de la Filière Automobile*), which has the task of contributing to reinforcing the French automotive branch. In this context, its research in 2012 revolved mainly around the *Comité Technique Automobile* (CTA – Automotive Technical Committee), the *Comité de Standardisation Technique Automobile* (CSTA – Automotive Technical Standardization Committee) and the *Comité de Recherche Automobile* (CRA – Automotive Research Committee).
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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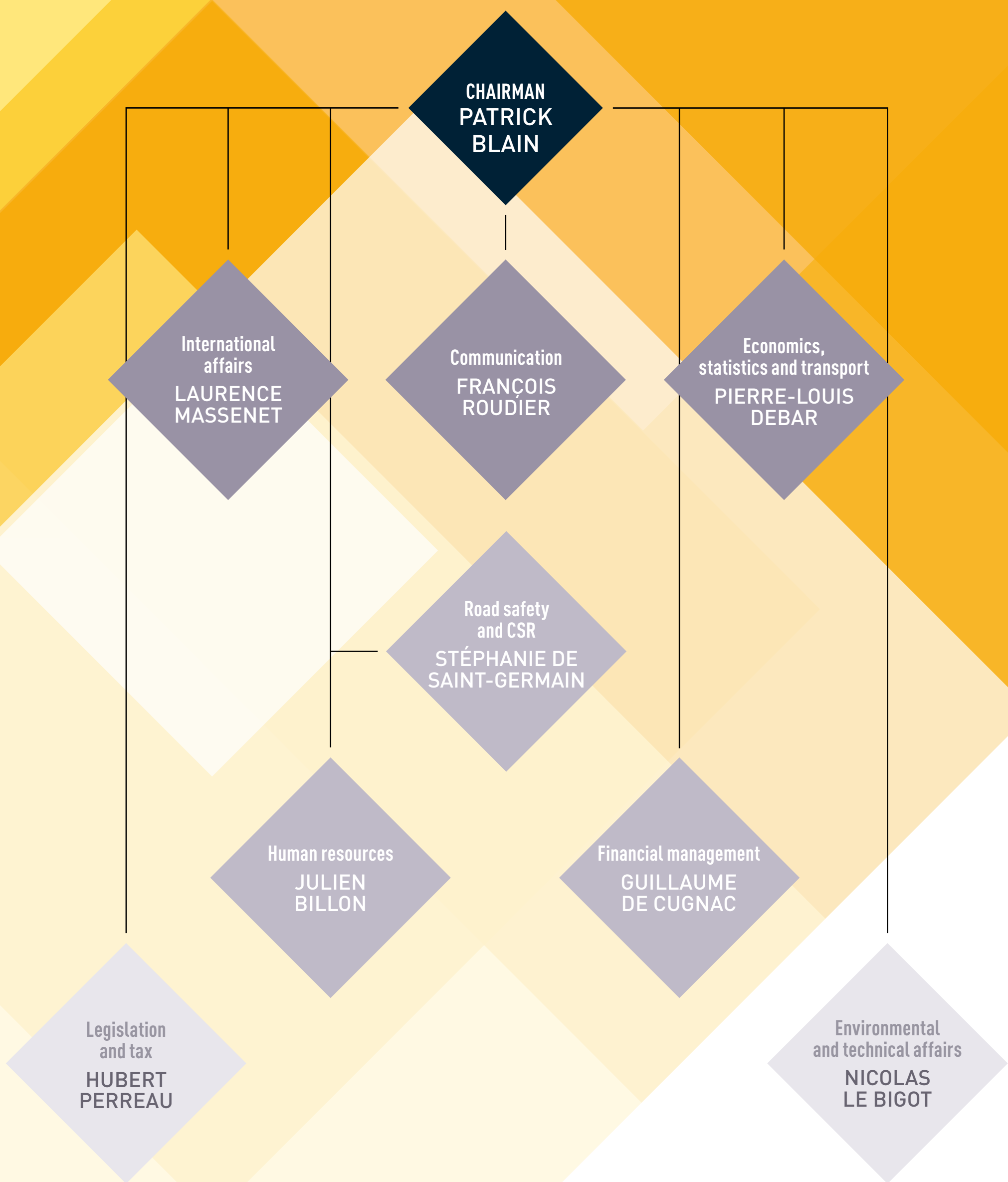
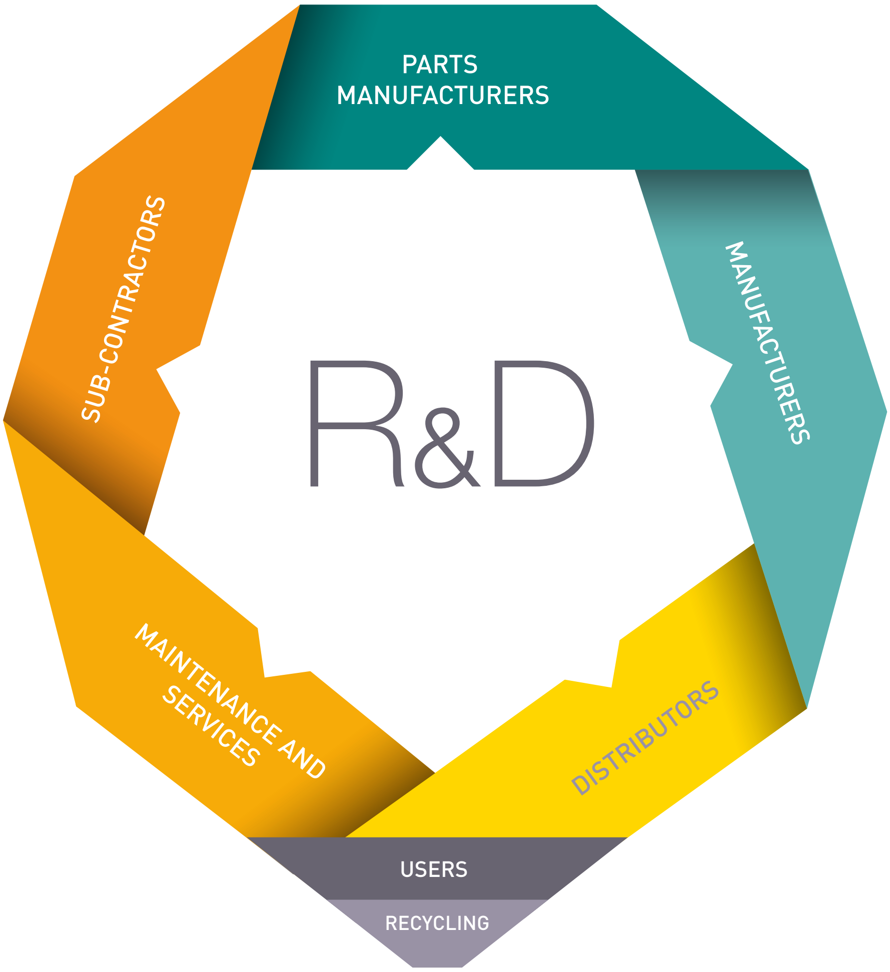


1909

YEAR
in which the *Chambre Syndicale des Constructeurs d'Automobiles* was founded

THE AUTOMOTIVE BRANCH IN FRANCE



4

ADDED VALUE generated in the national economy for each unit of added value in the automotive sector in France

53

BILLION EUROS, Total automotive industry purchases in France in 2011

2.2

BILLION EUROS, total investments of French automotive manufacturers in 2011

–25

GRAMS of CO_2/km, reduction in average CO_2 emissions in new passenger cars in France since the implementation of the bonus-malus scheme

–22%

Reduction since 1990 in the amount of CO_2 emitted by a heavy truck transporting one metric ton of freight one kilometer across France

2012: AFFECTED BY THE IRAN PROBLEMS, THE MARKETS FOR FRENCH MANUFACTURERS OUTSIDE OF WESTERN EUROPE WERE NOT ABLE TO MAKE UP FOR THE DROP IN THEIR SALES WITHIN THIS REGION, WHICH IS THEIR NATURAL BASE MARKET.

The production of French manufacturers has fallen by 9% from its pre-crisis levels, in the context of a world economic crisis marked since then by the continuation of considerable growth in emerging countries, which has largely exceeded its pre-crisis levels; on the other hand, in developed countries, although the USA joins them, this is not the case with the eurozone.

Sales outside of Western Europe have risen by almost 640,000 units since 2007, reaching 2.7 million vehicles in 2012. In 2012, not including the impact of Iranian sanctions, they rose by more than 3%. 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. Sales fell by one million vehicles in the period 2007-2012 to 2.9 million. The collapse of the markets in 2012, in particular in Southern Europe and France, is to blame for this. 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	2011	2012	Change 2012-2011	Change 2012-2007
World production of French manufacturers	**4,046**	**6,188**	**6,448**	**n/a**	**n/a**	**n/a**
Passenger cars	3,472	5,301	5,605	4,863	−13.2%	−8.3%
Light commercial vehicles	507	830	802	714	−11.1%	−14.0%
All light vehicles	3,979	6,131	6,407	5,576	−13.0%	−9.0%
Heavy trucks (at constant scope)	36	58	41	n/a	n/a	n/a
Production of French manufacturers in France	**2,525**	**2,573**	**2,007**	**1,647**	**n/a**	**n/a**
Passenger cars	2,235	2,165	1,678	1,377	−18.0%	−36.4%
Light commercial vehicles	258	352	292	270	−7.6%	−23.4%
All light vehicles	2,493	2,518	1,970	1,647	−16.4%	−34.6%
Heavy trucks	30	55	37	n/a	n/a	n/a
Automotive exports outside France	**2,822**	**4,697**	**4,893**	**4,404**	**−10.0%**	**−6.2%**
Passenger cars	2,526	4,110	4,337	3,898	−10.1%	−5.2%
Light commercial vehicles	276	549	530	481	−9.3%	−12.4%
All light vehicles	2,802	4,659	4,867	4,379	−10.0%	−6.0%
Heavy trucks	20	38	26	25	−2.1%	−32.6%
Automotive exports outside Europe (17 countries)	**659**	**2,110**	**2,977**	**2,747**	**−7.7%**	**30.2%**
Passenger cars	563	1,914	2,732	2,504	−8.4%	30.8%
Light commercial vehicles	88	178	230	228	−1.1%	28.0%
All light vehicles	651	2,092	2,963	2,731	−7.8%	30.5%
Heavy trucks	8	18	14	16	8.1%	−13.9%
Automotive registrations in France	**2,068**	**2,629**	**2,687**	**2,332**	**−13.2%**	**−11.3%**
Passenger cars	1,713	2,110	2,204	1,899	−13.9%	−10.0%
Light commercial vehicles	313	461	429	384	−10.5%	−16.8%
All light vehicles	2,026	2,571	2,633	2,283	−13.3%	−11.2%
Heavy trucks	39.3	52.5	47.4	43.4	−8.4%	−17.4%
Coaches and buses	3.1	5.5	6.2	5.5	−10.7%	1.0%
Automotive registrations for French groups in Europe (17 countries)	**3,300**	**3,906**	**3,431**	**2,907**	**−15.3%**	**−25.6%**
Passenger cars	2,841	3,181	2,814	2,374	−15.7%	−25.4%
Light commercial vehicles	432	690	591	510	−13.7%	−26.1%
All light vehicles	3,273	3,871	3,405	2,884	−15.3%	−25.5%
Heavy trucks	27	35	26	23	−9.5%	−33.0%

	Units	2011	2012	Change 2012-2011
Market share of French groups (new light vehicles)				
In France	(As a percentage)	58.0%	54.9%	–3.2 points
In Europe 17 countries (excluding France)	(As a percentage)	16.0%	15.0%	–0.9 points
In Europe 17 countries	(As a percentage)	23.7%	21.9%	–1.7 points
Market share of French makes (new heavy trucks)				
In Europe 17 countries	(As a percentage)	9.7%	9.6%	–0.0 points
French manufacturers' position in world production (PSA Peugeot Citroën and Renault-Dacia-Samsung)				
Passenger cars	(As a percentage)	9.4%	7.7%	–1.6 points
Commercial vehicles	(As a percentage)	4.0%	3.4%	–0.6 points
Total	(As a percentage)	8.0%	6.6%	–1.4 points
French automobile international trade				
Exports	(In € billions)	43.5	41.2	–5.2%
Imports	(In € billions)	48.3	44.6	–7.8%
Balance	(In € billions)	–4.9	– 3.3	1.5
Automotive industry contribution to foreign trade goods balance				
Exports	(As a percentage)	10.3%	9.5%	–0.9 points
Imports	(As a percentage)	9.5%	8.6%	–0.9 points
World key figures for French manufacturers (PSA Peugeot Citroën + Renault)				
Sales	(In € billions)	101.1	96.7	–4.4%
Capital expenditure	(In € billions)	3.8	4.2	+12.0%
No. of employees	(In thousands of people)	327	331	+1.3%
Jobs related to the automotive industry in France				
Automotive industry	(In thousands of people)		215	
As a share of industry (including food industries, etc.)	(As a percentage)		7%	
Total jobs (directly and indirectly related)	(In thousands of people)		2,351	
As a% of the employed working population	(As a percentage)		9%	

Following the record-breaking contraction of 2009 due to the economic and financial crisis, world GNP has returned to growth, achieving the same quick pace it had experienced up until 2007, before slowing back to under 3% in 2012. As in previous years, growth rates were different between OECD members, whose GNP rose by 1% and emerging economies (+5%), led mainly by China, as well as Thailand and Indonesia. Growth leveled off considerably in Latin America, both in Brazil and Argentina, as well as in Russia.

Raw material prices remained near record levels throughout 2012, near the peaks of 2008, in particular in the case of oil. These developments have limited consumer purchasing power; consumers have been affected in Europe by the effects of this crisis, with the high unemployment levels affecting their confidence. As regards companies, investments began to recover in 2010, ending in 2012 in Western Europe in an increasingly uncertain context. In addition, the reduction of state deficit levels, due both to falling expenditures and to rising taxes and social costs, had an effect on economic agents and thus on their level in the automotive markets.

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 more expensive and/or less-accessible short- and long-term capital, made worse by the crisis and the continuing strength of the euro against other main currencies up until its fall at the end of the second quarter of 2012. In spite of all this, they must continue to meet society's demands, which require considerable research and development expenditure. Furthermore, this crisis has affected the entire automobile branch upstream through suppliers and downstream with transportation and the sale/maintenance of vehicles.

In this economic and financial environment, in 2012 the world automotive market reached a new peak of 81.7 million vehicles; supported for the most part by the strong growth of developing countries and the continued recovery of the North American market. In Western Europe, the markets for new vehicles plummeted, in particular in France, where the government scrap incentive plan ended in March 2011. Faced with an unfavorable country mix effect (weaker markets in Southern Europe and France), the market share of French manufacturers dropped, returning to its 1997 level, in a context of even stiffer competition.

In Eastern Europe, the growth of the industry continued, driven by Russia and Ukraine. In order to satisfy vehicle ownership requirements, French manufacturers continued to develop commercially and industrially in this area where 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, the car market continued to develop strongly. Beyond China, the world's leading automobile market since 2009, growth was observed in many other countries such as India, Thailand and Indonesia. Sales by French manufacturers—910,000 vehicles in 2012— not including the impact of Iran, have remained stable in this zone. 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' sales grew to nearly 750,000 vehicles, exceeding their sales in Eastern Europe, including Turkey, for several years running. New investments have been made and renewed vehicle ranges have been developed by French manufacturers, in order to attempt to address the ongoing growth of the automotive market in this region.

Finally, sales of French manufacturers enjoyed strong growth in Africa, reaching 340,000 vehicles, up by 110,000.

+3%

INCREASE BETWEEN 2011 AND 2012 OF SALES BY FRENCH AUTOMOTIVE MANUFACTURERS OUTSIDE OF EUROPE 17 COUNTRIES, NOT INCLUDING IRAN

WORLD MOTOR VEHICLE PRODUCTION

In 2012, world vehicle production grew by 5.4% to 84.1 million vehicles, which is the third record since 2009. This increase represented a volume of 4.3 million vehicles.
In developed regions, the production increase over that of 2007 is contrasting; it fell in Western Europe (–23%) and Japan (–14%), but rose by 2% in NAFTA (Canada, USA, Mexico) and by 12% in South Korea.
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 2012, it grew by 40% compared to 2007 levels in Asia-Pacific (more than doubling in China), 14% in Latin America and 13% in the new EU member states.

WORLD MOTOR VEHICLE PRODUCTION

	Passenger cars				Commercial vehicles				Total		Change
	2011		2012		2011		2012		2011	2012	2012/2011
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**18,279**	**30.5**	**17,382**	**27.6**	**2,675**	**13.4**	**2,439**	**11.6**	**20,954**	**19,821**	**–5.4**
of which:											
Western Europe	12,445	20.8	11,331	18.0	1,677	8.4	1,496	7.1	14,122	12,827	–9.2
Germany	5,872	9.8	5,388	8.5	275	1.4	261	1.2	6,147	5,649	–8.1
Belgium	561	0.9	507	0.8	n/a	0.0	n/a	0.0	595	542	–8.9
Spain	1,839	3.1	1,540	2.4	534	2.7	439	2.1	2,373	1,979	–16.6
France	1,931	3.2	1,683	2.7	312	1.6	285	1.4	2,243	1,968	–12.3
Italy	486	0.8	397	0.6	305	1.5	275	1.3	790	672	–15.0
United Kingdom	1,344	2.2	1,465	2.3	120	0.6	112	0.5	1,464	1,577	7.7
Sweden	189	0.3	163	0.3	n/a	0.0	n/a	0.0	189	163	–13.8
Central and Eastern Europe	5,194	8.7	5,474	8.2	449	2.2	448	2.1	5,643	5,922	4.9
Turkey	640	1.1	577	0.9	549	2.7	496	2.4	1,189	1,072	–9.8
North and South America	**8,762**	**14.6**	**10,159**	**16.1**	**9,032**	**45.2**	**9,864**	**46.8**	**17,794**	**20,023**	**12.5**
of which:											
NAFTA [1]	5,625	9.4	6,956	11.0	7,853	39.3	8,838	41.9	13,478	15,795	17.2
South America	3,137	5.2	3,203	5.1	1,179	5.9	1,026	4.9	4,316	4,229	–2.0
Asia-Pacific	**32,481**	**54.2**	**35,147**	**55.7**	**8,094**	**40.5**	**8,563**	**40.6**	**40,576**	**43,710**	**7.7**
of which:											
Japan	7,159	12.0	8,554	13.6	1,240	6.2	1,388	6.6	8,399	9,943	18.4
China	14,485	24.2	15,524	24.6	3,934	19.7	3,748	17.8	18,419	19,272	4.6
South Korea	4,222	7.0	4,167	6.6	435	2.2	391	1.9	4,657	4,558	–2.1
India	3,040	5.1	3,285	5.2	887	4.4	860	4.1	3,927	4,145	5.5
Africa	**376**	**0.6**	**381**	**0.6**	**181**	**0.9**	**205**	**1.0**	**557**	**586**	**5.3**
TOTAL	**59,898**	**100.0**	**63,070**	**100.0**	**19,982**	**100.0**	**21,072**	**100.0**	**79,880**	**84,141**	**5.3**
Change 2012-2011			+5.3%				+5.5%			+5.3%	

Double counting is eliminated in regional totals.
(1) NAFTA: Canada, USA and Mexico. Sources: OICA, CCFA estimates for July 2013.

84.1

MILLION, NEW RECORD NUMBER OF VEHICLES PRODUCED IN THE WORLD IN 2012

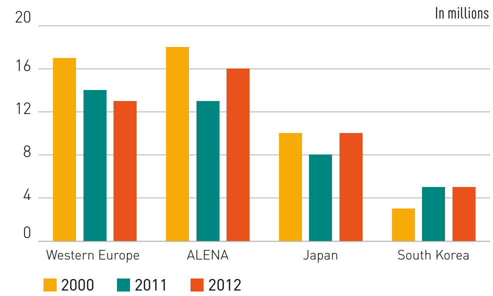
In 2012, production of passenger cars and commercial vehicles increased at almost the same pace (+5%) unlike in preceding years, when the growth of the former was slower than the latter, which were more severely affected by the crisis. Evolutions are still contrasting according to geographical area. In Europe, the contraction in the production of passenger cars was less sharp than that of commercial vehicles (–5% and –9%, respectively). In North and South America (+16% and +9%, respectively) and in Asia-Pacific (+8% and +6%, respectively), its growth was faster than that of commercial vehicles.
By country and for all vehicles, with the exception of Finland (+14%) and the United Kingdom (+8%), production fell in several Western European countries: the Netherlands (–21%), Spain (–17%), and Italy and Portugal (–15%).
In North and South America, production rose in the NAFTA zone, while it fell in South America.
As regards Asia-Pacific, which represents more than half of world production, growth of production in Indonesia (+27%) increased massively, unlike in India (+6%). Production in Iran fell by 40%. In China, the top manufacturing country since 2008, production rose by 5%. In Malaysia and Thailand, it grew by +7% and +70%, respectively.

WORLD MOTOR VEHICLE PRODUCTION

Between 2000 and 2012, the global production of motor vehicles (84.1 million) increased by 25 million units, which represents a growth rate of over 44%. Despite the 2008 crisis, the average annual growth rate remained above 3%.
In developed regions or countries, production dropped by more than 5 million vehicles, reaching a level of 43 million units (–10%). This accounted for only 51% of the world's production, more than 30 points less than in 2000. Within these regions, North American production fell by 2 million vehicles (–11%) and production in Western Europe fell by over 4 million (–25%). Japanese production fell by around 200,000 units in 2012 (–2% compared with 2000). On the other hand production in South Korea—a country which has benefited from more favorable exchange rates—grew by 1.4 million units (+46%).
In emerging regions or countries, production rose by almost 29 million vehicles, supported by China (+17.2 million), representing 23% of world production in 2012, against less than 4% in 2000; Turkey and Central and Eastern Europe (+3.9 million and a market share of 8%, against 5%), Indonesia, Iran, Malaysia and Thailand (+ 3.8 million and a market share of 6% against 2%), South America (+2.2 million and a market share of 6% against 4%) and India (+3.3 million and a market share of 5% against 1%). Overall, the market share in these emerging countries or regions rose from 16% to 47% in this period.

WORLD PRODUCTION OF ALL VEHICLES

Developed regions and countries



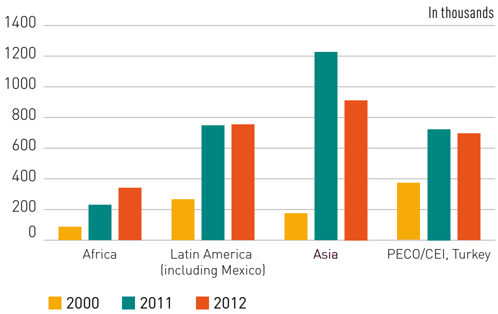
Sources: CCFA, OICA.

Emerging regions and countries

47%

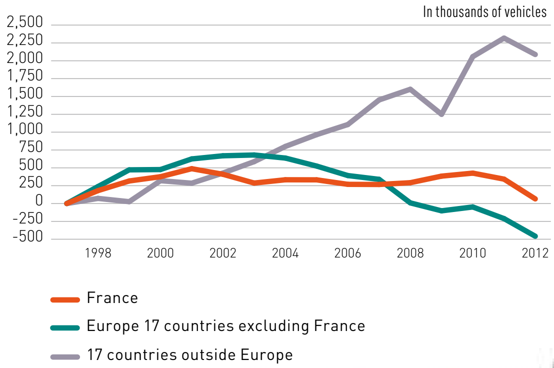
MARKET SHARE OF EMERGING REGIONS AND COUNTRIES IN WORLD MOTOR VEHICLE PRODUCTION IN 2012

Evolution of markets for French manufacturers outside of EU-17: all vehicles



Source: CCFA.

World markets of French manufacturers: evolution compared with 1997



In this context of changing world production, French manufacturers substantially increased exports to these regions. They grew by 1.8 million units between 2000 and 2012, excluding EU-17 countries, to reach 2.7 million vehicles.
After rising rapidly prior to the crisis, these exports fell and then resumed their considerable growth: +340,000 in Africa, +310,000 units in Latin America including Mexico, +296,000 in Central and Eastern Europe and Turkey, and +62,000 in Asia, despite the break-off of relations with Iran. On the other hand, exports to Spain and Italy dropped by more than 360,000 and 180,000 units, respectively, compared to 2007 levels.

WORLD RANKINGS OF AUTOMOBILE MANUFACTURERS

The 13 leading manufacturers—including French groups PSA Peugeot Citroën and Renault—account for three quarters of the world's production, producing more than two million vehicles each. Production by PSA Peugeot Citroën and Renault has fallen due to the unfavorable economic situation in Europe, ranking ninth and eleventh, respectively, in the world. The production of French manufacturers accounted for 7% of world production, as was the case during the last crisis of 1997, which is a much lower than the record level of 9.8% reached in 2001.

WORLD PRODUCTION IN 2012 (IN NUMBER OF VEHICLES)

In thousands of vehicles

	World ranking	All vehicles (1)	Passenger cars	Commercial vehicles(2)
Toyota-Daihatsu-Hino (3)	1	10,104	8,382	1,722
General Motors (Opel-Vauxhall-GM Daewoo) (4)	2	9,255	8,577	678
Groupe Volkswagen (including Porsche, Man et Scania)	3	7,126	6,761	365
Hyundai-Kia	4	6,486	3,953	2,533
Ford (4)	5	5,152	2,680	2,472
Nissan	6	4,889	3,831	1,058
Fiat-Chrysler	7	4,505	2,159	2,346
Honda	8	4,111	4,078	32
PSA Peugeot Citroën	**9**	**2,911**	**2,554**	**358**
Suzuki-Maruti	10	2,894	2,484	410
Renault-Dacia-Samsung	**11**	**2,676**	**2,303**	**373**
Daimler (Evobus et Fuso inclus)	12	2,195	1,456	740
BMW (Mini inclus)	13	2,065	2,065	0
SAIC	14	1,784	1,523	260
Tata (Telco, Jaguar, Land Rover, Tata Daewoo)	15	1,241	744	497
Mazda	16	1,189	1,098	92
Dongfeng Motor	17	1,138	540	598
Mitsubishi	18	1,110	980	130
Changan	19	1,064	835	228
Geely-Volvo	20	923	923	-
Fuji (Subaru)	21	753	735	18
BAIC	22	721	83	638
FAW	23	706	480	226
Great Wall	24	624	488	137
Mahindra	25	606	429	177
Isuzu	26	600	-	600
Chery	27	564	551	13
AvtoVaz	28	553	553	-
Brilliance	29	490	232	258
JAC	30	476	200	276
BYD	31	455	455	-
GAZ	32	305	180	125
Chongqing Lifan Motor Co.	33	273	184	89
Volvo - **Renault Trucks** - Mack - UD Trucks	34	235	-	235
Proton	35	162	135	28
China National Heavy Duty Truck	36	128	-	128
Paccar	37	125	-	125
Ashok Leyland	38	118	-	118
Hunan Jiangnan Automobile Manufacturing Co.	39	117	117	-
Guangzhou Auto Industry	40	114	87	27
Haima Business	41	91	39	51
Shannxi	42	86	8	78
South East (Fujian)	43	86	82	4
Navistar	44	83	-	83
Xiamen King Long	45	78	-	78

NB.: The production of Chinese manufacturers does not include joint-ventures. (1) There may be double counts between manufacturers. (2) Non-standard weight limits. (3) Of which Daihatsu produced 1,192,0000 and Hino 175,000. (4) The production of GM and Ford does not include their activity in China. For GM it amounted to 2.8 million vehicles, of which 1.4 were in SGMW (entered by SAIC) and 1.4 were in GM China (Shanghai-GM and SGMW-Chevrolet). For Ford it amounted to 475,000 units (Changan-Ford and JMC-Ford). Sources: OICA, CCFA estimates for July 2013.

7%

MARKET SHARE OF FRENCH MANUFACTURERS IN WORLD AUTOMOBILE PRODUCTION IN 2012

In a context of growth, world production rose by 5% thanks to the positive results from countries in Asia-Pacific and NAFTA (Canada, USA, and Mexico).

Recent years have also been 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 recently Porsche and Man). The Toyota Group has maintained its leading position since 2006, with a considerable increase (+26%) of its production after being seriously affected in 2011 by the earthquake in Japan. The Volkswagen Group (+5%), with a major presence in emerging economies, held second place. The volumes of GM and Ford benefitted from the healthy state of the North American market.

Among the Asian manufacturers, Hyundai-Kia (+8%, 4th place) and Nissan (+6%, 6th place) maintained their ranks. On the other hand, Japanese manufacturers benefited from the recovery of production in their country: Honda (+41%, 8th position) and Suzuki-Maruti (+6%, 10th position) rose up in the classification. The European groups have experienced different types of growth. The production of generalist manufacturers PSA Peugeot Citroën (–19%) and Renault (–5%) dropped, while that of Fiat-Chrysler (+4%) improved thanks to the American make (+19%). The German groups Daimler and BMW—specialists in premium ranges—continued their growth after being greatly affected by the crisis.

Manufacturers in emerging countries (China, India) also have different levels of growth. The production of the SAIC Group rose by 21%, compared with +4% and +3% for Tata and Dongfeng Motor, respectively.

WORLD AUTOMOTIVE MARKETS

In 2012, the world automotive market continued to grow (+5% to 81.8 million vehicles), setting a new record. While markets have grown in emerging economies, North America and Japan, registrations have dropped in Western Europe.
China, whose access to vehicle ownership is continuously developing in line with the progressing lifestyle, saw its market, despite the limitation on the number of new vehicles in large cities, increase by more than 4% to 19.3 million vehicles (compared to 9 million in 2008). Its status as the world's leading automotive market, achieved 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 for the former and a faster pace for the latter. On the other hand, despite continuing the recovery which started in 2010, Central and Eastern Europe remained below their 2008 levels. In 2012, the share of these areas in world sales reached 47%, compared with 26% in 2005.
In the main industrialized areas, where vehicle ownership rates have achieved maturity, the markets remain well under the levels previously seen, and their share of the world markets was only 46%, compared with 68% in 2005.

WORLD AUTOMOTIVE MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2011		2012		2011		2012		2011	2012	2012/2011
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**17,160**	**30.0**	**16,187**	**26.8**	**2,570**	**12.4**	**2,471**	**11.6**	**19,730**	**18,658**	**–5.4**
of which:											
Western Europe	12,815	22.4	11,773	19.5	1,868	9.0	1,647	7.7	14,684	13,420	–8.6
Central and Eastern Europe	4,344	7.6	4,414	7.3	702	3.4	824	3.9	5,046	5,238	+3.8
North and South America	**11,665**	**20.4**	**13,111**	**21.7**	**9,867**	**47.6**	**10,526**	**49.4**	**21,532**	**23,637**	**+9.8**
of which:											
NAFTA [1]	7,363	12.9	13,111	21.7	8,236	39.8	8,890	41.7	15,599	17,529	+12.4
USA	6,089	10.6	7,242	12.0	6,951	33.6	7,544	35.4	13,041	14,786	+13.4
South America	4,302	7.5	4,472	7.4	1,631	7.9	1,636	7.7	5,933	6,108	+2.9
Asia-Pacific	**27,419**	**47.9**	**30,126**	**49.8**	**7,886**	**38.1**	**7,908**	**37.1**	**35,305**	**38,034**	**+7.7**
of which:											
China	14,472	25.3	15,495	25.6	4,033	19.5	3,811	17.9	18,505	19,306	+4.3
South Korea	1,316	2.3	1,307	2.2	263	1.3	237	1.1	1,579	1,544	–2.3
Japan	3,509	6.1	4,572	7.6	701	3.4	797	3.7	4,210	5,370	+27.5
Other Asia-Pacific	8,121	14.2	8,752	14.5	2,889	13.9	3,062	14.4	11,010	11,814	+7.3
Africa	**999**	**1.7**	**1,068**	**1.8**	**392**	**1.9**	**396**	**1.9**	**1,390**	**1,464**	**+5.3**
TOTAL	**57,243**	**100.0**	**60,492**	**100.0**	**20,715**	**100.0**	**21,300**	**100.0**	**77,958**	**81,793**	**+4.9**
Change 2012-2011			5.7%				3%			5%	

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

In the United States, the consequences of the financial crisis, which had called a halt to household consumption, continued to be less severe and the market recovered further with 15 million vehicles, compared to over 17 million between 2004 and 2006.
In Western Europe, after a stable year, the market dropped again to 13.4 million vehicles, against 17.3 million in 2007. The markets for passenger cars and commercial vehicles dropped by 8% and 12% respectively, thus remaining at levels well under the record established in 2007. Notable variations were recorded by country, from –40% in Greece to +4% in the United Kingdom, with –20% in Italy, –15% in Spain, –13% in France and –3% in Germany.
In Central and Eastern Europe, the strong growth in recent years ended in Turkey (–5%). The Russian market continued to grow (+8%), as did the Ukrainian market (+14%). However, the latter only reached 40% of its pre-crisis level.
In Japan, following the drop in 2011, sales recovered by 28% to 5.4 million vehicles, a level slightly higher than that of 2007, but lower than those observed in the mid-2000s. Registrations in South Korea dropped by 2% to 1.5 million vehicles after rising for three years.
In Asia-Pacific, excluding the three major countries (China, Japan and South Korea), the strong growth in 2010 (+23%) was replaced with weaker growth (+7%) with 11.8 million vehicles. Growth was near 10% in India, and more than 20% and 70% in Indonesia and Thailand, respectively.
In South America, car ownership continues to expand and the markets rose by 3%, compared with 8% in 2011. The Brazilian market achieved a new record.
In Africa, where volumes are smaller, the markets continued to grow, with strong growth recorded in Morocco and, to a lesser extent, in South Africa. In Algeria, growth slowed (+5%).

24%
CHINA'S SHARE
OF WORLD SALES
IN 2012

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. The collapse of its domestic market since 2008 explains the reduction of imports as well as production. The latter can only be compensated by increasing exports. In North America including Mexico, production—essentially for the local market—continued to recover and has now returned to its 2006-2007 level. In Japan, production benefited in 2012 mostly from the domestic market, supported by government incentive schemes, as well as rising exports. Exports accounted for 48% of production (53% in 2011). Imports still only accounted for less than 5% of total car registrations. Outside of these three historical regions, China, which became the largest producing country in 2010, essentially only produces to satisfy its domestic market; imports, like exports, represented less than 5% of its production.

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

	European Union (1)		United States, Canada and Mexico (3)		Japan	
Passenger cars						
Production	in thousands	index (100=1990)	in thousands	index (100=1990)	in thousands	index (100=1990)
1970	9,876	78	7,474	105	3,179	33
1980	10,166	80	7,196	101	7,038	72
1990	12,726	100	7,150	100	9,753	100
2000	14,779	116	7,092	99	8,359	86
2012	14,612	115	6,956	97	8,554	88
Imports (2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
1970	148	1%	1,464	20%	19	1%
1980	800	8%	2,713	38%	46	1%
1990	1,495	12%	3,029	42%	186	2%
2000	2,629	18%	2,225	31%	268	3%
2012	1,850	13%	2,637	38%	240	3%
Exports (2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
1970	2,397	24%	49	1%	726	23%
1980	1,973	19%	107	1%	3,947	56%
1990	1,732	14%	288	4%	4,482	46%
2000	2,715	18%	1,130	16%	3,796	45%
2012	4,300	29%	950	14%	4,196	49%
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
2012	1,870	117	8,838	194	1,388	39
Imports (2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
1970			47	3%	0	0%
1980	101	6%	125	6%	1	0%
1990	258	16%	399	9%	1	0%
2000	242	10%	915	11%	8	0%
2012	280	15%	1,337	15%	2	0%
Exports (2)	in thousands	% of total	in thousands	% of total	in thousands	% of total
1970			64	4%	361	17%
1980	362	23%	114	5%	2,020	50%
1990	179	11%	32	1%	1,349	38%
2000	248	11%	339	4%	659	37%
2012	460	25%	100	1%	605	44%

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

48%

PERCENTAGE OF VEHICLES MANUFACTURED FOR EXPORT IN JAPAN IN 2012

Trends in the world's three leading automotive regions have contrasted sharply since 1990.
In the European Union (currently 27 countries) vehicle production increased by 15% (compared to +38% in 2007) and trade—already high—appears to be up by nearly 88%.
In North America, including Mexico, production has risen since 2009 by 35% over its 1990 level. Imports, which were already high in 1990 and which have since continued to rise, have exceeded those of 1990 by 16%. Exports only represented 7% of production (29% for the EU and 48% for Japan). Finally, in Japan, vehicle production has fallen by 25% due to the contraction of the domestic and export markets. These markets, which had suffered a decade of falls until 2001 (29% lower than 1990), had previously grown as the yen weakened and, in 2008, were 15% higher than in 1990. In 2012 they were 18% lower, mainly due to production by plants belonging to Japanese manufacturers outside of Japan and the strong yen.

WORLD TRADE IN AUTOMOTIVE PRODUCTS

After falling by 31% in 2009 due to the crisis, world trade of products from the automotive industry, according to the WTO, continued to recover (+17% in 2011, following +29% in 2010). It stood at US$1,287 billion, exceeding the previous record, set in 2008, by 4%. Between 2005 and 2011, very different changes were detected between countries and regions in the balances of products from the automotive industry. The surplus in South Korea rose from US$34 billion to US$59 billion, in Japan it rose from US$110 bn. to US$134 bn. and in the EU it rose from US$80 bn. to US$159 bn. Due to a noticeably weaker automotive market in 2011, the USA deficit dropped from –US$120 to –US$92 billion.
On the other hand, the balance of + US$9 billion recorded in Canada in 2005 became a US$11 billion deficit, in line with the place taken by Mexico in trade within NAFTA. The US$7 billion surplus gave way to a US$8 billion deficit in Brazil. Finally, the Chinese deficit, which has become the leading world automotive market in the meantime, rose from US$4 billion to US$32 billion.

WORLD TRADE OF AUTOMOTIVE PRODUCTS
Exports (FOB)/Imports (CIF) to/from the main regions

In US$ billions

ZONES			World	USA and Canada, later North America (1)			European Union (2)			Japan			Other countries (4)		
Country	EXP.	IMP.	**Balance**	EXP.	IMP.	**Balance**	EXP.	IMP.	**Balance**	EXP.	IMP.	**Balance**	EXP.	IMP.	**Balance**
USA															
2005	86.0	205.5	**–119.5**	59.3	94.3	**–35.0**	10.4	43.1	**–32.7**	1.5	49.4	**–47.9**	14.8	18.7	**–39**
2010	99.5	189.8	**–90.3**	60.2	91.7	**–1.5**	9.7	33.6	**–23.9**	1.2	42.9	**–41.7**	28.4	21.5	**6.8**
2011	119.3	211.7	**–92.4**	67.8	101.8	**–34.0**	12.8	39.9	**–27.1**	1.5	42.5	**–41.0**	37.2	27.4	**9.8**
Canada															
2005	66.8	57.6	**9.1**	64.4	47.3	**17.1**	0.5	3.1	**–2.6**	0.1	4.6	**–4.5**	1.8	2.6	**–0.8**
2010	50.1	59.6	**–9.5**	49.1	46.2	**3.0**	0.3	4.5	**–4.2**	0.0	5.7	**–5.6**	0.7	3.3	**–2.6**
2011	54.0	64.5	**–10.6**	52.7	50.7	**2.0**	0.3	5.1	**–4.8**	0.0	5.1	**–5.1**	0.9	3.6	**–2.7**
European Union (2)															
2005	492.0	412.6	**79.5**	51.1	9.2	**41.9**	357.7	357.7	**0.0**	7.7	21.0	**–13.3**	75.5	24.6	**50.9**
2010	546.4	426.9	**119.4**	42.9	10.0	**32.9**	369.2	369.2	**0.0**	7.0	18.9	**–11.9**	127.3	28.9	**98.4**
2011	659.2	500.5	**158.7**	49.4	13.5	**35.9**	432.7	432.7	**0.0**			**0.0**	177.1	54.3	**122.8**
Japan															
2005	122.9	13.2	**109.7**	55.0	1.8	**53.3**	20.2	8.0	**12.1**				47.7	3.4	**44.3**
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**
2011	150.5	17.0	**133.5**	49.4	1.6	**47.9**	19.1	9.4	**9.7**				82.0	6.0	**76.0**
South Korea															
2005	37.8	4.1	**33.7**	12.3	0.5	**11.8**	9.0	1.8	**7.2**	0.4	1.2	**–0.8**	16.0	0.6	**15.5**
2010	54.5	8.0	**46.5**	13.6	0.8	**12.7**	6.6	3.5	**3.1**	0.6	2.2	**–1.6**	33.8	1.5	**32.3**
2011	69.2	9.8	**59.4**	17.3	1.1	**16.2**	9.7	4.7	**5.0**	0.7	2.0	**–1.3**	41.5	2.0	**39.5**
China (excluding Hong Kong)															
2005	10.0	13.6	**–3.6**	3.7	1.1	**2.6**	1.4	4.5	**–3.1**	1.2	4.9	**–3.7**	3.7	3.1	**0.5**
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**
2011	37.5	69.6	**–32.2**	8.7	8.3	**0.4**	4.9	36.2	**–31.3**	2.3	18.0	**–15.7**	21.5	7.2	**14.4**
Brazil															
2005	12.0	4.7	**7.3**	3.6	0.6	**3.0**	1.6	2.0	**–0.4**	0.0	0.5	**–0.5**	6.8	1.6	**5.2**
2010	12.6	17.0	**–4.4**	1.6	2.3	**–0.7**	1.0	3.5	**–2.6**	0.0	1.2	**–1.2**	10.0	10.0	**0.0**
2011	14.4	22.8	**–8.4**	1.6	3.4	**–1.8**	0.5	5.5	**–4.9**	0.0	1.4	**–1.4**	12.3	12.6	**–0.3**
Trade of the main European Union countries (3)															
	Germany			**France**			**Spain**			**Italy**			**United Kingdom**		
2005	162.9	68.77	**94.1**	65.4	54.2	**11.2**	45.0	46.6	**–1.5**	26.8	41.7	**–14.9**	30.9	52.0	**–21.1**
2010	195.7	79.28	**116.4**	54.1	58.7	**–4.7**	47.5	31.4	**16.1**	29.1	39.7	**–10.6**	30.9	45.5	**–14.6**
2011	238.8	99.45	**139.3**	60.4	67.2	**–6.8**	55.8	37.2	**18.6**	33.5	42.5	**–9.0**	37.3	52.0	**–14.6**

(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) Since 2001, CCFA has based its estimates of imports and exports for European Union countries on local customs statistics.
(4) The "other countries" total contains countries not included in the three major divisions.
Source: GATT/WTO.

In 2011, world trade in automotive products accounted for 7% of the world's goods exports and 11% of the world's manufactured product exports. Intraregional trade as a share of world trade regained its 2003 level, at 61%, mainly due to weak demand in Europe. In NAFTA and Europe (excluding CIS), this share exceeded 70% and in South America it exceeded 80%, with just over 30% for Asia-Pacific. Germany was still the largest exporter of automotive products with an 18% share worth US$239 billion. Ranking second in the world, Japan exported US$150 billion, of which 33% was to North America. EU-27 automotive exports reached US$659 billion. Trade within the EU accounted for over 66% of this total (73% in 2009). France accounted for 5% of world exports, worth US$60 billion, against almost 8% in 2004. The USA remained the world's leading importer of automotive products, with US$212 billion.

China's imports—up 31% to $70 billion in 2011—came from the EU-27 (52% against 42% in 2009), followed by Japan (26% against 36% in 2009), NAFTA (12%), and South Korea (8%). Since 2005, Chinese imports have grown by 31% per year.
Finally, Russian imports of automotive products stood at US$39 billion in 2011, ahead of Saudi Arabia (US$ 17 billion) and the United Arab Emirates (UAE) (US$12 billion). Reflecting the evolution of oil resources, the imports of these countries have risen sharply since 2005, increasing annually by 9% on average in Saudi Arabia, 10% in the UAE and 23% in Russia. These variations in demand have a downward effect on the ratio measuring the share of intraregional trade.

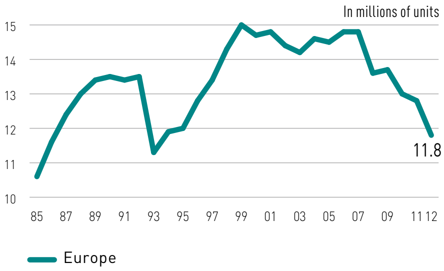
US$32 billion

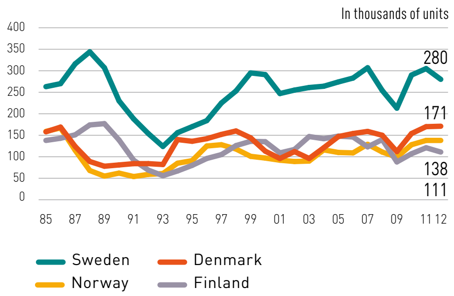
CHINA'S 2011 DEFICIT IN AUTOMOTIVE PRODUCTS

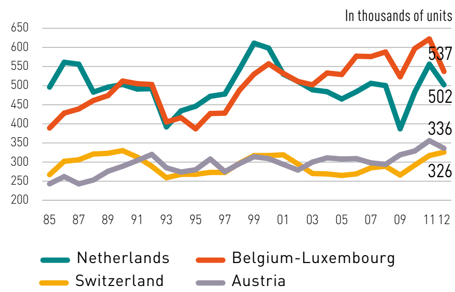
NEW PASSENGER CAR REGISTRATIONS PER COUNTRY

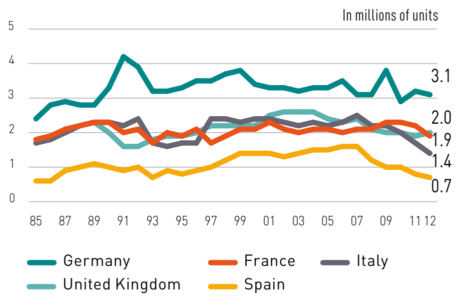
With 11.8 million new cars registered in Western Europe, the market dropped by 8.1% compared with 2011. The fall between 2007 and 2012 reached 21%, or 3.1 million units. For the fifth consecutive year, it was under 14 million units, representing one fifteenth of the European car fleet.
Contrasting variations were observed in countries undergoing economic difficulties. From 2007 to 2012, the German share of the European market rose by 5 points to 26%, against an equivalent drop of 12% for Italy and 6% for Spain. The market share of Northern Europe rose by 4 points.
The Italian market contracted by 1,100,000 units compared with the year before the crisis struck, or a drop of 44%. In Spain, the drop in volume reached more than 900,000 units compared with 2007 (– 57%). Over the course of this same period, Greece, Ireland and Portugal experienced drops of 221,000 (– 79%), 107,000 (– 57%) and 107,000 (– 53%) units, respectively.
In 2012, the German market—near its pre-crisis levels—fell by 3% following a recovery of 9% in 2011. In France, the market plummeted (– 14%); it has now become, after being second in 2009 and 2010, the third market in Europe, ahead of Italy and behind the UK (the only major market to grow, up 5% in 2012).

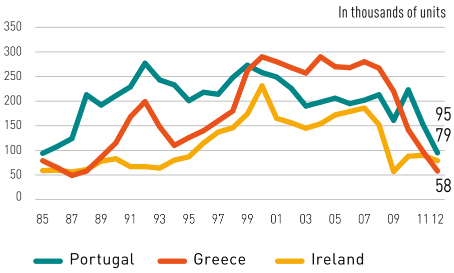
NEW PASSENGER CAR REGISTRATIONS IN EUROPE

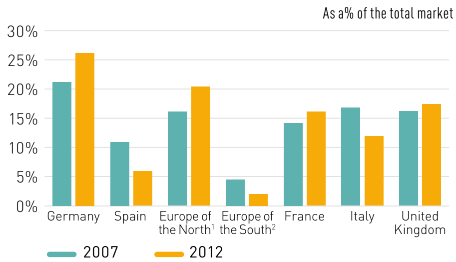












(1) Austria, Belgium-Luxembourg, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland.
(2) Portugal, Greece, Ireland.

–21%

DROP IN NEW PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE IN 2012 COMPARED WITH 2007

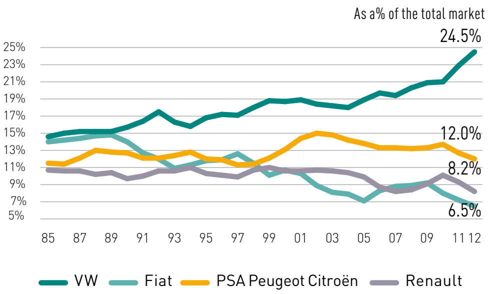
The European market covers 17 countries (the 15 European Union countries before 2004 plus Switzerland and Norway).
These countries have similar environments and comparable economic conditions. Since 1990, this market has included the former East Germany.
Lower oil prices and the expansion of the European Union drove strong growth in the automotive market between 1986 and 1989. Then followed a period of high-level stability.

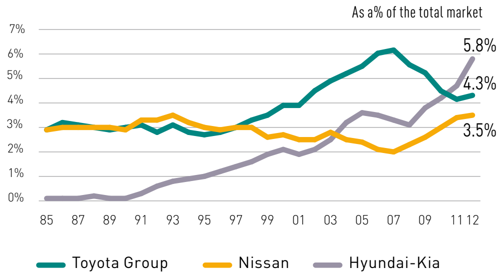
Demand plummeted in 1993, leading to a 16% drop in registrations. Subsequently, this market grew constantly and, from 1998 to 2007, registrations fluctuated between 14 and 15 million units. During the last four months of 2008, the market entered a crisis period; in 2009, it was maintained by incentive systems and then contracted.

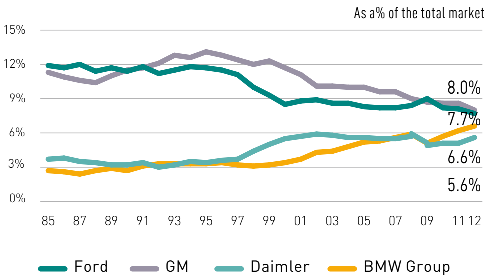
NEW PASSENGER CAR REGISTRATIONS PER GROUP

In 2012, the market share of French groups in the European market dropped for the second consecutive year, stabilizing at 20%, or a level lower than that of 2007. In addition to market difficulties, French manufacturers were also affected by intense competition, which has affected their share in the markets where they have a large presence: Germany (– 0.6 points to 9%), the UK (– 1.5 points to 10%) and Belgium (– 1.8 points to 28%). However, they rose slightly in Italy (+ 0.6 points to 16%) and Spain (+ 0.5 points to 26%). Six major 'generalist' European automakers manufacturing a full line of vehicles held around 7% of the market or more.
The market shares of manufacturers Volkswagen and Hyundai-Kia rose, as did that of 'premium' manufacturers, unlike those of all their competitors.

MARKET SHARES OF GROUPS [1] IN EUROPE







(1) Based on the scope of consolidation as of 1/1/2013.
See page 63 for group definitions.

The Volkswagen Group, with its four main makes, has maintained its position since 1999, and now accounts for more than 20% of the market. Benefiting from a stronger German market (26% of the European market against 25% the previous year), it reached a record level of 25% in 2012.
The market share of French groups Renault and PSA Peugeot Citroën (20% overall) reached a low point, below 2007 levels. It exceeded 25% between 2001 and 2003.
The market share of the GM Group was 8.0%, down by 0.6 points. The market shares of its makes Opel and Chevrolet were respectively stable at 6.7% and 1.3%. From 2000 to 2009, the market share of the Ford group was around 10%. In 2012, it rose to 7.7%. In the mid-1990s, the penetration of these two American groups was around 12% each.
The Fiat group—which now includes the makes of the Chrysler group—after four consecutive years of rising market shares between 2006 and 2009, lost 0.6 points of market share to 6.5%; it was near 13% in 1997 and 15% in 1989. In 2012, the Fiat make had a share of 4.7%.

The German groups Daimler and BMW, specialists in premium ranges and corporate sales, undertook a strategy to expand their ranges. Daimler consolidated its growth which began in 1997 by diversifying its range of vehicles, it gained 0.4 points of market share to 5.6%. BMW, including Mini, confirmed its growth that started in 1999, reaching a new peak; its penetration rose by 0.4 points to 6.6% (+ 0.7 points compared to the peak in 2008).
The market share of the Toyota group, after rising continuously between 1995 and 2007, had fallen for four consecutive years before recovering by 0.2 points in 2012 to 4.3%.
The market share of the Hyundai-Kia Group continued to rise. Its market share (almost non-existent in 1990 and 2.1% in 2000) grew by 1.2 points to 5.8% in 2012, or 687,000 vehicles.

20%
OF NEW PASSENGER CARS SOLD IN WESTERN EUROPE ARE MANUFACTURED BY A FRENCH GROUP

RANGE ANALYSIS IN 2012

French manufacturers expanded their vehicle ranges, offering 51 models in 2012, compared with 27 in 2000. In recent years they have also considerably increased the number of versions available, in particular by developing models for their lower ranges: station wagon (Clio and 208), MPV (C3 Picasso), and coupé (Laguna).

Groups	Makes	Economy and low range	Low-mid range	High-mid range	Premium range
PSA PEUGEOT CITROËN	CITROËN	C-Zero, C1, C3, DS3, Nemo, Berlingo	Xsara, C4, DS4, C4 Air Cross, Jumpy, Jumper	C5, DS5,	C8, C6
	PEUGEOT	i0n, 107, 206+, 207, 208, 2008, Bipper, Partner	308, RCZ, 3008, 4008, 5008, Expert, Boxer	407, 508	807, 607
RENAULT GROUP	RENAULT	Twingo, Wind, Clio, Modus, Captur, Kangoo, ZOE	Mégane, Fluence, Master	Laguna, Trafic, Koleos	Espace, Latitude
	DACIA	Logan, Sandero, Duster, Dokker	Lodgy		
BMW	BMW		1 Series	X1	3, 5, 6, 7, X3, X5, X6, Z4 Series
	MINI	Mini			
DAIMLER	MERCEDES		A, B classes, Vito	Viano	C, E, S, CL, SL, CLS, SLS, CLK, SLK, R, G, GL, GLK, ML classes
	SMART	Fortwo			
FIAT	ALFA ROMEO	Mito	147, Giulietta	159, Brera, GT	Spider
	CHRYSLER-JEEP			Patriot, Wrangler, Compass, Cherokee	(Grand) Voyager, (Grand) Cherokee
	FIAT	Panda, 500, Punto, Idea, Sedici, Fiorino, Doblo,	Bravo, Multipla, Scudo, Ducato	Freemont	
	LANCIA	Ypsilon, Musa	Delta		Thema, Flavia, Voyager
FORD EUROPE	FORD	Ka, Fiesta, B-Max, 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	Orlando, Volt	Cruze, Captiva	Malibu, Corvette, Camaro
	OPEL	Agila, Corsa, Meriva, Tigra, Combo, Mokka	Astra, Ampera, Zafira	Insignia, Antara, Vivaro	
HONDA	HONDA	Jazz	Civic, CR-Z, Insight	Accord, CR-V	
HYUNDAI	HYUNDAI	I10, I20, IX20	I30, Veloster, H1	Sonata, IX 35, I40, Santa Fe, IX 55	Genesis
	KIA	Picanto, Soul, Venga	Rio, Cerato, Cee'd, Carens	Optima, Sportage	Magentis, Carnival, Sorento
MAZDA	MAZDA	2	3, 5, MX5, cx-5	6, CX-7	RX8
MITSUBISHI	MITSUBISHI	i-MiEV, Colt	ASX, Lancer	Outlander	Pajero
NISSAN	NISSAN	Pixo, Micra, Note, Cube, Juke	Leaf	Qashqai, X-Trail	370Z, Murano, Pathfinder
SUBARU	SUBARU	Justy, Trezia		Impreza, Legacy, Forester	
SUZUKI	SUZUKI	Alto, Splash, Swift, SX4, Jimny		Grand Vitara	
Tata Group	JAGUAR				Type X, XJ, XK
	LAND ROVER			Freelander, Defender, RR Evoque	Discovery, Range Rover
TOYOTA	DAIHATSU	Charade, Cuore, Sirion, Materia, Terios			
	LEXUS		CT 200 H		GS, IS, LS, RX
	TOYOTA	IQ, Aygo, Yaris, Verso-S, Urban Cruiser	Verso, Auris	Avensis, Prius, RAV4	GT86, Land Cruiser
VOLKSWAGEN GROUP	AUDI	A1	A3	A4, A5, TT, Q3	A6, A7, A8, R8, Q5, Q7
	PORSCHE				911, Boxster, Cayman, Cayenne, Panamera
	SEAT	Mii, Ibiza	Leon, Altea	Toledo, Exeo	Alhambra
	SKODA	Citigo, Roomster, Yeti	Fabia	Octavia	Superb
	VOLKSWAGEN	Up!, Fox, Polo, Caddy	Golf, Jetta, New Beetle, Touran, Eos	Passat, Scirocco, Tiguan, CC	Sharan, Phaeton, Touareg

Source: CCFA.

51 and 98

RESPECTIVE NUMBERS OF MODELS AND BODY STYLES OFFERED BY FRENCH MANUFACTURERS.

BREAKDOWN AND RANK BY MODEL

Of the 15 best-selling models in Europe in 2012, five are made by Renault, Peugeot or Citroën.

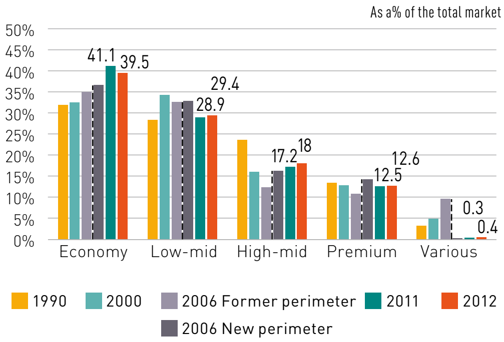
RANGES AND BODIES IN 2012

As a% of new registrations by country	Low range	Low-mid range	High-mid range	Premium range	Others
Germany	29	33	19	18	1
Austria	33	33	21	13	0
Belgium	36	31	19	14	0
Denmark	61	22	12	5	0
Spain	33	38	21	8	0
Finland	20	31	33	15	1
France	49	31	14	6	0
Greece	62	23	12	4	0
Ireland	24	34	31	11	1
Italy	59	21	14	6	0
Luxembourg	29	31	20	20	0
Netherlands	50	26	16	8	0
Portugal	43	31	14	12	0
United Kingdom	41	27	18	15	0
Sweden	17	26	28	29	0
European Union 15 countries	**40**	**30**	**18**	**12**	**0**
Norway	20	29	33	18	0
Switzerland	31	26	23	17	3
All 17 countries	**40**	**29**	**18**	**13**	**0**

	Sedans	Station wagons	Coupés	Convertibles	MPVs	Others
Germany	43	18	1	3	14	20
Austria	42	14	1	1	20	22
Belgium	46	15	2	2	19	17
Denmark	68	17	0	0	10	5
Spain	60	5	1	1	13	20
Finland	43	28	0	0	8	20
France	56	7	1	1	18	17
Greece	82	2	1	0	5	10
Ireland	71	6	1	0	6	16
Italy	61	8	0	1	13	18
Luxembourg	42	13	2	2	14	27
Netherlands	62	18	1	1	10	9
Portugal	64	17	1	1	7	11
United Kingdom	61	7	3	3	10	16
Sweden	34	40	1	1	7	19
European Union 15 countries	**53**	**12**	**1**	**2**	**14**	**18**
Norway	37	25	0	0	8	29
Switzerland	38	16	2	2	14	28
All 17 countries	**53**	**13**	**1**	**2**	**13**	**18**

Source: CCFA.

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



RANKINGS FOR THE 15 LEADING MODELS IN 2012

Models	Rank	Market share
Volkswagen Golf	1	4.1%
Ford Focus	2	2.8%
Renault Mégane	**3**	**2.7%**
Peugeot 206-207-208	**4**	**2.6%**
Ford Fiesta	5	2.5%
Volkswagen Polo	6	2.3%
Opel Corsa	7	2.2%
Renault Clio	**8**	**2.0%**
Opel Astra	9	1.8%
Volkswagen Passat	10	1.7%
Citroën C3	**11**	**1.7%**
Nissan Qashqai	12	1.6%
Fiat Panda	13	1.5%
BMW Series 3	14	1.4%
Citroën C4	**15**	**1.4%**
Peugeot 308		**1.0%**
Renault Twingo		**0.8%**
Peugeot 3008		**0.8%**
Dacia Duster		**0.7%**
Peugeot 508		**0.7%**
Peugeot 107		**0.6%**
Dacia Sandero		**0.6%**
Citroën C1		**0.5%**
Citroën DS3		**0.5%**
Peugeot 5008		**0.4%**

Source: CCFA.

The market shares of the 15 best-selling vehicles in Europe fell to 32%, compared with 41% in 2000. Over the course of this same period, the diversity of the low range of French manufacturers grew considerably, from 8 to 40 models.

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, this share dropped by more than two points in 2011 from the levels in the previous year, and remained stable in 2012. In 2000, this share was 73%.

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 four-wheel drives. However, after 2006, a dynamic offer in the low range, with a larger number of sedans, caused a reversal of this trend until 2009. Then, it fell to 53% in 2012.

Each European country retained its own features until 2008 when Southern Europe preferred low- and low-mid range vehicles, while premium cars and station wagons remained the most popular choice in Northern Europe. But in 2009, the success of the low range and sedans, particularly in Germany and the United Kingdom, reduced the contrast between the different regions. This trend lasted through 2010, except in Germany, where the premium ranges had market shares that were more in line with the long-period structure (37%).

+1 POINT

INCREASE IN THE MARKET SHARE OF PREMIUM RANGES IN THE EUROPEAN MARKET IN 2012

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS

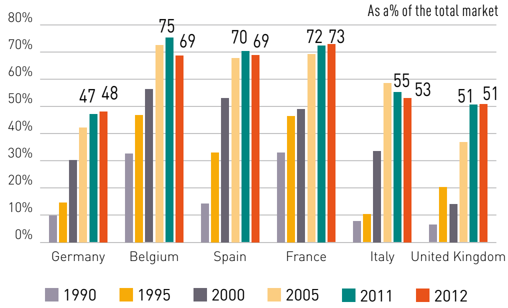
The proportion of new diesel-powered cars in Europe as a percentage of total registrations grew significantly between 1997 and 2007, reaching 53%, and has since fluctuated greatly.
On this market of 6.5 million units, the share of French manufacturers was 24% in 2012 (28% in 2010, 23% in 2007 and 29% in 2000), representing about 1.5 million new diesel cars, compared with 16% for all other engine types, before the full launch of the three-cylinder gasoline engine. This volume of diesel cars represents 65% of the total sales of new passenger cars from French manufacturers in Europe 17 countries.

TECHNICAL CHARACTERS FOR NEW PASSENGER CARS IN EUROPE IN 2012

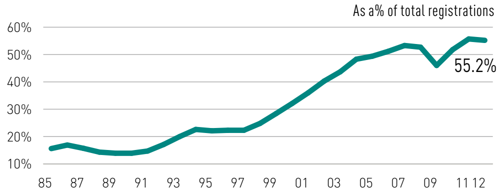
	Average displacement	Average power in kW	4WD %	Diesel %
Germany	1,749	100	15.0	48.1
Austria	1,651	87	17.6	56.4
Belgium	1,635	84	6.8	68.8
Denmark	1,397	72	1.5	39.5
Spain	1,635	84	8.0	68.9
Finland	1,671	96	13.4	38.2
France	1,592	81	7.2	72.9
Greece	1,368	-	3.1	40.0
Ireland	1,599	81	5.0	73.1
Italy	1,510	77	10.8	53.1
Luxembourg	1,874	109	20.8	76.1
Netherlands	1,437	79	3.4	28.2
Portugal	1,539	81	2.1	70.5
United Kingdom	1,672	93	10.0	50.8
Sweden	1,786	102	22.8	66.8
European Union 15 countries	**1,641**	**89**	**10.8**	**55.6**
Norway	1,730	93	28.0	64.2
Switzerland	1,825	110	32.2	37.1
All 17 countries	**1,647**	**90**	**11.6**	**55.2**

Source: CCFA.

DIESEL MARKET SHARE BY COUNTRY

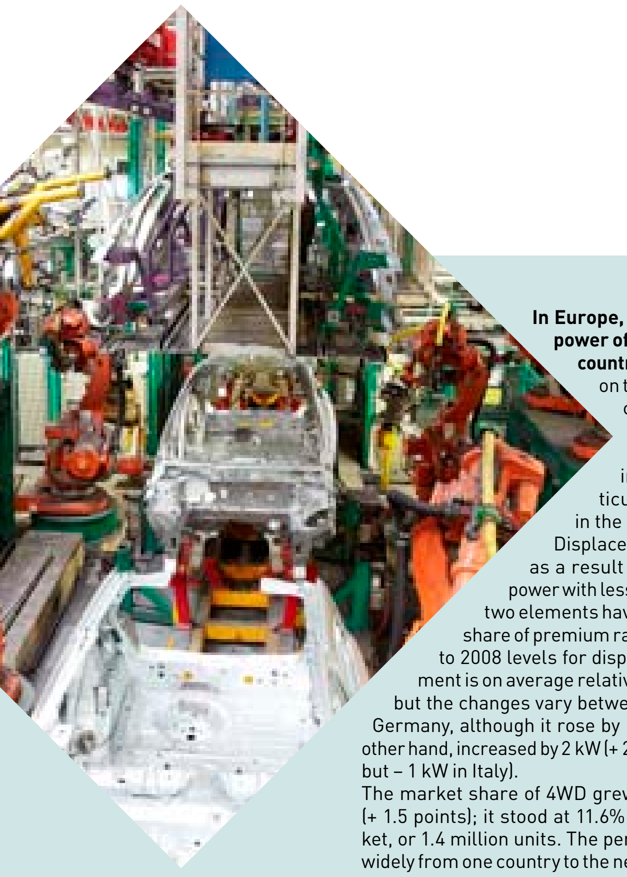


EUROPEAN DIESEL PASSENGER CAR MARKET



–93 cm^3

REDUCTION BETWEEN 2007 AND 2012 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 because of the increased share of premium ranges, without however returning to 2008 levels for displacement. In 2012, the displacement is on average relatively stable relative to that of 2011, but the changes vary between countries. It fell by 11 cm3 in Germany, although it rose by 19 cm3 in France. Power, on the other hand, increased by 2 kW (+ 2 kW in France, + 1 kW in Germany, but – 1 kW in Italy).
The market share of 4WD grew for the third consecutive year (+ 1.5 points); it stood at 11.6% throughout the European market, or 1.4 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 fueled sales of these vehicles. In Germany, it stood at 15%, 2 points up from 2011 and, notably, more than 4 points up since the start of the crisis.

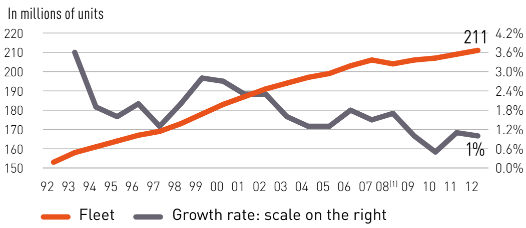
The market share of diesel vehicles in Europe is largely dependent on local regulations and tax rules.
In Europe, in a market which suffered considerable losses in 2012, the share of sales of diesel cars dropped slightly by half a point to 55%; overall, the volume reduction amounted to 639,000 units. The level of sales, including all engine types, remained at a lower level than that of 2009 and 2010, when mechanisms for supporting demand were in place. In Belgium, France, Ireland, Luxembourg, Portugal, Spain and Sweden, more than two out of every three new cars registered are diesel cars. In Germany, the share of diesel engines rose again (+ 1 point, to 48%), while it fell in Italy (– 2 points, to 53%).
Following a change in tax regulations, Scandinavian countries, in which the percentage of diesel cars was traditionally very low, have now reached high levels (around two thirds of the market in Norway and Sweden).
In terms of passenger cars, diesel vehicle ownership continued to grow, although at a slower rate than for previous years, reaching 38% in 2012, up by over one point.

PASSENGER CARS IN USE IN EUROPE

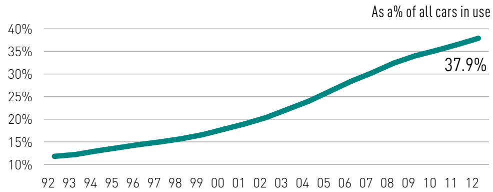
In Western Europe, in the same way as in France, growth in the number of passenger cars in use has been slowing since the end of the 1990s and now stands at around 1% a year.
In new European countries and in Turkey where levels of vehicle ownership are lower, the economic and financial crisis has extensively slowed growth: once again 3% compared with 5 to 7% between 2005 and 2009. The lower-cost demand is still mostly satisfied by imports of used vehicles.
After increasing from 32% to 34% between 2000 and 2009, the share of cars over ten years old in Western Europe rose for the fourth consecutive year, reaching 38% in 2012, mainly due to the low numbers of new passenger car registrations. Western Europe has become a replacement market. In the new EU member states and Turkey, this share can be estimated at 60%.

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

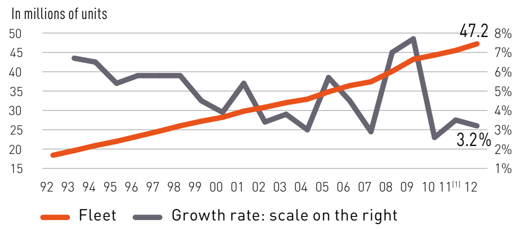
In Europe 17 countries: EU-15, Switzerland and Norway



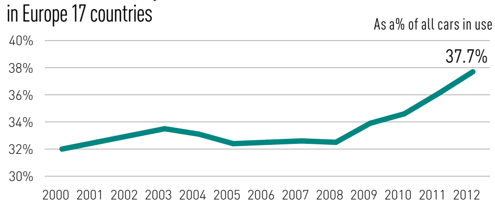
Diesel car ownership in EU-17



In the 12 new EU member states and Turkey



Share of cars over ten years old in Europe 17 countries



(1) The change for 2008 was calculated on a like-for-like basis.
National sources: statistics organizations, French Transport and Interior Ministries, professional sources.

On January 1st, 2012, the number of passenger cars in use in Western Europe (European Union 15 countries, Switzerland and Norway) reached 211 million units. The financial and economic crisis amplified the weakened growth of the the number of cars in use, nearing that of the population. By country, the total number of cars in use dropped in Greece (– 0.3%) and remained almost stable in the United Kingdom (+ 0.3%). As in 2011, growth levels were slower in the countries of Southern Europe (+ 0.6% in Spain, + 0.8% in France and + 1% in Italy) relative to those observed in Northern European countries (+ 1.5% in Germany and Belgium, + 1.6% in Austria and the Netherlands, and + 2.9% in Norway).

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 38% on January 1st, 2012. In five countries, this type of engine is the majority: Austria, Belgium, France, Luxembourg, and Spain. On the other hand, this share, although growing, is lower in Germany (28%) and the United Kingdom (30%), although it is slightly above average in Italy (39%).

In the new EU member states and Turkey, growth of the total number of cars in use slowed dramatically because of the financial and economic crisis to less than 3% compared to 5-7% for 2005-2009. By country, the total number of cars in use continued to fall in Hungary (dropping by more than 1% for the third year). In Poland, growth was less than 4%, against 8 to 10% between 2007 and 2009. In Slovenia and Romania, growth was weak (+ 0.5% and + 0.3%, respectively) and the growth observed in the Czech Republic (+ 1.9%) was similar to that recorded in countries neighboring Germany. In Croatia, an EU member state since the start of July 2013, the number of cars in use has stabilized (+ 0.2%) after falling for two years. Within these new EU member states and Turkey, the percentage of cars with diesel engines is 25%, up two points for several years.

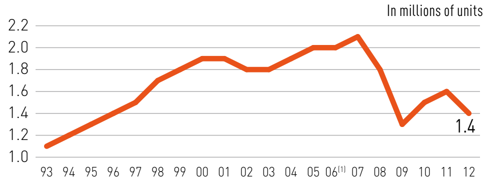
38%

SHARE OF VEHICLES IN USE IN WESTERN EUROPE THAT WERE OVER TEN YEARS OLD IN 2012.

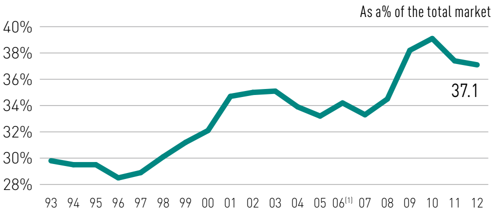
NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

The European light commercial vehicle market, severely affected by the crisis of 2009, has since fluctuated around 1.4 million units, which is down around 600,000 units from its record level in 2007.
Between 2007 and 2012, the German market was almost stable, while in the other four major markets, the reductions in volume ranged from – 77,000 units for France to – 199,000 for Spain, with – 100,000 for the United Kingdom and – 120,000 for Italy.
In 2012, French manufacturers saw their sales drop by 14% to 510,000 units, giving them 37% of the market. With a presence in every segment and due to the increase of their market share in certain countries (+ 3.4 points in the Netherlands, + 1 point in the United Kingdom and + 0.4 point in Italy), French manufacturers were able to stabilize their market share. The falling sales can be explained by their strong presence in markets affected by the crisis and by contracting market shares, in particular in Spain (– 2.9 points). Nevertheless, their market share was still almost 4 points higher than in 2007.

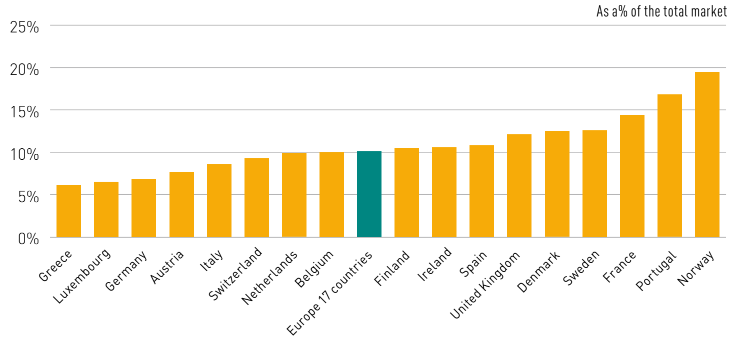
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE 17 COUNTRIES



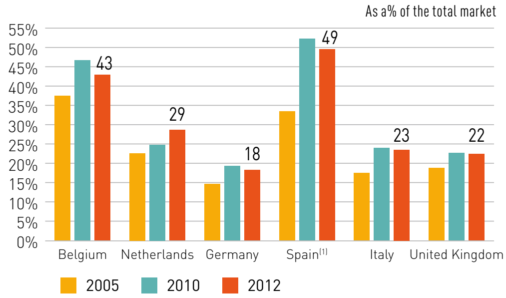
FRENCH MARKET SHARE



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



MARKET SHARE OF FRENCH MANUFACTURERS IN MAJOR EUROPEAN COUNTRIES



(1) In 2006, there was a change of scope in Spain: see the notes on page 63.

37%

FRENCH MANUFACTURERS IN SALES OF LIGHT COMMERCIAL VEHICLES IN WESTERN EUROPE IN 2012.

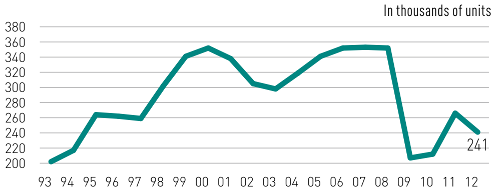
Light commercial vehicles are defined as freight carrying vehicles with a gross weight of less than five metric tons. Designed to carry goods, they are offered in a variety of categories, including commercial vehicles derived from passenger cars, light vans, light trucks, large vans, pickups and four-wheel drive vehicles. Since tax conditions are not the same in all European countries, the number of light commercial vehicles as a percentage of total light vehicles ranges from 6% in Greece to 20% in Norway. Globally, it stood at 10% in 2012, compared to over 12% in 2007.

For many years, sales of these vehicles have been stimulated by model renewals and the fact that they offer an appropriate response to business transport and mobility needs. In 2009, the crisis had a severe effect on this market, which returned to similar levels to those recorded in 1996.
In the van segment, French manufacturers maintained their market shares 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). In 2012, five of the best-selling models are by French manufacturers (Kangoo, Berlingo, Partner, Master and Trafic).
In Spain and Belgium, French manufacturers had a market share of well over 40% in 2012. The market share of French manufacturers was up from 2005 at 18% and 23% respectively in Germany and Italy, which have their own light commercial vehicle manufacturers.
France remains the leading European market (384,000 units) ahead of the United Kingdom (248,000 units), Germany (225,000 units), Italy (117,000 units) and Spain (77,000 units).

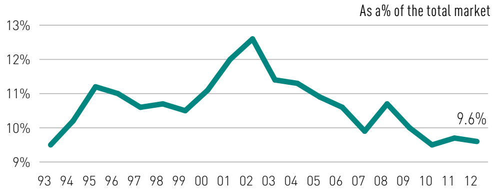
HEAVY TRUCK MARKET AND PRODUCTION IN EUROPE

The European market for heavy trucks weighing more than 5 metric tons contracted by 9% in 2012. It stood at 241,000 units, down 110,000 units relative to 2008. After rising for four years starting in 2003, the market reached a record level (over 350,000 vehicles) in 2007-2008, before dropping in 2009. In 2012, it was 8% lower than the levels of 1996, which was three years after 1993, another black year for heavy trucks.
European industrial vehicle production fell by 10% to 385,000 units, after the crisis of 2009 (– 70% compared to 2008) following five years of high-level stability of the domestic market and the ongoing rise in exports of industrial vehicles outside the European Union (15 countries), especially to Eastern Europe and Asia. It was up 1% from 2003.

EUROPEAN HEAVY TRUCK REGISTRATIONS IN EUROPE



RENAULT TRUCKS' MARKET SHARE IN EUROPE



-9%

DROP IN NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE IN 2012.

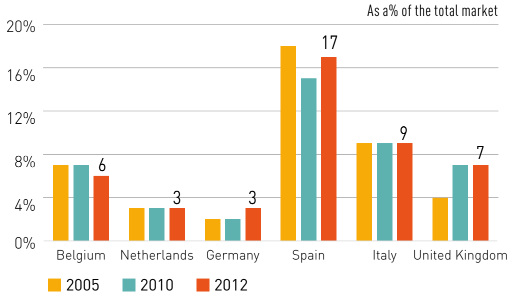
HEAVY TRUCK MARKET AND PRODUCTION IN WESTERN EUROPE

In thousands of units

	2003	2011	2012	Change 2012-2011
New heavy truck registrations				
5.1 t to 15.9 t	83	60	54	–8.8%
16 t and over	214	206	187	–9.4%
TOTAL	**298**	**266**	**241**	**–9.3%**
Heavy truck production				
5.1 t to 15.9 t	102	–	–	–
16 t and over	279	–	–	–
TOTAL	**381**	**430**	**385**	**–10%**

Source: CCFA.

RENAULT TRUCKS' MARKET SHARE IN THE MAIN 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. On the other hand, it was greatly affected by the effects of the financial and economic crisis of 2009.
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, by 30% and 16% two years later, and by 30% and 16% three years later.
Demand continued to focus on the 16 t-and-over segment, which accounted for 77% of total registrations, including both trucks and road tractors.
Within this climate, Renault Truck registrations dropped in 2012 and its penetration remained at 10%, slightly below 2007. The international growth of Renault Trucks was affected by the collapse of the markets in Southern Europe and its market share in Europe outside of France (5%) was slightly higher than in 2008 (6%).

FRENCH MANUFACTURERS IN THE NEW EU MEMBER STATES

In 2012, vehicle production rose slightly (+ 0.4% to 3.4 million vehicles) in relation to 2011, stabilizing at a record level that was higher than in the previous year, whilst new vehicle sales fell (– 7% to 925,000 units). The difference between production and sales of new vehicles was therefore 2.5 million units. The local market is notably lower than its 2007 level (down by around 41%).
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 1000 inhabitants) compared with France or Germany.

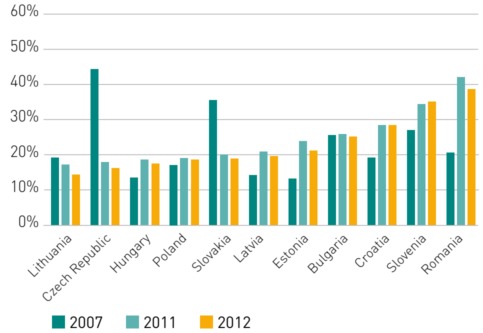
THE MARKET AND VEHICLE PRODUCTION IN THE MAIN COUNTRIES OF CENTRAL AND EASTERN EUROPE

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

	2011	2012	Change 2012/2011
Vehicle production			
Passenger cars	3,263	3,281	0.5%
Light commercial vehicles / Heavy trucks	145	140	–3.3%
New vehicle registrations			
Passenger cars	841	783	–6.9%
Light commercial vehicles	108	100	–7.3%
Heavy trucks	44.2	41.1	–6.9%

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

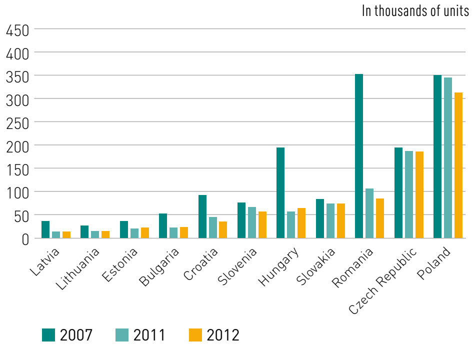
FRENCH MANUFACTURER SHARE IN THE NEW LIGHT VEHICLE MARKET



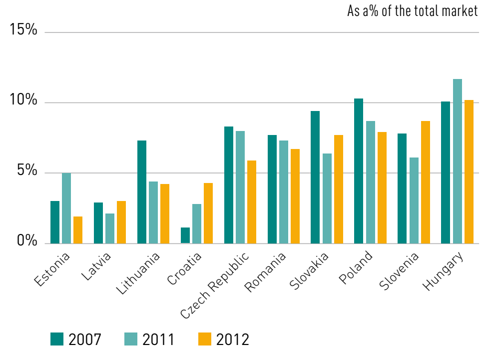
1 OUT OF 4

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

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



FRENCH MANUFACTURER SHARE IN THE NEW HEAVY TRUCK MARKET



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 2012. Their activity rose slightly, unlike in Western Europe, due to the increase in the production capacity of the Volkswagen Group and the end of the rising trend in the production capacity of Korean manufacturers.
In 2012, because of the crisis, this production was higher for the fourth 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 2012, new vehicle sales fell by 7% to 925,000 units after falling by 1% during the previous year. However, contrasting results can be seen by country, with sales increasing in Bulgaria, Estonia and Hungary. And yet, the number for all countries combined was substantially lower than that of 2007.

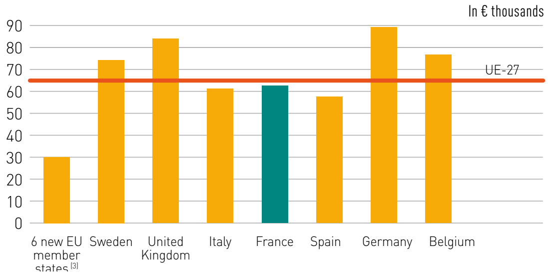
THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2010, the European automotive industry employed 2.2 million people (around 2.3 million in 2007), 45% of them in vehicle manufacturing. Germany accounted for 35% of the total employees in the automotive industry. France represented 10%, against an average of around 7% for Spain, Italy and the United Kingdom. The share of six new EU member states (Czech Republic, Hungary, Poland, Romania, Slovakia and Slovenia) reached 25%, which is 6 points more than in 2007. In Western Europe, it fell: Germany (–3 points), France and United Kingdom (– 1 point), Spain and Italy (–0.4 points). Value added per employee ranged from €30,000 a year in the six main new EU member states to €89,000 in Germany. In France, this figure was €62,000, below the European average of €65,000. Per capita personnel costs ranged from €14,000 in the six new EU member states to €64,000 in Germany; in France they were €54,000, above the European average of €44,000.

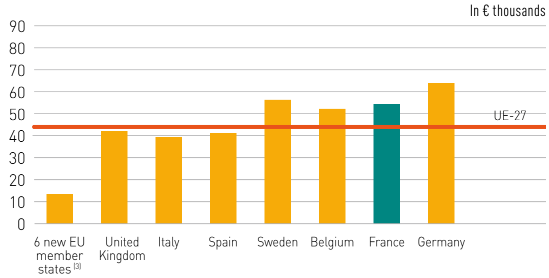
THE AUTOMOTIVE INDUSTRY IN THE EU-27 IN 2010 (1)

	Units	European Union (27 countries) (2)	Germany	France	6 new EU member states (3)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**thousands**	**2,170**	**749**	**225**	**535**	**136**	**141**	**171**	**66**	**35**
Automotive manufacturing	thousands	980	464	138	129	56	63	69	45	19
Body and trailer manufacturers	thousands	166	40	25	-	19	11	14	4	5
Automotive equipment manufacturing	thousands	1,024	245	62	406	62	67	88	17	11
Sales	**€ millions**	**740,587**	**325,874**	**99,082**	**89,970**	**53,998**	**51,110**	**53,393**	**21,955**	**16,863**
Production	**€ millions**	**636,518**	**281,750**	**62,664**	**87,648**	**47,307**	**47,581**	**45,180**	**21,568**	**16,205**
Production/sales	%	85.9	86.5	63.2	97.4	87.6	93.1	84.6	98.2	96.1
Value added (VA) (to factor costs)	**€ millions**	**141,063**	**66,839**	**14,029**	**16,099**	**11,454**	**8,111**	**10,457**	**4,941**	**2,679**
Value added/production	%	22.2	23.7	22.4	18.4	24.2	17.0	23.1	22.9	16.5
Value added/employee	€ thousands	65.0	89.2	62.5	30.1	84.0	57.6	61.2	74.3	76.6
	base 100: 6 new EU member states	216	296	207	100	279	191	203	247	255
Goods and services purchased	**€ millions**	**606,012**	**259,515**	**84,148**	**75,600**	**42,787**	**44,476**	**44,109**	**18,941**	**14,364**
Purchases as a% of output	%	95.2	92.1	134.3	86.3	90.4	93.5	97.6	87.8	88.6
Personnel costs	**€ millions**	**95,269**	**47,996**	**12,210**	**7,262**	**5,740**	**5,793**	**6,692**	**3,744**	**1,825**
Personnel costs per employee	€ thousands	43.9	64.0	54.4	13.6	42.1	41.1	39.2	56.3	52.2
	base 100: 6 new EU member states	323	472	400	100	310	303	289	415	384
Gross operating surplus (GOS)	**€ millions**	**45,793**	**18,843**	**1,819**	**8,880**	**5,714**	**2,318**	**3,765**	**1,197**	**855**
GOS/VA	%	32.5	28.2	13.0	55.2	49.9	28.6	36.0	24.2	31.9

VALUE ADDED PER EMPLOYEE



PERSONNEL COSTS PER EMPLOYEE



(1) Since 2008, data has been published in a new economic activity involving in particular a change to the automotive industry scope (inclusion of electrical and electronic equipment manufacture).
(2) Data for the EU-27 has been reconsolidated by CCFA.
(3) Czech Republic, Hungary, Poland, Slovakia and Slovenia: body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
Sources: Eurostat and CCFA estimates.

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 is taken from surveys of national companies and has 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 2010 was available.
The number of jobs in the automotive industry in Europe fell between 2008 and 2009, although it remained stable in 2009 and 2010 compared with 2000. Nevertheless, it grew considerably in the six new EU member states. In addition, the crisis involved a reduction in the value added per employee, from €56,000 to €45,000, before recovering to €65,000 in 2010.
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 higher than 60%, compared with 25% in the six new EU member states. It was between 40% and 45% in Italy, the United Kingdom, and Spain.
Personnel costs per person employed ranged from €14,000 in the six new EU member states to €64,000 in Germany, a ratio of 1 to 5. Employer social contributions for personnel costs stood at 29% in France compared to 17% in Germany, while the average for Europe stood at 22%.

2.2

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

FRENCH AUTOMOBILE MANUFACTURERS IN 2012

FRENCH MANUFACTURERS IN 2012

	Units	PSA Peugeot Citroën	Renault
Sales	€ millions	55,446	41,270
Capital expenditure	€ millions	2,279	1,945
Net income	€ millions	– 4,925	1,735
Employees worldwide[1]	**No. of people**	**204,287**	**127,086**
of which France	*No. of people*	*93,479*	*53,203*

	Units	PSA Peugeot Citroën					Renault		
		Automotive activity: Peugeot and Citroën	Automotive equipment: Faurecia	Financing: PSA Finance	Others	Eliminations	Automotive sector	Financial sector	Eliminations
Sales	€ millions	38,299	17,365	1,910	202	–2,330	39,859	2,566	–155
Operating income	€ millions	–1,504	514	391	21	2	–15	754	–10
Capital expenditure [2]	€ millions	2,667					1,936	9	
Employees worldwide[1]	**no. of people**	**117,374**	**80,825**	**2,669**	**3,419**				

(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.

345,000
worldwide
EMPLOYEES OF FRENCH MANUFACTURERS

PSA PEUGEOT CITROËN: WWW.PSA.FR

In 2012, in a context of growth in the world market in which, however, its base market was down following the crisis, PSA Peugeot Citroën sales dropped by 8.8%. The market share of the Group in Europe dropped due to its considerable presence in Spain and Italy, but the Group remains second (passenger cars and light commercial vehicles). Outside of this region, sales rose due to the positive results from China, Russia and North Africa; they accounted for 38% of total sales compared with 33% the previous year.
The Group's commitment to international expansion is based mainly on long-term, targeted cooperation initiatives with other automobile manufacturers. In China, the Group is opening in 2013 a plant with each one of the Chinese groups with which it is cooperating, namely Dongfeng Motor and China Changan Automobile Group. Finally, in 2012, PSA Peugeot Citroën and General Motors created a strategic worldwide alliance based on two main pillars: sharing platforms (vehicles, components and modules) and the creation of a worldwide joint venture for purchasing products and services.
The PSA Peugeot Citroën Group has a workforce of around 204,000 employees worldwide, including 93,000 in France, working at around twenty sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head offices, etc.). In addition to the assembly plants *(cf. opposite)*, the Group has a number of important sites in France, such as Vélizy (R&D), Trémery (engines), Vesoul (spare parts warehouse) and Valenciennes (gearboxes), which employ 5,100, 3,400, 3,100 and 2,200 people, respectively.
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 generation of Stop&Start, called e-HDi, has been rolled out in the Group's ranges since the end of 2010. Finally, sales of cars equipped with HYbrid4 hybrid technology have risen since the last quarter of 2011.
The Group presented in summer 2012 an industrial plan aimed at improving its competitiveness by reorganizing its sites in France. 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.

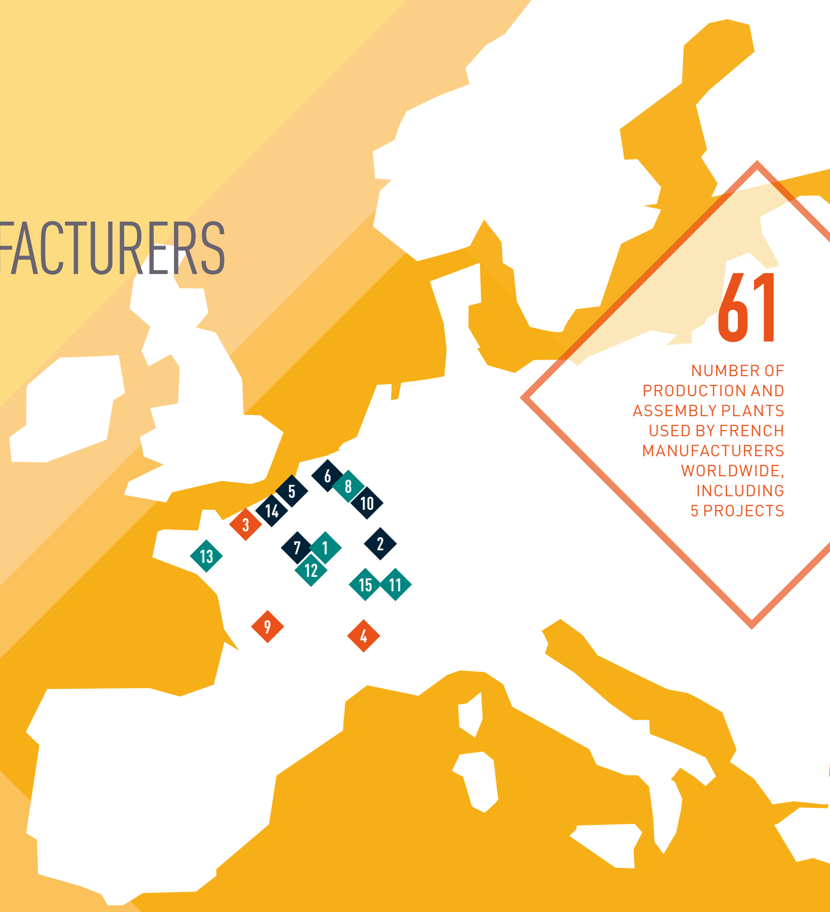
RENAULT: WWW.RENAULT.COM

Renault's international sales fell by 6.3%, due to the 18% drop recorded in a crisis-hit and highly competitive European market. Outside Europe, they rose by 9% representing over 50% of sales. The Renault brand ranks third in the European passenger car and light vehicle market.
Cooperation launched in 1999 with Nissan was further strengthened within the Alliance. New synergies have also been set up. They concern the plants and electric vehicles as well as purchases, logistics, engineering, research and advanced studies... In 2010, the Group also strengthened its alliance strategy by signing an agreement with Daimler AG for small cars, light commercial vehicles, and engines (including low-emission models since 2012). The strategic partnership with AvtoVAZ, involving Nissan, with a majority shareholding from now to 2014, aims to speed up their growth and strengthen their presence in Russia.
The Renault Group has a workforce of around 127,000 employees worldwide, including 53,000 in France, working at around fifteen sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head offices, etc.). Large numbers of employees may work outside of assembly sites *(cf. opposite for the latter)*. They range from 320 employees at the mechanical plant in Choisy to 3,500 at the engine plant in Cléon, with 1,900 employees at the mechanical plant in Mans. The Guyancourt Technocentre employs around 9,000 people.
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" which addresses two 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

In 2012, the number of vehicles sold worldwide dropped by 14% due to poor performance in the European market following two years of growth. Renault Trucks has still managed to maintain its market share of almost 10%. Outside of Europe, activity continues to grow: Eastern Europe, North Africa, Africa, Middle East and Latin America.
Since 2009, Renault Trucks is using new assembly sites outside Western Europe: the first in Turkey with Karsan, 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 in Vénessieux, research in Saint-Priest, etc.). Beyond industrial cooperation, synergies within the AB Volvo Group between the five makes (Renault, Volvo, Mack, UD Trucks and Eicher) have continued.
The passing of the Euro VI standard at the start of 2013 boosted the renewal and simplification of the entire range.

WORLD PRODUCTION SITES OF FRENCH AUTOMOBILE MANUFACTURERS



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NUMBER OF PRODUCTION AND ASSEMBLY PLANTS USED BY FRENCH MANUFACTURERS WORLDWIDE, INCLUDING 5 PROJECTS

EUROPE

FRANCE
01. Aulnay
02. Batilly
03. Blainville
04. Bourg-en-Bresse
05. Dieppe
06. Douai
07. Flins
08. Hordain
09. 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 (AvtoVAZ) (project)

SLOVAKIA
30. Trnava

SLOVENIA
31. Novo Mesto

TURKEY
32. Bursa (Tofas) (Karsan)

◆ PSA Peugeot Citroën ◆ Sevelsud ◆ Renault ◆ Renault Trucks

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)

ALGERIA
40. Oued Tlelat (project)

MOROCCO
41. Casablanca
42. Tangier (Renault-Nissan)

Asia

CHINA
43. Shenzhen (project)
44. Wuhan (project for Wuhan 3)

SOUTH KOREA
45. Busan (Renault Samsung Motors)

INDIA
46. Chakan (Renault-Nissan-Bajaj Auto) (project)
47. Chennai (Renault-Nissan)

IRAN
48. Tehran

JAPAN
49. Mizushima (Mitsubishi)
50. Okazaki (Mitsubishi)

MALAYSIA
51. Gurun

WORLD PRODUCTION OF FRENCH MANUFACTURERS

In 2012, the global production of French manufacturers reached a record of 5.6 million vehicles, down 12%, or 787,000 vehicles less, from 2011. Since 2007, despite two record years— 2010 and 2011—it was down by 9%, which represents a production drop of 527,000 units. However, since 1996, production had grown by 47% representing mean annual growth of 2% thanks, initially, to the increase of opportunities in Europe outside France and then, to opportunities outside Europe. Production of passenger cars dropped sharply (–13%) to 4.9 million units after being almost stable during 2011 and the recovery of 2010 (+17%); production of light commercial vehicles (–9.9% to 723,000 units) which had further increased in 2008, before being seriously affected by the crisis in 2009, remained strong in 2010 and 2011, but dropped considerably in 2012. Compared with 2007, production fell by 8%, or 427,000 cars, and 14%, or 116,000 vehicles, respectively.

PRODUCTION OR ASSEMBLY SITES/TOTAL PRODUCTION PER MODEL

Group / Make	Model	Launch date	Production or assembly sites in 2012	Production (in units) Total at the end of 2012
PSA PEUGEOT CITROËN				
Peugeot, Citroën	i0n, C-ZERO	2010	Japan (Mitsubishi)	5,400 / 5,500
Peugeot, Citroën	107, C1	2005	Kolín (Czech Rep.)	741,800 / 705,600
Peugeot	206	1998	Mulhouse, China, Iran	7,962,700
Peugeot	207	2006	Villaverde (E), Trnava (Slovakia), Argentina, Porto Real (Br)	2,504,900
Peugeot	208	2012	Poissy, Mulhouse, Trnava (Slovakia)	243,600
Citroën	C2	2003	China	690,800
Citroën	C3, DS3	2002/2008/2009	Aulnay, Poissy, Villaverde (E), Porto Real (Br), Trnava (Slovakia)	3,406,200 / 216,100
Peugeot, Citroën	301 / C-Elysée	2012	Vigo (E), China	11,600 / 7,000
Peugeot	307	2001	Argentina, China	3,781,000
Peugeot	308	2007	Mulhouse, Sochaux, Russia, Argentina	1,251,700
Peugeot	RCZ	2010	Austria (Magna Steyr)	48,800
Peugeot	3008	2009	Sochaux	441,500
Peugeot	5008	2009	Sochaux	215,100
Citroën	Xsara	1997	Porto Real (Brazil)	3,364,000
Citroën	ZX	1991	China	2,582,000
Citroën	C4, DS4	2004/2010/2011	Mulhouse, Vigo (E), China, Russia, Argentina	2,855,000 / 65,600
Peugeot	405	1987/1993	Iran	4,626,700
Peugeot, Citroën	4007, C-Crosser, 4008, C4 Air Cross	2007/2012	Russia, Japan (Mitsubishi)	49,000 / 47,800 / 12,200 / 21,700
Citroën	C5, DS5, C6	2008/2011/2006	Rennes-la-Janais, Sochaux, China	1,193,100 / 34,500 / 23,400
Peugeot	408	2010	China, Argentina	200,200
Peugeot	508	2010	Rennes-la-Janais, China	254,500
Peugeot, Citroën	807, C8	2002	Hordain	189,400 / 147,500
Peugeot, Citroën	Bipper, Nemo	2008	Turkey (Tofas)	166,900 / 182,400
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (E), Mangualde (P), Turkey, Argentina	2,106,300 / 2,585,000
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	505,900 / 465,300
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (I)	836,200 / 726,500
RENAULT GROUP				
Renault	Twingo	1993/2007	Novo Mesto (Sl), Colombia	2,489,928 / 787,045
Renault	Wind	2010	Novo Mesto (Sl)	12,924
Renault	Pulse	2011	India	6,023
Renault	Clio	1998/2005/2012	Flins, Turkey, Novo Mesto (Sl), Valladolid (E), Dieppe, Argentina, Colombia, Mexico	5,631,968 / 2,837,373 / 98,270
Renault	ZOE	2012	Flins	443
Renault	Symbol	2008	Argentina, Turkey	347,992
Renault	Modus	2004	Valladolid (E)	665,339
Renault	Logan	2005	Russia, Brazil, Morocco, Colombia, Iran	1,268,282
Renault	Latitude	2010	South Korea	29,666
Renault	Sandero	2007	Brazil, Morocco, Colombia, South Africa (Rosslyn), Russia	690,985
Renault	Duster	2010	Russia, Brazil, Colombia, India	218,967
Renault	Fluence / Fluence ZE	2009/2011	Turkey, India, Argentina	294,038 / 4,182
Renault	Mégane	2002/2008	Douai, Palencia (E), Turkey, Brazil, Russia, Iran	3,822,298 / 1,681,916
Renault	Scala	2012	India	3,586
Renault	Laguna	2007	Sandouville	312,935
Renault	Espace	2002	Sandouville	364,810
Renault	Kangoo / Kangoo ZE	1997/2007/2011	Maubeuge, Morocco, Argentina	2,618,195 / 634,677 / 8,568
Renault	Master	1997/2010	Batilly, Brazil	1,108,209 / 227,588
Renault	Trafic II	2001	Luton (UK, GM), Barcelona (E, Nissan)	617,378
Dacia	Logan	2004/2012	Pitesti (Romania)	1,283,174 / 1,657
Dacia	Sandero	2008/2012	Pitesti (Romania)	513,580 / 20,007
Dacia	Duster	2010	Pitesti (Romania)	371,238
Dacia	Lodgy	2012	Tangier (Morocco)	41,442
Dacia	Dokker	2012	Tangier (Morocco)	8,893
RSM	SM3 / Fluence	2002/2009	Busan (South Korea)	515,792 / 150,230
RSM	Latitude	2010	Busan (South Korea)	148,272
RSM	QM5 (Koleos)	2007	Busan (South Korea), India	254,778
RSM	SM7	2011	Busan (South Korea)	13,456

Sources: CCFA, PSA Peugeot Citroën, Renault.
See notes on page 70.

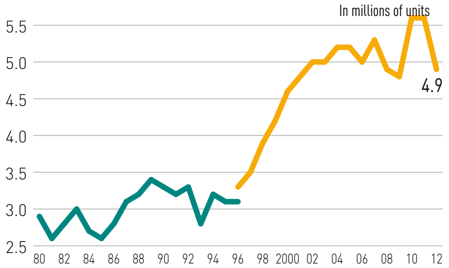
5.6 MILLION VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE IN 2012

MARKETS FOR NEW FRENCH VEHICLES

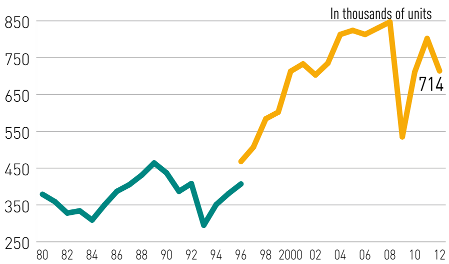
In 2012, following the crisis, the national markets for French manufacturers plummeted (–18%) and sales outside of France dropped sharply (–10%). French manufacturers' market share in their markets rose to 22% (20% for passenger cars, 33% for light commercial vehicles and 30% for heavy trucks). Export markets represented 78% of the French automobile manufacturers' sales, compared with 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 2012 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 MANUFACTURERS

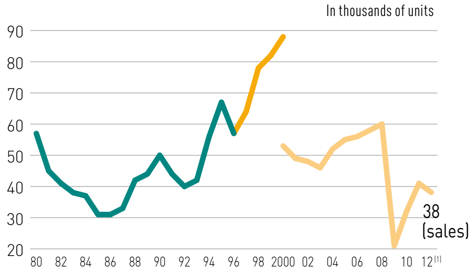
New passenger cars



New light commercial vehicles (up to 5 metric tons)



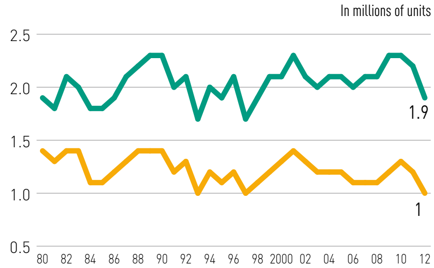
New heavy trucks over 5 metric tons



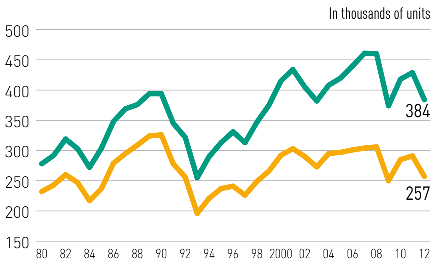
(1) Since 2012, the scope of heavy trucks includes actual sales of trucks 6 metric tons and over, including CKD *(see note on page 73)*.

VEHICLE REGISTRATIONS IN FRANCE

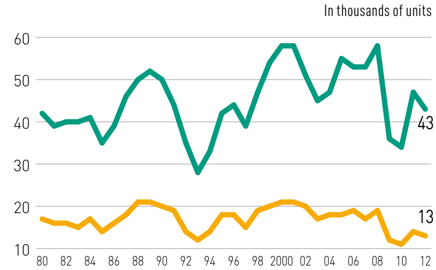
New passenger cars



New light commercial vehicles (up to 5 metric tons)



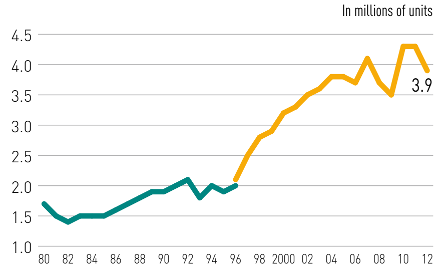
New heavy trucks over 5 metric tons



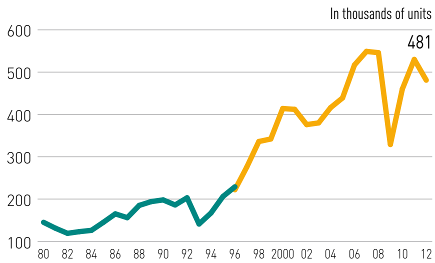
Total registrations
Registrations of French makes

FRENCH EXPORTS

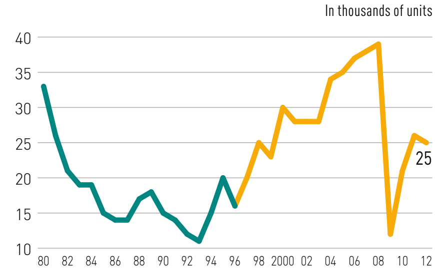
New passenger cars



New light commercial vehicles (up to 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 above 1997 figures. The cycle reversed in the period 2002-2007. Tougher competition followed by a selective sales strategy applied by French manufacturers have prevented them from consolidating 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 sales and particularly those of French groups adapted to the offer. In 2011, the end of the market-support system and the impact of the crisis in which they have a major presence led to falling sales, specifically for 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 3.9 million units, a sharp fall of 10%. Exports of commercial vehicles dropped after rising for two years. The fall amounted to 9%, or around 481,000 units for light commercial vehicles and 2%, or 25,000 units for heavy trucks.

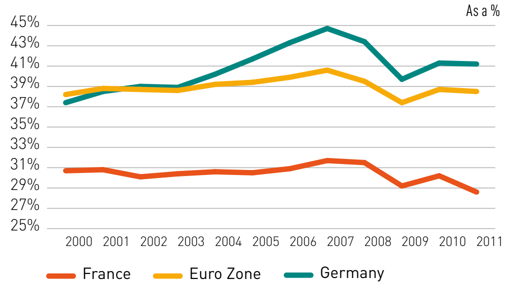
22%

SHARE OF THE FRENCH MARKET IN MARKETS FOR FRENCH MANUFACTURERS

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, such as the opening of the base market to competition. All these factors affect margin rates (ratio of gross operating surplus to value added). In 2010, industry conventions had already shown, compared to other eurozone countries, the sustained weakness of margins in French industry and their impact on the financing of investments and the improvement of competition. In 2012, the "Pact for the competitiveness of French industry" report, drawn up at the request of the government by Louis Gallois, General Commissaire for investment, confirmed this diagnostic and also showed that the loss of competitiveness was not only affecting the industry, but the entire French economy. This report led the government to draw up a "National pact for growth, competitiveness and employment", in particular creating the Competitiveness and Employment Tax Credit (*Crédit d'Impôt*

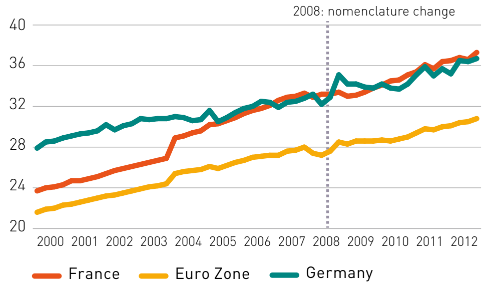
MARGIN RATE OF NON-FINANCIAL COMPANIES: RATIO BETWEEN GROSS OPERATING SURPLUS (1) AND VALUE ADDED (GOS/VA)



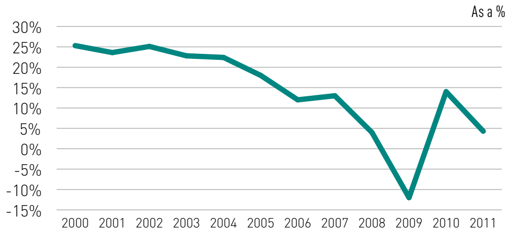
(1) Gross operating surplus and gross mixed income.
Source: Eurostat.

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

Results of the four yearly ECMOSS survey and extrapolation using the quarterly index of labor costs.



TRADE MARGIN OF THE AUTOMOTIVE INDUSTRY: RATIO BETWEEN GROSS OPERATING SURPLUS AND VALUE ADDED (GOS/VA)



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

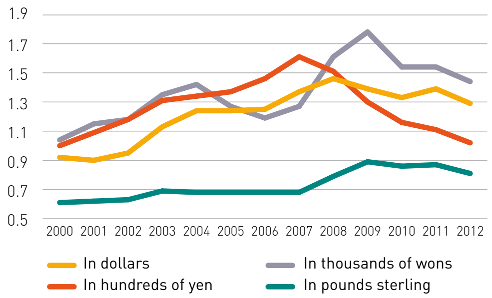
+11% and +8%

RESPECTIVE INCREASES OF HOURLY LABOR COSTS IN THE MANUFACTURING INDUSTRY BETWEEN 2008 AND 2012 IN FRANCE AND GERMANY

In France, the margin rate for non-financial companies is around 13 points lower than that of Germany, and 10 points lower than the eurozone average. According to the INSEE, the margin rate for the automotive sector fell from 25% in the early 2000s to under 5% in 2011. The margin rate depends mainly on cost competitiveness and is linked in the medium term to competitiveness exclusive of price.
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/sales) is one of the tools that can be used to measure this performance of automotive groups. In 2012, it stood at 1.8% for Renault and –1.0% for PSA. And yet, the operating margin of the German groups stood at 6.0% for Volkswagen, 10.8% for BMW and 7.5% for Daimler. In more general terms, in a European context that lost more than 3.8 million light vehicles (passenger cars and light commercial vehicles) between 2007 and 2012, the performance of European general manufacturers is at best level, but they are mostly suffering considerable losses.
Beyond the problems of globalized competition and industry (payroll, social and fiscal costs), there are competitive factors specific to the French automotive industry, resulting from the properties of the vehicles themselves and of the global automobile industry.
One of the factors affecting the French industry is the 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 deductions from production 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.

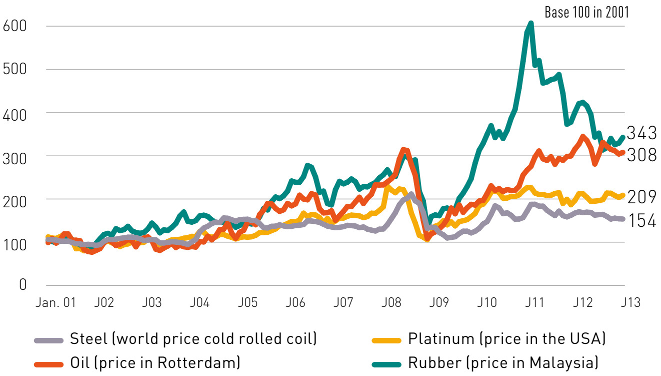
Compétitivité et Emploi – CICE), for a total amount of €20 billion, based on the salary basis excluding salaries that are higher than 2.5 times the index-linked minimum growth wage. Since the average industry wage is higher than the CICE ceiling (even more so in the automotive industry), it only benefits from this by 20%.
The prices of raw materials in euros have increased hugely since 2001, despite the fall observed during the latest crisis. At the start of 2013, rubber was up 243%, oil 108% and steel 54%. 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.
Finally, for the freight sector that buys light commercial vehicles and heavy trucks, the weak outlook and current gloomy context weighs on business and prices.

EURO EXCHANGE RATE VARIATION

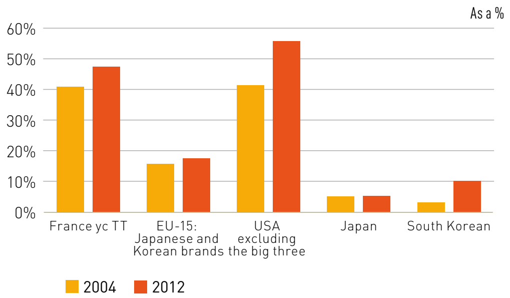


Source: FMI.

RAW MATERIAL PRICES IN EUROS

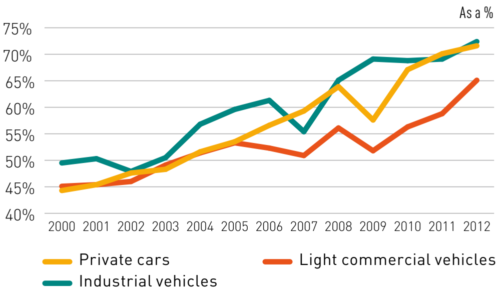


SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS



(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 IN EXTERNAL MARKETS FOR FRENCH MANUFACTURERS



Source: CCFA.

Since early 2002, the rise of the euro has affected French exports, forcing companies to bolster their sales and production initiatives in order to continue to expand their markets outside the eurozone (70% of total markets in 2012, compared with 47% in 2002).
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 has resulted in trade asymmetry between these two countries and the European Union.

10 points

DIFFERENCE IN MARGIN RATES OF NON-FINANCIAL COMPANIES BETWEEN FRANCE AND THE EUROZONE IN 2011

THE AUTOMOTIVE WHOLE INDUSTRY AND THE CRISIS

Registrations of new light vehicles (passenger cars and light commercial vehicles) in Western Europe stood at 13.1 million units in 2012 against 16.9 million in 2007, which is a reduction of 22%. This collapse of the markets can be seen in the industrial production index of the French automotive industry measured by the INSEE (base 100 in 2010) which fell from 146 in 2005 to 93 in 2012.

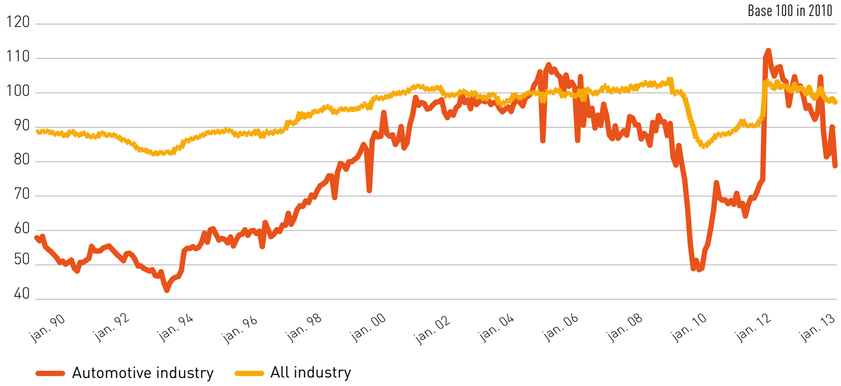
In order to deal with such a major crisis, the automotive industry structured itself. The *Plateforme de la Filière Automobile* (PFA – Automotive Branch Platform) was set up in 2009 by French automobile manufacturers and their suppliers, who joined to form the *Comité de Liaison des Fournisseurs de l'Automobile* (CLIFA – Automotive Suppliers' Liaison Committee), which aimed to improve the effectiveness of the automotive industry.

The *Comité Stratégique de Filière de l'Automobile* (CSFA – Strategic Committee of the Automotive Branch) was created in the context of the *Conférence Nationale de l'Industrie* (CNI – National Industry Conference)—which was renamed *Conseil National de l'Industrie* (National Industry Council) in early 2013. The CSFA brings together the entire branch, upstream and downstream, including employees unions.

22%

SHARE OF THE FRENCH MARKET IN MARKETS FOR FRENCH MANUFACTURERS

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



The economic and financial crisis had important effects on the automotive sector, upstream starting with the suppliers and downstream as far as vehicle sales/maintenance, including freight transport, manufacturers of equipment or services for companies, including research and development. The fabric has weakened, and in order to address this context, the PFA, which is the responsible party, has established four priorities: lean manufacturing, future skills and jobs, better management of communication, and the medium- and long-term strategy for the competitiveness of manufacturers and their suppliers. Since 2010, it relies on a regional level on the *Associations Régionales de l'Industrie Automobile* (ARIA – Regional Associations of the Automotive Industry). It has also organized trade days, in particular dealing with die stamping. Following an initial active phase, it consolidated in 2012, mainly around the *Comité Technique Automobile* (CTA – Automotive Technical Committee), the *Comité de Standardisation Technique Automobile* (CSTA – Automotive Technical Standardization Committee) and the *Comité de Recherche Automobile* (CRA – Automotive Research Committee). The purpose of the CTA is to provide a common vision for the automotive industry in terms of research and innovation. At the same time, the CSFA was created in 2010, together with ten other Strategic Branch Committees, following the *États Généraux de l'Industrie* (EGI – General Industry Reports) drawn up the same year. It includes automobile and heavy truck manufacturers with a presence in France, "level 1" equipment manufacturers and a large number of SMEs and temporary employment agencies which supply the automotive industry and belong to various sectors (mechanical systems, plastics, stamping, foundries, etc.). Body builders and the downstream side of the branch (distribution, repairs) are also included, as are players in R&D, in particular competitiveness clusters and major public research bodies (IFPEN, IFSTTAR). Branch employee unions also participate. In October 2012, a sector contract was signed that defined four working areas: a common vision in the branch for anticipating economic changes, innovation and R&D, solidarity of the branch and player globalization.

INTERVENTION FUNDS, RESEARCH TAX CREDITS, FUTURE INVESTMENTS

The automotive industry requires considerable physical investments (production sites, etc.), which are paid off over long periods. In addition, during their design and before they are sold, vehicles require work in research centers lasting several years, in a process of permanent progress, in order to be able to meet the needs of society in terms of safety as well as the environment. The automotive industry is a capital-intensive industry which, in general terms, has considerable financing needs. During the financial crisis, this specific feature had a serious effect on the automotive industry, and the public authorities created structural instruments to encourage long-term financing (Strategic Investment Funds in 2008 and a Fund for Modernizing Automotive Equipment Manufacturers in 2009) and research and development capabilities (Research Tax Credit and future investments).

INVESTMENT FUNDS

	Goals and provisions	List of recipients
Strategic Investment Fund (FSI) (created in November 2008)	Sovereign wealth fund, provisioned with a capital base of €20 billion, set up by the public authorities to meet the equity capital needs of companies with potential for growth and competitiveness for the economy	Gruau, Mécachrome, Valéo
Fund for the modernization of automotive equipment manufacturers (FMEA) (created in 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 provision of €600 million equally distributed among PSA Peugeot Citroën, Renault SA and the FSI.	Agrati, Atelier des Janves, Bourbon Automotive, Cooper Standard, Defta, Delfingen, Electropoli, Farinia, Gestamp, Gimaex, Le Bélier, Maike Automotive, Mecaplast, Metaltemple, SAFE, Savoy International, Sora, SNOP, Trèves
Funds for the modernization of automotive equipment manufacturers (FMEA) Level 2 (created in November 2009)	Fund specifically aimed at smaller automotive suppliers (Level 2 and higher) Initial provision of €50 million gathered by five leading automotive equipment manufacturers, the FSI, and the players of FMEA Level 1	Adduxi, Altia, Citele, Dévillé SA, Embaltech, FMX, Fournier Saint-Jean Industrie, Maike Automotive, PJ Industry, SPPP, Tecma

Source: Strategic Investment Fund (FSI).

38

MILLION EUROS IN 19 EQUIPMENT MANUFACTURING COMPANIES: IMPORTANCE OF THE FMEA INVESTMENT IN THE AUTOMOTIVE INDUSTRY AT THE END OF 2012

As regards long-term financing, from its creation until the end of 2012, the Strategic Investment Fund (FSI) had invested 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 €328 million in 19 equipment manufacturing companies. The Funds for the Modernization of Automotive Equipment Manufacturers Level 2 (FMEA Level 2) in turn has contributed €23 million to eleven companies.

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 is to strengthen productivity and improve the competitive edge of French companies. The €750 million 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 has three areas for research: electric vehicles, driving delegation and connectivity, and energy and shared mobility. It includes over 40 members: large industrial groups including PSA and Renault, SMEs, research laboratories and centers, colleges and training centers, as well as local authorities. Over ten years, the investment should rise to €360 million, one third of which is financed by manufacturers.

The public authorities also support Research and Development in companies through the Research Tax Credits (CIR), a fiscal measure created in 1983, improved in 2004 but simplified and amplified by the 2008 Finance Act. 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%

Loans from the European Investment Bank (EIB) or the Framework Program for Research and Technological Development (PCRD) of the European Union also make it possible to guarantee effective stimulation of funding for R&D. Nevertheless, in the European Union as a whole, the automotive industry accounts for one quarter of all private R&D, twice as much as aeronautics, while receiving five times less assistance. Moreover, countries that have traditionally been strong in the automotive industry as well as the BRIC countries are also providing major support for the automotive branch, in particular in terms of R&D.

THE AUTOMOTIVE INDUSTRY IN FRANCE'S 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.

VALUE ADDED MULTIPLIERS BY SECTOR (EXCLUDING COKING-REFINING)

Sectors	Agriculture	Agri-food products	Capital goods	Automotive	Aviation and space	Other transport equipment (excluding aviation)	Other industrial products	Power, water, waste	Construction	Trade, services
Multipliers	2.3	2.8	2.3	4.1	4.8	3.0	2.3	2.1	2.0	1.5

Source: INSEE - Outlook report - March 2012.

EMPLOYMENT IN THE AUTOMOTIVE SECTOR IN THE REGIONS

Regions	Direct jobs	Indirect jobs	Induced jobs	Reference year	Sources
Upper Normandy	8,070	18,900	n/a	2010	Insee Haute-Normandie, *Aval*, n° 122, September 2012
Nord-Pas-de-Calais	19,192	17,188	n/a	2010	Insee NPDC, *La filière automobile en Nord-Pas-de-Calais: une filière en phase d'adaptation*, October 2012
Nord-Pas-de-Calais	21,100	18,439	n/a	2008	Insee NPDC, *La filière automobile en Nord-Pas-de-Calais*, September 2010
Sud Alsace (Mulhouse) and Nord Franche-Comté	9,400	3,500	2,345	2007	Insee Alsace, *Chiffres pour l'Alsace*, n° 2, March 2009
Nord Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	Insee Franche-Comté - *L'essentiel*, n° 113 - May 2009
Lorraine	almost 20,000 employees			2006	Insee Lorraine, *Économie Lorraine*, no. 148, *L'industrie automobile en Lorraine: des positions à consolider*, November 2008
Seine-Aval	11,200	3,300	3,600	2006	Insee Ile-de-France, *À la page* n° 291 - January 2008
Val-d'Oise and Yvelines	75,000	75,000	50,000 to 100,000	2006-2007	RAVY (*Réseau Automobile Val-d'Oise - Yvelines*) - Press release - 2008 Edition

4.1

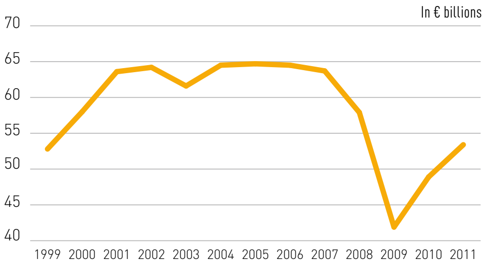
UNITS OF VALUE ADDED IN THE NATIONAL ECONOMY GENERATED FOR EACH UNIT OF VALUE ADDED IN THE AUTOMOTIVE SECTOR

The 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. The automotive industry has the highest value added multiplier after the aviation and space industry. In addition, industrial sites generate local economic activity that is not limited exclusively to their own employees (direct employment). Regional divisions of the INSEE have produced papers describing, on the one hand, indirect jobs made up of personnel employed by suppliers, subcontractors and service providers and, on the other hand, induced jobs, which are those that are required to fulfill the consumption needs of employees (direct and indirect) and their families.
The 2012 study by the INSEE Haute-Normandie shows that the automotive industry employed 27,000 people in the region in 2010, of which 8,000 were in manufacturing and 19,000 were in the rest of the branch, including 48% in equipment manufacturers, 30% in the production of intermediate goods and 9% in design and analysis. Studies by the INSEE Nord-Pas-de-Calais in the same year indicate that the automotive industry had 36,000 employees in 2010, including 19,000 in automotive manufacturing. Moreover, in this region, half of the employees in the plastics sector and almost one quarter of workers in the metalworking industry are dedicated to the automotive branch. The 2009 study relating to the south of Alsace and the north of Franche-Comté highlighted that in 2008 45,000 people overall (spouses, children) depended on the activity of the 13,000 people employed directly or indirectly by the automotive industry. Also, the studies conducted in 2008 relating to the Seine-Aval region indicated that one in six jobs depended on the activity of the PSA Peugeot Citroën and Renault plants in the area, specifically the Poissy and Flins sites, respectively. The ratio of employees to temporary workers on these sites is 5 to 1.
According to data from the INSEE, on January 1st 2011, the Greater Paris region accounted for 22% of the total employees in the automotive industry. The other main regions in the automotive industry were Nord-Pas-de-Calais (11%), Rhône-Alpes (10%), Franche-Comté (9%), Lorraine and Alsace (6% each), as well as Normandy (Upper and Lower) and Pays de la Loire (5% each) *(see page 56)*.
The *Associations Régionales de l'Industrie Automobile* (Regional Associations of the Automotive Industry – ARIA), regional representatives of the *Plateforme de la Filière Automobile* (PFA), bring companies (manufacturers, equipment manufacturers and other suppliers) of the automotive branch in the regions together with the public authorities and education and research establishments. There are 15 of these. They perform various tasks: increasing competitiveness, improving industrial performance, access to new opportunities (customers and markets), emergence of new projects, promotion of the image of the sector in the regions. They also cooperate with automotive competitiveness clusters. Furthermore, each ARIA organizes the Regional automotive operating committee which brings together the Public Authorities (DIRECCTE and the leading automotive company in the region, credit intermediary, OSEO, *Caisse des Dépôts et Consignations*), the UIMM and other professional bodies, as well as the competitiveness clusters.

ECONOMIC RATIOS OF THE AUTOMOTIVE INDUSTRY IN FRANCE

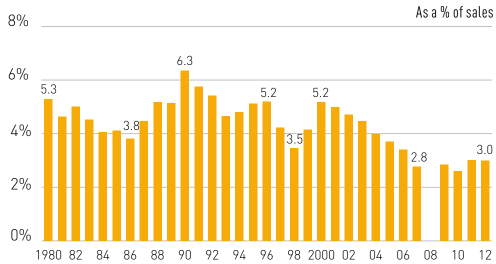
As a crossroads between many different technologies, the automotive industry needs considerable investments. Automotive manufacturing has been reinvesting almost 3% of its total sales since the start of the crisis in late 2008. In a new scope of the industry (now including extractive industries, food industries and industrial companies with fewer than 20 employees), the automotive industry represented almost 5% of the fixed investments exclusive of contributions in 2011 (4% in 2010 and 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 BRANCH

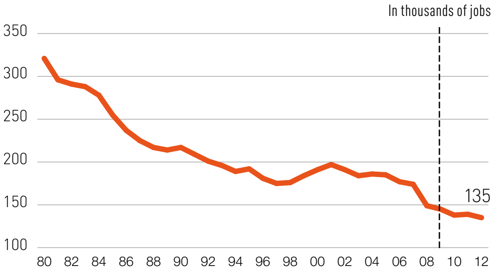


Source: INSEE, National accounts, base 2005 *(see also page 54)*.

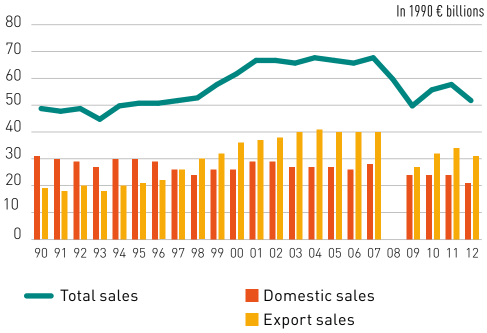
CAPITAL EXPENDITURE BY THE AUTOMOTIVE MANUFACTURING INDUSTRY (1)



AUTOMOTIVE MANUFACTURING EMPLOYEES (1)

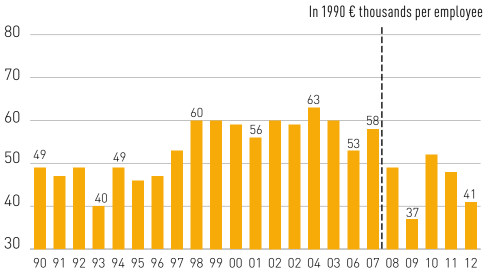


DOMESTIC AND EXPORT SALES BY THE AUTOMOTIVE MANUFACTURING INDUSTRY (1)



(1) CCFA estimates for 2012 *(see also pages 76 and 77 in particular for concept changes)*.

VALUE ADDED PRODUCED BY THE AUTOMOTIVE MANUFACTURING INDUSTRY (1)



Every year, the SESSI, formerly the *Service des Etudes et des Statistiques Industrielles* (Department for Industrial Studies and Statistics) and now attached to INSEE, produced annual surveys providing one of the main sources of information about the French industry. These surveys have been overhauled with the new ESANE information system. A new economic activity categorization was launched in early 2008 (*see pages 76 and 77*). 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 55*).

Automotive manufacturing. Following strong growth between 1996 and 2004 (+30%), in line with the increase in vehicle production, value added (excluding tax) of automotive manufacturing, in constant euros and by employee, has fallen under the impact of various factors: expenses linked to new environmental standards, stagnation and then collapse of the Western European market for new vehicles worsened by the crisis, and the rising cost of raw materials. In 2012, in dropped again, reaching its 1993 level, barely above the low point of 2009.
The automotive manufacturing industry dedicated almost 3% of sales to capital expenditure representing more than €2 billion to develop new models and optimize its production capacity. These figures do not include research and development costs *(see the next page)*.
Export sales have increased constantly since 1990, when they reached 38%, oscillating around 60% until the crisis of 2008. After falling in 2009, this share has recovered since, reaching its pre-crisis levels in 2012.

7%

AUTOMOTIVE INDUSTRY SHARE OF TOTAL INDUSTRY EMPLOYEES IN 2012 IN FRANCE

RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

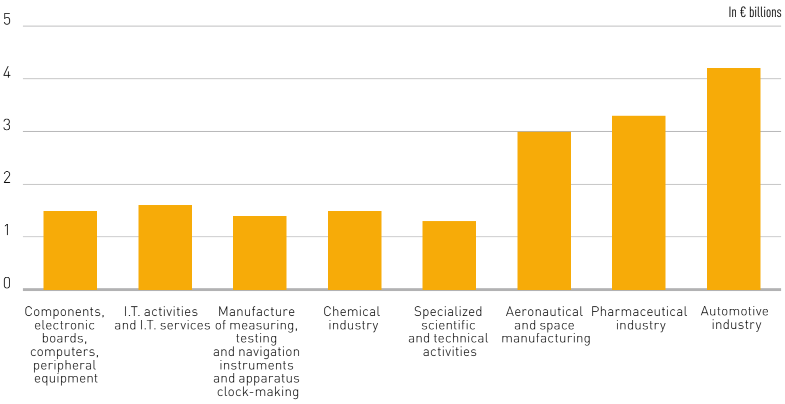
In 2010, the French automobile industry remained the leader of all other industries in France in terms of corporate research and development spending. Its expenditure was €5.4 billion, accounting for 15% of total corporate spending on research and development. After rising strongly between 2001 and 2006 (+24%), R&D expenditure in the automotive industry reached a ceiling of around €4 billion before growing again in 2008 (+10%). After 2009, the crisis significantly limited the financial resources, but expenditure only fell by 2% in 2009 and 2010, stressing its vital, long-term nature. It represents 46% 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 2010

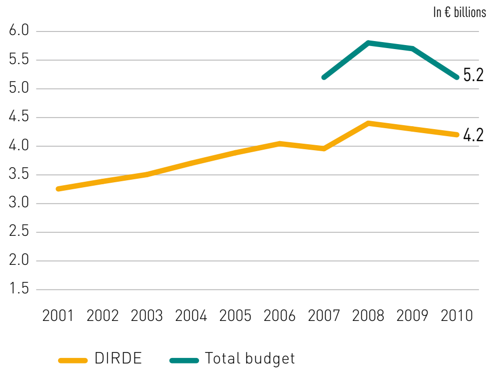
	DRDS (1)	ERDS (2)	Total budget		Of which public financing (3)	
	in € millions	in € millions	in € millions	as a % of total	in € millions	as a % of total
Automotive industry	4,202	1,155	5,357	15.4%	2	0.1%
Pharmaceutical industry	3,269	1,344	4,613	13.3%	20	0.8%
Aviation and space	2,959	993	3,952	11.4%	6	0.3%
Other specialized, scientific and technical activities	1,337	590	1,927	5.6%	17	0.7%
Chemical industry	1,463	384	1,847	5.3%	2	0.1%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,387	393	1,780	5.1%	82	3.3%
IT and information services	1,633	123	1,756	5.1%	63	2.5%
Components, printed circuit boards, computers, peripherals	1,486	210	1,697	4.9%	8	0.3%
Manufacture of communication equipment	904	264	1,168	3.4%	6	0.2%
Manufacture of machinery and equipment not included elsewhere	930	154	1,084	3.1%	12	0.5%
Manufacture of electrical equipment	863	149	1,013	2.9%	s	7.1%
Telecommunications	793	s	997	2.9%	109	4.3%
Other branches	6,176	1,522	7,698	22.2%	2,193	87.0%
TOTAL	**27,403**	**7,280**	**34,683**	**100.0%**	**2,522**	**100.0%**

(1) DRDS: Domestic Research and Development Spending. (2) ERDS: External Research and Development Spending. (3) Excluding research tax credits.
s: statistical secret. Source: Ministry of Higher Education and Research (MESR DGESIP-DGRI SIES).

TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2010 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



15%

SHARE OF THE AUTOMOTIVE INDUSTRY IN THE TOTAL RESEARCH AND DEVELOPMENT BUDGET OF COMPANIES IN 2010

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 is 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 2010, 20% 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 2010, 32,000 equivalent full-time employees (including 16,700 researchers) worked in automotive R&D. These figures were down 3% compared to 2003 (+21% for researchers).
According to the French National Industrial Property Institute (INPI), PSA Peugeot Citroën Automobiles (including Faurecia) and Renault were among the largest patent applicants with the INPI in 2012. 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

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 offer 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 "National pact for growth, competitiveness and employment", drawn up by the French government in November 2012 aims to concentrate the action of competitiveness clusters towards the products and services to be manufactured in order to increase their economic impact in terms of the growth of companies and job creation. This new phase will affect performance contracts for 2013-2018.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2011 (1)

	Mov'eo	Véhicule du Futur	LUTB	iDforCAR
With a...	world vocation	national vocation	national vocation	national vocation
Number of companies with a business unit in a competitiveness cluster	236	153	131	96
Of which SMEs (under 250 employees)	167	82	66	56
Employees of business units involved in the cluster (number of people)	26,556	46,441	40,540	19,827
Spending by public bodies on cluster projects (in € thousands)	73,101	39,574	5,580	n/a
Spending by corporate bodies on cluster projects (in € thousands)	233,443	143,042	3,673	n/a
Total spending (in € thousands)	306,544	182,616	9,253	n/a
Number of labeled projects	54	26	8	19

(1) Information concerning the size of companies and employees corresponding to 2010.
Sources: DGCIS survey, INSEE, DIACT, competitiveness clusters.

In 2012, 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. Also, automotive competitiveness clusters were deemed efficient following the assessment requested by the DGCIS (Central Trade Department for Industry and Services of the Ministry of Industrial Recovery).

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 following themes were addressed: consumption, the environment, road safety, mobility and services, and mechatronics. In 2012, efforts were focused mainly on cooperation with the other competitiveness clusters, including those outside the automotive industry, and on assisting with the creation of the "Institute for Excellence in Carbon-Free Energy" VeDeCoM.

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. In 2012, its mission was clarified, revolving around two main pillars: innovation (mobility services, traffic-management tools, eco-design, reduction of engine consumption and emissions, and vehicle architecture) and industrial excellence in the service of companies (supervised by the association of the PerfoEST cluster, which is the ARIA for Alsace and Franche-Comté).

The goal of the Lyon Urban Truck & Bus cluster (www.lutb.fr) is to meet the challenges offered by the growing need for mobility of persons and goods within towns. It coordinates structuring activities for the region: manufacturers, transport operators, research centers, etc. The research projects deal with five main themes: engines and drive trains, safety and security, vehicle architecture, transport system, modeling, and mobility management. The application was carried out by five urban transportation demonstrators, who continued their work in 2012. The cluster is also associated with the Rhône-Alpes Automotive Cluster, which is the ARIA for the region and has industrial efficiency as one of its areas for development.

Set up in western France (Brittany, Pays de La Loire, Poitou-Charentes), the *iDforCAR* cluster (www.id4car.org) aims to achieve excellence in the automotive industry by developing know-how in small series and specific vehicles, a field with stiff competition on the international stage. The cluster works with processes as well as products: on-board systems (driving assistance, communication interfaces, reliability), research on materials used and architecture (weight, solidity, eco-design, recyclability), control of engineering and industrial processes for short runs. In 2012, the cluster created two strategic fields of activity: vehicles and innovative uses, and Information and Communication Technologies (ICT) and sustainable mobility, and established its position in new markets (including mobility services).

616

NUMBER OF COMPANIES THAT HAD A BUSINESS UNIT BELONGING TO A COMPETITIVENESS CLUSTER IN 2011

FRENCH AUTOMOTIVE FOREIGN TRADE

The year 2012 was marked by growing global trade (+2%) but also by the economic crisis in Europe. In this context, exports of French automotive products fell by 5% to €41.2 billion. The automotive industry remains one of the leading export sectors alongside aeronautical, agri-food, etc. In 2011, in the exporter rankings of French Customs, the three companies in this sector were among the ten leading export companies.
The balance of the automotive sector improved (–€3.3 billion) mainly due to the weakness of the French market, which involved a greater reduction of imports (–8%). The robustness of new vehicle imports from Germany (€7.7 billion) had a major effect on the deficit; however, imports were down as a whole. Exports to Belgium (€2.6 billion) rose, while exports to Germany (€2.4 billion) and the United Kingdom (€1.2 billion) dropped. However, they were severely affected by the crises in the Italian and Spanish markets, where they dropped to €1.9 billion and €1.2 billion, respectively, against €2.8 billion and €3.7 billion, respectively, in 2007.
The positive balance for "parts and engines" dropped to €4.8 billion. The surplus is explained by the production of sites of French manufacturers outside of France with French supplies, for example for thruster units (surplus of €2 billion).

FRENCH AUTOMOTIVE FOREIGN TRADE

In € billions

	New passenger cars	New light commercial vehicles	New heavy trucks	Parts and engines	Automotive industry sector	Used vehicles	Automotive sector	All products [1]	Share of the automotive industry
Exports									
(FOB)									
2011	16.0	2.1	2.5	21.9	42.4	1.0	43.5	420.1	10.3%
2012	15.0	2.1	2.4	20.6	40.1	1.1	41.2	434.1	9.5%
% change 2012/2011	–6.5	+2.3	–6.1	–5.6	–5.6	+12.2	–5.2		
Imports									
(CIF)									
2011	24.6	3.0	3.0	16.6	47.3	1.1	48.3	511.3	9.5%
2012	22.4	2.4	2.7	15.8	43.4	1.1	44.6	518.4	8.6%
% change 2012/2011	–8.9	–18.7	–11.1	–4.4	–8.1	+3.9	–7.8	+1.4	
Balance									
2011	–8.6	–0.9	–0.5	+5.3	–4.8	–0.1	–4.9	–91.1	
2012	–7.5	–0.3	–0.4	+4.8	–3.4	+0.0	–3.3	–84.3	
Coverage rate [2]									
2011	65	69	82	132	90	94	90	82	
2012	67	87	87	130	92	102	92	84	

(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, base 2000.

EXPORTER RANKINGS — YEAR 2011

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

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

9.5%

SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS IN 2012

In 2012, the automotive industry's share of all goods exports stood at 9.5%, against 12% in 1997. As for imports, they accounted for 9% as in 1997, which was a crisis year in the French new vehicle market.
The trade balance for passenger cars improved significantly between 1996 and 2004. The deficit of €350 million observed in 1996 became healthy surpluses of more than €7 billion. Since 2005, the decrease in production in France and rising imports following the large-scale opening of the French markets to foreign manufacturers were reflected in a sharp decline in the surplus, which became a deficit in 2007. The worldwide crisis worsened the deficit in 2008 and 2009 before improving in 2010. The deterioration of the activity in 2011 worsened the deficit before the weakness of the French market reduced it partially in 2012.
The trade balance deficit for light commercial vehicles improved to stabilize at €0.3 billion in a context of falling exports. Following a sharp drop in 2009, exports of light commercial vehicles and heavy trucks made a clear recovery in the two following years and then stagnated in the case of the former and fell in the case of the latter in 2012.
Flows of parts and engines also slowed: –5.6% for exports and –4.4% for imports. The trade balance thus fell by 9.4% to €4.8 billion.

FRENCH AUTOMOTIVE FOREIGN TRADE

The deficit in industrial automobile trades (excluding used vehicles) recovered to −€3.4 billion (−€4.8 billion in 2011). This represents a €6.8 billion deficit with the EU-27 and a €3.5 billion surplus with the rest of the world.
The reduction in the automotive balance deficit was due to falling imports within the EU-27 and is explained, in 2012, by the weakness of the French market.
The surplus with the rest of the world fell to €3.4 billion, compared with €3.8 billion in 2011. Exchanges with many countries always result in important surplus figures: Algeria (€1,260 million), Russia (€1,000 million), Switzerland (€640 million), Brazil (€580 million), China (€480 million), and Argentina (€380 million). The trade surplus with Africa outside of North Africa amounted to €410 million and the surplus with NAFTA (USA, Canada and Mexico) was €300 million.

INDUSTRIAL AUTOMOBILE TRADE BALANCE

In € billions

	1985	1990	2000[1]	2005	2009	2010	2011	2012
All	4.57	4.13	9.84	8.21	−4.42	−3.36	−4.81	−3.36
Within EEC (12 countries)	**0.29**	**0.45**						
Within EU (15 countries)			**5.80**	**4.11**	**−3.11**	**−3.45**	**−5.15**	**−3.51**
Within EU (25 countries)				**4.42**	**−5.41**	**−6.08**	**−8.22**	**−6.31**
Within EU (27 countries)					**−5.63**	**−6.49**	**−8.58**	**−6.81**
of which: Germany	−1.62	−2.20	−3.75	−5.54	−6.09	−6.78	−7.29	−6.02
Austria			0.33	0.43	0.31	0.25	0.21	0.17
Belgium-Luxembourg	0.26	0.68	0.35	2.23	2.12	1.94	1.93	2.37
Denmark		0.12	0.23	0.34	0.10	0.23	0.31	0.20
Spain	−0.55	−0.14	1.55	0.46	−1.62	−1.98	−2.81	−2.12
Finland			0.17	0.23	0.06	0.11	0.12	0.09
Italy	0.59	0.13	0.58	1.56	0.77	0.69	0.80	0.39
Netherlands	0.34	0.57	1.54	0.37	−0.01	0.20	0.35	0.11
Poland				0.15	−0.38	−0.50	−0.57	−0.35
Portugal	0.12	−0.12	0.50	0.51	0.04	0.02	−0.26	−0.34
Czech Republic				−0.21	−1.00	−1.08	−1.29	−1.26
United Kingdom	0.98	1.21	3.56	2.81	1.06	1.66	1.60	1.70
Slovenia				0.05	−0.46	−0.42	−0.36	−0.30
Sweden			0.14	0.07	−0.01	−0.02	−0.29	−0.20
Outside EEC (12 countries)	**4.27**	**3.69**						
Outside EU (15 countries)			**4.04**	**4.10**	**−1.31**	**0.09**	**0.34**	**0.15**
Outside EU (25 countries)				**3.79**	**0.99**	**2.72**	**3.41**	**2.95**
Outside EU (27 countries)					**1.21**	**3.13**	**3.77**	**3.45**
of which: Switzerland	0.27	0.50	0.59	0.57	0.46	0.61	0.72	0.64
Russia				0.22		0.53	0.91	1.02
Turkey		0.17	0.55	0.13	−0.94	−0.61	−0.51	−0.54
Canada	0.12	0.15	−0.02	0.02	0.03	−0.01	0.01	0.04
USA	0.81	0.41	0.46	0.41	0.22	0.23	0.30	0.15
Mexico	0.00	−0.01	0.03	0.13	0.03	0.03	0.13	0.11
Argentina		0.06	0.38	0.17	0.19	0.32	0.32	0.38
Brazil		0.07	0.25	0.19	0.29	0.45	0.49	0.58
Algeria	0.56	0.47	0.29	0.52	0.77	0.82	0.82	1.26
Morocco		0.18	0.12	0.17	0.28	0.27	0.25	−0.02
Nigeria		0.14	0.15	0.08	0.02	0.02	0.02	0.02
Tunisia		0.11	0.17	0.08	0.10	0.12	0.08	0.09
Saudi Arabia		0.06	0.06	0.06	0.06	0.07	0.09	0.06
China		0.05	0.09	0.26	0.19	0.30	0.42	0.48
South Korea		0.02	−0.22	−0.47	−0.30	−0.23	−0.35	−0.53
Iran		0.10	0.15	0.92	0.59	0.64	0.52	0.10
Japan	−0.43	−0.63	−1.04	−1.67	−1.60	−1.50	−1.67	−1.66

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

After exceeding €4 billion between 1997 and 2005, the trade surplus with the EU-15 gave way to a deficit of €1.2 billion in 2007. This was further increased in 2008 to −€5 billion, before falling to −€3.1 billion 2009 and then worsening again in 2010 and 2011 to −€5.1 billion and then recovering to −€3.5 billion in 2012. Between 2011 and 2012, the reduction of the negative balance can be explained mainly by increased trade with Germany (from −€7.3 billion to −€6.0 billion) and with Spain (from −€2.8 billion to −€2.1 billion). Nevertheless, there are important trade surpluses with Belgium & Luxembourg (€2.4 billion), the United Kingdom (€1.7 billion) and Italy (€0.4 billion).

With the 12 new EU member states, the industrial automobile trade deficit was €3.3 billion in 2012 (down 4% from 2011), on the one hand due to the rising share of the local plants of all manufacturers in a context of 36 favorable investment and production costs and, on the other hand, the relative weakness of the local markets.
Outside the EU-27, the automotive manufacturing trade surplus stood at €3.5 billion. Trade with Latin America and Africa remains encouraging. The deficit with Japan and South Korea combined further worsened to − €2.2 billion.

3.5

BILLION EUROS: SURPLUS OF INDUSTRIAL AUTOMOBILE TRADE BETWEEN FRANCE AND COUNTRIES OUTSIDE THE EU-27 FOR 2012

PASSENGER CARS BY ENGINE TYPE (DIESEL, HYBRID, AND ELECTRIC)

Since 2002, there have been more diesel passenger car registrations than registrations of vehicles running on other fuels. In 2012, diesel cars accounted for 73% of total car registrations for the second year in a row, mainly due to the shift in the sale mix towards premium ranges, which are generally fitted with diesel engines, and high fuel prices.
Hybrid and electric engines are emerging in France, with respective market shares of 1.5% and 0.3%. In Europe, the development is slower and they only represent 1.2% and 0.2% of the market. In 2012, one fifth of all hybrid cars registrations and one third of all electric car registrations in Europe were in France, and the French share of the market as a whole was 16%.

DIESEL PASSENGER CARS

	1990	1995	2000	2005	2010	2011	2012	Change 2012/2011 as a%
Production								
In units	804,007	1,036,796	1,648,448	2,328,108	2,178,408	2,213,668	1,883,359	–14.9
As a % of total production	24.4%	34.0%	35.8%	45.0%	38.8%	39.5%	38.7%	
Exports								
In units	292,061	472,087	975,038	1,500,989	1,346,022	1,373,140	1,208,770	–12.0
As a % of total exports	15.5%	25.5%	33.7%	39.1%	31.3%	31.7%	31.0%	
Registrations								
In units	762,054	897,698	1,046,485	1,466,296	1,593,173	1,596,155	1,384,544	–13.3
As a % of total registrations	33.0%	46.5%	49.0%	69.2%	70.8%	72.4%	72.9%	
Cars in use								
In units	3,775,000	6,938,000	9,980,000	14,348,000	18,165,000	18,865,000	19,377,000	+2.7
As a % of all cars in use	16.0%	27.6%	35.6%	47.7%	58.0%	59.8%	61.3%	

Source: CCFA.

ELECTRIC AND HYBRID PASSENGER CAR REGISTRATIONS

	2008		2009		2010		2011		2012	
	Units	Market share	Units	Market share	Units	Market share	Units	Market share	Units	Market share
Electric	4	0.0%	12	0.0%	184	0.0%	2,630	0.1%	5,663	0.3%
Hybrids	8,468	0.4%	9,876	0.4%	9,655	0.4%	13,641	0.6%	27,889	1.5%

Source: CCFA.

In 2012, France ranked second for diesel car ownership with 1,385,000 new diesel passenger cars, behind Germany with 1.5 million units. 61% of cars in use in France on January 1st, 2013 had diesel engines.
In Europe, the market share of new diesel cars has dropped by one point to 55%, representing 6.5 million units. In this market, French manufacturers hold a share of 24%.
In 2012, 1.9 million diesel cars were produced by French manufacturers, down 22% from the record level of 2004. The diesel car share of total production (39%), down slightly from 2011, is still considerably lower than in 2004 (47%).

In 2012, new hybrid passenger car registrations rose by 104% to 27,889 units; new electric passenger car registrations rose by 115% to 5,663 units (electric light commercial vehicle registrations also rose sharply by +117% to 3,651 units). The strength of these sales is supported by the Automobile Plan of the French government in July 2012. The French market is the leading market in Europe for these two engine types.

7 out of 10

NEW PASSENGER CARS REGISTERED IN FRANCE IN 2012 ARE DIESEL-POWERED

NEW PASSENGER CAR REGISTRATIONS BY MODEL, RANGE AND BODY STYLE

The range structure of new cars has developed significantly over the last twenty years. Low ranges represented 63% of the market in 1990, and then remained around 70% during the 1990s before rising to 78% in 2007. They subsequently rose during the crisis (2008-2010), peaking at 85% due to the "bonus/malus" system and the scrap incentive scheme. In 2012, their share fell back to 80%. The structure of cars by body type has also changed since 1990. Sedans had a market share of over 90% of the market in 1990, compared with 72% in 2000 and 56% today.
After expanding their offer in the economy and low ranges, renewed in 2012 with the launches of the Peugeot 208 and the Renault Clio IV, French manufacturers have sought to meet demand for vehicles with greater value added. On the one hand, Citroën has developed its DS range and Peugeot has expanded its mid and premium ranges with the 3008, 5008 and 508. On the other hand, Renault is relying on its Mégane range and Dacia has increased its offer with Lodgy.

RANKINGS OF MAIN NEW PASSENGER MODELS IN 2012

Rank	Make	Model	% market	Rank	Make	Model	% market	Rank	Make	Model	% market
1	**Peugeot**	**206-207-208**	**6,9**	**11**	**Dacia**	**Duster**	**1,8**	21	Mini	Mini	1,1
2	**Renault**	**Clio**	**6,3**	12	Ford	Fiesta	1,7	22	Nissan	Juke	1,1
3	**Renault**	**Mégane**	**6,2**	13	Nissan	Qashqai	1,6	**23**	**Renault**	**Modus**	**1,0**
4	**Citroën**	**C3**	**4,5**	14	Opel	Corsa	1,4	24	Fiat	500	0,9
5	**Citroën**	**C4**	**3,9**	**15**	**Dacia**	**Sandero**	**1,4**	**25**	**Citroën**	**C5**	**0,9**
6	Peugeot	308	2,4	**16**	**Peugeot**	**508**	**1,4**	26	Ford	C-max	0,8
7	**Volkswagen**	**Polo**	**2,3**	**17**	**Citroën**	**DS3**	**1,3**	27	Volkswagen	Touran	0,8
8	**Peugeot**	**3008**	**2,3**	18	Toyota	Yaris	1,3	**28**	**Renault**	**Laguna**	**0,8**
9	**Renault**	**Twingo**	**2,1**	19	Volkswagen	Tiguan	1,2	29	Seat	Ibiza	0,8
10	Volkswagen	Golf	2,0	**20**	**Peugeot**	**5008**	**1,2**	30	Audi	A1	0,7

Source: CCFA.

NEW PASSENGER CAR REGISTRATIONS BY RANGE

Ranges	1990		2000		2010		2011		2012	
	units	%	units	%	units	%	units	%	units	%
Low	986,532	42.7	855,161	40.1	1,283,902	57.0	1,156,494	52.5	929,796	49.0
Low-mid	477,631	20.7	695,146	32.6	627,694	27.9	653,483	29.6	592,207	31.2
High-mid	555,053	24.0	303,028	14.2	234,664	10.4	272,395	12.4	263,283	13.9
Premium	256,381	11.1	163,293	7.7	105,313	4.7	121,782	5.5	113,467	6.0
Others	33,533	1.5	117,256	5.5	96	0.0	75	0.0	7	0.0
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,204,229**	**100.0**	**1,898,760**	**100.0**

(1) In 2007, a new range-based segmentation of the market was introduced, with the aim of eliminating the previous "others" range. The special Transit Temporaire series was integrated as of 2004. Source: CCFA.

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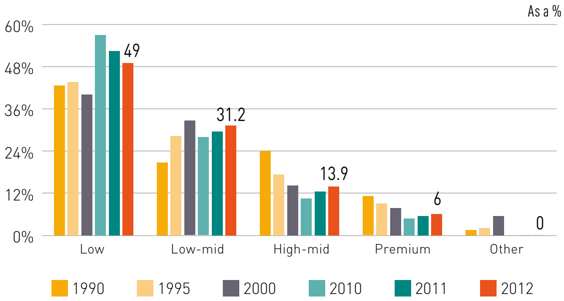
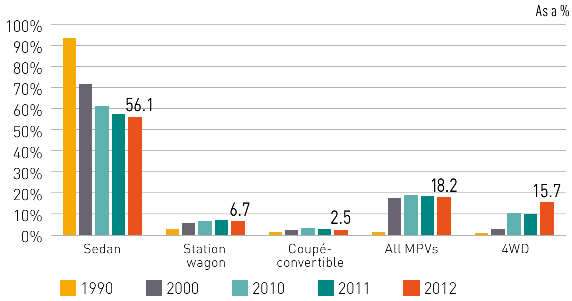
POINTS: DROP IN THE MARKET SHARE OF THE LOW RANGE IN FRANCE IN 2012 COMPARED WITH 2010

MARKET SHARE BY RANGE



MARKET SHARES BY BODY



NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Body	1990		2000		2010		2011		2012	
	units	%	units	%	units	%	units	%	units	%
Sedan	2,155,724	93.4	1,527,676	71.6	1,377,498	61.2	1,269,780	57.6	1,064,713	56.1
Station wagon	61,418	2.7	119,739	5.6	153,476	6.8	153,705	7.0	126,361	6.7
Coupe-convertible	36,269	1.6	50,527	2.4	70,353	3.1	64,990	2.9	47,523	2.5
All MPVs	28,682	1.2	369,434	17.3	430,857	19.1	406,452	18.4	345,254	18.2
of which compact MPVs	-	-	*241,190*	*11.3*	*233,363*	*10.4*	*222,131*	*10.1*	*203,431*	*10.7*
4WD	17,129	0.7	57,116	2.7	205,106	9.1	292,832	13.3	298,407	15.7
Others	9,908	0.4	9,392	0.4	14,379	0.6	16,470	0.7	16,502	0.9
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,204,229**	**100.0**	**1,898,760**	**100.0**

Source: CCFA.

USED PASSENGER CARS

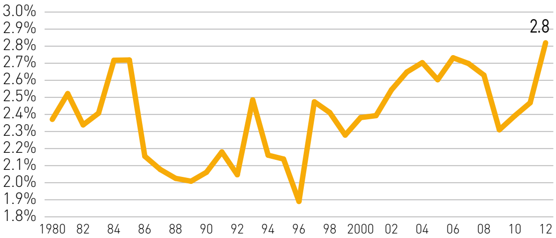
In 2012 as in previous years, used passenger car registrations exceeded five million units, reaching 5,372,000 units (–1.3% from 2011).
Every year, two to three used cars are exchanged for every new car: relative to the total number of cars in use, around 17% change hands every year. Households keep a vehicle for an average of five years.
The used/new ratio rose vigorously to 2.8 (or +0.3 points) as in 1993 (+0.4 points to 2.5) and in 1997 (+0.6 points to 2.5).
58% of cars owned or used by households were bought used, versus 51% in 1991. At the time of purchase, the average number of kilometers on their odometers was 67,000 kilometers, and one quarter of the used vehicles purchased by households had over 100,000 kilometers on their odometers. In addition, households that own a used vehicle and replace it with a used vehicle account for 45% of replaced vehicles.

USED PASSENGER CARS

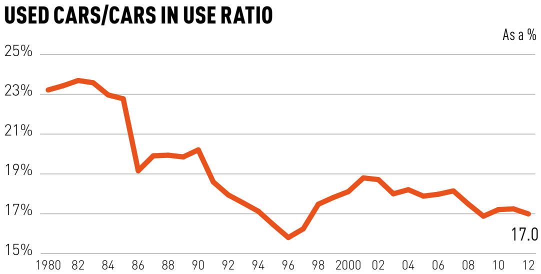
	Units	1980	1990	2000	2005	2010	2011	2012
Registrations								
New cars	thousands	1,873	2,309	2,134	2,118	2,252	2,204	1,899
Used cars	thousands	4,441	4,759	5,082	5,383	5,386	5,441	5,372
Used/new ratio		*2.4*	*2.1*	*2.4*	*2.5*	*2.4*	*2.5*	*2.8*
Cars less than 5 years old	% used		52	40	40	37	36	36
of which: cars less than 1 year old	% used		12	12	10	8	8	8
cars less than 1 year old	% new		25	29	25	19	21	23
Cars more than 5 years old	% used		48	60	60	63	64	64
Cars in use (on 12/31)	thousands	19,130	23,550	28,060	30,100	31,300	31,550	31,600
Used/Cars in use	%	23.2%	20.2%	18.1%	17.9%	17.2%	17.2%	17.0%

Source: CCFA.

USED CARS/NEW CAR RATIO



USED CARS/CARS IN USE RATIO



58%

PERCENTAGE OF CARS OWNED BY HOUSEHOLDS THAT HAVE BEEN BOUGHT USED

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. They represent about 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 2012, demand for new cars dropped by 13.9% to 1.9 million units whilst demand for used cars fell by 1.3% to 5.4 million units.

The used/new ratio increased to 2.8 (+0.3 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 has still been 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 2012.
Used cars that are less than one year old can be considered new. In fact, they are often registered by automotive dealers as demonstration or leased vehicles and then sold on the retail market. They represented 427,000 registrations or 23% of the new car market, an increase of two points for the third consecutive year compared to the previous year due to the cancellation of the scrap incentive and thus its effect on the price of new vehicles. The market share thus stood at its 2007 level.
Since 2001, registrations of used cars less than one year old have declined steadily as a percentage of used cars, only accounting for 8% in 2012, versus 12% in 2001.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS (DOM)

Having developed more recently than in the Mainland, the annual markets for new vehicles in France's overseas departments have accounted for 60,000 to 75,000 vehicle registrations since 1998. The five French Overseas Departments are Guadeloupe, French Guiana, Martinique, Mayotte, and Reunion Island. Given the geographic environment, commercial vehicles over 5 metric tons account for a smaller proportion of registrations in overseas departments (1.1%) than in mainland France (2.1%). In contrast, the proportion of light commercial vehicles is slightly higher (17.2% versus 16.5% in mainland France). In 2012, the number of registrations of new light vehicles dropped by 6.7% compared with the previous year. The drop in the overseas market was less pronounced than in the mainland (–13.3%). This market was less affected by the crisis than mainland France. Compared with 2007, the downturn was still –18.7%. French manufacturers suffer from intense competition in passenger cars; their market share has been below 50% since 2006. However, they are faring better on the light commercial vehicle market (more than 50% of the market), which remains much weaker than in the mainland (around two thirds of the market). On the other hand, on the narrow heavy vehicle market, Renault Trucks have a market share of almost 33%.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS

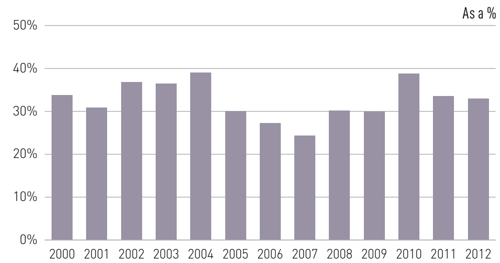
New passenger cars	2000	2005	2010	2011	2012	Change 2012/2000	Change 2012/2011
Guadeloupe	13,691	14,359	13,438	13,695	13,158	–3.9%	–3.9%
French Guiana	4,031	4,085	4,382	4,719	4,357	8.1%	–7.7%
Martinique	14,424	14,749	13,147	12,976	11,527	–20.1%	–11.2%
Mayotte [1]				780	808	-	-
Reunion Island	21,463	25,142	20,295	21,111	19,795	–7.8%	–6.2%
Total French Overseas Departments	**53,609**	**58,335**	**51,262**	**53,281**	**49,645**	**–7.4%**	**–3.2%**
Light commercial vehicles (up to 5 metric tons)	**2000**	**2005**	**2010**	**2011**	**2012**	**Change 2012/2000**	**Change 2012/2011**
Guadeloupe	2,685	2,772	2,394	2,545	2,214	–17.5%	–13.0%
French Guiana	1,143	1,169	1,239	1,246	1,310	14.6%	5.1%
Martinique	2,368	2,732	2,016	2,234	1,882	–20.5%	–15.8%
Mayotte [1]				182	214	-	-
Reunion Island	5,200	6,021	4,166	4,882	4,807	–7.6%	–1.5%
Total French Overseas Departments	**11,396**	**12,694**	**9,815**	**11,089**	**10,427**	**–8.5%**	**–6.0%**
Commercial vehicles including coaches and buses (over 5 metric tons)	**2000**	**2005**	**2010**	**2011**	**2012**	**Change 2012/2000**	**Change 2012/2011**
Guadeloupe	146	196	135	124	80	–45.2%	–35.5%
French Guiana	66	99	85	71	58	–12.1%	–18.3%
Martinique	187	183	84	115	167	–10.7%	45.2%
Mayotte [1]				29	24	-	-
Reunion Island	362	464	293	275	347	–4.1%	26.2%
Total French Overseas Departments	**761**	**942**	**597**	**614**	**676**	**–11.2%**	**13.2%**

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

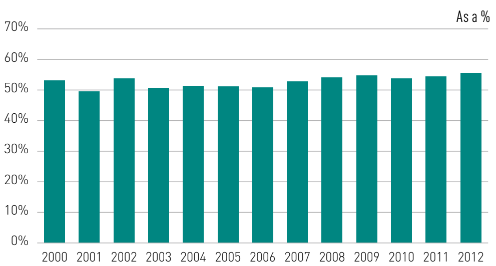
FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

New passenger cars

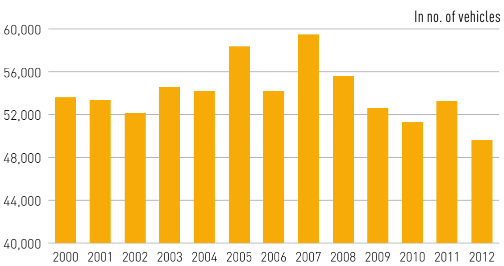
New heavy trucks



New light commercial vehicles



NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



–19%

REDUCTION OF LIGHT VEHICLE REGISTRATIONS SINCE 2007

HOUSEHOLD CAR OWNERSHIP

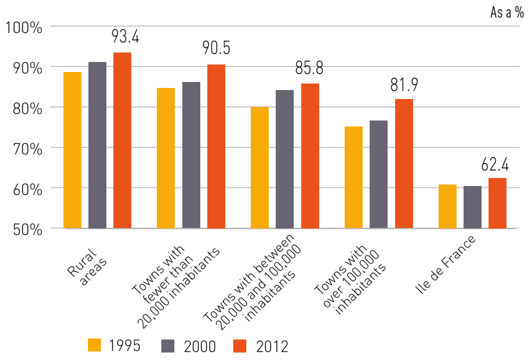
In 2012, multi-car households accounted for 35% of the total, compared with 26% in 1990 and 16% in 1980.
Car ownership is very high among households in rural and semi-rural areas, i.e. rural areas located close to towns (nearly 93%).
62% of households in the Paris region own at least one vehicle (60% in 2000).
69% of young households owned a vehicle in 2012 (49% in 2000). 78% of older households own a vehicle, compared with 69% in 2000.
Every year, 2% to 3% of households get rid of their cars. Changes in family situation (death, divorce, etc.), health problems, moving and professional changes are the main causes.

CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR)

	1980	1990	1995	2000	2005	2010	2012
By socio-professional group							
Farmers	87.3%	95.9%	98.9%	91.1%	100.0%	92.1%	93.0%
Farm workers	72.6%	74.7%	-	-	-	-	-
Tradesmen, craftsmen, business owners	91.1%	95.2%	89.4%	90.6%	91.2%	91.1%	95.3%
Self-employed professionals, executives	93.6%	94.4%	85.5%	84.6%	83.7%	84.1%	84.7%
Middle management	90.2%	93.3%	88.7%	90.8%	87.6%	89.8%	88.2%
White collar workers	75.4%	78.3%	75.9%	77.5%	80.9%	82.5%	81.1%
Blue collar workers	80.4%	87.2%	89.7%	88.7%	89.1%	91.2%	90.2%
Service employees	57.9%	59.3%	-	-	-	-	-
Other working population	91.2%	90.2%	-	-	-	-	-
Non-working population	39.6%	54.6%	65.8%	70.9%	72.8%	77.1%	77.3%
of which retired persons	-	59.4%	70.9%	76.0%	76.2%	80.1%	80.6%
By area of residence							
Rural areas	71.7%	82.1%	88.6%	91.1%	92.4%	92.7%	93.4%
Towns with fewer than 20,000 inhabitants	69.6%	76.6%	84.7%	86.1%	88.4%	90.2%	90.5%
Towns with 20,000 to 100,000 inhabitants	72.3%	77.3%	80.0%	84.2%	83.7%	87.1%	85.8%
Towns with over 100,000 inhabitants	69.5%	74.2%	75.1%	76.6%	78.5%	80.8%	81.9%
Greater Paris	69.3%	77.0%	60.8%	60.4%	61.5%	63.6%	62.4%
Inner Paris	48.8%	47.3%					
By location of residence							
Town center	–	–	67.6%	69.4%	69.2%	73.0%	72.4%
Suburb	–	–	79.3%	80.5%	80.9%	83.2%	82.0%
Peri-urban area	–	–	88.5%	89.8%	91.2%	91.6%	92.5%
Rural area	–	–	85.3%	90.4%	92.6%	94.8%	94.8%
By age of head of household							
Under 25	–	–	51.2%	49.3%	63.3%	64.9%	69.0%
25 to 34	–	–	85.1%	82.4%	82.3%	83.9%	82.1%
35 to 44	–	–	86.7%	86.3%	87.5%	88.0%	87.5%
45 to 54	–	–	87.5%	87.4%	86.1%	88.1%	87.5%
55 to 64	–	–	84.9%	87.0%	86.7%	86.9%	85.4%
Over 65	–	–	61.9%	69.0%	70.8%	76.2%	78.2%
All	**69.3%**	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.5%**	**83.3%**
Vehicles with a woman as their main driver	–	–	–	40.4%	40.7%	41.5%	42.3%

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

CAR OWNERSHIP RATE BASED ON AREA OF RESIDENCE



88%

PERCENTAGE OF CAR-OWNING HOUSEHOLDS OUTSIDE THE GREATER PARIS REGION

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 2012; 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 these households owned vehicles in 2012, compared with 75% in 1995.
- Rural households, large households, and workers typically own several vehicles.
- The non-working and employee categories have relatively lower rates, although their car ownership rates have increased considerably since 2000 (by 3.6 and 6.4 points respectively).

HOUSEHOLD VEHICLES IN USE

Daily car use has dropped regularly in recent years, with 71% of the total car fleet used in 2012 compared with 79% in 2000.
The share of vehicles used for commuting exceeded the 50% threshold for the first time. In 2012, professional trips other than commutes rose to 16%.
Since 2006, there are more diesel-powered (60%) than gasoline-powered cars.
The average number of kilometers on the odometer stands at around 102,000 kilometers, i.e. 9,000 kilometers more than in 2000 and 33,000 kilometers more than in 1990. This trend leveled off between 2009 and 2011 with the bonus-malus system and the scrap incentive helping renew part of the total number of cars in use; in 2012, the increase resumed.
80% of all cars in use belong to the low and mid-low ranges, compared with 60% in 1990.

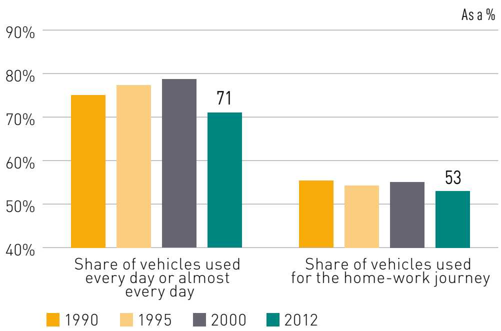
VEHICLES IN USE (OWNED, LEASED OR LOANED) BY HOUSEHOLDS

	Units	1980	1990	1995	2000	2005	2010	2012
Total	millions	16.7	23.0	25.1	27.4	31.0	33.6	33.8
Average age	years	5.8	5.8	6.6	7.3	7.7	8.0	8.3
Breakdown by automotive group								
Renault (including Dacia)	%	36.2	33.3	33.3	33.3	30.2	28.6	28.9
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	38.2	37.2
Foreign makes	%	16.7	28.4	30.5	31.4	33.2	33.2	33.9
Breakdown by power category for tax purposes								
2 and 3 HP	%	12.3	3.4	1.6	0.7	43.3	44.4	45.9
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	41.4
8 HP and above	%	17.5	12.8	10.9	8.8	10.1	13.1	12.7
Breakdown by vehicle range								
Low range	%		39.4	43.4	45.1	44.5	46.8	48.3
Low-mid	%		20.8	24.3	27.3	32.2	30.9	31.3
High-mid	%		26.0	22.2	19.9	16.2	11.5	9.9
Premium range	%		8.7	7.0	7.0	5.7	5.0	3.6
Others	%		5.1	3.2	0.8	1.4	5.7	7.0
Percentage of vehicles purchased new	%	55.7	50.4	45.2	43.9	40.1	41.1	42.0
Breakdown by type of fuel used								
Premium unleaded	%		15.5	38.4	49.1	51.1	40.1	38.1
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	61.9
Average kilometers on odometer	km		69,500	84,080	93,140	99,460	103,470	102,130
Percentage of vehicles used on a daily or near-daily basis	%		75.1	77.4	78.7	75.7	71.8	70.8
Percentage of vehicles used for travel to and from work	%		55.4	54.3	55.1	55.2	53.7	52.9

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

An annual SOFRES survey gives a clear picture of the cars owned or available to households in France. Most of these vehicles are passenger cars, but light commercial vehicles account for about 5% of the total.The total number of vehicles in use continues to grow.
The average age of vehicles in use rose during the 1990s. The return to better conditions in the automotive market helped it to stabilize between 2000 and 2002. Since 2003, it started to rise again, reaching 8.2 years in 2007. The following two years, it fell slightly to 8 years, before rising again to 8.1 years in 2011 and 8.3 years in 2012.
The most common taxable horsepowers were in the 4 to 7 HP categories. Low and low-mid range cars have become more popular in recent years, representing respectively 48% and 31% of the total number of cars in use in 2012, to the detriment of high mid-range models, which have a share of 10%.
Luxury or comfort equipment are increasingly popular; in 2012, 71% of cars were fitted with air conditioning. In terms of safety equipment, numbers have also risen: 65% of vehicles have ABS, 37% a speed-limiting device, and 30% a central stability system (ESP).

VEHICLE USE



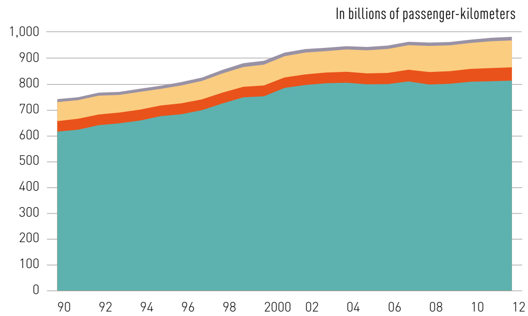
71% and 53%

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

DOMESTIC PASSENGER TRANSPORT

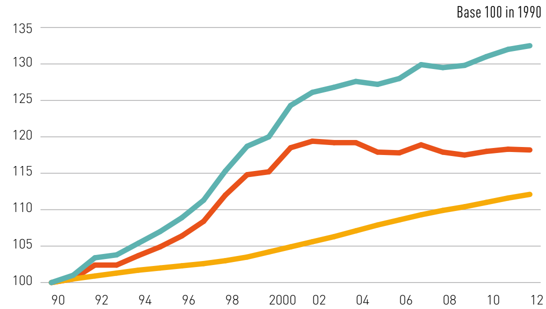
Personal mobility drives the economy, shaping economic and social exchanges, creating wealth, and underpinning whole sectors such as health and tourism.
When expressed as passenger-kilometers, which under-represents urban transport and focuses on domestic transport to the exclusion of long-distance international transport, roads emerge as the dominant mode: 83% for passenger cars and 5% for coaches and buses in 2012.
Cars and light commercial vehicles allow people to carry their belongings, offering an appropriate solution to transport today, particularly in sparsely-populated residential areas or regions where there is insufficient demand to make public transport networks economically and socially relevant solutions.

DOMESTIC PASSENGER TRANSPORT



Sources: MEDDE/SOeS, INSEE.

DOMESTIC PASSENGER TRANSPORT FIGURES



Sources: MEDDE/SOeS, INSEE.

-1%

DECLINE IN DOMESTIC PASSENGER TRANSPORT IN ALL MODES BETWEEN 2002 AND 2012, EXPRESSED IN PASSENGER-KILOMETERS.

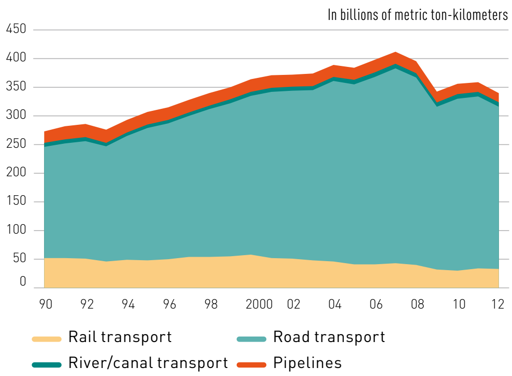
Personal transport is obviously linked to the economy, as is the transport of freight, but it also includes the vital social aspect of meeting people.
Whereas freight is more closely associated with industrial, agricultural and craft production, personal transport covers a much broader economic sphere.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

When measuring transport in terms of passenger-kilometers, light vehicles tend to dominate in domestic passenger transport. This can be expressed as the number of daily trips, particularly in dense urban areas where transport facilities and other methods (bicycles, motorcycles, etc.) play an important role, or as passenger-kilometers when dealing with international long distance travel, showing the relevance of each mode of transport.
Domestic passenger transport expressed in passenger-kilometers rose continuously until 2002 (up 19% since 1990). Since then, it appears to have tailed off due to rising fuel prices, and dropped by 1% between 2002 and 2012.

DOMESTIC FREIGHT TRANSPORT

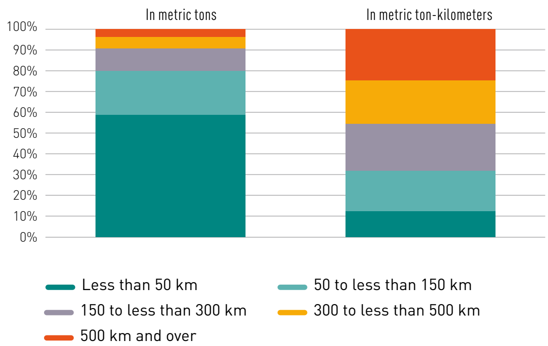
Transporting freight drives the economy, enabling production sites to connect with each other and with consumer sites, which in turn link to reprocessing-recycling plants. The time dimension must be added to this spatial model, often associated with town and country planning. Each mode of transport—road, rail, inland waterways, pipeline, etc.—depends on infrastructure that requires the kind of large-scale capital expenditure that is generally paid off over a long period. Road haulage meets many of the criteria involved in selecting a transport hub. According to the Road Freight Haulage Survey from the French Ministry of Transport, 59% of French freight loads are delivered within a radius of 50 kilometers, and 54% of metric ton-kilometers generated by these deliveries involve distances of under 300 kilometers.

DOMESTIC FREIGHT TRANSPORT IN FRANCE



Source: MEDDE/SOeS.

BREAKDOWN OF FREIGHT TRANSPORT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2012



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, with the domestic demand of various economic players and, on the other hand, with exports of producing companies in the country. Some countries, such as Germany and France, act as key freight transit countries due to their geographical locations. In the case of road haulage, this also leads to the phenomenon of cabotage.
The physical transfer of goods exported by a country is a major focus of economic competitiveness. Among other factors, it should not be too expensive compared with other countries in order to promote exports. 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: automotive manufacturers mainly transport coils of steel by rail or waterways;
• the value of the goods transported:
• delivery time: perishables such as fresh products must be transported quickly—usually 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 homogeneous 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 when 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 54% of French metric ton-kilometers are generated less than 300 km from the source.

14 years

STABILITY OF DOMESTIC FREIGHT TRANSPORT MEASURED IN METRIC TONS-KILOMETERS IN 2012 COMPARED WITH 1998

ROAD TRAFFIC

Road traffic increased by an annual average of 2% between 1990 and 2004, and has remained relatively stable since (+0.1% per year).
After two years of recovery, traffic fell slightly in 2012 (–0.2%), in a context of stagnating economic growth and high fuel prices.
As a reflection of economic activity, French heavy truck traffic dropped by 8.3%. Its level, which was below that of 2009 or 1990, was 22% lower than in 2007.
Passenger car traffic in France remained practically stable (+0.3%): it was affected, among others, by high fuel prices. The average kilometers covered per year by a passenger car remained almost stable (–0.2%).

TRAFFIC STATISTICS

	Units	1990	2000	2011	2012	Average annual change as a % 2000-1990	2012-2000	2012-2011
Total vehicles (annual averages)	**thousands of vehicles**	**28,106**	**33,464**	**37,941**	**38,137**	**+1.8**	**+1.1**	**+0.5**
Passenger cars		23,280	27,770	31,425	31,575	+1.8	+1.1	+0.5
of which: gasoline		19,760	18,150	12,910	12,454	–0.8	–3.0	–3.5
diesel		3,520	9,621	18,515	19,121	+10.6	+6.1	+3.3
Light commercial vehicles (LCV)		4,223	5,062	5,869	5,911	+1.8	+1.4	+0.7
of which: gasoline		2,279	1,302	539	456	–5.4	–7.7	–15.4
diesel		1,944	3,761	5,330	5,455	+6.8	+3.2	+2.4
Heavy trucks (> 5 t)		535	551	557	560	+0.3	+0.1	+0.5
Coaches and buses		68	81	90	91	+1.8	+0.9	+1.1
Kilometers (annual averages)	**thousands of km**							
Passenger cars		13.4	13.5	12.7	12.7	+0.1	–0.6	–0.2
of which: gasoline		11.9	10.7	8.5	8.2	–1.1	–2.1	–4.2
diesel		21.3	18.8	15.6	15.6	–1.2	–1.7	+0.0
Light commercial vehicles (LCV)		14.6	15.5	15.9	15.7	+0.6	+0.2	–1.2
of which: gasoline		9.9	8.3	7.6	7.3	–1.7	–0.8	–4.2
diesel		20.2	18.0	16.7	16.4	–1.1	–0.7	–1.9
Heavy trucks (> 5 t)		36.1	41.2	36.3	33.1	+1.3	–1.1	–8.7
Coaches and buses		31.0	30.2	36.2	36.2	–0.3	+1.7	–0.1
Consumption per vehicle	**liters/100 km**							
Passenger cars: gasoline		8.68	8.12	7.66	7.68	–0.7	–0.5	+0.3
Passenger cars: diesel		6.73	6.74	6.45	6.36	+0.0	–0.4	–1.4
LCV: gasoline		9.39	9.29	8.27	8.30	–0.1	–1.1	+0.3
LCV: diesel		9.77	9.67	9.20	9.20	–0.1	–0.5	+0.0
Heavy trucks: diesel		36.23	36.62	35.11	34.97	+0.1	–0.4	–0.4
Buses and coaches: diesel		32.00	32.99	32.78	32.78	+0.3	–0.1	+0.0
Fuel consumption (all road transportation)	**millions of liters**							
Gasoline		24,110	18,729	10,744	10,067	–2.5	–4.9	–6.3
Diesel		17,977	30,779	38,743	38,373	+5.5	+2.1	–1.0
Total		42,086	49,508	49,487	48,440	+1.6	–0.0	–2.1
Total traffic	**billions of vehicle-km**	**420**	**518**	**565**	**564**	**+2.1**	**+0.8**	**–0.2**
of which: French cars and light commercial vehicles		373	455	492	493	+2.0	+0.7	+0.1
Road traffic								
Passengers in passenger cars [1]	billions of passenger-km	617.3	754.4	812.7	815.0	+2.0	+0.7	+0.3
Passengers in coaches and buses	billions of passenger-km	40.7	42.0	51.1	51.6	+0.3	+1.8	+1.0
Freight	billions of metric tons-km	193.9	276.9	300.2	283.4	+3.6	+0.7	–5.6

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

79%

SHARE OF DIESEL ENGINES IN THE LIGHT VEHICLE TRAFFIC IN FRANCE

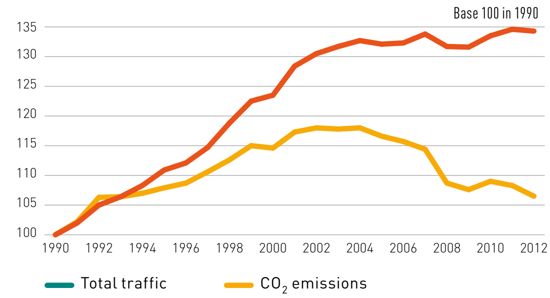
Automobile traffic is estimated by comparing vehicle counts on national, regional, local and urban roads with the average number of kilometers covered per year by all the vehicles in use and fuel consumption data. It also includes data on vehicles registered abroad. Road accounted for 88% of all domestic transport for passengers 2012 and 84% for freight.
In 2012, the number of French-registered vehicles on the road rose by 0.5%, comparable to previous years, but far lower than in the 1990s. More light vehicles use diesel engines, which now power 66% of this segment.
As regards traffic, diesel accounts for 79% of the traffic of light vehicles registered in France, against 55% in 2000 and 31% in 1990.

The consumption per vehicle given in the table above includes over-consumption associated with biofuels, which have a lower energy quotient than conventional fuels. Between 2011 and 2012, the share of premium unleaded 95-E10 grew sharply by more than 7 points to 24% of gasoline sales. On January 1st, 2013, almost three quarters of cars were compatible with this fuel.

ROAD TRAFFIC AND CO_2 EMISSIONS

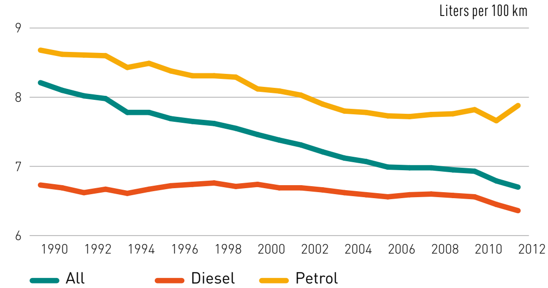
The number of French and foreign vehicles on French roads has increased by 34% since 1990, while the corresponding CO_2 emissions have risen by only 7%. The credit for enhanced energy efficiency stems from a variety of factors. The average consumption per registered vehicle on the road in France decreased by nearly 18% between 1990 and 2012, as a result of the increased percentage of diesel-powered vehicles, auto improvements and changes in driving behavior, as well as the effects of the bonus/malus system implemented in 2008. 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 22% between 1990 and 2012, despite the impact of the financial and economic crisis.

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



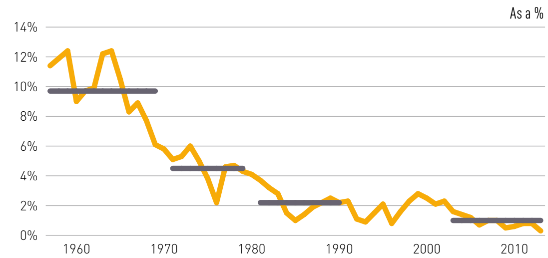
Sources: CITEPA and Traffic Statistics.

AVERAGE CONSUMPTION OF A PASSENGER CAR ON THE ROAD [1]



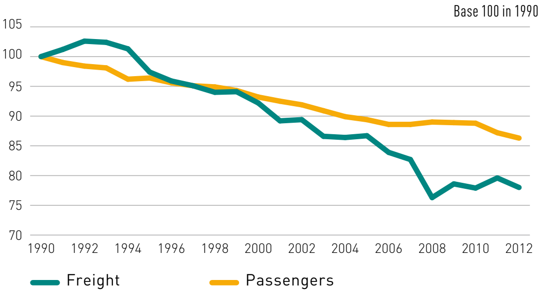
Source: Traffic Statistics.

ANNUAL GROWTH RATE OF PASSENGER CARS ON THE ROAD IN FRANCE



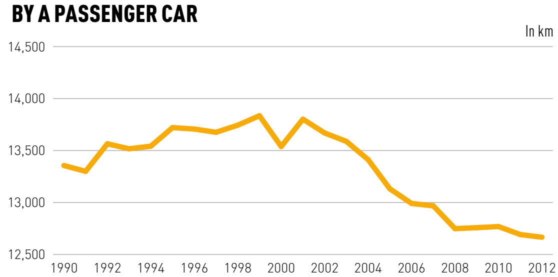
Source: CCFA.

CHANGE IN TRANSPORT ENERGY EFFICIENCY [2]



(1) Unit consumption includes the overconsumption effects associated with biofuels.
(2) Energy efficiency relates to the change in the amount of CO_2 emitted in order to transport one metric ton of goods (or a passenger) one kilometer by heavy truck (or passenger car) driving on French roads. The reduction in CO_2 emissions due to the use of biofuels is not taken into account. Between 2006 and 2012, it represented an additional drop of around 5 points, which should be added.
Sources: MEDDE/SOeS, CCFA calculations.

AVERAGE KILOMETERS COVERED PER YEAR BY A PASSENGER CAR



Source: Traffic Statistics.

Passenger car traffic involves the number of vehicles on the road and the average number of kilometers they cover in a year. Over the long term, the increase of the 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 2012, the first estimates from CITEPA for road transport CO_2 emissions net of renewable energy sources stand at 118 million metric tons. After the stable situation observed in the early 2000s, a clear drop was observed linked to the effects of the economic crisis and also to the increase of biofuels in fuel deliveries.

For 2011, 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 24% for heavy trucks, including coaches and buses (26% in 2007).

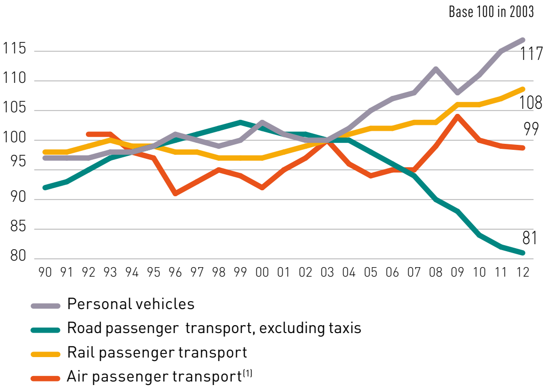
−10%

REDUCTION IN CO_2 EMISSIONS FOR ROAD TRAFFIC BETWEEN 2004 AND 2012 ACCORDING TO CITEPA

PASSENGER TRANSPORT PRICE INDICES

In 2012, because of the increase in fuel prices, the price index for passenger cars (purchases and use) rose more slowly than in the two previous years (+4%) due to the slower rise in fuel prices. However, fuel prices remain high. The price index for rail passengers grew by 4%, which is a faster pace that observed during previous years, which was between 2% and 3%. The price index for the road transport of passengers (not including taxis) ended its long downward trend, rising by 0.5%.
Since 2003, real price indices for different modes of passenger transport changed in very different ways: from –19% for road transport of passengers (not including taxis) to +17% for private vehicles, with a slight fall (–1%) for air transport and an increase of 9% for rail transport.

PASSENGER TRANSPORT MODE PRICE INDICES, ADJUSTED FOR INFLATION



Source: Insee.

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

	Passenger cars	Road transport of passengers, not including taxis	Rail transport of passengers	Road transport of passengers	Taxis	Air transport of passengers[1]
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%
2012	3.7%	0.5%	4.0%	1.6%	3.8%	ns

(1) The methodology for calculating the price index for air transport services changed in January 2012. The variation between 2011 and 2012 cannot be considered to be significant.
Source: INSEE.

+4%

INCREASE OF THE PRICE INDICES LINKED TO PRIVATE VEHICLES, RAIL TRANSPORT OF PASSENGERS AND TAXIS IN 2012

The price indices of the various passenger transport modes show evolutions in prices inclusive of tax. So, for air transport, this includes airport tax; in other modes, infrastructure-related costs are only shown insofar as they can be included in the retail price. Furthermore, only the part paid directly by the household is considered. For example, if a region or a local authority decides, in the context of a town or country planning strategy or social measures, to subsidize a part of transport-related expenses, this will appear as a reduction in household expenses. Fuel surcharges are included in the index for air transport of passengers.
The indices for rail and road transport of passengers only relate to intercity links. The index for passenger cars was defined including purchasing as well as running expenses. To calculate the actual change in the real prices of these main modes of transport, these indices have been adjusted by the consumer price index in the above graph.
After remaining close to their 1995 level, the tax-adjusted price indices for different modes of passenger transport have had varied evolutions since 2003. From 2003 to 2012, the tax-adjusted personal car index (purchases and use of passenger cars) rose 17%, and clearly exceeded its 2000 level. Despite rising for four years and a context of increasing oil prices, the index for air transport of passengers fell slightly. The index for rail transport increased by 9%, continuing the growth started in 2000, while the index for road transport of passengers (excluding taxis) fell by 19%; it is important to remember that only the part paid directly by the households is taken into consideration.

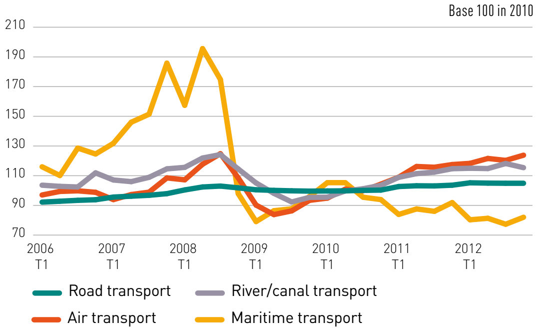
FREIGHT TRANSPORT PRICE INDICES

In 2012, the freight transport price index, whose variations were traditionally more moderate, rose for the second consecutive time (+3% and then +2%) after falling for two years. On the other hand, over the last quarters, changes in freight transport price indices other than for road were less extreme than before.

Since 2006, the price index of freight transport by road rose by 2% per year on average, from 1.9% for intercity to around 2% for international and proximity freight transport by road. In the same period, the fluvial index showed less change, rising by 1.6% per year, varying from 0.8% for domestic transport to 2.5% for international transport.

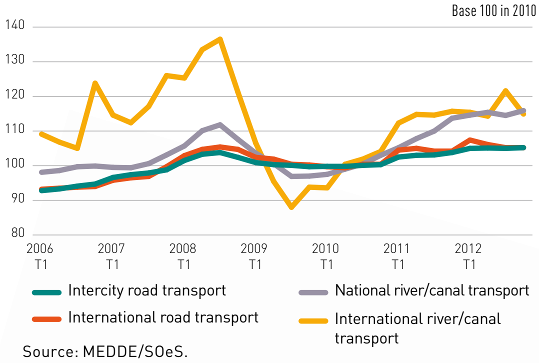
Air transport, followed by fluvial transport and, to a lesser extent, road transport, have seen considerable year-on-year variations in freight indices. The high and low points of the air transport index observed over the last year have a 5% gap (7% in 2011 and 9% in 2010). The volatility of fuel prices is the cause; for river transport, the relationship between demand and supply explains the figures.

FREIGHT TRANSPORT PRICE INDICES IN FRANCE



Source: MEDDE/SOeS.

FREIGHT TRANSPORT PRICE INDICES



Source: MEDDE/SOeS.

Freight transport price indices are calculated by the statistics department of the French Transport Ministry (SOeS). For road and river transport, only activities performed on behalf of others by companies registered in France with freight as their core business are included; a company transporting its own products by its own means is therefore not counted. The indices are calculated according to representative services defined mainly by the loading and unloading locations, the type of freight transported, as well as the characteristics of the contract binding the shipper and the carrier. The data used correspond to the current prices at the end of each quarter.

Monitored since the start of 2006, indices for air freight consist of freight transport services departing France by air waybill. The transport service is defined by the unloading location and the airline in charge of transport. Unlike the data for road and fluvial transport, the indices are drawn up using the so-called unit value method. They include fuel and security surcharges paid to the airline providing the transport.

The maritime transport price index has also been tracked since early 2006. It comprises transport services for third parties provided by companies registered in France with maritime freight as their activity (bulk and ferry). It is based on international price indices, unit prices and tariffs.

In connection with the major volatility of fuel prices, the air freight price index has fluctuated greatly since 2006, including a sharp drop in 2009. In 2012, the index rose for the third consecutive year (+6%).

The price index for maritime freight is very volatile, in line with the changes in bulk prices. However, it dropped sharply in 2012 (–8%) for the second year running.

Available since 2000, the fluvial freight price index increased every year, with the exception of the drop in 2009. In 2012, it rose by 4% following a 12% increase in the previous year. To a lesser extent than in air transport, major infra-annual variations can also be seen in the fluvial rate.

The price index for road freight rose by 2% in 2012. This is broken down as 1.9% for intercity and 2.2% for proximity transport. Compared with fluvial and air transport, the infra-annual variations are less considerable, even though, as shown by the structure of road haulage cost price of the CNR (*see page 49*), in December 2012 fuel accounted for 28% and 19% respectively of the total cost of long-distance and regional road haulage.

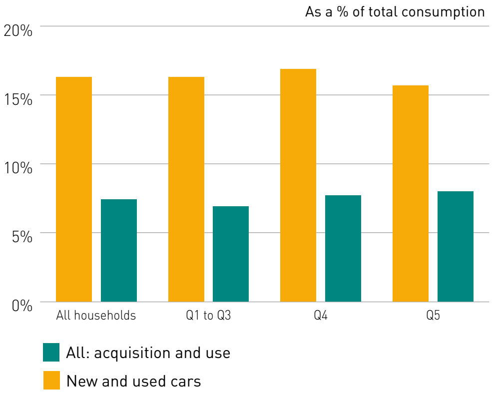
+2%

ANNUAL INCREASE IN 2012 OF THE ROAD HAULAGE PRICE INDEX FOR INTERCITY FREIGHT

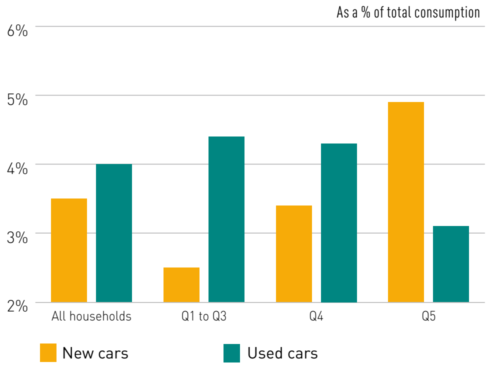
HOUSEHOLD MOTORING COSTS

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 to 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

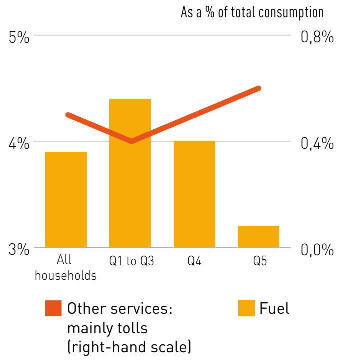


CAR PURCHASES

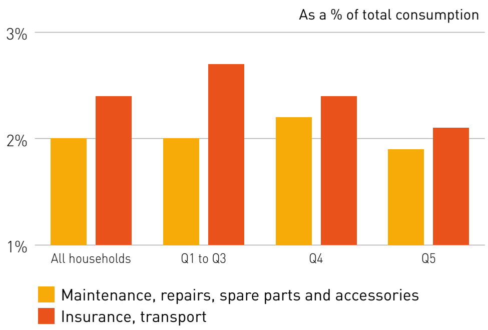


FUEL AND OTHER USE-RELATED SERVICES

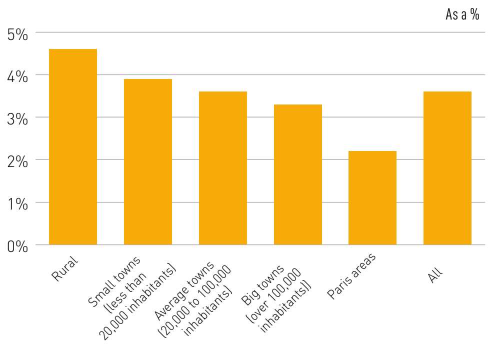
(mainly tolls)



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 macroeconomic level. When it comes to spending on used vehicles, the full cost is reflected in the surveys, while at the macroeconomic level, this spending corresponds mainly with the margins made by professionals involved in a transaction, and does not include transactions between individuals.
Some charts show the breakdown of different car items as a percentage of total consumption, equivalent to individual consumption (excluding rent) based on income, broken down by 20% segments of the population: Q5 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 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%.

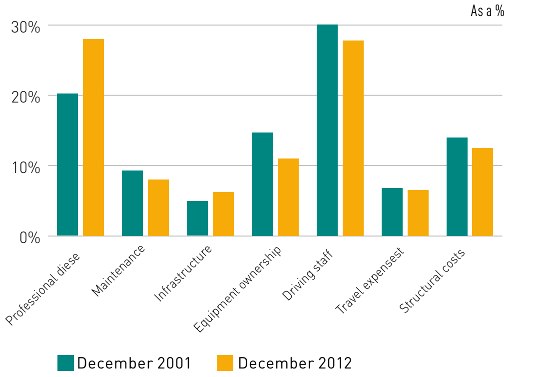
ROAD FREIGHT COST PRICE

According to the CNR, between 2002 and 2012, the cost price for long distance road freight rose by 36%, an average of 3.1% a year. For this same period, the cost price for regional transport rose by 32%, an average of 2.8% per year.

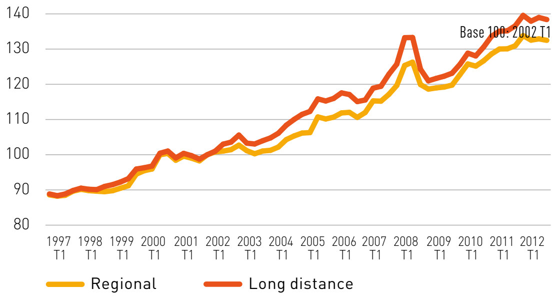
The share of professional diesel in the cost price of long-distance road freight rose by 7 percentage points between 2001 and 2007 to almost 28%. Then, this share lost almost 5 points and settled around 23% in 2008-2009 before recovering more than three points to 26% in 2010 and more than two points to 29% in 2011, thus exceeding its 2007 record level, and finally dropping slightly in 2012.

In the period from 2001 to 2012, the cost of equipment ownership (road tractors and semi-trailers) dropped by 4 percentage points from 14.7% to 11.0%. The share linked to infrastructures rose by 1.3 points to reach 6.2% in 2012 and should continue rising with the implementation of the national tax on heavy trucks (HT).

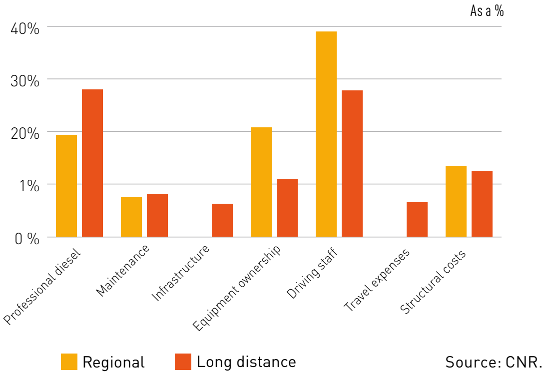
ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE



COST PRICE OF ROAD FREIGHT



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2012



Source: CNR.

The National Road Transport Committee (CNR) publishes, among others, two indexes showing changes in the cost of professional road transport: one for long distances and the other for regional transport.

Long distance transport covers national or international transportation by a maxi-code articulated truck and trailer where operating restrictions make it impossible or uncertain for the driver to return home each day.

Regional transport, with vehicles carrying a total load of between 3.5 and 19 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, costs fell by 22% before improving every year to reach 29% in 2011 and dropping slightly in 2012 to 28%.

From 2001-2012, infrastructure costs increased by 1.3 points to 6.2%.

On the other hand, equipment ownership (road tractors and semi-trailers) and maintenance (upkeep and repairs) dropped by 3.7 and 1.3 percentage points respectively, a little more than the figure for haulage employees (down 2.3 percentage points).

In the case of regional transport, fuel accounted for 19% of combined costs in December 2012; this lower percentage is one of the causes of the weak growth of more than 4 points in the regional index between 2002 and 2012 when compared with the long-distance index. The share for equipment ownership rose by between 20% and 22% over the same period.

28%

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

AUTOMOTIVE PRICE INDICES

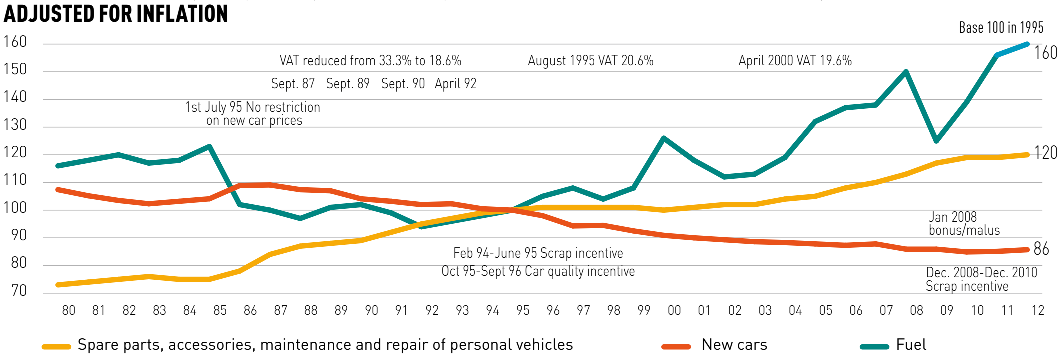
In 2012, the new passenger car price index rose by 2.6%, 0.6 percentage points faster than inflation. Since 1995, the new car price index has decreased by 14% in real terms. This variation can also be seen across Europe.
After dropping in the second semester of 2009, the price of fuel increased sharply in 2010 and 2011 before slowing in 2012, the real price index of fuel still reached a record level of 160, compared with 150 in 2008.
The price index for spare parts, accessories, and vehicle maintenance and repair rose by 2.5% in 2012, or, as in 2011, at a pace similar to that of inflation.

YEAR-ON-YEAR AUTOMOTIVE PRICE CHANGES

	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Fuel prices
2010	1.5%	0.3%	3.0%	13.4%
2011	2.1%	2.4%	2.3%	14.3%
2012	2.0%	2.6%	2.5%	4.9%

Source: Insee, calculs CCFA.

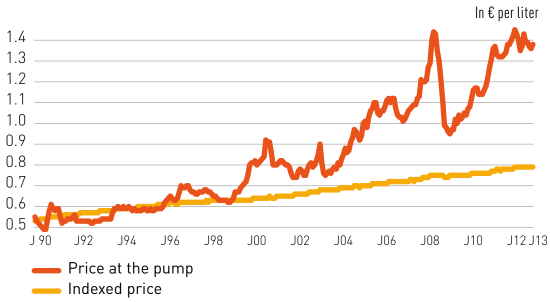
NEW PASSENGER CAR, FUEL, PARTS, ACCESSORIES, MAINTENANCE AND REPAIR PRICE INDICES, ADJUSTED FOR INFLATION



Source: INSEE, CCFA presentation.

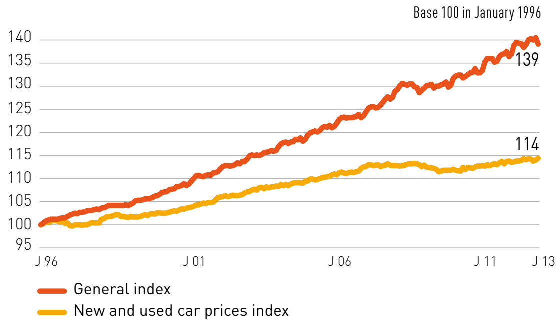
+6%
INCREASE OF THE PRICE OF DIESEL AS AN ANNUAL AVERAGE BETWEEN 2003 AND 2012

RETAIL PRICE FOR DIESEL FUEL 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.

+76%
INCREASE OF THE PRICE OF DIESEL BETWEEN 2003 AND 2012

The new car price index compares the prices of passenger cars with similar technical characteristics, so that price rises resulting from quality and equipment improvements can be factored out. Allowance is made for periodic rebates (except by mutual agreement) as well as the "bonus/malus" system.
To calculate the actual change in the key components of the cost of owning a car, these indices have been adjusted by the consumer price index in the first graph above.
When price controls were lifted in 1985, the cost of a new passenger car rose in real terms. Subsequently, the successive cuts in VAT rates on new passenger cars—from 33.3% to 18.6% between 1987 and 1992—led to a reduction in new car prices in real terms. Since then, car prices have continued to decline steadily in real terms due to the regular impact of competition and occasional impact of government support measures ("bonus/malus" system and scrap incentive scheme since 2008).
Actual repair and maintenance costs have risen steadily since 1985, along with the increase in required technology investments and the improved qualifications of workforce. 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 (labor cost, 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 the eurozone (17 countries), Eurostat calculates a new and used car price index; the data from the various countries are then harmonized. Since 1996, the evolution of this index compared with that of the general price index has shown intense pressure, as in France, on prices associated with the stiffness of competition. In 2012, the general price index rose 29% compared to 2000, whilst that of new and used car purchases only grew by 11%.

CONSUMER SPENDING ON PRIVATE VEHICLES

The financial and economic crisis has affected the purchasing power of households, (–0.9% in 2012 following +0.7% in 2011). Considering population growth, it has even seen its fastest fall since 1984. The consumption expenditure of households thus dropped (–0.4%) for the first time since 1993.
In this context, new car purchases of households dropped by 11% due to the major fall in registrations.
Household fuel purchases increased dramatically (+2% to €43 billion), in line with weaker price fluctuations than in 2011, a new record following those of 2008 and 2011. This expenditure accounts for amounts more than 20% higher than those for purchases of new and used cars, against 10% in 1011; in 1990 they were more than one quarter lower.

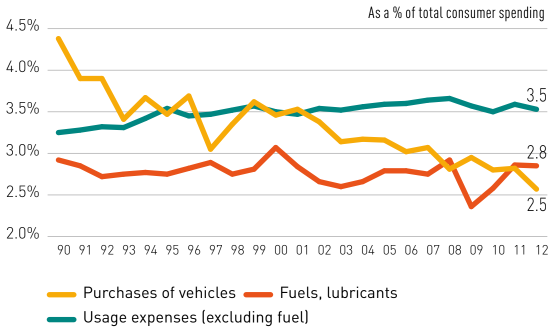
HOUSEHOLD CONSUMER SPENDING ON TRANSPORT

Amount and% of total consumer spending for the year

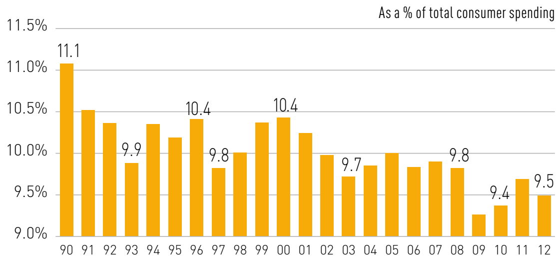
	Unit	1990		2000		2011 (1)		2012 (1)		change 2012/2011
Vehicle purchases	€ billions	31.9	4.4%	35.0	3.5%	41.7	2.8%	38.5	2.6%	–7.6%
– New and used cars		29.6	4.1%	31.8	3.1%	37.6	2.5%	34.5	2.3%	–8.0%
of which new cars		24.7	3.4%	23.6	2.3%	27.2	1.8%	24.3	1.6%	–10.8%
– Caravans, motorcycles, bicycles		2.3	0.3%	3.2	0.3%	4.1	0.3%	4.0	0.3%	–3.9%
Running costs	€ billions	44.9	6.2%	66.5	6.6%	94.8	6.4%	95.8	6.4%	+1.1%
– Maintenance, repairs, spare parts and accessories		19.3	2.6%	27.9	2.8%	41.5	2.8%	41.3	2.8%	–0.5%
of which automotive equipment manufacturing		9.3	1.3%	14.3	1.4%	23.2	1.6%	23.1	1.5%	–0.2%
of which automotive service		8.1	1.1%	10.5	1.0%	14.4	1.0%	14.3	1.0%	–0.7%
– Fuel and lubricants		21.2	2.9%	31.1	3.1%	41.8	2.8%	42.8	2.9%	+2.5%
– Tolls, parking fees, rental, driving lessons		4.4	0.6%	7.5	0.7%	11.5	0.8%	11.6	0.8%	+1.5%
Insurance	€ billions	3.9	0.5%	4.1	0.4%	6.5	0.4%	8.2	0.5%	+25.8%
TOTAL consumer spending on private vehicles	**€ billions**	**80.7**	**11.1%**	**105.7**	**10.4%**	**142.9**	**9.7%**	**142.4**	**9.5%**	**–0.3%**
Public transport	€ billions	10.3	1.4%	15.2	1.5%	25.1	1.7%	26.0	1.7%	+3.8%
Total consumer spending for the year	**€ billions**	**728**	**100%**	**1,013**	**100%**	**1,476**	**100%**	**1,501**	**100%**	**+1.7%**
Number of households (mainland France)	thousands	21,632		24,256		27,547		27,810		+1.0%
Spending on passenger cars per household	€	3,729		4,356		5,357		5,396		+0.7%
Spending on passenger cars per vehicle-owning household	€	4,855		5,425		6,214		6,134		–1.3%

(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 2012



TOTAL VEHICLE-RELATED EXPENDITURE



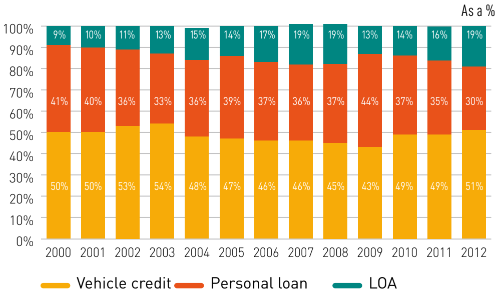
2,6%
VEHICLE PURCHASES AS A PERCENTAGE OF TOTAL HOUSEHOLD SPENDING FOR 2012

In 2012, households spent €142 billion (–0.3%) on their individual transport, most frequently by car. This amount represents 89% 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 48*).
Spending on car purchases fluctuates widely, a fact that largely explains most of the changes in the percentage of the household budget allocated to owning a car, and its falling trend. In 2012, the portion of the budget allocated to car purchases was 2.6%, which is the lowest level observed since the start of the 1990s. Purchases of new passenger cars by households continued to fall, and only represent 1.6% of their actual nominal consumption, compared with 1.9% in 2010, 2.3% in 2000, and notably 3.4% in 1990.
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.

AUTOMOBILE FINANCING

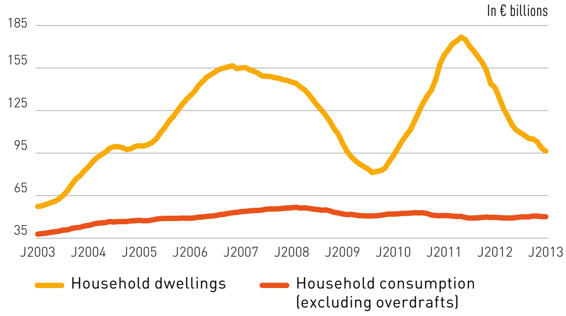
In 2012, 61% of new cars purchased by consumers were bought on credit (stable compared with 2011). After the end of the scrap incentive schemes, the level observed between 2003 and 2008 was regained.
Similar to the previous years, car (or conventional) loans were the most common source of financing (51%) almost equal to personal loans (30%, down 5 points from 2011) and lease-financing with a purchase option (19%). Compared with 2007, the year before the financial crisis, while the share of lease-financing with a purchase option (LOA) remained stable, car loans rose 5 points to the detriment of personal loans, showing a relative quieting of the competition among generalist banks. For new vehicles used by companies (both private cars and light commercial vehicles or heavy trucks), 2012 was marked by the end of the increase observed in 2010. The fall registered in long-term rentals was clearly less important than in other financing modes.

CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES.

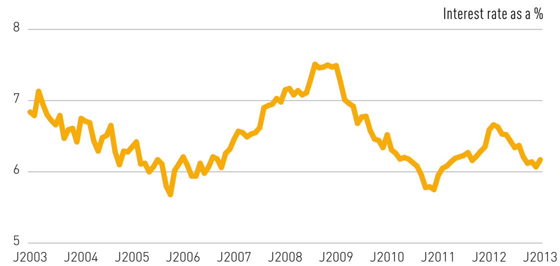


Sources: ASF, CCFA.

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



INTEREST ON LOANS, EXCLUDING OVERDRAFTS



Source: Banque de France.

61%

SHARE OF NEW CARS PURCHASED ON CREDIT BY CONSUMERS IN 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 €96 billion at the start of 2013.

CAR AND MOTORCYCLE SALES AND REPAIRS

In France, all motor vehicles are sold and repaired through dealership networks, totaling almost 15,000 outlets, including around 10,000 for French makes.

In 2012, motor vehicle sales generated revenue of €79 billion (–5.6% compared to 2011). The repercussions of purchases connected to the scrap incentives until the end of the first quarter of 2011 and the fall in the commercial vehicle market are the main reasons for this. Vehicle maintenance/repair, which rose on average by 4% per year between 2000 and 2007, has since recorded dropped by 2% in current euros between 2007 and 2012.

According to the INSEE, 6.5% of companies working in automotive sales and repairs were controlled by one group in 2009 (excluding franchises). These companies employed 50% of the workers in this sector (47% in 2008), representing 66% of total sales in the sector and 49% of the value added. In 2008, the four largest groups employed 8% of the workers (against 13% for the ten largest) and provided 7% of the value added to factor costs (14% for the ten largest).

LIGHT VEHICLE SALES NETWORKS IN FRANCE ON JANUARY 1ST, 2012

MAKES	Primary dealership
Renault	749
Peugeot	430
Citroën	430
French makes	**1,609**
Ford	307
Opel	280
Fiat	225
Volkswagen	374
BMW	177
Mercedes-Benz	159
Japanese makes	1,248
South Korean makes	462
Other makes	1,504
TOTAL	**6,345**

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 SALES AND REPAIRS

In current € billions, including VAT

Activity	2007	2008	2009	2010	2011	2012	Change 2012-2011
Automotive sales	77.1	76.8	78.2	79.3	83.5	78.8	–5.6%
Automotive maintenance and repairs	24.0	24.5	23.6	23.3	23.6	23.6	–0.2%
Retail sales of automotive equipment	7.1	7.2	7.3	7.5	7.7	7.8	1.9%
Motorcycle sales and repairs	2.6	2.6	2.4	2.3	2.4	2.3	–3.5%
Retail fuel sales	16.4	18.8	13.6	15.0	17.0	17.6	3.8%
TOTAL	**127.2**	**129.9**	**125.0**	**127.6**	**134.1**	**130.1**	**–3.0%**

Source: INSEE - National Accounts, base 2005 of national accounts: these are provisional results.

Vehicles require special care throughout their service life: this care includes continuous supervision whenever and wherever necessary with optimum servicing in order to maintain the vehicle's initial qualities.

Vehicle manufacturers and official dealers and repair specialists thus work closely to provide maintenance and repairs. They also cooperate to ensure warranty service, driver safety, environmental protection, spare parts availability and information about technical improvements.

To ensure a link between sales and customer support, dealer networks are based on carefully selected distributors and repair specialists capable of meeting make and product requirements.

79

BILLION EUROS: FRENCH MOTOR VEHICLE REVENUE IN 2012, INCLUDING VAT, ACCORDING TO THE INSEE

PRODUCTION OF THE AUTOMOTIVE INDUSTRY AND ITS ECONOMIC IMPACT

The margin rate (ratio between gross operating surplus and VA) was 5% in 2011, much lower than the average of the early 2000s (25%) and in industry as a whole (26%).
From 2000 to 2007, the production of the automotive industry ranged between €71 billion and €77 billion. Due to the crisis, it had fallen to €49 billion before recovering in the following two years. In 2011, it increased again (+7%), reaching €62 billion.
In a very complicated automotive market, the value added (VA) of the automotive industry also recovered following its low point in 2009; however, it dropped by 7% in 2011, reaching €9 billion (or 14% of production). Its total purchases (or intermediate consumption)—up by 9%—represented six times its VA, at €53 billion, benefiting a number of economic sectors. A capital-intensive industry, the investment rate (GFCF to VA ratio) for the automotive branch was 28% in 2009 (20% overall and 18% for the industry excluding energy).

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		2000	2005	2008	2009	2010	2011 [1]
Purchases from other industries	%	75.4	80.6	78.8	81.4	81.3	81.7
Electrical, electronic and IT equipment; machines	%	19.8	19.9	18.1	18.3	18.6	18.8
of which: manufacture of IT, electronic and optical products		4.8	4.8	3.8	3.8	4.0	4.0
manufacture of electrical equipment		3.6	3.8	3.6	3.7	3.9	4.1
manufacture of machinery and equipment not included elsewhere		11.4	11.2	10.7	10.8	10.7	10.8
Other industries (including coking and refining)	%	37.4	40.9	39.2	39.7	39.6	39.8
of which: metallurgy and metalworking		17.8	18.4	18.3	18.8	18.7	18.8
manufacture of rubber, plastic and mineral products		9.4	11.0	10.2	10.1	10.2	10.2
other manufacturing industries (including repairs and installation)		3.5	4.4	4.1	4.1	4.0	4.3
chemical industry		2.2	2.4	2.2	2.3	2.3	2.4
manufacture of textiles, clothing industries, leather and shoes		1.6	1.7	1.5	1.4	1.5	1.4
wood, paper and printing industries		1.5	1.5	1.6	1.7	1.7	1.6
Extraction, energy and water industries	%	1.3	1.2	1.5	1.6	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	0.7	0.7	0.7
Construction	%	0.5	0.6	0.5	0.6	0.6	0.6
Motorcycle and car sales and repairs	%	0.6	0.9	0.9	0.9	0.8	0.8
Transport and storage	%	0.6	0.6	0.6	0.6	0.7	0.6
Information and communication	%	0.7	0.7	0.7	0.7	0.7	0.7
Financial and insurance services	%	0.9	0.9	0.8	0.9	1.0	1.0
Real estate activities	%	0.2	0.3	0.3	0.3	0.3	0.3
Corporate services	%	11.6	12.9	14.4	16.0	15.7	15.6
of which: legal, accounting, control and technical analysis, etc.		1.4	1.8	1.8	1.8	1.9	1.9
research and development		4.1	5.4	7.0	9.5	8.8	8.5
other specialized, scientific and technical activities		2.7	2.7	2.6	2.4	2.4	2.3
administrative and support services		3.3	3.1	3.1	2.2	2.6	3.0
Other commercial sector industries	%	1.9	1.6	1.8	1.7	1.8	1.8
All commercial sector purchases	%	16.4	18.0	19.5	21.1	21.0	20.8
Purchases within the industry	**%**	**24.6**	**19.4**	**21.2**	**18.6**	**18.5**	**18.3**
Total production at base prices	**current € billion**	**71.4**	**76.7**	**67.3**	**49.0**	**58.1**	**62.0**
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
Total purchases [2]	**current € billion**	**58.0**	**64.7**	**57.9**	**41.9**	**48.9**	**53.4**
As a % of production at base prices	%	81.3	84.4	86.1	85.4	84.2	86.2
Value added of the branch	**current € billion**	**13.4**	**12.0**	**9.4**	**7.1**	**9.2**	**8.6**
As a % of production at base prices	%	18.7	15.6	13.9	14.6	15.8	13.8
Gross Operating Surplus (GOS)	**current € billion**	**–**	**–**	**0.4**	**–0.8**	**1.3**	**0.4**
As a % of value added (margin rate)	%	–	–	4.4	–11.8	14.4	4.6
Gross Fixed Capital Formation (GFCF)	**current € billion**	**–**	**–**	**–**	**–**	**–**	**–**
As a % of value added (investment rate), 2000 base	%	31.4	24.6	30.8	28.4	–	–

(1) Accounts for 2011 are semi-definitive. (2) Total purchases (intermediate consumption) refers to the value of goods and services transformed or consumed fully during the production process. It does not include the depreciation of fixed production assets, which is recorded in uses of capital employed. Source: INSEE – National accounts (base 2005).

5%

MARGIN RATE OF THE AUTOMOTIVE INDUSTRY IN 2011

Total purchases as a percentage of production reached 86% in 2011, slightly higher than in 2005 to 2008 and equivalent to 2008 figures. Total industry purchases in 2011 were split 18% within the industry and 82% 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 commercial sector accounted for 21% of purchases to the services sector (18% in 2005): the most requested corporate services were research and development (8%), 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 sales, the French OEM industry is third in Europe.
The FIEV estimates the workforces of automotive suppliers belonging to the CLIFA for the year 2012 at 239,000 jobs, with sales of €45 billion. In 2007, before the crisis, their estimates were of 315,000 jobs and sales of €52 billion.

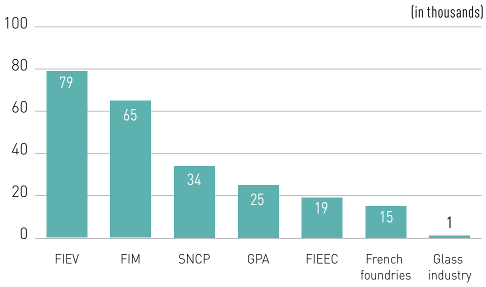
TURNOVER OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY (2012)

In € billions

FIEV	
Fédération des industries des équipements pour véhicules (French Automotive Equipment Industries Association)	16.2
FIM	
Fédération des industries mécaniques (Federation of Mechanical Industries)	10.3
SNCP	
Syndicat national du caoutchouc et des polymères (National Union of Rubber and Polymer Workers)	6.1[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)	4.9
Fondeurs de France	**2.1**
Glass industry	**0.3**

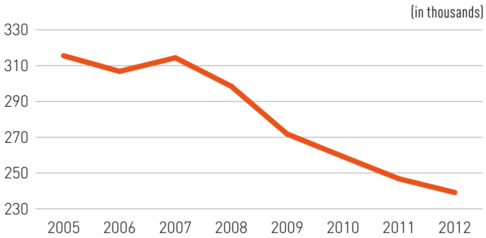
(1) 2011 data.
Sources: FIEV, professional organizations.

WORKFORCE OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY IN 2012



(1) 2011 data.
Sources: FIEV, professional organizations.

WORKFORCE OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY



Sources: FIEV, professional organizations.

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. Equipment manufacturers have two types of markets: the first type with a total worth of €13.7 billion in 2012, producing equipment for assembly chains, and the second type dealing with spare parts, with a total worth of around €2.5 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 sales of suppliers to the automotive industry to have reached €44.8 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 sales. 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)*.

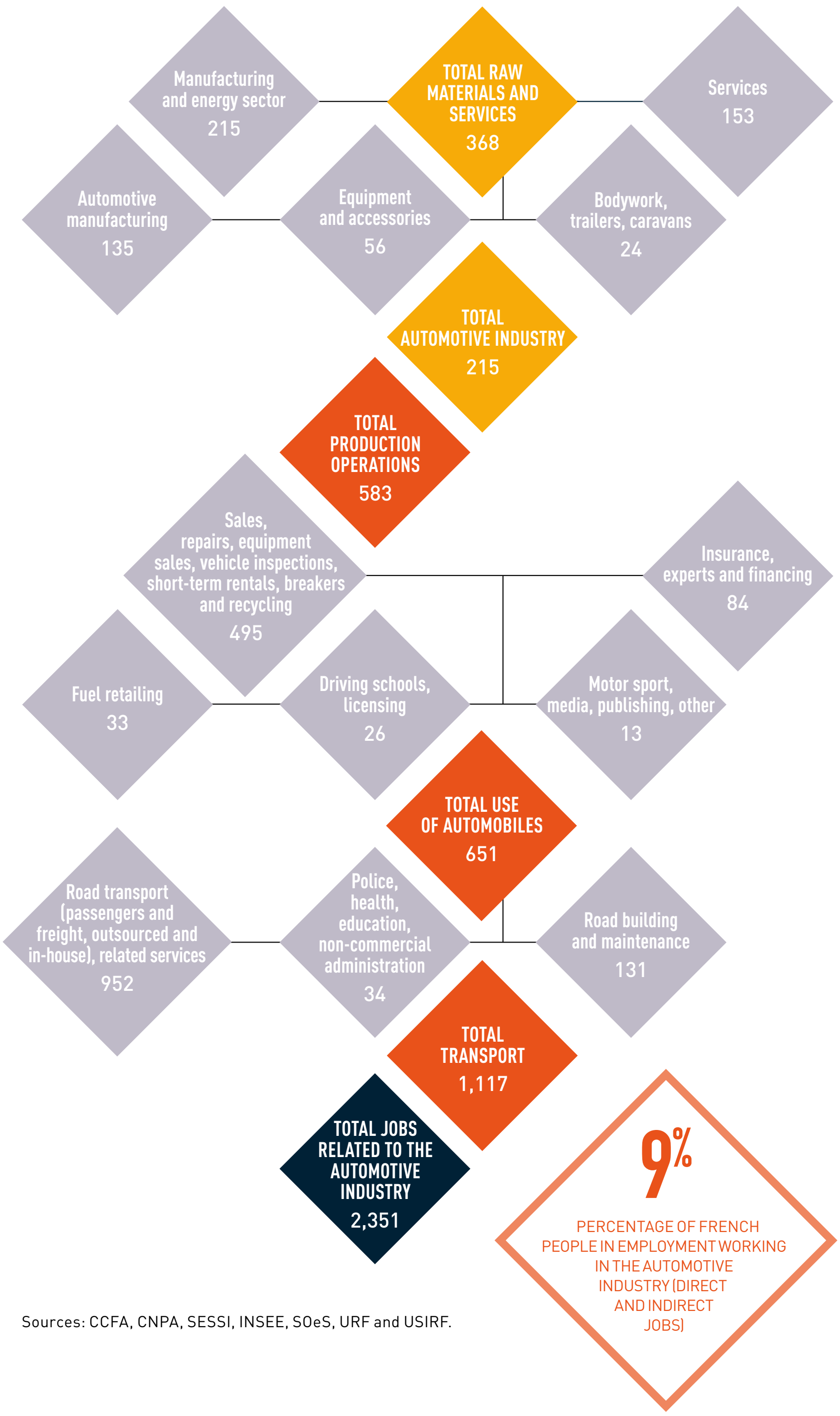
1st

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

EMPLOYMENT

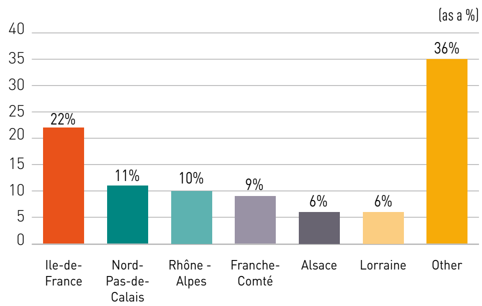
In the broadest sense, in 2012 the industry provided work for close to 2.3 million people, representing more than 9% of France's employed working population.
The automotive industry alone directly employed 215,000 people, representing 7% of all employment in the manufacturing and energy sector (including 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. Following the consolidation of 2011, the fall in employment figures resumed in 2012.

JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2012
In thousands of jobs



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

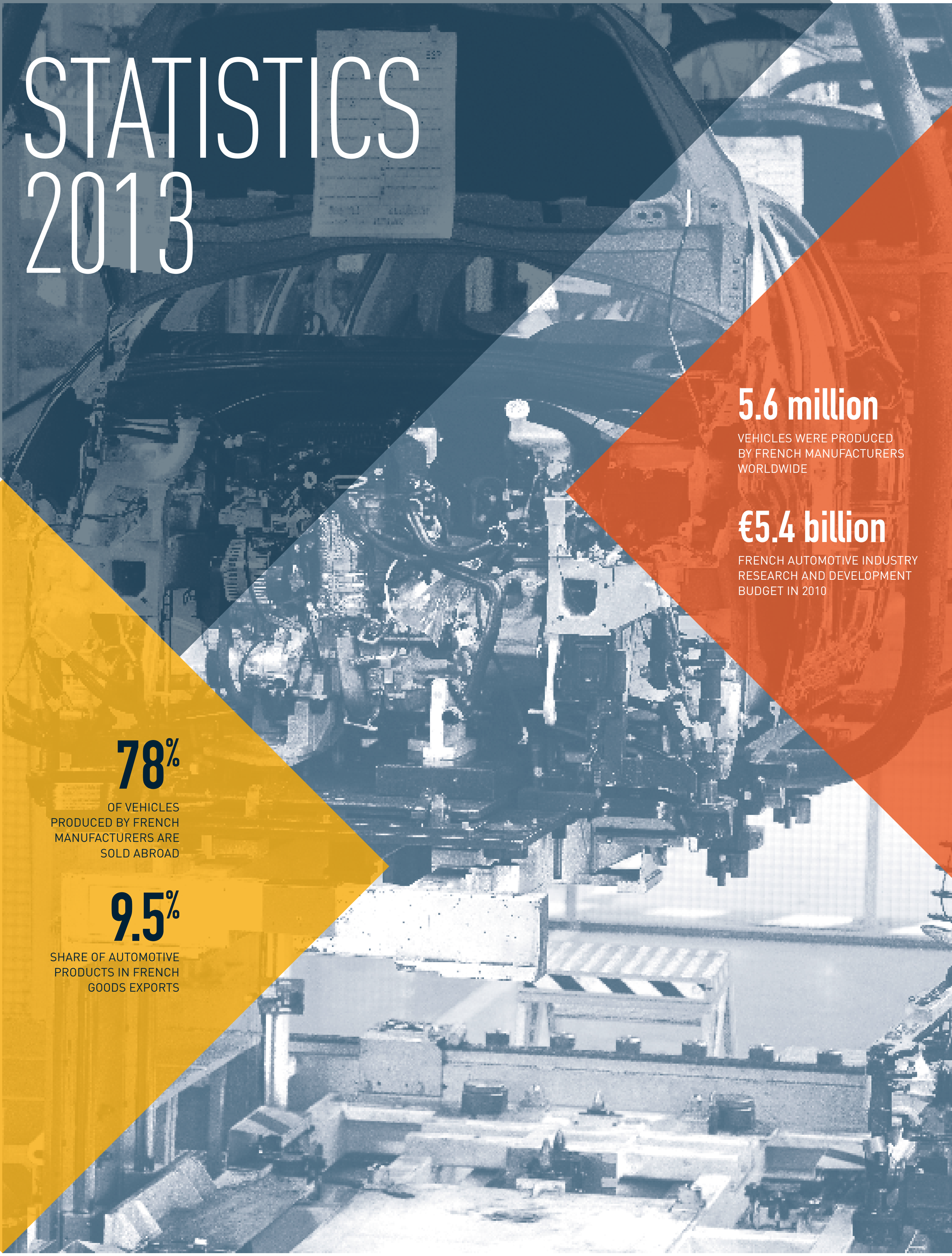
GEOGRAPHIC BREAKDOWN OF AUTOMOTIVE INDUSTRY EMPLOYEES ON JANUARY 1ST, 2011



Source: INSEE.

As the driving force behind industrial output in France, the automotive industry and its suppliers directly and indirectly created 583,000 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 77*), OEM employees join those working for car seat and electrical equipment manufacturers for engines and vehicles, that previously were included in purchases from manufacturing an energy industries.
According to figures published by the FIEV, employees for 2012 in the automotive industry not including manufacturers stood at 239,000, including 79,000 for equipment (FIEV), 65,000 for mechanics (FIM), 34,000 for tires and rubber (SNCP) and 25,000 for plastics (GPA, figures 2011).
Vehicle usage provided jobs for more than 651,000 people, particularly in the areas of vehicle-related services (sales, repairs, automotive equipment retailing, etc.), fuel and recycling (oil recovery, car breakers, etc.). These figures concern employees and also individual entrepreneurs and non-salaried employees.
Finally, the road transport (passenger and freight) sector and its related infrastructure employed more than 1 million people. These include both outsourced and in-house transport operations.
In a broader sense of freight transport and logistics (storage and related services), the French Transport Ministry's Statistics Department (SESP) carried out a multi-sector analysis that showed there were 1.5 million employees in this sector in 2004.

STATISTICS 2013



5.6 million

VEHICLES WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE

€5.4 billion

FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN 2010

78%

OF VEHICLES PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

9.5%

SHARE OF AUTOMOTIVE PRODUCTS IN FRENCH GOODS EXPORTS

Comité des Constructeurs Français d'Automobiles

PRODUCTION

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

PASSENGER CARS

In units

	1980	1990	2000 [2]	2008	2009	2010	2011	2012
Europe	**11,983,548**	**15,231,409**	**17,407,047**	**18,381,339**	**15,247,066**	**17,341,941**	**18,279,084**	**17,382,025**
Western Europe	**10,401,320**	**13,061,853**	**14,778,879**	**12,849,218**	**11,037,669**	**12,138,971**	**12,445,044**	**11,331,076**
Germany	3,520,934	4,660,657	5,131,918	5,532,030	4,964,523	5,552,409	5,871,918	5,388,456
Belgium	882,001	1,160,412	912,233	680,131	524,595	528,996	560,779	507,204
Spain	1,028,813	1,679,301	2,366,359	1,943,049	1,812,688	1,913,513	1,839,068	1,539,680
France [1]	**2,938,581**	**3,294,815**	**2,879,810**	**2,145,935**	**1,819,497**	**1,924,171**	**1,931,030**	**1,682,814**
Italy	1,445,221	1,874,672	1,422,284	659,221	661,100	573,169	485,606	396,817
Netherlands	80,779	121,300	215,085	59,223	50,620	48,025	40,772	28,000
Portugal	61,000	60,221	178,509	132,242	101,680	114,563	141,779	115,735
United Kingdom	923,744	1,295,611	1,641,452	1,446,619	999,460	1,270,444	1,343,810	1,464,906
Sweden	235,320	335,853	259,959	252,287	128,738	177,084	188,969	162,814
Central and Eastern Europe	**1,582,228**	**2,002,000**	**2,330,692**	**4,910,554**	**3,698,466**	**4,599,576**	**5,194,306**	**5,474,289**
Turkey	**31,529**	**167,556**	**297,476**	**621,567**	**510,931**	**603,394**	**639,734**	**576,660**
North and South America	**8,663,060**	**8,450,862**	**10,022,089**	**9,202,759**	**6,954,032**	**8,228,067**	**8,761,800**	**10,159,350**
NAFTA	**7,526,658**	**7,747,823**	**8,371,806**	**6,189,535**	**3,960,731**	**5,084,330**	**5,624,553**	**6,956,158**
of which: Canada	846,777	1,072,281	1,550,500	1,195,436	822,267	967,077	990,482	1,040,298
USA	6,376,825	6,077,449	5,542,217	3,776,641	2,195,588	2,731,105	2,976,991	4,105,853
Mexico	303,056	598,093	1,279,089	1,217,458	942,876	1,386,148	1,657,080	1,810,007
South America	**1,136,402**	**703,039**	**1,650,283**	**3,013,224**	**2,993,301**	**3,143,737**	**3,137,247**	**3,203,192**
of which: Argentina	218,516	81,107	238,921	399,236	380,067	508,401	577,233	497,376
Brazil	977,697	663,097	1,351,998	2,545,729	2,575,418	2,584,690	2,519,389	2,623,704
Asia-Pacific	**8,796,971**	**11,910,333**	**13,573,073**	**25,058,888**	**25,289,717**	**32,414,823**	**32,481,277**	**35,146,789**
of which: China	–	–	605,000	6,737,745	10,383,831	13,897,083	14,485,326	15,523,658
South Korea	55,000	986,751	2,602,008	3,450,478	3,158,417	3,866,206	4,221,617	4,167,089
India	30,538	176,015	517,957	1,846,051	2,175,220	2,831,542	3,040,144	3,285,496
Japan	7,038,108	9,947,972	8,359,434	9,928,143	6,862,161	8,310,362	7,158,525	8,554,219
Africa	**277,058**	**209,603**	**213,444**	**382,095**	**281,783**	**356,872**	**375,585**	**381,377**
of which: South Africa	277,058	209,603	230,577	321,124	222,981	295,394	312,265	274,873
TOTAL	**29,720,637**	**35,802,207**	**41,215,653**	**53,025,081**	**47,772,598**	**58,341,703**	**59,897,746**	**63,069,541**

COMMERCIAL VEHICLES

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Europe	**2,563,596**	**2,688,509**	**2,783,468**	**3,396,455**	**1,808,776**	**2,549,317**	**2,674,986**	**2,439,436**
Western Europe	**1,663,080**	**1,671,915**	**2,326,653**	**2,325,472**	**1,204,952**	**1,686,875**	**1,676,587**	**1,496,105**
Germany	357,619	315,895	394,697	513,700	245,334	353,576	275,035	260,813
Belgium	47,029	91,784	121,061	44,367	12,759	26,306	n/a	n/a
Spain	152,846	374,049	666,515	598,595	357,390	474,387	534,261	439,499
France [1]	**439,852**	**474,178**	**468,551**	**423,043**	**228,196**	**305,250**	**311,898**	**284,951**
Italy	166,635	246,178	316,031	364,553	182,139	265,017	304,742	274,951
Netherlands [4]	32,102	29,832	52,234	73,271	26,131	46,081	32,379	29,462
Portugal	58,000	77,466	68,215	42,913	24,335	44,166	50,463	47,826
United Kingdom	389,170	270,133	172,442	202,896	90,679	123,019	120,189	112,039
Sweden	63,080	74,415	41,384	56,012	27,698	40,000	n/a	n/a
Central and Eastern Europe	**900,516**	**975,000**	**323,203**	**545,440**	**245,150**	**371,279**	**449,002**	**447,652**
Turkey	**19,352**	**41,594**	**133,471**	**525,543**	**358,674**	**491,163**	**549,397**	**495,679**
North and South America	**2,599,948**	**5,032,605**	**9,761,798**	**7,683,330**	**5,608,388**	**8,139,331**	**9,032,009**	**9,864,003**
NAFTA	**2,349,318**	**4,775,818**	**9,325,214**	**6,754,191**	**4,822,200**	**7,088,685**	**7,853,153**	**8,838,432**
of which: Canada	527,522	850,566	1,411,136	886,805	668,215	1,101,112	1,144,639	1,423,434
USA	1,634,846	3,702,787	7,257,640	4,916,900	3,535,809	5,031,439	5,684,544	6,223,031
Mexico	186,950	222,465	656,438	950,486	618,176	956,134	1,023,970	1,191,967
South America	**250,630**	**256,787**	**436,584**	**929,139**	**786,188**	**1,050,646**	**1,178,856**	**1,025,571**
of which: Argentina	63,153	5,337	100,711	197,850	132,857	208,139	251,538	267,119
Brazil [3]	187,477	251,450	329,519	670,247	607,505	797,038	888,472	718,913
Asia-Pacific	**4,344,363**	**4,492,406**	**4,497,938**	**6,448,515**	**6,470,438**	**8,515,432**	**8,094,235**	**8,563,210**
of which: China	–	–	1,464,000	2,561,435	3,407,163	4,367,678	3,933,550	3,748,150
South Korea	65,012	334,879	512,990	376,204	354,509	405,535	435,477	390,649
India	83,379	186,640	283,403	486,277	466,330	725,531	887,267	859,698
Japan	4,004,776	3,538,824	1,781,362	1,647,501	1,071,896	1,318,558	1,240,105	1,388,492
Africa	**127,698**	**125,174**	**115,305**	**203,918**	**131,668**	**158,204**	**181,052**	**205,019**
of which: South Africa	127,698	125,174	126,787	241,841	150,942	176,655	220,280	264,551
TOTAL	**9,675,970**	**12,399,000**	**17,158,509**	**17,732,218**	**14,019,270**	**19,362,284**	**19,982,282**	**21,071,668**

(1) As of 1996, figures are based on the number of vehicles assembled in France by French manufacturers.
(2) As of 2001, some passenger cars were reclassified as commercial vehicles.
(3) Since 2010, Brazilian production does not include CKDs.
(4) Production in the Netherlands did not include DAF en 2012.
Sources: OICA, CCFA estimates for July 2013.

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	2008 [1]	2009	2010	2011	2012
Germany	2,426,187	3,349,788	3,378,343	3,090,040	3,807,175	2,916,259	3,173,634	3,082,504
Austria	227,548	288,618	309,427	293,697	319,403	328,563	356,145	336,010
Belgium	399,240	473,506	515,204	535,947	476,194	547,340	572,211	486,737
Denmark	73,774	80,654	112,688	150,143	112,199	153,583	170,036	170,763
Spain	504,051	988,270	1,381,515	1,161,176	952,772	982,015	808,051	699,589
Finland	103,167	139,095	134,646	139,611	88,344	107,346	126,123	111,251
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,091,368**	**2,302,398**	**2,251,669**	**2,204,229**	**1,898,760**
Greece	35,700	115,480	290,222	267,295	219,730	141,501	97,680	58,482
Ireland	93,563	82,584	230,989	151,603	57,455	88,445	89,911	79,498
Italy	1,717,432	2,307,055	2,415,600	2,161,673	2,159,436	1,961,578	1,749,740	1,403,010
Luxembourg	21,500	38,422	41,896	52,359	47,265	49,726	49,881	50,398
Norway	95,550	61,901	97,376	110,617	98,675	127,754	138,345	137,967
Netherlands	450,076	502,732	597,640	499,918	387,155	482,527	555,812	502,544
Portugal	58,357	210,924	257,834	213,389	161,013	223,464	153,404	95,309
United Kingdom	1,513,761	2,008,934	2,221,670	2,131,795	1,994,999	2,030,846	1,941,253	2,044,609
Sweden	192,588	229,941	290,529	253,982	213,408	289,684	304,984	279,899
Switzerland	279,764	329,899	316,519	288,557	266,049	292,453	318,958	328,139
European Union 15 countries	**9,690,146**	**13,125,133**	**14,312,087**	**13,193,996**	**13,298,946**	**12,554,546**	**12,353,094**	**11,299,363**
Europe 17 countries	**10,065,460**	**13,516,933**	**14,725,982**	**13,593,170**	**13,663,670**	**12,974,753**	**12,815,435**	**11,773,371**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**5,183,155**	**2,986,411**	**3,488,531**	**4,344,480**	**4,413,858**
Canada	948,967	886,217	849,132	872,720	729,023	694,349	681,956	748,530
USA	8,760,937	9,300,678	8,846,625	6,813,369	5,400,890	5,635,433	6,089,403	7,241,900
Mexico	286,000	353,000	603,010	589,051	439,103	499,567	592,101	649,333
Argentina	215,177	77,306	224,950	452,539	373,231	522,591	626,037	600,915
Brazil	793,028	532,791	1,188,818	2,341,709	2,645,013	2,859,000	2,647,250	2,851,540
South Korea	45,972	626,126	1,057,620	1,020,457	1,234,618	1,308,326	1,316,320	1,306,749
Japan	2,854,185	5,102,659	4,259,771	4,184,266	3,905,310	4,203,181	3,509,036	4,572,333
Turkey	31,000	215,000	456,696	305,998	369,819	509,784	593,519	556,280
World	**28,500,000**	**34,825,967**	**38,689,767**	**49,876,618**	**49,761,464**	**55,933,978**	**57,243,311**	**60,492,160**

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units

	1980	1990	2000	2008 [1]	2009	2010	2011	2012
Germany	175,687	203,389	314,804	334,999	242,178	282,157	334,820	311,498
Austria	21,821	29,211	36,457	42,303	31,026	34,001	40,510	38,819
Belgium	34,478	46,670	66,125	81,276	63,431	64,048	71,300	63,782
Denmark	19,469	23,031	38,108	41,465	19,585	19,980	28,482	28,384
Spain	105,934	249,185	335,684	201,367	121,450	132,104	123,353	91,402
Finland	17,699	32,154	18,128	21,632	12,451	14,218	18,302	15,254
France	**323,291**	**446,983**	**477,204**	**523,432**	**416,183**	**457,215**	**482,823**	**432,971**
Greece	53,500	30,075	25,015	25,570	17,388	12,341	7,002	4,036
Ireland	11,905	28,087	46,261	34,010	10,566	11,544	12,532	12,230
Italy	122,293	159,322	268,057	260,412	198,390	199,350	193,209	142,754
Luxembourg	1,300	2,961	4,642	6,046	4,197	4,267	5,134	4,651
Norway	15,135	23,035	35,618	42,630	28,762	34,600	41,968	38,942
Netherlands	47,926	68,791	114,354	104,139	64,204	59,777	71,945	69,349
Portugal	46,967	71,904	161,045	61,730	42,747	49,290	37,958	18,126
United Kingdom	274,143	293,473	301,523	353,463	227,543	262,730	308,230	289,154
Sweden	19,684	33,133	38,474	47,477	34,105	44,450	54,082	46,542
Switzerland	22,418	28,165	29,345	32,789	28,675	30,371	36,298	38,134
European Union 15 countries	**1,276,097**	**1,718,369**	**2,245,881**	**2,139,321**	**1,505,444**	**1,647,472**	**1,789,682**	**1,568,952**
Europe 17 countries	**1,313,650**	**1,769,569**	**2,310,844**	**2,214,740**	**1,562,881**	**1,712,443**	**1,868,381**	**1,646,633**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**1,028,392**	**584,642**	**734,587**	**701,946**	**824,401**
Canada	335,827	416,041	736,951	800,802	753,209	889,039	938,265	967,648
USA	2,476,777	4,845,360	8,965,048	6,679,796	5,200,478	6,136,787	6,951,210	7,544,036
Mexico	166,000	198,000	302,944	486,712	337,279	347,314	346,377	377,879
Argentina	59,881	17,481	81,995	159,231	113,911	175,813	220,814	231,111
Brazil	187,233	180,000	302,288	478,641	496,227	656,064	986,003	950,531
South Korea	58,502	328,151	372,840	211,000	231,000	247,693	263,000	237,000
Japan	2,161,305	2,674,834	1,703,114	897,969	703,946	752,955	701,188	797,388
Turkey	19,000	43,015	199,825	220,546	206,050	283,388	270,920	261,340
World	**9,150,000**	**13,410,615**	**18,723,143**	**18,687,337**	**15,942,023**	**19,224,875**	**20,714,840**	**21,300,472**

(1) Some light commercial vehicles have been reclassified as passenger cars.
Sources: CCFA - OICA from 2011, which uses data from its members and thus local definitions of vehicle types.

PRODUCTION

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	363,443	381,500
Opel	32,742	76,441	288,651	310,802	238,910	200,410	236,982	226,521
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,278,671	1,238,822	985,365	1,095,790	1,258,667
Ford	5,344	90,117	179,130	342,580	348,715	317,161	347,553	343,328
BMW	33,520	28,135	194,794	483,359	416,432	386,557	448,604	478,091
Total[2]	**465,788**	**662,007**	**1,788,999**	**2,830,087**	**2,640,456**	**2,227,276**	**2,502,419**	**2,709,347**
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%	45.1%	46.1%
Spain								
Total[2]	**n/a**	**150,221**	**681,262**	**1,100,000**	**910,000**	**830,000**	**1,000,000**	**1,030,000**
TOTAL gasoline + diesel	**n/a**	**1,679,301**	**2,445,421**	**2,195,780**	**1,943,049**	**1,812,688**	**1,913,513**	**1,839,068**
Diesel share	n/a	8.9%	27.9%	50%	47%	46%	52%	56%
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
United Kingdom								
Honda	0	0	596	100,548	73,016	11,812	35,908	22,177
Jaguar-Land Rover	0	25,374	69,775	164,509	161,051	98,242	137,824	162,523
Mini	0	0	0	29,031	40,327	31,586	34,752	39,679
Nissan	0	3,200	54,396	81,832	118,096	116,139	173,050	226,357
Opel	0	7,695	125,880	44,892	34,441	26,955	35,206	79,657
Peugeot	0	50,942	37,432	0	0	0	0	0
Toyota	0	0	38,931	141,570	106,271	54,257	55,599	44,298
Others	774	34,740	57,413	3,119	2,095	1,739	1,814	1,375
Total	**774**	**121,951**	**384,423**	**565,501**	**535,297**	**340,730**	**474,153**	**576,066**
TOTAL gasoline + diesel	**923,744**	**1,295,611**	**1,641,317**	**1,534,394**	**1,447,550**	**999,288**	**1,274,070**	**1,340,842**
Mini	0.1%	9.4%	23.4%	36.9%	37.0%	34.1%	37.2%	43.0%

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

REGISTRATIONS

NEW HYBRID OR ELECTRIC PASSENGER CARS REGISTRATIONS IN WESTERN EUROPE

In units and as a % of total registrations

	Engine	2005	2006	2007	2008	2009	2010	2011	2012
Germany	electric	0	0	0	0	14	160	1,731	2,410
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	hybrid	3,559	5,227	7,497	6,126	8,000	10,174	11,788	20,718
		0.1%	0.2%	0.2%	0.2%	0.2%	0.3%	0.4%	0.7%
Austria	electric	0	0	0	2	39	112	631	426
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
	hybrid	460	585	766	665	1,055	1,248	1,310	2,174
		0.1%	0.2%	0.3%	0.2%	0.3%	0.4%	0.4%	0.6%
Belgium	electric	0	0	0	0	0	47	263	562
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	hybrid	471	889	1,308	1,877	1,839	4,073	6,676	5,875
		0.1%	0.2%	0.2%	0.4%	0.4%	0.7%	1.2%	1.2%
Denmark	electric	2	2	2	5	78	50	460	527
		0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%	0.3%
	hybrid	5	13	14	48	58	148	263	431
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.3%
Spain	electric	0	0	0	0	1	69	367	439
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	hybrid	908	2,582	2,951	4,277	4,582	6,253	6,904	8,564
		0.1%	0.2%	0.2%	0.4%	0.5%	0.6%	0.9%	1.2%
France	**electric**	**6**	**14**	**6**	**4**	**12**	**184**	**2,630**	**5,663**
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%
	hybrid	**2,857**	**6,414**	**7,178**	**8,468**	**9,876**	**9,655**	**13,635**	**27,889**
		0.1%	0.3%	0.3%	0.4%	0.4%	0.4%	0.6%	1.5%
Italy	electric	28	26	23	120	60	112	306	519
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	hybrid	1,132	2,062	3,372	2,796	7,311	4,841	5,161	6,833
		0.1%	0.1%	0.1%	0.1%	0.3%	0.2%	0.3%	0.5%
Norway	electric	7	14	5	177	117	355	1,996	3,950
		0.0%	0.0%	0.0%	0.2%	0.1%	0.3%	1.4%	2.9%
	hybrid	337	410	1,349	1,762	1,973	3,144	3,645	6,116
		0.3%	0.4%	1.0%	1.6%	2.0%	2.5%	2.6%	4.4%
Netherlands	electric	0	0	0	2	22	96	846	933
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
	hybrid	2,940	3,163	3,678	11,814	16,275	16,099	14,868	25,446
		0.6%	0.7%	0.7%	2.4%	4.2%	3.3%	2.7%	5.1%
United Kingdom	electric	0	298	397	179	55	167	1,098	1,262
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	hybrid	5,766	8,957	15,972	15,385	14,645	22,148	23,398	25,892
		0.2%	0.4%	0.7%	0.7%	0.7%	1.1%	1.2%	1.3%
Sweden	electric	1	0	0	0	21	9	181	268
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	hybrid	1,947	2,841	3,391	4,153	3,058	3,628	2,909	3,539
		0.7%	1.0%	1.1%	1.6%	1.4%	1.3%	1.0%	1.3%
Switzerland	electric	13	5	19	21	53	199	446	560
		0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%
	hybrid	1,413	2,240	3,239	3,118	3,905	4,210	5,358	6,908
		0.5%	0.8%	1.1%	1.1%	1.5%	1.4%	1.7%	2.1%
Western Europe (including the countries not shown)	electric	57	359	452	515	475	1,611	11,263	17,850
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
	hybrid	23,210	37,469	55,055	66,711	76,525	90,198	99,822	144,573
		0.2%	0.3%	0.4%	0.5%	0.6%	0.7%	0.8%	1.2%

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY GROUP IN WESTERN 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	2008 (1)	2009	2010	2011	2012
PSA Peugeot Citroën	**1,225**	**1,719**	**1,930**	**1,792**	**1,818**	**1,776**	**1,620**	**1,407**
	11.5%	12.7%	13.1%	13.2%	13.3%	13.7%	12.7%	12.0%
Renault Group	**1,135**	**1,315**	**1,559**	**1,138**	**1,237**	**1,305**	**1,195**	**967**
	10.7%	9.7%	10.6%	8.4%	9.1%	10.1%	9.3%	8.2%
Fiat Group (including Chrysler)	1,488	1,890	1,575	1,210	1,252	1,035	916	770
	14.0%	14.0%	10.7%	8.9%	9.2%	8.0%	7.2%	6.5%
Ford Group	1,266	1,540	1,248	1,147	1,229	1,063	1,033	901
	11.9%	11.4%	8.5%	8.4%	9.0%	8.2%	8.1%	7.7%
General Motors	1,201	1,560	1,720	1,223	1,188	1,119	1,099	944
	11.3%	11.5%	11.7%	9.0%	8.7%	8.6%	8.6%	8.0%
Volkswagen Group	1,573	2,138	2,776	2,796	2,887	2,757	2,979	2,887
	14.8%	15.8%	18.8%	20.6%	21.1%	21.3%	23.3%	24.5%
Daimler	394	438	811	771	671	662	659	653
	3.7%	3.2%	5.5%	5.7%	4.9%	5.1%	5.1%	5.6%
BMW Group	290	364	499	804	695	735	792	780
	2.7%	2.7%	3.4%	5.9%	5.1%	5.7%	6.2%	6.6%
Nissan	306	395	392	314	349	384	436	408
	2.9%	2.9%	2.7%	2.3%	2.6%	3.0%	3.4%	3.5%
Toyota-Lexus-Daihatsu	303	406	576	756	715	582	531	507
	2.9%	3.0%	3.9%	5.6%	5.2%	4.5%	4.2%	4.3%
Other Japanese makes	534	789	701	806	769	651	563	487
	5.0%	5.8%	4.8%	5.9%	5.6%	5.0%	4.4%	4.1%
Hyundai-Kia	7	18	303	422	520	539	604	687
	0.1%	0.1%	2.1%	3.1%	3.8%	4.2%	4.7%	5.8%
Volvo	255	235	230	213	196	222	245	222
	2.4%	1.7%	1.6%	1.6%	1.4%	1.7%	1.9%	1.9%
Tata Group	21	44	112	110	87	97	94	124
	0.2%	0.3%	0.8%	0.8%	0.6%	0.7%	0.7%	1.1%
Other makes (including MG-Rover, Saab)	612	666	304	91	51	47	37	19
	5.8%	4.9%	2.1%	0.7%	0.4%	0.4%	0.3%	0.2%
TOTAL Europe (17 countries)	**10,611**	**13,517**	**14,738**	**13,593**	**13,664**	**12,975**	**12,802**	**11,763**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		0.9%	– 2.1%	– 8.3%	0.5%	– 5.0%	– 1.3%	– 8.1%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

In thousands of units and as a % of total registrations

	1985	1990	2000	2008 (1)	2009	2010	2011	2012
PSA Peugeot Citroën	**186**	**251**	**349**	**365**	**299**	**326**	**330**	**286**
	16.9%	16.5%	18.1%	19.9%	22.5%	22.1%	20.9%	20.8%
Renault Group	**175**	**278**	**272**	**268**	**208**	**251**	**261**	**224**
	15.8%	18.3%	14.1%	14.6%	15.6%	17.0%	16.5%	16.3%
Fiat Group	115	163	275	280	200	214	225	178
	10.4%	10.7%	14.2%	15.3%	15.1%	14.5%	14.3%	12.9%
Ford Group	123	195	180	219	151	161	176	154
	11.1%	12.9%	9.3%	11.9%	11.4%	10.9%	11.1%	11.2%
General Motors	55	81	92	132	70	75	89	73
	5.0%	5.3%	4.8%	7.2%	5.3%	5.1%	5.6%	5.3%
Volkswagen Group	113	134	202	200	136	170	200	197
	10.2%	8.9%	10.5%	10.9%	10.2%	11.6%	12.7%	14.3%
Daimler	64	71	163	163	118	130	138	131
	5.8%	4.7%	8.4%	8.9%	8.9%	8.8%	8.8%	9.5%
Nissan	61	105	100	62	41	41	51	46
	5.5%	6.9%	5.2%	3.4%	3.1%	2.8%	3.2%	3.3%
Toyota-Lexus-Daihatsu	66	81	69	56	35	37	40	31
	6.0%	5.3%	3.6%	3.1%	2.7%	2.5%	2.5%	2.3%
Other Japanese makes	67	72	117	46	34	39	35	25
	6.1%	4.8%	6.0%	2.5%	2.5%	2.6%	2.2%	1.8%
Hyundai-Kia	1	0	44	9	5	5	5	3
	0.1%	0.0%	2.3%	0.5%	0.4%	0.4%	0.3%	0.3%
Other makes	78	85	69	34	31	26	30	28
	7.1%	5.6%	3.6%	1.8%	2.3%	1.8%	1.9%	2.0%
TOTAL Europe (17 countries)	**1,104**	**1,516**	**1,931**	**1,833**	**1,327**	**1,475**	**1,580**	**1,376**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		– 2.6%	5.6%	– 11.4%	– 27.6%	11.1%	7.1%	– 12.9%

(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 + other Ford makes / General Motors = Opel + Vauxhall + GM Daewoo + Chevrolet + Pontiac + others / Volkswagen Group = Volkswagen + Audi + Porsche + Seat + Skoda + Bentley + Lamborghini + Bugatti + MAN + Scania / 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 on 01/01/2013.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY AND GROUP IN 2012

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	**3,083**	**132**	**61**	**71**	**151**	**92**	**1,176**	**206**	**243**	**285**	**311**	**279**	**156**
	100%	4.3%	2.0%	2.3%	4.9%	3.0%	38.1%	6.7%	7.9%	9.2%	10.1%	9.1%	5.1%
Austria	**336**	**25**	**11**	**14**	**23**	**17**	**119**	**22**	**24**	**19**	**11**	**37**	**32**
	100%	7.6%	3.3%	4.2%	6.9%	5.1%	35.5%	6.4%	7.1%	5.8%	3.4%	11.0%	9.5%
Belgium	**487**	**77**	**37**	**40**	**58**	**20**	**108**	**29**	**41**	**36**	**22**	**49**	**27**
	100%	15.9%	7.7%	8.2%	12.0%	4.1%	22.1%	5.9%	8.4%	7.4%	4.5%	10.0%	5.5%
Denmark	**171**	**28**	**13**	**15**	**9**	**8**	**38**	**13**	**14**	**3**	**4**	**32**	**20**
	100%	16.6%	7.7%	8.9%	5.1%	4.5%	22.4%	7.7%	7.9%	1.9%	2.2%	18.9%	11.7%
Spain	**700**	**108**	**52**	**56**	**70**	**23**	**169**	**51**	**65**	**33**	**24**	**93**	**49**
	100%	15.5%	7.5%	8.0%	10.0%	3.4%	24.1%	7.3%	9.3%	4.7%	3.4%	13.3%	7.0%
Finland	**111**	**6**	**3**	**3**	**2**	**2**	**30**	**9**	**5**	**4**	**5**	**28**	**11**
	100%	5.7%	2.7%	3.0%	1.8%	2.0%	27.2%	7.8%	4.5%	4.0%	4.7%	25.5%	9.7%
France	**1,899**	**572**	**266**	**305**	**424**	**63**	**267**	**92**	**96**	**70**	**53**	**175**	**62**
	100%	30.1%	14.0%	16.1%	22.3%	3.3%	14.0%	4.9%	5.1%	3.7%	2.8%	9.2%	3.3%
Greece	**58**	**7**	**4**	**3**	**1**	**5**	**12**	**3**	**8**	**2**	**2**	**13**	**4**
	100%	11.5%	7.2%	4.3%	2.4%	8.7%	20.4%	5.1%	13.7%	3.4%	3.1%	22.1%	7.1%
Ireland	**79**	**3**	**1**	**2**	**5**	**1**	**20**	**9**	**5**	**4**	**2**	**20**	**8**
	100%	4.3%	1.5%	2.8%	6.6%	1.1%	25.4%	10.8%	6.5%	4.8%	2.3%	25.2%	10.5%
Italy	**1,403**	**139**	**69**	**69**	**86**	**417**	**189**	**99**	**110**	**60**	**64**	**139**	**71**
	100%	9.9%	5.0%	4.9%	6.1%	29.7%	13.5%	7.1%	7.9%	4.3%	4.6%	9.9%	5.1%
Luxembourg	**50**	**6**	**3**	**3**	**6**	**2**	**14**	**3**	**3**	**6**	**3**	**4**	**2**
	100%	12.7%	5.7%	6.9%	11.3%	4.3%	27.5%	5.0%	5.0%	10.9%	6.7%	7.6%	4.5%
Netherlands	**502**	**66**	**26**	**40**	**46**	**25**	**110**	**36**	**44**	**23**	**12**	**73**	**49**
	100%	13.1%	5.1%	8.0%	9.2%	5.0%	21.8%	7.2%	8.8%	4.5%	2.3%	14.6%	9.7%
Portugal	**95**	**13**	**5**	**8**	**11**	**6**	**21**	**5**	**8**	**7**	**7**	**11**	**3**
	100%	13.8%	5.0%	8.8%	12.0%	6.4%	21.5%	5.1%	8.9%	7.8%	7.5%	11.2%	3.2%
United Kingdom	**2,045**	**173**	**74**	**99**	**41**	**65**	**408**	**282**	**246**	**179**	**97**	**313**	**142**
	100%	8.5%	3.6%	4.9%	2.0%	3.2%	20.0%	13.8%	12.0%	8.8%	4.8%	15.3%	6.9%
Sweden	**280**	**16**	**6**	**11**	**10**	**6**	**74**	**14**	**9**	**18**	**11**	**39**	**28**
	100%	5.8%	2.0%	3.8%	3.6%	2.1%	26.6%	5.0%	3.1%	6.3%	4.1%	14.0%	10.0%
European Union 15 countries	**11,299**	**1,373**	**632**	**741**	**944**	**752**	**2,755**	**872**	**921**	**749**	**629**	**1,306**	**665**
	100%	12.2%	5.6%	6.6%	8.4%	6.7%	24.4%	7.7%	8.2%	6.6%	5.6%	11.6%	5.9%
Norway	**138**	**10**	**4**	**6**	**1**	**1**	**36**	**11**	**4**	**8**	**6**	**39**	**11**
	100%	7.1%	2.6%	4.5%	0.5%	0.8%	26.1%	8.0%	2.7%	5.9%	4.1%	28.3%	7.6%
Switzerland	**326**	**24**	**12**	**12**	**22**	**18**	**96**	**18**	**19**	**23**	**18**	**57**	**17**
	100%	7.3%	3.6%	3.8%	6.8%	5.4%	29.5%	5.5%	5.9%	7.2%	5.6%	17.6%	5.1%
Europe 17 countries	**11,763**	**1,407**	**647**	**760**	**967**	**770**	**2,887**	**901**	**944**	**780**	**653**	**1,402**	**692**
	100%	12.0%	5.5%	6.5%	8.2%	6.5%	24.5%	7.7%	8.0%	6.6%	5.6%	11.9%	5.9%
Bulgaria	**20**	**2**	**1**	**1**	**3**	**0**	**5**	**1**	**2**	**1**	**0**	**4**	**1**
	100%	9.4%	3.5%	5.8%	13.6%	1.5%	25.2%	6.5%	9.5%	4.3%	0.0%	18.0%	6.1%
Estonia	**19**	**2**	**1**	**1**	**1**	**0**	**4**	**1**	**1**	**0**	**0**	**7**	**2**
	100%	8.9%	3.1%	5.9%	7.6%	1.8%	21.4%	4.3%	5.2%	1.7%	1.3%	35.6%	9.4%
Hungary	**53**	**3**	**1**	**2**	**6**	**3**	**12**	**5**	**8**	**2**	**1**	**10**	**3**
	100%	5.1%	2.3%	2.9%	10.5%	5.2%	22.6%	9.8%	15.2%	2.9%	2.1%	18.4%	5.7%
Latvia	**11**	**1**	**0**	**1**	**1**	**0**	**3**	**1**	**1**	**0**	**0**	**3**	**1**
	100%	10.6%	2.4%	8.1%	5.5%	2.1%	26.1%	5.4%	5.3%	3.4%	2.4%	27.9%	7.8%
Lithuania	**12**	**1**	**0**	**1**	**1**	**1**	**4**	**0**	**1**	**0**	**0**	**3**	**1**
	100%	7.8%	1.6%	6.1%	5.3%	8.2%	29.7%	3.5%	4.2%	3.9%	1.3%	25.0%	8.8%
Poland	**271**	**22**	**10**	**12**	**23**	**16**	**62**	**17**	**30**	**6**	**5**	**55**	**31**
	100%	8.1%	3.7%	4.3%	8.3%	5.9%	22.8%	6.2%	10.9%	2.3%	1.8%	20.2%	11.4%
Czech Republic	**174**	**12**	**6**	**7**	**14**	**3**	**75**	**13**	**7**	**4**	**3**	**14**	**24**
	100%	7.0%	3.2%	3.8%	8.1%	1.9%	42.9%	7.2%	3.8%	2.3%	1.9%	8.2%	13.6%
Romania	**72**	**3**	**1**	**2**	**25**	**2**	**17**	**5**	**4**	**2**	**2**	**8**	**4**
	100%	3.8%	1.1%	2.6%	34.3%	2.6%	23.6%	6.5%	5.7%	3.2%	2.2%	10.4%	6.0%
Slovakia	**69**	**6**	**2**	**4**	**6**	**2**	**25**	**2**	**4**	**2**	**2**	**9**	**10**
	100%	9.2%	3.5%	5.7%	8.0%	2.8%	36.0%	3.1%	6.4%	3.5%	2.5%	12.7%	14.6%
Slovenia	**50**	**7**	**3**	**4**	**9**	**2**	**13**	**3**	**5**	**2**	**1**	**4**	**5**
	100%	14.6%	6.8%	7.8%	17.3%	4.0%	25.3%	5.3%	10.7%	3.1%	1.7%	7.4%	10.1%
10 new EU member states	**752**	**59**	**25**	**34**	**87**	**30**	**219**	**47**	**62**	**20**	**14**	**115**	**82**
	100%	7.8%	3.4%	4.5%	11.5%	3.9%	29.1%	6.3%	8.3%	2.7%	1.9%	15.3%	10.9%
Europe 27 countries	**12,515**	**1,466**	**672**	**793**	**1,053**	**800**	**3,106**	**948**	**1,006**	**800**	**667**	**1,517**	**774**
	100%	11.7%	5.4%	6.3%	8.4%	6.4%	24.8%	7.6%	8.0%	6.4%	5.3%	12.1%	6.2%

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 + Porsche + Seat + Skoda + Bentley + Lamborghini + Bugatti. Daimler = Mercedes + Smart + others. BMW Group = BMW + Mini + Rolls-Royce. Japanese makes: Mazda, Mitsubishi, Nissan, Subaru, Suzuki, Toyota, etc. Korean makes: Hyundai-Kia and Ssangyong.

REGISTRATIONS

NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY

In units and as a % of total registrations

	1980	1990	2000	2008	2009	2010	2011	2012
Germany	193,841	327,046	1,023,997	1,361,958	1,167,447	1,220,675	1,493,614	1,482,980
	8.0%	9.8%	30.3%	44.1%	30.7%	41.9%	47.1%	48.1%
Austria	7,425	74,197	191,402	160,465	146,949	167,106	194,519	189,496
	3.3%	25.7%	61.9%	54.6%	46.0%	50.9%	54.6%	56.4%
Belgium	54,897	154,804	290,301	422,681	358,400	415,728	431,059	334,305
	13.8%	32.7%	56.3%	78.9%	75.3%	76.0%	75.3%	68.7%
Denmark	2,352	3,305	14,898	69,347	50,729	72,670	81,415	68,215
	3.2%	4.1%	13.2%	46.2%	45.2%	47.3%	48.0%	40.0%
Spain [1]	-	140,740	734,256	804,499	668,022	693,905	568,246	482,049
		14.2%	53.1%	69.3%	70.1%	70.7%	70.3%	68.9%
Finland	-	7,215	-	69,291	40,852	44,574	50,905	42,846
		5.2%		49.6%	46.2%	41.5%	42.0%	38.5%
France	**186,050**	**762,054**	**1,046,485**	**1,620,980**	**1,628,495**	**1,593,173**	**1,596,155**	**1,384,544**
	9.9%	33.0%	49.0%	77.5%	70.7%	70.8%	72.4%	72.9%
Greece	-	60	2,006	9,590	7,237	5,661	9,722	23,384
		0.1%	0.7%	3.6%	3.3%	4.0%	10.0%	40.0%
Ireland	-	12,413	23,259	50,741	29,953	55,016	62,911	58,089
		15.0%	10.1%	33.5%	52.1%	62.2%	70.0%	73.1%
Italy	138,562	179,779	812,203	1,096,485	904,275	901,310	965,301	745,257
	8.1%	7.8%	33.6%	50.7%	41.9%	45.9%	55.2%	53.1%
Luxembourg	-	8,206	21,110	40,314	34,480	37,403	38,194	38,348
		21.4%	50.4%	77.0%	73.0%	75.2%	76.6%	76.1%
Norway	-	1,581	8,761	80,096	71,752	95,733	104,665	88,530
		2.6%	9.0%	72.4%	72.7%	74.9%	75.7%	64.2%
Netherlands	30,450	54,738	134,426	125,377	77,674	98,477	156,508	142,697
	6.8%	10.9%	22.5%	25.1%	20.1%	20.4%	28.2%	28.4%
Portugal	-	10,426	62,417	147,896	107,178	149,046	106,811	67,239
		4.9%	24.2%	69.3%	66.6%	66.7%	69.6%	70.5%
United Kingdom	5,850	128,160	313,149	928,737	832,590	936,448	981,516	1,038,770
	0.4%	6.4%	14.1%	43.6%	41.7%	46.1%	50.6%	50.8%
Sweden	-	1,335	18,325	91,874	87,518	147,802	187,605	186,970
		0.6%	6.3%	36.2%	41.0%	51.0%	61.5%	66.8%
Switzerland	-	9,998	29,466	93,493	78,307	88,760	104,227	120,421
		3.0%	9.3%	32.4%	29.4%	30.4%	32.9%	36.9%
Europe 17 countries [1]	**619,427**	**1,866,021**	**4,726,461**	**7,173,824**	**6,291,858**	**6,723,487**	**7,133,373**	**6,494,140**
% diesel in Europe	7.1%	13.9%	32.1%	52.8%	46.0%	51.8%	55.7%	55.2%
Year-on-year change		+ 0.7%	+ 10.7%	– 9.4%	– 12.3%	+ 6.9%	+ 6.1%	– 9.0%

(1) See notes on page 63.

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

In thousands of units and as a % of total registrations

	1980	1990	2000	2008	2009	2010	2011	2012
Germany	2,527,580	3,475,172	3,590,633	3,320,059	3,981,805	3,118,705	3,412,932	3,307,461
Austria	243,021	310,157	336,670	326,633	345,132	356,693	388,822	367,653
Belgium	429,849	525,996	569,294	604,326	530,509	603,346	637,238	544,636
Denmark	89,485	100,303	145,780	184,582	128,060	170,431	194,625	195,213
Spain	592,093	1,218,091	1,680,761	1,328,219	1,060,263	1,098,785	912,749	776,677
Finland	115,741	166,602	149,702	156,913	97,898	118,896	136,336	123,445
France	**2,151,089**	**2,702,925**	**2,548,850**	**2,551,641**	**2,676,384**	**2,669,281**	**2,633,483**	**2,282,810**
Greece	80,824	144,960	313,230	290,091	234,647	152,436	104,139	62,259
Ireland	102,203	106,720	272,463	181,552	66,751	98,931	101,305	90,387
Italy	1,826,702	2,464,050	2,641,117	2,384,652	2,336,362	2,139,465	1,920,597	1,520,411
Luxembourg	22,514	40,285	44,979	56,447	50,368	53,017	53,547	53,883
Norway	106,945	82,483	129,003	146,716	123,196	158,176	175,375	171,383
Netherlands	483,574	555,812	694,210	584,881	438,710	532,390	614,782	559,148
Portugal	96,954	275,160	410,670	268,991	200,050	269,220	188,452	111,355
United Kingdom	1,725,803	2,256,662	2,466,833	2,431,300	2,189,726	2,262,385	2,208,176	2,292,545
Sweden	204,626	256,303	322,383	293,790	241,266	328,227	351,852	319,869
Switzerland	297,855	352,652	340,640	315,602	289,909	318,960	347,916	359,485
European Union [1]	9,358,799	14,523,790	16,187,575	14,964,077	14,577,931	13,972,208	13,859,035	12,607,752
Europe 17 countries	**11,096,858**	**15,034,333**	**16,657,218**	**15,426,395**	**14,991,036**	**14,449,344**	**14,382,326**	**13,138,620**

(1) European Union: 9 countries in 1980, 10 in 1985, 12 from 1990 to 1994, 15 from 1995.

REGISTRATIONS

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Germany	101,393	125,384	212,290	230,019	174,630	202,446	239,298	224,957
Austria	15,473	21,539	27,243	32,936	25,729	28,130	32,677	31,643
Belgium	30,609	52,490	54,090	68,379	54,315	56,006	65,027	57,899
Denmark	15,711	19,649	33,092	34,439	15,861	16,848	24,881	24,626
Spain [1]	88,042	229,821	299,246	167,043	107,491	116,770	104,698	77,088
Finland	12,574	27,507	15,056	17,302	9,554	11,550	15,165	12,298
France	**277,887**	**393,795**	**414,966**	**460,273**	**373,986**	**417,612**	**429,254**	**384,050**
Greece	45,124	29,480	23,008	22,796	14,917	10,935	6,459	3,780
Ireland	8,640	24,136	41,474	29,949	9,296	10,486	11,378	10,893
Italy	109,270	156,995	225,517	222,979	176,926	177,887	171,512	117,387
Luxembourg	1,014	1,863	3,083	4,088	3,103	3,291	3,666	3,485
Norway	11,395	20,582	31,627	36,099	24,521	30,422	37,030	33,416
Netherlands	33,498	53,080	96,570	84,963	51,555	49,863	58,970	56,693
Portugal	38,597	64,236	152,836	55,602	39,037	45,756	35,048	16,046
United Kingdom	212,042	247,728	245,163	299,505	194,727	231,539	266,923	247,936
Sweden	12,038	26,362	31,854	39,808	27,858	38,543	46,868	39,970
Switzerland	18,091	22,753	24,121	27,045	23,860	26,507	31,070	33,537
European Union [2]	790,064	1,398,657	1,875,488	1,770,081	1,278,985	1,417,662	1,511,824	1,308,751
Europe 17 countries[1]	**1,031,398**	**1,517,400**	**1,931,236**	**1,833,225**	**1,327,366**	**1,474,591**	**1,579,924**	**1,375,704**

(1) See notes on page 63.

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Germany	59,061	73,770	96,830	99,907	62,518	75,014	90,902	82,020
Austria	5,642	7,222	8,508	8,506	4,691	5,138	7,257	6,474
Belgium	8,604	10,690	11,061	11,868	8,271	7,133	9,449	8,277
Denmark	3,179	3,539	4,597	6,563	3,175	2,682	3,560	3,654
Spain	23,208	30,432	33,700	31,226	11,675	13,215	15,790	12,539
Finland	4,497	4,218	3,072	4,018	2,572	2,368	2,794	2,749
France	**41,846**	**50,028**	**57,918**	**57,504**	**35,533**	**34,221**	**47,363**	**43,378**
Greece	1,178	497	1,633	2,344	1,578	1,081	459	166
Ireland	3,511	2,748	4,666	3,602	1,104	1,011	1,079	1,113
Italy		31,973	38,388	33,852	18,685	17,532	18,859	13,273
Luxembourg	690	1,136	1,451	1,742	898	803	1,274	1,011
Norway	3,056	2,106	3,564	5,729	3,429	3,126	3,933	4,695
Netherlands	13,346	14,804	16,835	18,023	11,692	9,390	12,551	11,896
Portugal	8,370	7,186	7,403	5,516	3,195	3,116	2,651	1,881
United Kingdom	57,489	45,794	51,864	49,558	28,539	27,988	37,925	38,995
Sweden	6,703	5,998	5,549	6,749	5,357	4,605	5,855	5,369
Switzerland	3,955	4,832	4,733	4,942	4,276	3,388	4,326	3,847
European Union [2]	187,726	272,597	343,475	340,978	199,483	205,297	257,768	232,795
Europe 17 countries	**244,335**	**296,973**	**351,772**	**351,649**	**207,188**	**211,811**	**266,027**	**241,337**

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Germany	6,058	4,235	5,684	5,073	5,030	4,697	4,620	4,521
Austria	676	450	706	861	606	733	576	702
Belgium	585	580	974	1,029	845	909	669	576
Denmark	579	311	419	463	549	450	334	320
Spain	1,511	2,376	2,738	3,098	2,284	2,119	2,865	1,775
Finland	625	429		312	325	300	218	337
France	**3,558**	**3,160**	**4,320**	**5,655**	**6,664**	**5,382**	**6,206**	**5,545**
Greece		625	374	430	893	325	84	90
Ireland		24	121	459	166	47	75	232
Italy		3,825	4,152	3,581	2,779	3,931	3,200	2,200
Luxembourg	53	57	108	216	196	173	194	155
Norway	684	380	427	802	812	1,052	1,005	831
Netherlands	1,082	1,069	949	1,153	957	524	427	688
Portugal		482	806	612	515	418	259	179
United Kingdom	5,792	3,324	4,496	4,400	4,277	3,203	3,382	3,798
Sweden	943	863	1,071	920	890	1,302	1,359	1,202
Switzerland	371	580	491	802	539	476	606	440
European Union [2]	17,707	20,068	26,918	28,262	26,976	24,513	24,468	22,320
Europe 17 countries	**22,517**	**22,770**	**27,836**	**29,866**	**28,327**	**26,041**	**26,079**	**23,591**

(2) European Union: 9 countries in 1980, 10 in 1985, 12 from 1990 to 1994, 15 from 1995.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS IN EUROPE

In units

	2000	2005	2007	2008	2009	2010	2011	2012
Bulgaria			41,042	43,758	21,478	15,646	18,631	19,773
Estonia	10,600	19,640	30,912	24,579	9,946	10,295	17,070	19,424
Hungary	133,233	198,982	171,661	153,278	60,189	43,476	45,094	53,059
Latvia	7,300	16,602	32,771	19,831	5,367	6,365	10,980	10,665
Lithuania	6,158	10,467	21,606	22,217	7,515	7,970	13,234	12,165
Poland	478,752	235,522	293,305	320,040	320,206	333,490	297,937	270,895
Czech Republic	148,592	151,699	174,456	182,554	167,708	169,580	173,595	174,320
Romania			315,621	270,995	130,195	106,333	94,619	72,143
Slovakia	55,090	57,125	59,700	70,040	74,717	64,033	68,254	69,268
Slovenia	67,665	59,324	68,719	71,575	57,967	61,142	60,193	50,091
TOTAL new EU countries (1)	**907,400**	**749,361**	**1,209,793**	**1,178,867**	**855,288**	**818,330**	**799,607**	**751,803**
Romania	64,432	215,554						
Croatia	62,009	70,541	82,664	88,265	44,918	38,587	41,561	31,360

NEW LIGHT COMMERCIAL VEHICLE (UP TO 5 METRIC TONS) REGISTRATIONS IN EUROPE

In units

	2000	2005	2007	2008	2009	2010	2011	2012
Bulgaria			10,697	11,478	4,275	3,211	2,979	2,998
Estonia	1,500	2,944	4,693	3,041	1,206	1,406	2,478	2,801
Hungary	26,686	20,479	21,920	21,559	10,619	9,337	11,564	11,058
Latvia	900	1,753	3,615	2,151	555	649	1,926	2,307
Lithuania	1,270	3,371	4,445	3,201	884	1,044	1,939	1,715
Poland	33,653	35,985	56,312	61,221	43,764	42,852	47,206	40,862
Czech Republic	14,786	16,024	19,722	20,648	13,258	11,318	13,149	11,669
Romania			36,431	40,876	15,397	10,404	11,791	12,269
Slovakia	5,812	14,428	23,618	26,907	15,722	6,953	5,717	5,135
Slovenia	6,274	6,897	6,860	7,331	4,452	4,744	5,791	5,820
TOTAL new EU countries (1)	**90,900**	**101,881**	**188,313**	**198,413**	**110,132**	**91,918**	**104,540**	**96,634**
Romania	14,789	35,842						
Croatia	3,360	7,671	9,550	9,279	4,777	2,845	3,653	3,658

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

In units

	2000	2005	2007	2008	2009	2010	2011	2012
Bulgaria			51,739	55,236	25,753	18,857	21,610	22,771
Estonia	12,100	22,584	35,605	27,620	11,152	11,701	19,548	22,225
Hungary	159,919	219,461	193,581	174,837	70,808	52,813	56,658	64,117
Latvia	8,200	18,355	36,386	21,982	5,922	7,014	12,906	12,972
Lithuania	7,428	13,838	26,051	25,418	8,399	9,014	15,173	13,880
Poland	512,405	271,507	349,617	381,261	363,970	376,342	345,143	311,757
Czech Republic	163,378	167,723	194,178	203,202	180,966	180,898	186,744	185,989
Romania			352,052	311,871	145,592	116,737	106,410	84,412
Slovakia	60,902	71,553	83,318	96,947	90,439	70,986	73,971	74,403
Slovenia	73,939	66,221	75,579	78,906	62,419	65,886	65,984	55,911
TOTAL new EU countries (1)	**998,300**	**851,242**	**1,398,106**	**1,377,280**	**965,420**	**910,248**	**904,147**	**848,437**
Romania	79,221	251,396						
Croatia	65,369	78,212	92,214	97,544	49,695	41,432	45,214	35,018

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

In units

	2000	2005	2007	2008	2009	2010	2011	2012
Bulgaria			3,600	3,400	800	1,000	1,300	800
Estonia	400	927	1,875	1,380	337	502	798	848
Hungary	2,900	4,400	5,400	5,500	1,800	2,408	4,335	4,051
Latvia	1,000	1,284	3,304	2,103	322	520	1,406	1,525
Lithuania	1,000	2,297	5,039	3,467	519	1,355	2,756	2,789
Poland	7,464	11,079	22,661	19,971	8,172	11,611	16,800	16,461
Czech Republic	6,400	8,200	12,860	12,249	5,824	5,750	8,201	7,416
Romania			14,766	12,220	2,370	2,686	4,014	3,060
Slovakia	1,796	3,754	5,776	5,431	2,322	2,870	3,962	3,856
Slovenia	1,876	1,635	2,819	2,725	867	985	1,467	1,131
TOTAL new EU countries (1)	**22,800**	**33,500**	**78,100**	**68,400**	**23,300**	**29,700**	**45,000**	**41,900**
Romania	3,113	5,019						
Croatia	3,360	7,822	9,807	9,495	5,073	2,897	3,686	3,716

(1) New EU member states: 8 countries in 2000, 10 since 2006.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS IN NEW EU MEMBER STATES (1)

In thousands of units and as a % of total registrations

	2005 (2)	2006	2007	2008	2009	2010	2011	2012
PSA Peugeot Citroën	**99**	**106**	**119**	**110**	**75**	**73**	**69**	**64**
	9.5%	9.4%	9.2%	8.6%	8.3%	8.5%	8.2%	8.2%
Renault Group	**193**	**194**	**197**	**172**	**116**	**112**	**108**	**90**
	18.7%	17.1%	15.3%	13.6%	12.8%	13.0%	12.9%	11.5%
Fiat Group (including Chrysler)	50	57	66	71	59	45	34	30
	4.8%	5.0%	5.1%	5.6%	6.6%	5.3%	4.0%	3.9%
Ford Group	59	68	86	91	71	65	59	48
	5.7%	6.0%	6.6%	7.2%	7.9%	7.5%	7.0%	6.2%
General Motors	132	143	155	139	76	76	74	67
	12.7%	12.6%	12.0%	11.0%	8.4%	8.9%	8.8%	8.5%
Volkswagen Group	257	280	303	297	220	226	238	227
	24.8%	24.7%	23.4%	23.5%	24.5%	26.4%	28.2%	28.9%
Daimler	11	14	19	21	14	13	14	14
	1.1%	1.2%	1.5%	1.6%	1.5%	1.6%	1.7%	1.8%
BMW Group	11	12	18	20	14	17	20	21
	1.0%	1.0%	1.4%	1.5%	1.6%	2.0%	2.4%	2.7%
Nissan	19	21	23	25	21	23	28	28
	1.8%	1.8%	1.7%	1.9%	2.3%	2.6%	3.3%	3.6%
Toyota-Lexus-Daihatsu	60	75	90	86	56	47	41	41
	5.8%	6.6%	7.0%	6.8%	6.2%	5.5%	4.8%	5.2%
Other Japanese makes	91	97	121	128	81	67	56	50
	8.7%	8.6%	9.4%	10.1%	9.0%	7.9%	6.6%	6.4%
Hyundai-Kia	39	48	72	88	83	75	81	86
	3.8%	4.3%	5.6%	6.9%	9.2%	8.7%	9.7%	10.9%
Volvo	7	8	11	11	10	9	10	9
	0.6%	0.7%	0.9%	0.8%	1.1%	1.1%	1.2%	1.2%
Tata Group	2	3	4	4	3	3	3	3
	0.2%	0.3%	0.3%	0.3%	0.3%	0.3%	0.4%	0.4%
Other makes (including MG-Rover, Saab)	7	10	8	5	3	6	5	5
	0.7%	0.9%	0.6%	0.4%	0.3%	0.7%	0.6%	0.6%
TOTAL new EU member states	**1,035**	**1,135**	**1,292**	**1,267**	**900**	**857**	**841**	**783**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		9.6%	13.9%	– 2.0%	– 29.0%	– 4.8%	– 1.8%	– 6.9%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN NEW EU MEMBER STATES (1)

In thousands of units and as a % of total registrations

	2005 (2)	2006	2007	2008	2009	2010	2011	2012
PSA Peugeot Citroën	**20**	**27**	**34**	**37**	**22**	**18**	**25**	**20**
	13.6%	16.3%	17.4%	17.8%	19.0%	19.5%	22.9%	20.0%
Renault Group	**35**	**29**	**29**	**32**	**15**	**15**	**18**	**16**
	24.4%	17.7%	14.8%	15.2%	13.2%	16.3%	16.2%	16.3%
Fiat Group (including Chrysler)	21	23	33	35	20	19	21	20
	14.7%	14.0%	16.6%	16.7%	17.1%	19.8%	19.0%	19.6%
Ford Group	14	19	21	21	11	10	11	10
	9.8%	11.4%	10.6%	10.3%	9.7%	10.1%	10.2%	10.1%
General Motors	8	8	8	9	4	3	4	3
	5.2%	4.6%	3.9%	4.2%	3.1%	3.2%	3.6%	3.3%
Volkswagen Group	21	26	31	35	20	14	15	16
	14.7%	15.6%	15.7%	16.6%	17.5%	14.9%	13.7%	15.5%
Daimler	10	11	14	15	9	7	6	7
	6.7%	6.6%	7.0%	7.3%	7.9%	7.7%	5.7%	7.0%
Nissan	2	5	7	6	4	2	3	2
	1.4%	3.0%	3.4%	2.8%	3.9%	2.5%	2.9%	2.2%
Toyota-Lexus-Daihatsu	2	3	7	7	4	2	3	3
	1.6%	2.0%	3.3%	3.2%	3.1%	2.2%	2.5%	3.0%
Other Japanese makes	3	4	6	6	2	2	3	2
	2.3%	2.7%	3.3%	2.7%	2.1%	2.4%	2.6%	1.8%
Hyundai-Kia	5	6	4	4	2	1	0	0
	3.2%	3.4%	2.1%	1.7%	1.5%	0.7%	0.3%	0.2%
Other makes (including MG-Rover, Saab)	4	5	4	3	2	1	1	1
	2.5%	2.7%	1.9%	1.5%	1.9%	0.8%	0.5%	1.0%
TOTAL new EU member states	**145**	**166**	**198**	**208**	**115**	**95**	**108**	**100**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		14.4%	18.9%	5.0%	– 44.7%	– 17.5%	14.2%	– 7.3%

(1) New European Union member states not including Cyprus and Malta, including Croatia.
(2) Not including Bulgaria in 2005.
The scope of the groups corresponds to their situation on 01/01/2013 *(see page 63)*.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY [1]

In thousands of units and as a % of total registrations

	2005 [2]	2006	2007	2008	2009	2010	2011	2012
PSA Peugeot Citroën	**2,111**	**2,077**	**2,089**	**1,902**	**1,892**	**1,849**	**1,689**	**1,471**
	13.6%	13.0%	13.0%	12.8%	13.0%	13.4%	12.4%	11.7%
Renault Group	**1,635**	**1,474**	**1,408**	**1,310**	**1,353**	**1,416**	**1,303**	**1,057**
	10.5%	9.3%	8.7%	8.8%	9.3%	10.2%	9.6%	8.4%
Fiat Group (including Chrysler)	1,085	1,284	1,375	1,281	1,311	1,080	950	801
	7.0%	8.1%	8.5%	8.6%	9.0%	7.8%	7.0%	6.4%
Ford Group	1,269	1,281	1,305	1,238	1,300	1,128	1,092	949
	8.2%	8.0%	8.1%	8.3%	8.9%	8.2%	8.0%	7.6%
General Motors	1,590	1,557	1,582	1,362	1,264	1,196	1,173	1,011
	10.2%	9.8%	9.8%	9.2%	8.7%	8.6%	8.6%	8.1%
Volkswagen Group	3,041	3,245	3,228	3,094	3,107	2,984	3,216	3,114
	19.5%	20.4%	20.0%	20.8%	21.3%	21.6%	23.6%	24.8%
Daimler	830	830	829	792	685	676	673	667
	5.3%	5.2%	5.1%	5.3%	4.7%	4.9%	4.9%	5.3%
BMW Group	772	796	852	823	709	753	812	801
	5.0%	5.0%	5.3%	5.5%	4.9%	5.4%	6.0%	6.4%
Nissan	361	331	313	338	369	407	464	436
	2.3%	2.1%	1.9%	2.3%	2.5%	2.9%	3.4%	3.5%
Toyota-Lexus-Daihatsu	852	968	1,002	842	770	629	572	548
	5.5%	6.1%	6.2%	5.7%	5.3%	4.5%	4.2%	4.4%
Other Japanese makes	911	984	1,027	934	850	718	619	537
	5.8%	6.2%	6.4%	6.3%	5.8%	5.2%	4.5%	4.3%
Hyundai-Kia	569	567	560	510	603	614	686	773
	3.7%	3.6%	3.5%	3.4%	4.1%	4.4%	5.0%	6.2%
Volvo	249	244	266	224	206	231	256	231
	1.6%	1.5%	1.7%	1.5%	1.4%	1.7%	1.9%	1.8%
Tata Group	128	130	141	114	90	100	97	128
	0.8%	0.8%	0.9%	0.8%	0.6%	0.7%	0.7%	1.0%
Other makes (including MG-Rover, Saab)	168	159	137	96	54	53	42	23
	1.1%	1.0%	0.8%	0.6%	0.4%	0.4%	0.3%	0.2%
TOTAL	**15,572**	**15,926**	**16,113**	**14,860**	**14,564**	**13,832**	**13,644**	**12,546**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		2.3%	1.2%	– 7.8%	– 2.0%	– 5.0%	– 1.4%	– 8.0%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY [1]

In thousands of units and as a % of total registrations

	2005 [2]	2006	2007	2008	2009	2010	2011	2012
PSA Peugeot Citroën	**389**	**396**	**422**	**402**	**321**	**344**	**354**	**307**
	18.1%	18.6%	18.6%	19.7%	22.3%	21.9%	21.0%	20.8%
Renault Group	**331**	**333**	**332**	**299**	**223**	**266**	**279**	**240**
	15.4%	15.6%	14.6%	14.7%	15.4%	17.0%	16.5%	16.3%
Fiat Group (including Chrysler)	284	297	335	314	220	233	246	197
	13.2%	13.9%	14.8%	15.4%	15.3%	14.9%	14.5%	13.4%
Ford Group	235	255	279	240	162	171	187	164
	10.9%	12.0%	12.3%	11.8%	11.2%	10.9%	11.1%	11.1%
General Motors	153	152	155	141	74	78	93	76
	7.1%	7.1%	6.8%	6.9%	5.1%	5.0%	5.5%	5.2%
Volkswagen Group	212	230	254	234	156	185	215	213
	9.9%	10.8%	11.2%	11.5%	10.8 %	11.8%	12.8%	14.4%
Daimler	161	160	184	179	127	137	145	139
	7.5%	7.5%	8.1%	8.8%	8.8%	8.7%	8.6%	9.4%
Nissan	103	103	96	67	45	43	54	48
	4.8%	4.9%	4.2%	3.3%	3.1%	2.7%	3.2%	3.3%
Toyota-Lexus-Daihatsu	65	54	72	63	39	39	42	34
	3.0%	2.5%	3.2%	3.1%	2.7%	2.5%	2.5%	2.3%
Other Japanese makes	86	79	76	52	36	41	38	27
	4.0%	3.7%	3.4%	2.5%	2.5%	2.6%	2.2%	1.8%
Hyundai-Kia	52	26	17	12	7	6	5	4
	2.4%	1.2%	0.7%	0.6%	0.5%	0.4%	0.3%	0.3%
Other makes (including MG-Rover, Saab)	78	46	45	37	33	27	31	29
	3.6%	2.2%	2.0%	1.8%	2.3%	1.7%	1.8%	1.9%
TOTAL	**2,149**	**2,130**	**2,267**	**2,041**	**1,442**	**1,569**	**1,688**	**1,476**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		– 0.9%	6.4%	– 10.0%	– 29.3%	8.8%	7.6%	– 12.6%

(1) For the scope of the new EU member states, see the previous page.
(2) Not including Bulgaria in 2005.
The scope of the groups corresponds to their situation on 01/01/2013 *(see page 63)*.

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	2008	2009	2010	2011	2012
Citroën	536,415	783,224	1,168,470	1,377,392	1,302,881	1,452,847	1,437,065	1,243,983
Peugeot	734,461	1,369,359	1,708,968	1,947,822	1,739,430	2,152,331	2,144,894	1,667,424
PSA Peugeot Citroën [1]	**1,647,221**	**2,152,583**	**2,877,438**	**3,325,214**	**3,042,311**	**3,605,178**	**3,581,959**	**2,911,407**
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	1,986,052	1,796,624	2,099,027	2,254,331	2,224,683
Renault	1,659,099	1,571,264	2,356,616	1,889,950	1,744,387	2,023,181	2,169,887	2,077,303
Dacia	-	-	55,183	241,991	307,052	341,090	327,393	358,036
Renault Samsung Motors	-	-	14,517	189,308	192,333	276,169	243,365	155,872
Renault-Dacia-Samsung [2]	**1,659,099**	**1,571,264**	**2,426,316**	**2,417,351**	**2,296,009**	**2,716,286**	**2,825,089**	**2,738,591**
C.B.M.	105							
Renault Trucks [3]	54,086	60,263	96,040	65,328	24,314	31,874	41,169	n/a
of which Mack Trucks	-	*15,423*	*34,562*	-	-	-	-	-
Etalmobil (Sovam)	113	75	44	7	9	0	0	0
Unic	17,809							
Heuliez [4]	-	231	391	-	-	-	-	-
Irisbus-Renault [4]	-	-	2,547	-	-	-	-	-
TOTAL	**3,378,433**	**3,784,416**	**5,402,776**	**5,807,900**	**5,362,643**	**6,353,338**	**6,448,217**	**5,576,308**
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	2008	2009	2010	2011	2012
Citroën	49,034	93,259	192,238	236,830	138,864	180,462	193,224	162,053
Peugeot	127,428	81,439	186,917	247,693	140,941	210,252	227,231	195,652
PSA Peugeot Citroën [1]	**200,979**	**174,698**	**379,155**	**484,523**	**279,805**	**390,714**	**420,455**	**357,705**
Renault (including Trafic II)	166,760	254,334	312,801	343,507	235,223	302,706	364,584	342,043
Renault	166,760	254,334	312,801	273,175	195,564	244,123	299,966	285,437
Dacia	-	-	12,580	13,956	16,680	17,704	17,409	13,853
Renault-Dacia-Samsung [2]	**166,760**	**254,334**	**325,381**	**357,463**	**251,903**	**320,410**	**381,993**	**355,896**
C.B.M.	105							
Renault Trucks [3]	54,086	60,263	96,040	65,328	24,314	31,874	41,169	n/a
of which Mack Trucks	-	*15,423*	*34,562*	-	-	-	-	-
Etalmobil (Sovam)	113	75	44	7	9	0	0	0
Unic	17,809							
Heuliez [4]	-	231	391	-	-	-	-	-
Irisbus-Renault [4]	-	-	2,547	-	-	-	-	-
TOTAL	**439,852**	**489,601**	**803,558**	**907,321**	**556,031**	**742,998**	**843,617**	**713,601**
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. It is included in Renault's production.
(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	2008	2009	2010	2011	2012
Foreign manufacturers								
Bugatti				82	38	40	0	0
Fiat	-	-	10,377	2,688	1,717	888	0	0
Heuliez-Opel				8,840	3,218	0	0	0
Lancia	-	-	2,265	4,068	1,996	1,561	0	0
Smart	-	-	101,365	140,072	115,469	97,373	103,560	105,321
Toyota	-	-	0	232,406	207,456	158,512	149,153	200,521
Passenger cars	**-**	**-**	**114,007**	**388,156**	**329,894**	**258,374**	**252,713**	**305,842**
Light commercial vehicles (Fiat)	**-**	**-**	**39,428**	**35,856**	**17,837**	**19,450**	**19,786**	**15,148**
Heavy trucks (Scania)	**-**	**-**	**10,710**	**12,629**	**4,724**	**9,594**	**n/a**	**n/a**
Irisbus-Heuliez	-	-	-	404	407	451	n/a	n/a
Irisbus	-	-	-	3,117	2,875	2,473	n/a	n/a
Evobus	-	-	535	630	742	551	n/a	n/a
Scania	-	-	0	0	0	0	n/a	n/a
Coaches and buses	**-**	**-**	**535**	**4,151**	**4,024**	**3,475**	**n/a**	**n/a**
Total foreign makes	**-**	**-**	**164,680**	**440,792**	**356,479**	**290,893**	**287,819**	**n/a**
French manufacturers								
Total French makes	**-**	**-**	**3,183,681**	**2,128,186**	**1,691,214**	**1,938,528**	**2,007,070**	**1,646,775**
Foreign and French manufacturers								
TOTAL all vehicles	**-**	**-**	**3,348,361**	**2,568,978**	**2,047,693**	**2,229,421**	**2,294,889**	**1,967,765**

Source: CCFA.

WORLD PRODUCTION OF FRENCH MANUFACTURERS

PRODUCTION OF PASSENGER CARS BY MAKE

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Citroën	536,366	689,965	976,232	1,140,562	1,164,017	1,272,385	1,243,841	1,081,930
Peugeot	607,033	1,287,920	1,522,051	1,700,129	1,598,489	1,942,079	1,917,663	1,471,772
PSA Peugeot Citroën [1]	**1,446,242**	**1,977,885**	**2,498,283**	**2,840,691**	**2,762,506**	**3,214,464**	**3,161,504**	**2,553,702**
Renault	1,492,339	1,316,930	2,043,815	1,642,551	1,561,446	1,796,321	1,889,747	1,808,950
Dacia	-	-	42,603	228,035	290,372	323,386	309,984	344,183
Renault Samsung Motors	-	-	14,517	189,302	192,288	276,169	243,365	155,872
Renault-Dacia-Samsung [1]	**1,492,339**	**1,316,930**	**2,100,935**	**2,059,888**	**2,044,106**	**2,395,876**	**2,443,096**	**2,309,005**
TOTAL	**2,938,581**	**3,294,815**	**4,599,218**	**4,900,579**	**4,806,612**	**5,610,340**	**5,604,600**	**4,862,707**
KD and CKD units	467,879	208,241	-	-	-	-	-	-
of which production in France	-	-	*2,765,803*	*1,757,779*	*1,489,603*	*1,665,797*	*1,678,317*	*1,376,972*
Citroën	-	-	504,323	520,319	404,049	468,398	516,994	455,925
Peugeot	-	-	1,094,756	708,459	657,226	722,214	716,461	584,997
PSA Peugeot Citroën [1]	**-**	**-**	**1,599,079**	**1,228,778**	**1,061,275**	**1,190,612**	**1,233,455**	**1,040,922**
Renault	-	-	1,166,724	529,001	428,328	475,185	444,862	336,050
Renault-Dacia-Samsung [1]	**-**	**-**	**1,166,724**	**529,001**	**428,328**	**475,185**	**444,862**	**336,050**

(1) See notes on page 70.

PASSENGER CAR PRODUCTION BY MODEL IN 2012

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**2,553,702**	**1,040,922**	**1,512,780**
Citroën		**1,081,930**	**455,925**	**626,005**
	C-ZERO	1,763		1,763
	C1	65,782		65,782
	C2	14,842		14,842
	C3	281,557	163,118	118,439
	DS3	68,801	68,801	
	C4	360,260	119,785	240,475
	C-ELYSEE	6,756		6,756
	DS4	30,668	30,668	
	ZX	55,644		55,644
	XSARA	1,815		1,815
	C5	72,486	38,681	33,805
	DS5	29,734	29,734	
	C-CROSSER	2,333		2,333
	C6	1,417	1,417	
	C8	3,721	3,721	
	NEMO	13,581		13,581
	BERLINGO	70,770		70,770
Peugeot		**1,471,772**	**584,997**	**886,775**
	ION	1,820		1,820
	107	74,864		74,864
	206	183,252	53,903	129,349
	207	131,111	12,864	118,247
	307	103,291		103,291
	208	232,730	129,066	103,664
	301	11,572		11,572
	308	144,793	142,740	2,053
	RCZ	9,828		9,828
	2008	57	57	
	3008	104,036	102,665	1,371
	5008	49,269	49,269	
	405	108,379		108,379
	408	106,856		106,856
	508	116,421	90,243	26,178
	4007	2,298		2,298
	4008	12,327		12,327
	807	4,190	4,190	
	BIPPER	11,809		11,809
	PARTNER	62,869		62,869

Makes	Models	World production	Production in France	Production outside France
Renault-Dacia-Samsung		**2,309,005**	**336,050**	**1,972,955**
Renault		**1,808,950**	**336,050**	**1,472,900**
	TWINGO	96,453		96,453
	WIND	921		921
	CLIO	422,035	104,244	317,791
	ZOE	443	443	
	MODUS	31,193		31,193
	LOGAN	351,327		351,327
	SANDERO	107,261		107,261
	MEGANE	392,190	139,151	253,039
	LAGUNA	27,702	27,702	
	ESPACE	12,930	12,930	
	KANGOO	65,903	49,272	16,631
	TRAFIC	17,084		17,084
	MASTER	2,308	2,308	
	DUSTER	174,981		174,981
	FLUENCE	93,392		93,392
	DIVERS	12,827		12,827
Dacia		**344,183**		**344,183**
	LOGAN	112,763		112,763
	SANDERO	50,752		50,752
	DUSTER	132,999		132,999
	LODGY	41,442		41,442
	DOKKER	6,227		6,227
Renault Samsung Motors		**155,872**		**155,872**
	SM3 / FLUENCE	56,073		56,073
	LATITUDE	40,525		40,525
	QM5 (KOLEOS)	55,458		55,458
	SM7	3,816		3,816
TOT AL		**4,862,707**	**1,376,972**	**3,485,735**

NB.: Renault also produced 11,325 Twizys at its Valladolid plant (Spain).
Source: CCFA.

WORLD PRODUCTION OF FRENCH MANUFACTURERS

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Citroën	49,034	93,259	192,238	236,830	138,864	180,462	193,224	162,053
Peugeot	127,428	81,439	186,917	247,693	140,941	210,252	227,231	195,652
PSA Peugeot Citroën [1]	**200,979**	**174,698**	**379,155**	**484,523**	**279,805**	**390,714**	**420,455**	**357,705**
Renault (including Trafic II [2])	166,760	254,334	312,801	343,507	235,223	302,706	364,584	342,043
Renault	166,760	254,334	312,801	273,175	195,564	244,123	299,966	285,437
Dacia	-	-	12,580	13,956	16,680	17,704	17,409	13,853
Renault-Dacia-Samsung [1]	**166,760**	**254,334**	**325,381**	**357,463**	**251,903**	**320,410**	**381,993**	**355,896**
Renault Trucks [1]	**11,632**	**7,464**	**8,321**	**5,271**	**3,405**	**0**	**0**	
Others	86	71	42	3	5	0	0	
TOTAL	**379,457**	**436,567**	**712,899**	**847,260**	**535,118**	**711,124**	**802,448**	**713,601**
KD and CKD units	**68,587**	**79,271**	**-**	**-**	**-**	**-**	**-**	**-**
of which production in France	-	-	*370,538*	*313,275*	*181,010*	*243,029*	*292,112*	*269,803*
Citroën	-	-	53,561	67,348	33,037	42,882	48,540	38,684
Peugeot	-	-	67,629	52,675	26,348	38,514	42,115	34,598
PSA Peugeot Citroën [1]	**-**	**-**	**121,190**	**120,023**	**59,385**	**81,396**	**90,655**	**73,282**
Renault	-	-	240,985	187,978	118,215	161,633	201,457	196,521
Renault-Dacia-Samsung [1]	**-**	**-**	**240,985**	**187,978**	**118,215**	**161,633**	**201,457**	**196,521**
Renault Trucks [1]	**-**	**-**	**8,321**	**5,271**	**3,405**	**0**	**0**	**0**
Others	-	-	42	3	5	0	0	0

(1) See notes on page 70.
(2) As of 2006, some Renault Trafic II vehicles are classified as passenger cars.

LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2012

In units

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**357,705**	**73,282**	**284,423**
Citroën		**162,053**	**38,684**	**123,369**
	C1	51		51
	C3	11,461	11,461	
	C4	3,635	3,635	
	NEMO	13,888		13,888
	BERLINGO	66,023		66,023
	JUMPY	23,588	23,588	
	JUMPER	43,407		43,407
Peugeot		**195,652**	**34,598**	**161,054**
	107	25		25
	206	4,007	3,227	780
	207	4,281		4,281
	208	7,561	181	7,380
	307	2,639	37	2,602
	308	3,001	3,001	
	BIPPER	12,440		12,440
	PARTNER	79,386		79,386
	EXPERT	28,152	28,152	
	BOXER	54,160		54,160
Renault-Dacia-Samsung		**355,896**	**196,521**	**159,375**
Renault		**342,043**	**196,521**	**145,522**
	TWINGO	4,113		4,113
	CLIO	22,614	13,206	9,408
	LOGAN	1,516		1,516
	KANGOO	110,368	83,798	26,570
	TRAFIC	56,606		56,606
	MASTER	115,016	99,514	15,502
	OTHERS	31,810	3	31,807
Dacia		**13,853**		**13,853**
	LOGAN	11,187		11,187
	DOKKER	2,666		2,666
TOTAL		**713,601**	**269,803**	**443,798**

Source: CCFA.

WORLD PRODUCTION OF FRENCH MANUFACTURERS

HEAVY TRUCK (5 METRIC TONS AND OVER) PRODUCTION BY MAKE

In units

	1980	1990	2000	2008	2009	2010	2011	2012 [3]
Renault Trucks [1]	**39,475**	**50,493**	**87,719**	**60,057**	**20,909**	**31,874**	**41,169**	**37,964**
of which Mack Trucks	–	*15,423*	*34,562*	-	–			
Others [2]	17,836	4	2		4	0	0	
TOTAL	**57,311**	**50,497**	**87,721**	**4**	**20,913**	**31,874**	**41,169**	**37,964**
of which production in France	–	–	*44,402*	*60,061*	*20,601*	*29,702*	*36,641*	
Renault Trucks [1]	**–**	**–**	**44,400**		**20,597**	**29,702**	**36,641**	
Others [2]	–	–	2	57,132	4	0	0	
				57,128				
				4				

(1) 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.
(2) Including Unic up to 1984.
(3) The scope of heavy trucks now includes actual sales of trucks 6 metric tons and over, including CKD.

COACH AND BUS (OVER 5 METRIC TONS) PRODUCTION BY MAKE

In units

	1980	1990	2000	2008	2009	2010	2011	2012
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 1st, 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

SALES OF HEAVY TRUCKS BY RENAULT TRUCKS IN 2012

In units

TOTAL	**51,486***
more than 6 metric tons	36,391
2.6 to 6 metric tons	13,522
CKD [1]	1,573
Share by range	
Long distance	36%
Delivery	27%
Distribution	20%
Construction	17%

(1) Complete knockdown.
*The total number of vehicles sold fell by 14 % compared with 2011.
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)	2008	2009	2010	2011	2012
Up to 3.5 t		318,633	402,994	577,926	623,579	419,326	531,452	579,153	501,018
	P	281,031	128,422	55,883	49,354	50,212	61,998	75,209	61,258
	D	37,602	274,572	521,229	574,225	369,114	469,178	500,840	433,587
	EL			814	0	0	276	3,104	6,173
From 3.5 t to 5.1 t		60,824	33,573	134,973	223,681	115,793	179,672	223,181	212,583
	P	14,675	1,961	1,724	14	17	0	0	0
	D	46,149	31,612	133,249	223,667	115,776	179,672	223,181	212,583
From 5.1 t to 12 t	D	25,538	6,377	13,593	5,724	3,174	2,453	3,134	n/a
From 12 t to 16 t	D	12,541	8,251	5,009	4,562	2,483	3,066	3,504	n/a
From 16 t to 20 t	D	6,909	5,518	7,304	8,356	3,179	4,484	4,935	n/a
Over 20 t	D	3,054	3,650	6,255	10,690	3,437	5,543	6,892	n/a
Road tractors	D	9,269	11,278	20,998	30,729	8,639	16,328	22,818	n/a
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	49,368	50,229	61,998	75,209	61,258
Total diesel		144,097	343,806	710,243	857,953	505,802	680,724	765,304	n/a
Total electric		49	0	814	0	0	276	3,104	6,173
Total CNG or LPG				332	–	–	–	–	–
TOTAL all categories		**439,852**	**474,189**	**768,996**	**907,321**	**556,031**	**742,998**	**843,617**	**n/a**

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)	2008	2009	2010	2011	2012
Passenger car derivatives								
Citroën	26,904	22,942	29,449	26,314	13,139	14,972	19,009	15,147
Peugeot	69,411	55,208	41,451	30,979	22,864	33,403	29,884	21,514
PSA Peugeot Citroën (2)	103,229	78,150	70,900	57,293	36,003	48,375	48,893	36,661
Renault (3)	30,420	56,245	60,320	69,804	68,996	67,844	88,296	70,307
TOTAL	**133,649**	**134,395**	**131,220**	**127,097**	**104,999**	**116,219**	**137,189**	**106,968**
Small vans								
Citroën	45,573	67,257	100,832	112,254	80,729	98,042	97,352	79,911
Peugeot	27,002	18,537	70,443	113,638	73,525	97,608	105,486	91,826
PSA Peugeot Citroën (2)	90,178	85,794	171,275	225,892	154,254	195,650	202,838	171,737
Renault	126,779	129,335	147,670	108,734	74,476	97,142	105,631	110,368
TOTAL	**216,957**	**215,129**	**318,945**	**334,626**	**228,730**	**292,792**	**308,469**	**282,105**
Large vans								
Citroën	23,813	32,209	61,957	98,262	44,996	67,448	76,863	66,995
Peugeot	33,031	47,623	75,023	103,076	44,552	79,241	91,861	82,312
PSA Peugeot Citroën (2)	56,844	79,832	136,980	201,338	89,548	146,689	168,724	149,307
Renault	40,508	84,681	104,811	172,502	101,412	148,404	181,960	171,622
Renault Trucks	–	–	8,321	5,271	3,405	0	0	0
Sovam-Etalmobil	86	71	42	3	5	0	0	0
TOTAL	**97,438**	**164,584**	**250,154**	**379,114**	**194,370**	**295,093**	**350,684**	**320,929**
4WD								
Peugeot		1,730						
Pick-ups, small vans								
Dacia	–	–	12,580	6,423	7,019	7,020	6,106	3,599

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

EXPORTS BY FRENCH AUTOMOBILE MANUFACTURERS

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

NEW PASSENGER CAR DELIVERIES BY DESTINATION

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Europe (1)	**1,202,834**	**1,645,276**	**2,636,150**	**2,266,279**	**2,120,054**	**2,331,256**	**2,239,833**	**2,012,131**
of which: European Union (2)	946,760	1,479,316	2,261,904	1,906,629	1,879,124	1,893,455	1,711,698	1,492,650
Germany	202,939	277,424	337,743	287,149	453,617	299,072	296,411	273,409
Austria	35,775	36,175	41,510	43,189	47,424	50,767	53,685	49,411
Belgium-Luxembourg	105,966	144,896	172,806	168,273	158,251	182,241	169,058	154,540
Denmark	4,059	13,919	30,239	31,722	14,857	27,801	32,647	36,597
Spain	100,640	297,846	556,934	326,495	299,407	302,663	242,557	202,154
Greece		11,458	54,270	26,713	13,136	10,744	7,325	8,232
Italy	381,626	324,952	353,616	293,976	339,196	317,851	264,073	223,923
Netherlands	84,063	95,340	120,438	99,265	79,864	108,951	127,494	112,575
Portugal	14,729	59,459	68,375	55,084	39,309	58,750	40,936	24,472
United Kingdom	156,071	245,989	432,507	262,015	225,536	280,244	230,494	210,254
Sweden	13,060	18,001	31,473	18,121	9,556	16,691	16,495	24,075
10 new EU member states				153,332	114,391	130,576	123,358	121,294
12 new EU member states				266,698	161,382	176,330	164,337	153,469
of which: CEEC/CIS (3)	23,619	31,569	164,814	224,787	100,240	206,868	280,527	308,339
Hungary		2,040	23,887	17,766	4,657	6,156	6,777	8,767
Poland		806	59,093	53,025	39,977	53,521	44,251	48,847
Romania			7,520	103,502	42,841	41,804	35,349	27,578
Russia			6,042	177,610	80,682	158,018	217,917	263,335
of which: Switzerland	51,821	43,832	45,654	38,812	38,840	50,740	50,150	44,778
of which: Turkey		13,069	148,264	87,572	96,204	168,456	184,505	155,003
Africa	**133,213**	**45,675**	**69,865**	**151,256**	**151,611**	**171,484**	**201,174**	**292,971**
of which: South Africa	22,439	0	13,913	5,637	7,804	14,711	15,291	12,070
North Africa	15,542	20,432	37,236	132,101	133,041	139,790	170,222	258,295
Nigeria	61,133	8,319	8,860	6,244	204	210	1,909	433
North and South America	**145,204**	**29,360**	**230,270**	**483,777**	**391,503**	**559,780**	**634,508**	**646,567**
of which: Argentina	11,899	516	97,605	122,942	93,781	149,746	189,560	189,169
Brazil			80,205	280,258	248,973	320,930	368,887	349,360
Colombia	11,885	9,112	16,659	2,807	3,510	6,329	7,146	3,852
Mexico		20	1,408	23,298	13,883	24,822	19,034	12,373
Asia (1)	**26,178**	**96,645**	**166,261**	**751,237**	**845,922**	**1,201,459**	**1,218,993**	**905,283**
of which: Japan	883	14,264	15,976	9,910	5,098	12,346	12,001	13,660
China		3,960	54,334	180,179	278,739	392,569	435,130	468,799
Iran	12,836	29,852	45,722	358,694	365,277	516,121	538,004	224,639
India				17,592	3,892	4,488	12,100	35,157
South Korea				104,028	133,977	157,824	112,161	54,588
Pacific	**6,290**	**5,761**	**9,984**	**15,591**	**8,100**	**14,079**	**13,830**	**15,314**
of which: Australia	2,398	820	2,765	10,762	4,937	9,761	8,928	10,939
TOTAL all categories	**1,529,652**	**1,881,998**	**3,174,447**	**3,736,921**	**3,542,282**	**4,306,065**	**4,336,759**	**3,898,019**
KD and CKD units	**471,744**	**208,241**						

NEW COMMERCIAL VEHICLES BY DESTINATION

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Europe (1)	**88,235**	**174,998**	**379,289**	**473,705**	**251,928**	**357,998**	**404,818**	**341,640**
of which: European Union (2)	74,382	156,268	312,421	411,784	224,591	312,293	344,414	286,108
Germany	17,490	23,581	50,081	59,809	38,001	46,406	52,459	57,935
Austria	2,185	3,702	4,697	7,956	5,498	6,797	7,431	7,361
Belgium-Luxembourg	11,455	18,383	22,857	34,012	24,811	29,330	30,768	27,603
Spain	71	44,110	57,516	40,419	17,026	28,263	29,001	19,310
Italy	26,207	19,923	35,910	41,408	34,731	39,690	38,409	21,845
Netherlands	8,234	7,995	23,087	20,926	11,097	13,848	17,061	15,868
Portugal	2,805	14,291	34,551	19,242	13,397	18,557	15,514	7,167
United Kingdom	8,390	21,127	55,647	62,972	35,411	60,997	61,885	64,248
10 new EU member states				49,057	20,802	28,891	37,428	30,996
12 new EU member states				75,366	22,934	33,784	44,067	37,332
of which: CEEC/CIS (3)	361	2,781	25,100	20,370	4,042	16,121	24,544	24,118
Poland	301	97	5,624	21,606	10,546	14,258	17,529	14,210
of which: Switzerland	3,317	2,921	4,293	8,174	7,874	8,500	9,436	9,528
Africa	**75,802**	**18,320**	**16,074**	**30,466**	**27,146**	**27,769**	**29,007**	**46,758**
of which: North Africa	18,334	8,588	13,509	26,601	24,961	24,690	25,344	42,231
North and South America	**5,875**	**5,453**	**36,682**	**68,808**	**55,553**	**85,810**	**112,910**	**107,161**
of which: USA	1,999	2,000	1,099					
Asia (1)	**6,930**	**11,302**	**8,260**	**7,356**	**3,804**	**5,632**	**6,302**	**6,729**
Pacific	**776**	**1,364**	**1,797**	**3,238**	**1,611**	**2,208**	**2,238**	**2,940**
TOTAL all categories	**178,126**	**213,502**	**444,516**	**585,270**	**340,931**	**480,430**	**556,356**	**506,303**
KD and CKD units	**39,428**	**12,207**						

(1) As of 2004, exports 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) CEEC/CIS, 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

Until 2008, the physical and financial data are taken from surveys (known as the EAE reports) conducted every year of French companies in the automotive manufacturing industry. Since then, they have been replaced by the ESANE information system, combining both survey and administrative data.
These surveys are one of the main sources of information for French industry. The SESSI, formerly the statistics department of the Government Secretary for Industry now attached to INSEE, uses the surveys.
These data reflect the businesses of French and foreign-owned companies with operations in France. Their core businesses may extend to other countries.
Changes such as the creation, reorganization, acquisition or sale of companies can result in significant variations from one year to another.
The introduction of a new economic category, the joint use of 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	2008	2009	2010	2011	2012 [1]
Physical data									
Employees [2]	units	320,922	216,848	190,830					
Employees on 12/31 (excluding temporary staff)					148,898	144,717	137,527	139,411	135,000
Production in France (only light vehicles since 2012)	thousands			3,348	2,569	2,048	2,229	2,295	1,968
Production / employee				**17.5**	**17.3**	**14.1**	**16.2**	**16.5**	**14.6**
Financial data									
Turnover before tax	€ millions	19,251	49,472	73,684	82,838	69,854	78,969	83,317	76,000
Export turnover	€ millions	7,511	18,817	42,290		36,790	45,526	48,719	45,500
Exports as a % of total turnover	**%**	**39.0%**	**38.0%**	**57.4%**		**52.7%**	**57.6%**	**58.5%**	**60%**
Value added (VA) before tax	€ millions	5,883	10,650	13,282	10,076	7,423	10,112	9,541	8,000
Value added / turnover before tax	**%**	**30.6%**	**21.5%**	**18.0%**	**12.2%**	**10.6%**	**12.8%**	**11.5%**	**10.5%**
Value added / per employee before tax	€ thousands	18	49	70	68	51	74	68	59
Social security costs	€ millions	1,452	1,860	2,153	2,271	2,015	2,302	2,443	
Social security costs / employee	€ thousands	4.5	8.6	11.3	15.3	13.9	16.7	17.5	
Wages and salaries	€ millions	3,254	4,271	5,093	5,972	5,808	5,696	5,632	
Wages and salaries / employee	€ thousands	10.1	19.7	26.7	40.1	40.1	41.4	40.4	
Personnel costs	€ millions	4,706	6,132	7,246	8,242	7,823	7,999	8,075	
Personnel costs / employee	€ thousands	14.7	28.3	38.0	55.4	54.1	58.2	57.9	
Personnel costs / VA	%	80.0%	57.6%	54.6%	81.8%	105.4%	79.1%	84.6%	
Gross operating surplus	€ millions	928	3,855	5,201	886	– 1,174	1,340	710	
Gross operating surplus / VA	**%**	**15.8%**	**36.2%**	**39.2%**	**8.8%**	**– 15.8%**	**13.3%**	**7.4%**	
Interest expense	€ millions	484	1,170	1,178		4,038	2,862	1,134	
Interest expense / VA	%	8.2%	11.0%	8.9%		54.4%	28.3%	11.9%	
Interest income	€ millions	207	1,095	2,508		3,444	2,191	2,049	
Interest income / VA	%	3.5%	10.3%	18.9%		46.4%	21.7%	21.5%	
Net interest income (expense)	€ millions	– 276	– 74	1,330		– 594	– 671	915	
Net interest income (expense) / VA	%	– 4.7%	– 0.7%	10.0%		– 8.0%	– 6.6%	9.6%	
Cash flow	€ millions	638	2,918	5,499		– 2,218	1,078	1,537	
Cash flow / VA	%	10.8%	27.4%	41.4%		– 29.9%	10.7%	16.1%	
Net income (loss)	**€ millions**	**– 26**	**969**	**2,851**	**– 3,702**	**– 4,900**	**293**	**– 521**	
Net income / turnover	%	– 0.1%	2.0%	3.9%	– 4.5%	– 7.0%	0.4%	– 0.6%	
Capital expenditure	€ millions	1,018	3,139	3,807					
Gross fixed investments exclusive of contributions	€ millions				2,735	1,983	2,078	2,230	2,200
Capital expenditure / turnover	**%**	**5.3%**	**6.3%**	**5.2%**	**2.8%**	**2.8%**	**2.6%**	**2.7%**	**2.9%**
Capital expenditure / VA	**%**	**17.3%**	**29.5%**	**28.7%**	**27.1%**	**26.7%**	**20.6%**	**23.4%**	**27.5%**

(1) CCFA estimates.
(2) Until 2007, these are actual employees: average employee numbers, corrected by the balance of employees hired (temporary staff) and quoted as hired staff.

PHYSICAL AND FINANCIAL DATA FOR THE AUTOMOTIVE EQUIPMENT MANUFACTURING INDUSTRY

The physical and financial data in the table below are taken from surveys (known as the EAE reports) conducted every year of French companies in the automotive equipment manufacturing industry and from 2008, from the new ESANE information system.
In 1993, a new French business category (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 category has become 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 category.
Companies listed in the new "automotive equipment manufacturing" sector do not represent, therefore, all suppliers of the automotive industry. Added to these should be manufacturers of glass, tires, doors and locks and automotive springs...
In addition to these activities, the automotive manufacturing and automotive equipment manufacturing industries purchase a number of intermediate products (metals, rubber, plastics, etc.), services (consulting, research, advertising, etc.) and capital goods from other sectors.

	Units	1980	1990	2000	2008	2009	2010	2011	2012 (1)
Physical data									
No. of companies (> 20 employees until 2007)	units	320	320	243	653	565	639	616	
Employees (2)	units	143,347	112,963	94,171					
Employees on 12/31 (excluding temporary staff)					73,210	64,881	61,759	59,579	56,000
Financial data									
Turnover before tax	€ millions	5,637	14,452	17,766	20,464	14,898	16,056	16,542	14,500
Export turnover	€ millions	1,301	4,018	7,512		7,056	7,865	8,513	
Exports as a % of total turnover	**%**	**23.1%**	**27.8%**	**42.3%**		**47.4%**	**49.0%**	**51.5%**	
Percentage of production exported (source: FIEV)					**53%**	**54%**	**51%**	**53%**	**54%**
Value added (VA) before tax	€ millions	2,251	4,530	4,643	4,403	3,479	3,885	3,761	
Value added/turnover before tax	**%**	**39.9%**	**31.3%**	**26.1%**	**21.5%**	**23.4%**	**24.2%**	**22.7%**	
Value added per employee before tax	€ thousands	16	40	49	60	54	63	63	
Social security costs	€ millions	503	867	902	1,046	939	937	940	
Social security costs / employee	€ thousands	3.5	7.7	9.6	14.3	14.5	15.2	15.8	
Wages and salaries	€ millions	1,239	2,060	2,213	2,489	2,300	2,302	2,173	
Wages and salaries / employee	€ thousands	8.6	18.2	23.5	34.0	35.4	37.3	36.5	
Personnel costs	€ millions	1,742	2,926	3,115	3,535	3,239	3,239	3,113	
Personnel costs / employee	€ thousands	12.2	25.9	33.1	48.3	49.9	52.4	52.2	
Personnel costs / VA	%	77.4%	64.6%	67.1%	80.3%	93.1%	83.4%	82.8%	
Gross operating surplus	€ millions	418	1,337	1,206	541	7	412	417	
Gross operating surplus / VA	**%**	**18.6%**	**29.5%**	**26.0%**	**12.3%**	**0.2%**	**10.6%**	**11.1%**	
Interest expense	€ millions	186	387	440		171	177	129	
Interest expense / VA	%	8.2%	8.5%	9.5%		4.9%	4.6%	3.4%	
Interest income	€ millions	36	213	337		226	217	305	
Interest income / VA	%	1.6%	4.7%	7.3%		6.5%	5.6%	8.1%	
Net interest income (expense)	€ millions	– 150	– 174	– 103		55	40	175	
Net interest income (expense) / VA	%	– 6.7%	– 3.8%	– 2.2%		1.6%	1.0%	4.7%	
Cash flow	€ millions	237	883	889		– 46	341	428	
Cash flow / VA	%	10.5%	19.5%	19.2%		– 1.3%	8.8%	11.4%	
Net income (loss)	**€ millions**	**54**	**400**	**– 92**	**– 248**	**– 427**	**– 17**	**201**	
Net income / turnover	%	1.0%	2.8%	– 0.5%	– 1.2%	– 2.9%	– 0.1%	1.2%	
Capital expenditure	€ millions	328	899	1,024					
Gross fixed investments exclusive of contributions	€ millions				1,092	1,119	413	524	
Capital expenditure / turnover	**%**	**5.8%**	**6.2%**	**5.8%**	**5.3%**	**7.5%**	**2.6%**	**3.2%**	
Capital expenditure / VA	**%**	**14.6%**	**19.8%**	**22.0%**	**24.8%**	**32.2%**	**10.6%**	**13.9%**	

(1) FIEV estimates.
(2) Actual employees: average employee numbers, corrected by the balance of employees hired (temporary staff) and quoted as hired staff.

REGISTRATIONS

NEW PASSENGER CAR REGISTRATIONS BY MAKE

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Citroën	270,983	266,822	261,508	295,431	346,437	328,146	323,076	266,430
Peugeot [1]	414,335	498,481	397,547	364,523	391,944	400,663	369,761	305,440
Dacia				43,525	61,217	104,641	88,980	80,790
Renault	759,312	639,440	602,415	463,019	517,093	497,820	455,705	343,345
Others France	56	146	63	33	73	54	752	1,968
TOTAL France [2]	**1,444,686**	**1,404,889**	**1,261,533**	**1,166,531**	**1,316,764**	**1,331,324**	**1,238,274**	**997,973**
Alfa Romeo	25,380	15,916	12,774	10,316	11,732	13,033	16,232	10,323
Audi	17,455	32,762	34,937	47,871	49,109	50,936	58,970	61,754
BMW	17,239	29,580	31,576	49,194	43,414	46,074	46,305	48,045
Chevrolet				9,156	21,074	21,247	23,708	24,739
Chrysler	16	4,084	4,827	2,485	1,085	880	184	8
Daihatsu	-	0	1,043	1,853	1,914	1,083	217	352
Dodge				2,564	1,358	857	147	7
Fiat	53,147	128,822	95,983	73,504	82,290	72,717	57,326	43,554
Ford	68,426	159,575	117,061	112,128	133,079	114,810	115,357	92,469
Honda	8,293	14,002	8,716	12,382	14,669	11,251	8,793	8,406
Hyundai	-	0	11,019	18,454	21,516	18,785	20,204	28,733
Jaguar	269	1,290	1,939	1,678	1,169	1,126	1,001	897
Jeep	-	3,824	3,001	2,278	1,183	1,177	2,637	3,228
Kia	-	0	2,631	15,750	21,164	24,056	27,961	33,018
Lada	13,069	15,758	1,867	176	98	346	405	248
Lancia	6,801	18,225	5,864	4,765	4,839	3,368	4,000	5,248
Land Rover	237	3,611	7,570	3,177	2,419	2,735	4,317	7,770
Mazda	13,021	18,563	6,366	13,473	13,096	10,232	6,509	5,107
Mercedes	14,430	28,605	43,389	51,584	50,927	45,612	43,545	47,567
Mini	-	-	-	19,015	17,777	18,007	21,702	21,483
Mitsubishi	2,788	4,298	5,575	2,571	2,131	3,514	4,386	3,639
Nissan–Infiniti	17,700	25,707	31,330	38,302	46,070	54,351	72,212	70,133
Opel	32,709	113,490	133,576	89,790	89,265	94,877	94,102	71,666
Porsche	1,060	1,297	825	1,645	2,112	2,073	2,734	3,336
Rover	20,690	41,147	13,474	0	0	0	0	0
Saab	179	2,459	3,265	3,174	1,585	574	377	40
Santana	-	1,746	4,231	144	99	27	3	0
Seat	306	48,052	40,562	34,774	38,364	30,645	33,268	24,180
Skoda	1,636	1,825	11,570	17,399	19,003	18,533	21,185	22,464
Smart	-	-	6,645	8,669	7,920	6,408	6,810	5,441
Ssangyong	-	0	19	595	472	451	560	290
Subaru	-	0	2,312	1,234	1,405	1,146	831	971
Suzuki	-	0	11,355	25,353	29,056	22,070	19,233	16,026
Toyota-Lexus	13,095	15,839	43,698	92,279	90,320	67,311	70,192	68,007
Volkswagen	75,727	155,971	152,868	144,506	150,392	146,538	163,584	154,434
Volvo	8,207	12,415	6,777	11,001	12,007	11,841	15,192	13,396
TOTAL Foreign [2]	**428,516**	**904,241**	**872,351**	**924,838**	**985,634**	**920,345**	**965,955**	**900,787**
TOTAL all categories	**1,873,202**	**2,309,130**	**2,133,884**	**2,091,369**	**2,302,398**	**2,251,669**	**2,204,229**	**1,898,760**
of which Temporary Transit	-	-	-	*41,086*	*33,727*	*39,011*	*38,421*	*38,427*
Total France (as a %)	77.1%	60.8%	59.1%	55.8%	57.2%	59.1%	56.2%	52.6%
Total foreign (as a %)	22.9%	39.2%	40.9%	44.2%	42.8%	40.9%	43.8%	47.4%

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

USED PASSENGER CAR REGISTRATIONS

In units

	1980	1990	2000	2008	2009	2010	2011	2012
TOTAL all categories	**4,441,423**	**4,758,750**	**5,082,122**	**5,393,045**	**5,240,411**	**5,386,007**	**5,440,856**	**5,371,599**
Used/new ratio	2.4	2.1	2.4	2.6	2.3	2.4	2.5	2.8

USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

In units

	1980	1990	2000	2008	2009	2010	2011	2012
TOTAL all categories		**644,925**	**651,033**	**781,720**	**766,764**	**806,398**	**799,058**	**778,270**
Used/new ratio		1.6	1.6	1.7	2.1	1.9	1.9	2.0

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	2008	2009	2010	2011	2012
Citroën	24,158	111,881	138,628	239,593	256,454	243,841	238,010	203,866
Peugeot [1]	65,199	189,322	206,153	278,689	295,599	307,518	288,634	242,860
Dacia				33,846	35,483	53,737	73,642	65,204
Renault	45,862	205,374	257,909	369,788	377,769	352,530	316,841	253,796
TOTAL France [2]	**135,219**	**506,577**	**602,711**	**921,916**	**965,305**	**957,626**	**917,127**	**765,726**
Alfa Romeo	-	2,524	7,444	9,079	8,307	8,432	11,187	6,660
Audi	19,591	13,495	25,901	43,243	44,403	45,201	49,615	52,449
BMW/Mini	-	8,271	21,065	52,348	46,578	50,906	54,738	56,503
Chrysler/Dodge/Jeep	-	-	4,161	7,135	3,536	2,863	2,876	3,145
Fiat-Lancia	10,352	33,913	38,337	42,262	35,445	28,240	19,441	15,056
Ford	1,833	56,331	58,896	96,417	98,745	89,334	88,850	65,176
Honda			413	7,298	6,575	5,029	3,360	3,992
Hyundai	-	-	5,510	12,675	11,099	13,174	14,536	20,706
Kia			1,200	12,025	12,750	15,428	18,996	20,704
Land Rover	-	2,980	5,656	3,138	2,368	2,637	4,095	7,388
Mazda	-	5,200	3,204	8,615	8,519	6,768	4,671	3,386
Mercedes	10,635	15,676	30,007	46,859	46,125	41,460	39,645	43,537
Mitsubishi	-	1,623	3,227	2,053	1,370	3,102	4,249	3,539
Nissan-Infiniti	694	4,982	15,533	26,832	30,361	35,092	50,108	51,675
Opel	6,178	28,218	63,726	64,629	59,335	63,751	64,617	45,363
Rover	-	4,419	7,480	0	0	0	0	0
Seat	-	14,367	27,861	30,402	33,170	25,462	28,922	18,718
Skoda	-	-	7,741	15,548	15,362	14,781	16,531	15,889
Suzuki	-	-	3,165	14,240	13,282	9,263	9,044	5,682
Toyota-Lexus	-	3,594	12,282	55,623	43,266	35,744	38,576	32,082
Volkswagen	-	50,975	89,487	129,683	123,629	118,702	129,026	117,017
Volvo	1,198	4,097	4,786	10,590	11,799	11,614	14,937	13,087
TOTAL Foreign [2]	**50,815**	**255,477**	**443,774**	**699,064**	**663,190**	**635,547**	**679,028**	**618,818**
TOTAL all categories	**186,034**	**762,054**	**1,046,485**	**1,620,980**	**1,628,495**	**1,593,173**	**1,596,155**	**1,384,544**
of which Temporary Transit	-	-	-	*36,542*	*30,759*	*34,432*	*33,788*	*38,247*
% diesel	9.9%	33.0%	49.0%	77.5%	70.7%	70.8%	72.4%	62.8%
Total France (as a %)	72.7%	66.5%	57.6%	56.9%	59.3%	60.1%	57.5%	55.3%
Total foreign (as a %)	27.3%	33.5%	42.4%	43.1%	40.7%	39.9%	42.5%	44.7%

(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	2008 [3]	2009	2010	2011	2012
Citroën	53,245	80,958	77,048	78,593	66,833	70,838	75,876	65,346
Peugeot [1]	58,986	60,813	74,950	82,256	66,436	72,228	72,071	63,671
Dacia				53	5,237	5,434	5,298	3,732
Renault	116,602	162,549	139,752	144,750	116,498	135,591	137,360	123,447
Others France	256	415	40	460	532	528	486	523
TOTAL France	**229,089**	**304,735**	**291,790**	**306,112**	**255,536**	**284,619**	**291,091**	**256,719**
Fiat	8,326	10,139	25,253	36,403	32,373	34,659	37,152	34,036
Ford	9,099	16,080	18,110	24,765	20,197	20,437	20,473	18,478
Hyundai	-	-	588	659	374	237	182	276
Isuzu			108	1,950	1,711	1,961	1,904	1,788
Iveco	2,941	11,543	16,534	17,845	10,505	11,610	12,954	11,385
Land Rover	645	2,718	1,857	1,211	1,078	1,550	1,489	1,478
Mazda	579	1,067	916	620	424	482	424	160
Mercedes	5,495	11,156	23,139	22,509	16,929	19,051	20,073	18,275
Mitsubishi	-	-	3,392	2,916	2,111	2,639	2,776	1,716
Nissan	861	5,063	5,197	8,449	6,498	7,307	9,616	9,076
Opel	664	2,408	7,561	11,606	6,772	7,195	7,560	7,257
Toyota-Lexus	7,112	6,099	1,771	7,019	4,348	4,013	4,115	4,505
Volkswagen	8,091	9,673	13,819	13,713	11,506	13,249	14,895	14,815
TOTAL Foreign [2]	**48,798**	**89,060**	**123,176**	**154,161**	**118,450**	**132,993**	**138,163**	**127,330**
TOTAL all categories	**277,887**	**393,795**	**414,966**	**460,273**	**373,986**	**417,612**	**429,254**	**384,049**
Total France (as a %)	82.4%	77.4%	70.3%	66.5%	68.3%	68.2%	67.8%	66.8%
Total foreign (as a %)	17.6%	22.6%	29.7%	33.5%	31.7%	31.8%	32.2%	33.2%

(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 to "Other France" and "Foreign".

REGISTRATIONS

NEW PASSENGER CARS AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY MAKE

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
Citroën	324,228	347,780	338,556	374,024	413,270	398,984	398,952	331,776
Peugeot	473,321	559,294	472,497	446,779	458,380	472,891	441,832	369,111
Dacia				43,578	66,454	110,075	94,278	84,522
Renault	875,914	801,989	742,167	607,769	633,591	633,411	593,065	466,792
TOTAL France	**1,673,775**	**1,709,624**	**1,553,323**	**1,472,643**	**1,572,300**	**1,615,943**	**1,529,365**	**1,254,692**
Fiat	61,473	138,961	121,236	109,907	114,663	107,376	94,478	77,590
Ford	77,525	175,655	135,171	136,893	153,276	135,247	135,830	110,947
Land Rover	882	6,329	9,427	4,388	3,497	4,285	5,806	9,248
Mercedes	19,925	39,761	66,528	74,093	67,856	64,663	63,618	65,842
Nissan-Infiniti	18,561	30,770	36,527	46,751	52,568	61,658	81,828	79,209
Opel	33,373	115,898	141,137	101,396	96,037	102,072	101,662	78,923
Rover	20,812	41,343	13,564	0	0	0	0	0
Seat	306	51,999	42,230	35,150	38,813	31,080	33,966	24,180
Toyota-Lexus	20,207	21,938	45,469	99,298	94,668	71,324	74,307	72,512
Volkswagen	83,818	165,644	166,687	158,219	161,898	159,787	178,479	169,249
TOTAL Foreign	**477,314**	**993,301**	**995,527**	**1,078,999**	**1,104,084**	**1,053,338**	**1,104,118**	**1,028,117**
TOTAL all categories	**2,151,089**	**2,702,925**	**2,548,850**	**2,551,642**	**2,676,384**	**2,669,281**	**2,633,483**	**2,282,809**
Total France as a %	77.8%	63.3%	60.9%	57.7%	58.7%	60.5%	58.1%	55.0%
Total foreign as a %	22.2%	36.7%	39.1%	42.3%	41.3%	39.5%	41.9%	45.0%

(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	2008	2009	2010	2011	2012
Renault Trucks	17,984	20,453	20,818	19,359	12,158	10,908	14,343	12,929
TOTAL France	**18,312**	**20,738**	**20,992**	**19,472**	**12,295**	**10,964**	**14,399**	**12,965**
DAF	1,881	3,460	4,365	6,579	3,752	4,464	6,240	5,545
Iveco	6,578	7,204	6,998	5,838	4,120	4,003	4,980	4,488
MAN	327	1,433	3,498	5,530	3,630	2,729	4,765	4,540
Mercedes	8,014	9,500	9,976	9,610	5,482	5,229	7,087	7,100
Scania	1,389	2,711	4,963	4,156	2,176	2,553	3,670	2,823
Volvo	3,724	4,647	6,739	5,739	3,615	3,938	5,825	5,564
TOTAL Foreign	**23,534**	**29,290**	**36,924**	**38,032**	**23,238**	**23,257**	**32,964**	**30,413**
TOTAL all categories	**41,846**	**50,028**	**57,916**	**57,504**	**35,533**	**34,221**	**47,363**	**43,378**
Total France as a %	43.8%	41.5%	36.2%	33.9%	34.6%	32.0%	30.4%	29.9%
Total foreign as a %	56.2%	58.5%	63.8%	66.1%	65.4%	68.0%	69.6%	70.1%

USED HEAVY TRUCK (OVER 5 METRIC TONS) REGISTRATIONS

In units

	1980	1990	2000	2008	2009	2010	2011	2012
TOTAL	**–**	**–**	**59,056**	**54,586**	**49,452**	**55,591**	**57,152**	**52,154**
Used/new ratio	–	–	1.0	0.9	1.4	1.6	1.2	1.2

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

In units

	1980	1990	2000	2008	2009	2010	2011	2012
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)	–	–	–	2,914	3,092	2,412	2,843	2,603
Evobus Group (2)	–	–	–	1,346	1,851	1,433	1,681	1,846
Neoman Bus Group (3)	–	–	–	527	658	559	515	187
Bova	–	–	–	155	150	116	86	34
Temsa	–	–	–	284	384	309	272	174
Van Hool	57	250	230	157	117	169	175	98
Others	–	–	–	272	412	384	634	602
TOTAL all categories	**–**	**–**	**–**	**5,655**	**6,664**	**5,382**	**6,206**	**5,544**

(1) IrisbusGroup: 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	2012
European Union 27 countries	–	–	524	560
European Union 15 countries from 1995	380	473	576	592
12 new EU member states	–	–	332	440
Germany	450	529	593	560
Belgium	363	463	534	576
Spain	276	430	566	594
France	**446**	**520**	**596**	**603**
Italy	412	541	656	692
United Kingdom	379	474	566	571
Sweden	400	445	509	526
Poland	117	229	379	558
Turkey	27	65	116	164
Canada	559	562	585	626
USA	708	759	817	782
South Korea	25	177	319	381
Japan	375	527	591	597
Argentina	173	167	182	269
Brazil	86	89	121	176
China	3	8	21	69
India	3	6	12	22

Source: CCFA.

TOTAL VEHICLES IN USE (JANUARY 1ST, 2013)

In thousands

	All fuels	Diesel
Passenger cars		
Up to 5 HP	13,761	7,701
6 to 10 HP	16,266	10,898
11 HP and over	1,573	778
Total passenger cars	**31,600**	**19,377**
Light commercial vehicles (LCV)		
Up to 2.5 t	3,673	3,273
From 2.5 t to 3.5 t	2,223	2,206
From 3.6 t to 5 t	14	14
TOTAL LCVs up to 5 t	5,910	5,493
Total passenger cars and light commercial vehicles	**37,510**	**24,870**
Heavy trucks over 5 metric tons		
Trucks		
From 5 t to 12 t	78	78
From 12 t to 16 t	48	48
From 16 t to 20 t	116	116
20 t and over	100	100
Total trucks	**342**	**342**
Road tractors	**199**	**199**
Total heavy trucks	**541**	**540**
Coaches and buses	87	84
Total commercial vehicles over 5 t	**628**	**624**
Total commercial vehicles all sizes	**6,538**	**6,117**
TOTAL all vehicles	**38,138**	**25,494**

Source: CCFA estimates.

VEHICLE OWNERSHIP

	Units	1980	1990	2000	2008	2009	2010	2011	2012 (1)
Households without a vehicle	%	29.2%	23.2%	19.7%	17.3%	16.8%	16.5%	16.5%	16.7%
Households with a vehicle	%	70.8%	76.8%	80.3%	82.7%	83.2%	83.5%	83.5%	83.3%
Households with one vehicle	%	54.3%	50.5%	50.7%	46.9%	47.5%	47.6%	48.2%	48.1%
Households with two vehicles	%	14.8%	23.0%	25.4%	30.5%	30.5%	30.7%	30.5%	30.4%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.3%	5.2%	5.2%	4.8%	4.8%
Average vehicle age	years		5.90	7.25	8.1	8.0	8.0	8.1	8.3
Average ownership period	years		3.66	4.43	4.9	4.9	5.0	5.1	5.2
Used passenger cars	%		50.0	56.1	61.9	59.6	58.9	57.8	57.9
Total average kilometers	km	12,200	13,041	13,560	12,015	11,793	11,755	11,515	11,639
Gasoline average kilometers	km	11,600	11,651	10,780	8,658	8,176	8,108	7,897	8,022
Diesel average kilometers	km	26,200	20,950	18,140	15,106	14,819	14,542	14,265	14,256
Domestic passenger road transportation									
By passenger car	billion passenger-km	482.3	617.3	754.4	800.0	802.9	810.8	812.7	815.0
By coach - bus	billion passenger-km	37.4	40.7	42.0	48.4	48.8	49.9	51.1	51.6
Total traffic	billion passenger-km	588.0	743.3	892.2	962.6	964.8	974.0	981.2	984.9
Road transport as a % of total traffic	%	88.4	88.5	89.3	88.1	88.3	88.4	88.0	88.0
Annual change									
By passenger car	%	–	+ 2.6	+ 0.6	– 1.5	0.4	1.0	0.2	0.3
By coach - bus	%	–	+ 2.7	+ 2.7	6.8	0.7	2.2	2.4	1.0

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

TOTAL VEHICLES IN USE ON JANUARY 1ST, 2013

In thousands

	1980	1990	2000	2009	2010	2011	2012	2013
Passenger cars								
Up to 5 HP	5,090	8,312	10,572	12,537	12,946	13,351	13,628	13,761
6 HP to 10 HP	11,460	13,385	15,723	16,789	16,583	16,422	16,375	16,266
Over 10 HP	1,890	1,313	1,186	1,523	1,521	1,528	1,547	1,573
TOTAL passenger cars	**18,440**	**23,010**	**27,480**	**30,850**	**31,050**	**31,300**	**31,550**	**31,600**
of which diesel	730	3,265	9,261	16,753	17,458	18,165	18,865	19,377
Commercial vehicles								
Up to 3.5 t	1,985	4,125	4,974	5,720	5,750	5,809	5,867	5,896
From 3.5 t to 5 t	103	20	12	10	10	11	13	14
From 5 t to 20 t	250	334	287	253	250	246	247	242
20 t and over	26	41	46	89	91	93	98	100
Road tractors	129	160	210	206	202	199	206	199
TOTAL commercial vehicles	**2,493**	**4,680**	**5,529**	**6,278**	**6,303**	**6,358**	**6,431**	**6,451**
of which diesel	976	2,342	4,202	5,538	5,632	5,777	5,941	6,033
Coaches and buses	**57**	**68**	**80**	**84**	**85**	**86**	**86**	**87**
TOTAL Overall	**20,990**	**27,758**	**33,090**	**37,212**	**37,438**	**37,744**	**38,067**	**38,138**
of which diesel	**1,763**	**5,675**	**13,543**	**22,373**	**23,172**	**24,025**	**24,889**	**25,494**

Source: CCFA estimates.

FUEL AND TAXATION, EMISSIONS AND CO_2

ROAD FUEL CONSUMPTION, PRICES AND TAXES

	Units	1980	1990	2000	2008	2009	2010	2011	2012
Fuel consumption									
Regular gasoline	millions of liters	4,216	959						
Premium leaded - AVSR	millions of liters	20,007	19,911	3,924	0	0	0	0	0
Premium unleaded	millions of liters		3,406	14,329	12,054	10,871	9,501	8,582	7,335
Premium unleaded 95-E10	millions of liters				–	727	1,379	1,754	2,331
Total gasoline	**millions of liters**	**24,223**	**24,276**	**18,253**	**12,054**	**11,598**	**10,880**	**10,337**	**9,666**
Diesel	**millions of liters**	**11,415**	**20,664**	**32,373**	**38,849**	**38,913**	**39,749**	**40,327**	**40,382**
TOTAL road fuel	**millions of liters**	**35,638**	**44,940**	**50,627**	**50,902**	**50,510**	**50,629**	**50,664**	**50,047**

Source: CPDP.

	Units	1980	1990	2000	2008	2009	2010	2011	2012
Retail prices of fuel (annual average)									
Regular gasoline inc. VAT	**€/liter**	**0.49**	**0.80**	**–**	**–**	**–**	**–**	**–**	**–**
Tax as a %	%	57	73	–	–	–	–	–	–
Premium leaded - AVSR	**€/liter**	**0.52**	**0.81**	**1.17**	**–**	**–**	**–**	**–**	**–**
Tax as a %	%	57	74	71	–	–	–	–	–
Premium unleaded 98	**€/liter**	**–**	**0.79**	**1.11**	**1.39**	**1.24**	**1.38**	**1.54**	**1.62**
Tax as a %	%	–	71	69	60	65	60	56	54
Gasoline	**€/liter**	**0.52**	**0.81**	**1.12**	**1.36**	**1.21**	**1.35**	**1.51**	**1.58**
Tax as a %	%	57	74	69	61	66	61	57	55
Diesel	**€/liter**	**0.37**	**0.54**	**0.85**	**1.27**	**1.00**	**1.15**	**1.34**	**1.40**
Tax as a %	%	46	61	62	50	59	54	49	47

Source: SOeS.

TOTAL AUTOMOBILE EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2012

Thousands of metric tons

	1990	1995	2000	2005	2009	2010	2011	2012 [1]	Variation 2012-1990	Variation 2012-2011
Regulated pollutants										
SO_2	143	117	23	4	1	1	1	1	– 99%	-
CO_2	6,464	4,592	2,552	1,306	674	619	513	434	– 93%	– 15%
NOx	1,144	1,061	916	759	597	592	568	540	– 53%	– 5%
NMVOC	1,095	827	527	268	129	109	91	72	– 93%	– 21%
Lead (in metric tons)	3,915	1,181	62	56	57	57	58	57	– 99%	-
PM10: particles	69	79	66	50	42	42	39	36	– 48%	– 8%
Other emissions										Millions of metric tons
CO_2	111	120	127	129	119	121	121	118	9%	– 2%

(1) 2012 estimates.
Source: CITEPA / Secten data, updated February 2013.

CO_2 EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

In millions of metric tons of CO_2

	1990	1995	2000	2005	2007	2008	2009	2010	2011	2012 [1]
Power production	66	57	63	67	64	62	59	59	51	52
Industry	114	108	108	103	102	97	84	89	84	83
Residential/Commercial	85	87	89	98	86	91	90	91	77	84
Transport	118	127	135	136	133	127	125	127	127	124
of which road	**111**	**120**	**127**	**129**	**127**	**120**	**119**	**121**	**121**	**118**
of which other transportation	6.9	7.1	8.0	6.9	6.3	6.3	6.1	6.0	6.2	6.1
Agriculture/silviculture	9.4	9.8	10.1	10.4	9.7	10.6	10.6	9.9	9.7	9.2
TOTAL excluding LULUCF [2]	**392**	**389**	**405**	**414**	**395**	**388**	**369**	**376**	**348**	**352**
LULUCF [2]	– 27	– 36	– 34	– 50	– 55	– 56	– 47	– 43	– 53	– 53
TOTAL with LULUCF [2]	**365**	**353**	**371**	**365**	**339**	**332**	**322**	**334**	**296**	**299**

(1) 2010 estimates.
(2) LULUCF: Land Use, Land Use Change and Forestry
Source: CITEPA/ CORALIE/ Secten format, April 2013.

AVERAGE CO_2 EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE

In grams of CO_2 per km

	1995	2000	2005	2006	2007	2008	2009	2010	2011	2012 [1]
France										
Gasoline	177	168	159	155	153	141	131	130	129	127
Diesel	175	155	149	147	148	139	134	130	127	124
TOTAL	**176**	**162**	**152**	**149**	**149**	**140**	**133**	**130**	**127**	**124**
European Union 15 countries										
TOTAL	**186**	**171**	**161**	**161**	**159**	**154**	**146**	**141**	**136**	**132**

(1) CCFA estimates for 2012.
Source: ADEME (June 2012)

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%
2011	16,003	5%	2,066	23%	2,508	8%	21,865	7%	42,442	7%	1,021	– 3%	43,463	7%
2012	14,964	– 6%	2,113	2%	2,355	– 6%	20,633	– 6%	40,066	– 6%	1,146	12%	41,212	– 5%
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%
2011	24,638	10%	2,986	3%	3,048	25%	16,581	9%	47,252	10%	1,087	– 9%	48,339	9%
2012	22,441	– 9%	2,427	– 19%	2,710	– 11%	15,847	– 4%	43,425	– 8%	1,129	4%	44,553	– 8%
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	
2011	– 8,634		– 921		– 540		+ 5,284		– 4,810		– 66		– 4,876	
2012	– 7,477		– 313		– 355		+ 4,786		– 3,359		+ 18		– 3,342	
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	
2011	65		69		82		132		90		94		90	
2012	67		87		87		130		92		102		92	

FOB (free-on-board): transaction value including freight and insurance up to the border of the exporting country.
CIF (cost, insurance, freight): transaction value including freight and insurance up to the border of the importing country.
Sources: customs data processed by CCFA.

AUTOMOTIVE TAXES AND DUTIES

In € millions

	1980	1990	2000	2008	2009	2010	2011	2012
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	34,619	32,250	32,324	35,360	35,609
Automotive insurance tax	478	2,780	3,429	3,933	4,018	4,126	4,263	4,373
Tax on vehicle registration certificates	157	846	1,373	1,968	1,917	1,917	2,080	2,117
Road tax	866	1,901	539	0	0	0	0	0
Tax on company cars	199	345	644	1,086	1,098	992	927	985
Tax based on number of axles	59	75	223	226	172	168	172	172
Fixed rate police and traffic fines, sentence fines	154	317	720	1,435	1,201	1,255	1,572	1,624
Driver's license tax	88	86	4	–	–	–	–	–
Regional development tax	0	0	442	521	528	539	577	570
Government royalty	–	30	132	174	180	186	193	198
TOTAL	**11,079**	**27,716**	**38,136**	**43,962**	**41,364**	**41,507**	**45,145**	**45,648**
VAT on spending to acquire and use vehicles	–	–	15,300 [1]	–	–	–	–	–
Freeway tolls (including VAT)	610	2,592	5,330	9,078	9,305	9,700	10,106	10,542

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

USEFUL ADDRESSES

FRENCH AUTOMOTIVE MANUFACTURERS

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

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

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

Renault Trucks
99, route de Lyon - 69800 Saint-Priest
Tel.: +33 (0)4 72 96 51 11
Direction des Relations Extérieures
15, bd de l'Amiral-Bruix - 75016 Paris
Tel.: +33 (0)1 58 44 19 71 – Fax: +33 (0)1 58 44 19 75
www.renault-trucks.com

Alpine-Renault
Avenue de Bréauté - 76885 Dieppe Cedex
Tel.: +33 (0)1 76 86 31 00 – Fax: +33 (0)1 76 86 34 01

AUTOMOTIVE ORGANIZATIONS IN FRANCE

Association Française du Gaz Naturel pour Véhicules (AFGNV)
10, rue Saint-Florentin - 75001 Paris
Tel.: +33 (0)1 42 97 97 99 – Fax: +33 (0)1 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.: +33 (0)1 44 29 71 00 – Fax: +33 (0)1 42 67 48 21
www.carcoserco.org

Chambre Syndicale Internationale de l'Automobile et du Motocycle (CSIAM)
5, square de l'Avenue-du-Bois
BP 2116 - 75771 Paris Cedex 16
Tel.: +33 (0)1 53 64 50 30 – Fax: +33 (0)1 40 67 95 94
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.: +33 (0)1 56 88 22 40 – Fax: +33 (0)1 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.: +33 (0)1 40 99 55 00 – Fax: +33 (0)1 47 28 44 15
www.cnpa.fr

Fédération des Industries d'Équipements pour Véhicules (FIEV)
77-81, rue Jean-Jacques-Rousseau
92158 Suresnes cedex
Tel.: +33 (0)1 46 25 02 30 – Fax: +33 (0)1 46 97 00 80
www.fiev.fr

Groupement pour l'Amélioration des Liaisons dans l'Automobile (GALIA)
20, rue Danjou
92100 Boulogne-Billancourt
Tel.: +33 (0)1 41 31 68 68 – Fax: +33 (0)1 41 31 68 60
www.galia.com

Plateforme de la Filière Automobile (PFA)
2, rue de Presbourg - 75008 Paris
Tel.: +33 (0)1 49 52 63 98
www.pfa-auto.fr

Syndicat des Véhicules de Loisirs (UNIVDL)
3, rue des Cordelières - 75013 Paris
Tel.: +33 (0)1 43 37 86 61
Fax: +33 (0)1 45 35 07 39
www.univdl.fr

Union des Industries et Métiers de la Métallurgie (UIMM)
56, avenue de Wagram - 75017 Paris
Tel.: +33 (0)1 40 54 20 20 – Fax: +33 (0)1 47 66 22 74
www.uimm.fr

Union Routière de France (URF)
9, rue de Berri - 75008 Paris
Tel.: +33 (0)1 44 13 37 17 – Fax: +33 (0)1 46 25 02 62
www.unionroutière.fr

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

INTERNATIONAL AUTOMOTIVE ORGANIZATIONS

European Automobile Manufacturer's Association (ACEA)
85, avenue des Nerviens - 1040 Brussels (Belgium)
Tel.: +32 2 732 55 50 - Fax: +32 2 738 73 10
www.acea.be

International Organization of Motor Vehicle Manufacturers (OICA)
4, rue de Berri - 75008 Paris
Tel.: +33 (0)1 43 59 00 13 – Fax: +33 (0)1 45 63 84 41
www.oica.net

AUTOMOTIVE ASSOCIATIONS IN FRANCE

40 Millions d'Automobilistes
118, boulevard Haussmann – 75008 Paris
Tel.: +33 (0)1 44 90 00 24 – Fax: +33 (0)1 44 90 96 09
www.40millionsdautomobilistes.com

L'Automobile Club – French Drivers' Association
Head office: 5, avenue de la Paix – 67000 Strasbourg
Paris office: 14, avenue de la Grande-Armée - 75017 Paris
Tel.: +33 (0)821 74 11 11
www.automobileclub.org

Fédération Française du Sport Automobile (FFSA)
32, avenue de New-York - 75781 Paris Cedex 16
Tel.: +33 (0)1 44 30 24 00 – Fax: +33 (0)1 42 24 16 80
www.ffsa.org

La Prévention Routière
4, rue Ventadour - 75001 Paris
Tel.: +33 (0)1 44 15 27 00 – Fax: +33 (0)1 42 27 98 03
www.preventionroutiere.asso.fr

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

RESEARCH BODIES

FRENCH AUTOMOTIVE MANUFACTURERS

Association pour le développement du transport et de la mobilité électriques France (AVERE France)
112 quarter, rue Marcadet – 75018 Paris – France
Tel. : 01 53 25 00 60
www.france-mobilite-electrique.org

Fondation sécurité routière
www.fondationsecuriteroutiere.org

Groupe d'Études et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile (GERPISA)
École Normale Supérieure de Cachan - Bât. Desjardin – 61, avenue du Président-Wilson - 94235 Cachan Cedex – France
Tel.: +33 (0)1 47 40 20 00
www.leblog.gerpisa.org

IDforCAR
Technocampus EMC2 – ZI du Chaffault
44340 Bouguenais – France
Tel.: +33 (0)2 28 44 36 50 – Fax: +33 (0)2 99 34 10 61
www.id4car.org

Institut Français du Pétrole Énergies nouvelles (IFPEN)
1 & 4, avenue de Bois-Préau
92852 Rueil-Malmaison Cedex – France
Tel.: +33 (0)1 47 52 60 00 – Fax: +33 (0)1 47 52 70 00
www.ifpenergiesnouvelles.fr

Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
IFSTTAR Head office
Département Économie et Sociologie des Transports (DEST)
14-20 Boulevard-Newton
Cité Descartes, Champs-sur-Marne
F77447 Marne-la-Vallée Cedex 2 – France
Tel.: +33 (0)181668000
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Lyon Urban Trucks&Bus (LUTB)
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Place de la Bourse – 69289 Lyon Cedex 02 – France
Tel.: +33 (0)4 72 40 57 00 – Fax: +33 (0)4 72 40 58 60
www.lutb.fr

Pôle Mov'eo
Technopôle du Madrillet
50, rue Ettore-Bugatti – 76800 Saint-Étienne-du-Rouvray – France
Tel.: +33 (0)2 35 65 78 20 – Fax: +33 (0)2 35 34 64 97
www.pole-moveo.org

Pôle Véhicule du Futur
Head office: Étupes
Centre d'affaires Technoland
15, rue Armand-Japy - 25461 Étupes Cedex – France
General Secretariat: Mulhouse
Technopole de Mulhouse - BP 2118 –
40, rue Marc-Seguin
68060 Mulhouse Cedex – France
Tel.: +33 (0)3 89 32 76 44 – Fax: +33 (0)3 89 32 76 45
www.vehiculedufutur.com

Programme National de Recherche et d'Innovation dans les Transports terrestres (PREDIT)
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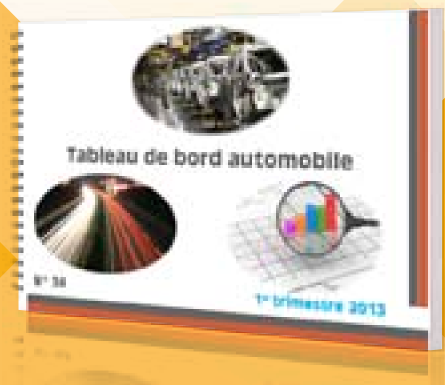


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