The French Automotive Industry

ANALYSIS AND STATISTICS 2015

5.7
MILLION VEHICLES
WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE

79%
OF VEHICLES
PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

€5.9
BILLION
FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN 2012

€39
BILLION
IN EXPORTS OF AUTOMOTIVE PRODUCTS FROM FRANCE

Comité des Constructeurs Français d'Automobiles

WORLD

EUROPE

FRANCE

Statistics

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Growth returned in 2014, along with an inversion in the production curve. This leap forward is the outcome of investments, innovation and competitiveness agreements in France.

PATRICK BLAIN,
CHAIRMAN OF CCFA

In 2014, the global auto industry expanded by 3%. Does this indicate the start of the exit from the crisis?

PATRICK BLAIN: 2014 represented a positive change for some countries, but a negative one for others. The crisis is deepening in the emerging countries, while the mature countries, including the United Sates, are heading for an exit from the crisis. However, overall, it is still present.

The markets are being turned upside down: Europe is making a comeback, Russia is collapsing, and China is hanging on. Is this a long-term trend?

P. B.: Given the rates of vehicle ownership in China and India (20 cars per 000 inhabitants in India), it is clear that we will soon bounce back to a standard situation with Europe, whose market is stabilising, and emerging countries that are once more beginning to... emerge.

There have often been criticisms in the past about French auto makers concentrating too much on Europe. Yet the "old" countries bounced back strongly in 2014. Were the French on the right track?

P. B.: The situation is not the same between the two groups. It never makes sense to be on one small portion of the world market, yet not on another. The French market represents just less than 2.5% of the world market, compared with 20% for that of Europe. Regardless of its home country, an auto maker needs to be as active as possible in all markets and to expand its production in all of them. Since there is an imperative to build cars nearer to customers, it only stands to reason that production at home will continue to decline. Conversely, one needs to watch that the decline in value is as small as possible. All the same, France did not do too badly in 2015, with production in the first quarter rising by 6% over 2014.

Due to many company-level labor agreements and the use of the CICE*, competitiveness is back in the factories of the French auto makers. Is it sufficient to reduce the gap with Germany in this field?

P. B.: Yes, the gap is narrowing, and that is largely due to the in-house efforts of the French companies, which are improving their competitiveness. This can be seen in the classic indicators on the subject. Furthermore, it is significant to see that each of our auto makers has succeeded in convincing its partners to produce in France. PSA for Toyota at Valenciennes, and for GM at Sochaux; Renault for Mercedes in Maubeuge, for Nissan in Flins, for Nissan and GM at Batilly and in Soundouville, and Renault Trucks for Volvo Trucks at Blainville.

It would appear that our car builders' factories are specialising simultaneously in the utility, where our know-how is unanimously recognised, and in the upscaling of models aimed at individuals. Do the results prove them right?

P. B.: Yes indeed. The common element in these two segments is their strong content of value added. Just as it is true that manufacturing a product with little value added in France has become economically impossible, similarly the inverse is economically fair. Particularly with products with a high innovation content, such as electric and hybrid vehicles. Partially, that is what explains the French auto makers' strength in utilities. By adding what we produce for our partners, that represents 40% of the market.

French auto makers can boast vehicles that are among the most virtuous in the world when it comes to polluting emissions, in both gasoline and diesel models. However, the versatility of the governments and the punitive tax plans for diesel, as well as the negation of the very low emissions of the Euro 6 diesels are causing French buyers to switch to gasoline engines. Doesn't that risk being harmful for our auto makers?

P. B.: Our politicians' attitudes are absurd and paradoxical: just when the modern diesel engine is reaching emission levels comparable with those of gasoline engines, with Euro 6, they are increasing the load against diesel. While that is easily understandable when it comes to the old diesel models, it is ridiculous considering Euro 6. What is even crazier is that we are just a few months away from COP21 and diesel provides 15% in CO_2 savings! This represents a considerable challenge for the planet and for consumers, since it is also 25% less consumption of fuel, saved by our customers. The play of these positions, solely motivated by political considerations, has a dreadful influence on employment in our French factories. This will also add an additional difficulty in reaching the goal of 95 g of CO_2 per kilometer by 2021. It is even paradoxical to see that this movement is precisely in the opposite direction from what is happening everywhere else in the world, where the market share of diesel is expanding naturally or even thanks to help from subsidies, as in Japan.

The French auto industry is still investing a great deal in R&D, since it is the leading filer of patents, ahead of the pharmaceutical industry, thanks—among other things—to the research tax credits. Is R&D an essential feature of our industry?

P. B.: Very much so. In such a competitive industry, alongside competitiveness it is innovation that is the key to survival. Innovation by the auto makers, of course, but actually by the entire industry. It is really the backbone of the vehicle industry via its projects such as the 2 liters per 100 km vehicle (accounting for €6 billion in R&D expenses in 2013). It is all the more important for jobs, since R&D for French companies is focused overwhelmingly in France.

Despite the economic crisis and wildly fluctuating markets, the auto industry remains one of the strengths of the French economy, via its auto makers, but as well via their suppliers, and then, in addition, there are the taxes gathered from the sale of fuel. How is 2015 shaping up?

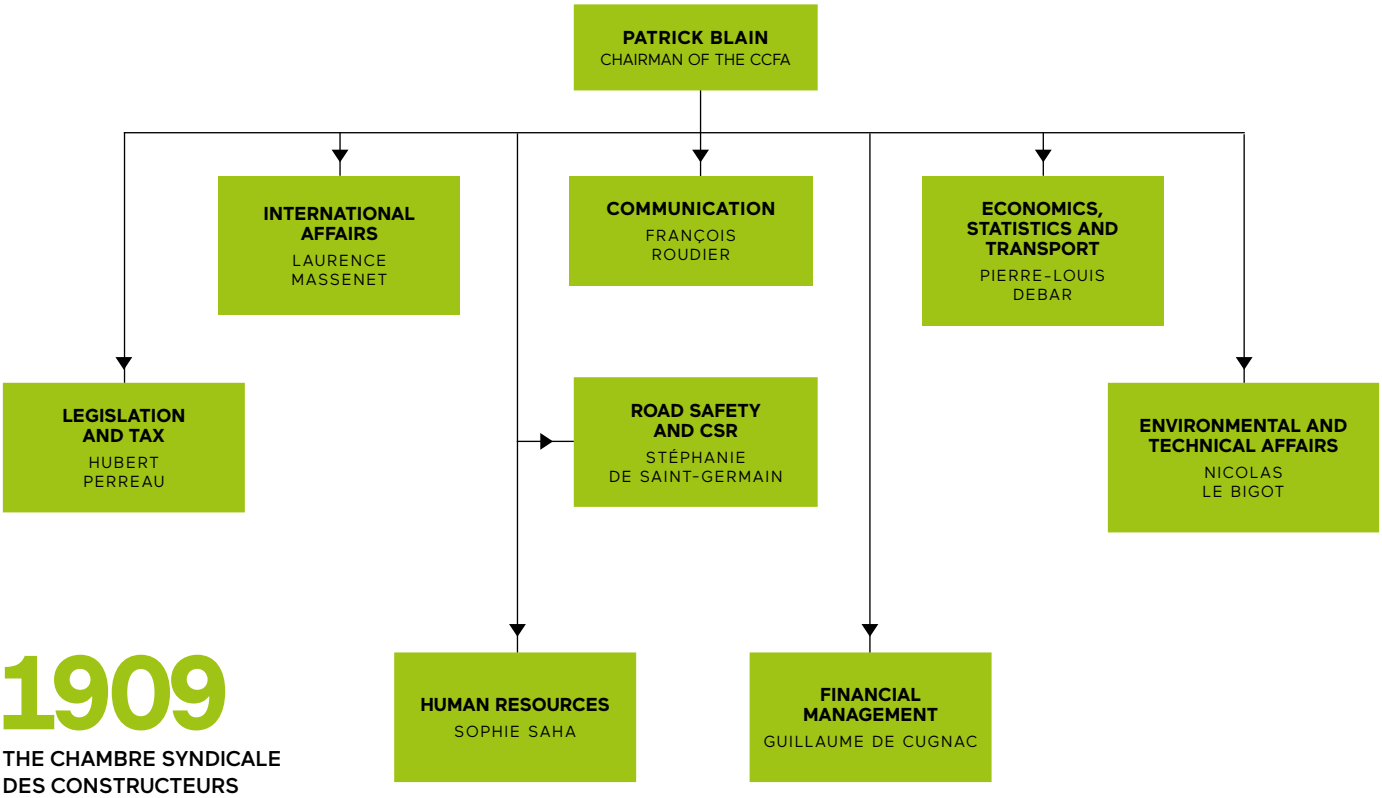
P. B.: 2015 is rather different from what has come before, with markets inverted, though that is not sustainable. The European and French markets are rising solidly, even though they are still 15% beneath the pre-2008 crisis values. Overall, the global market will continue rising by 2%, such that by 2020, there will be 100 million vehicles sold, since automobiles are becoming more important for mobility and the world economy.
In all automobile producing countries in the world, policy is in place to serve the industry. It would not make sense to do any differently in France, where the automobile industry represents 16% of industrial earnings and the automobile industry as a whole provides 10% of jobs.

*The tax credit for competitiveness and jobs.

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 of all French automobile manufacturers on both national and international levels (excluding labor issues which are the remit of the UIMM – the union of specialties and metallurgical industries).
CCFA's activities encompass information, analysis and communication for its members as well as for government agencies, public officials, members of parliament, the manufacturing sector, the automotive and road industry, research bodies, the media and the general public. Other sectors of the automotive industry (parts and equipment manufacturers, dealers, body manufacturers) have their own trade associations (FIEV, CNPA, FFC, *Fédération des Industries Électriques, Électroniques et de Communication* – Electrical, Electronic and Communications Industry Federation, *Fédération des Industries Mécaniques* – Mechanical Industry Federation, *Fédération Forge Fonderie* – Forging Foundry Federation, *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 industry. Among the various committees making it up (including strategy and competitiveness, industrial performance, trades and skills), in 2012 the *Comité Technique Automobile* (CTA – Automotive Technical Committee) was added, along with its two boards, the *Comité de Standardisation Technique Automobile* (CSTA – Automotive Technical Standardization Committee) and the *Comité de Recherche Automobile* (CRA – Automotive Research Committee), their role being to guide research and development.
Foreign brands are represented by the *Chambre Syndicale Internationale de l'Automobile et du Motocycle* (CSIAM – International Association of the Automobile and the Motorcycle). 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.

ORGANIZATIONAL CHART

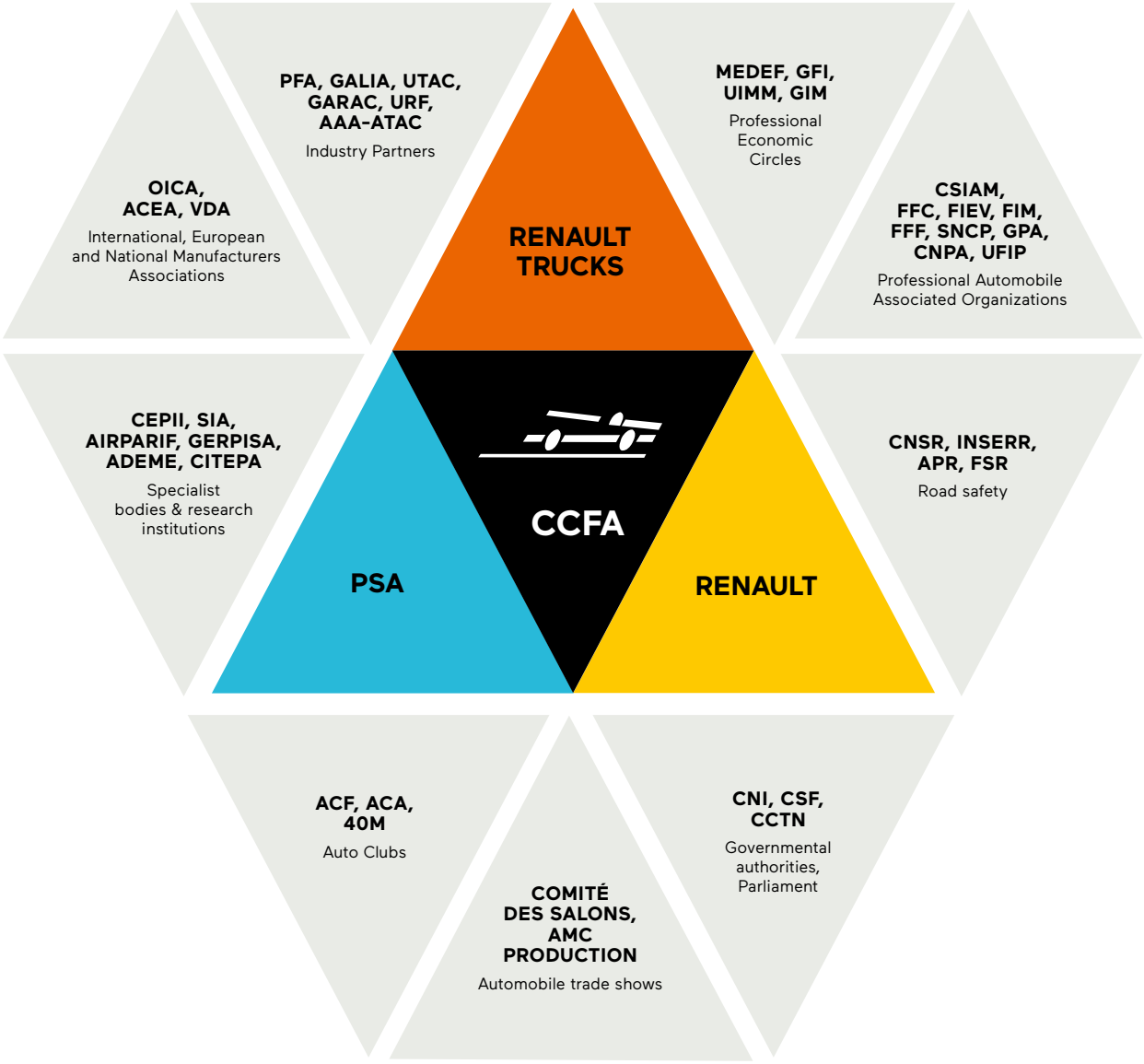


1909

THE CHAMBRE SYNDICALE DES CONSTRUCTEURS D'AUTOMOBILES WAS FOUNDED

Telephone: +33 (0)1 49 52 51 00 – Fax: +33 (0)1 47 23 74 73
Website: www.ccfa.fr – E-mail: ccfa@ccfa.fr

CCFA and its partners



International, European and National Manufacturers Associations:
OICA: International Organization of Motor Vehicle Manufacturers
ACEA: European Automobile Manufacturers' Association
VDA: Verband der Automobilindustrie

Industry Partners:
PFA: Plateforme de la Filière Automobile
GALIA: Groupement pour l'Amélioration des Liaisons dans l'Automobile
UTAC: Union Technique de l'Automobile, du Motocycle et du Cycle
GARAC: École Nationale des Professions de l'Automobile
URF: Union Routière de France

Specialist bodies & research institutions:
CEPII: Centre d'Études Prospectives et d'Informations Internationales
SIA: Société des Ingénieurs de l'Automobile
AIRPARIF: Association de surveillance de la qualité de l'air en Ile-de-France
GERPISA: Groupe d'Études et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile
ADEME: Agence de l'Environnement et de la Maîtrise de l'Énergie
CITEPA: Centre Interprofessionnel Technique d'Études de la Pollution Atmosphérique

Auto Clubs:
ACF: Automobile Club de France
ACA: Automobile Club Association
40M: 40 Millions d'Automobilistes

Governmental authorities, Parliament:
CNI: Conseil National de l'Industrie
CSF: Comité Stratégique de Filière
CCTN: French National Transport Accounting Commission

Road safety:
CNSR: National Road Safety Council
INSERR: National Institute of Road Safety and Research
APR: Association Prévention Routière
FSR: Road Safety Foundation

Professional Automobile Associated Organizations:
CSIAM: Chambre Syndicale Internationale de l'Automobile et du Motocycle
FFC: Fédération Française de la Carrosserie
FIEV: *Fédération des industries d'équipements pour véhicules* (French Automotive Equipment Industries Association)
FIM: *Fédération des industries mécaniques* (Federation of Mechanical Industries)
FFF: Fédération Forge Fonderie
SNCP: *Syndicat national du caoutchouc et des polymères* (National Union of Rubber and Polymer Workers)
GPA: *Groupement plasturgie automobile* (Automotive Plastic Converters Association)
CNPA: *Conseil National des Professions de l'Automobile* (National Council of Automotive Professions)
UFIP: *Union Française des Industries Pétrolières* (French Petroleum Industries Union)

Professional Economic Circles:
MEDEF: *Mouvement des Entreprises de France* (Employers' association)
GFI: *Groupe des Fédérations Industrielles* (Industrial employers' association)
UIMM: *Union des Industries et Métiers de la Métallurgie* (Mettalurgy employers' association)
GIM: *Groupe des Industries Métallurgiques de la Région Parisienne* (Paris region metallurgical industries group)

"A global automobile market growing less energetically and with highly contrasting local developments"

The major markets for French companies outside Europe are in the emerging economies. However, since the end of 2013, they have been in freefall, except for China. At the same time the European markets, which had fallen and have been at extremely low levels since 2009, have begun to recover, which means that French automakers can deal with these cyclical fluctuations.

Production by French manufacturers has declined by 8% compared with the level prior to the 2008 financial and economic crisis; meanwhile emerging economies have experienced significant growth until 2013. These economies, like the United States, have surpassed their pre-crisis levels by a great deal, whereas in other developed countries—including the eurozone–that is not yet the case. Sales outside of Western Europe have risen by more than 940,000 units since 2007, reaching 3 million vehicles in 2014. These regions where the level of vehicle ownership is generally much lower than in Western Europe (20 vehicles per 1000 inhabitants in India; 91 in China; compared with 564 in the European Union) represent markets of large potential within which European manufacturers would be wise to continue and expand their investment, regardless of cyclical fluctuations. The market in Western Europe, a mature automobile zone, remains the base market for French manufacturers. They declined by more than a million vehicles over the period 2007–2013, to 2.8 million, chiefly as a result of the collapse of the markets in southern Europe and in France. In 2014, registrations in Western Europe jumped to three million units, a lift of more than 200,000 units. 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	2013	2014	Change 2014/2013	Change 2014/2007
World production of French manufacturers						
Passenger cars	3,472	5,301	4,794	4,920	2.6%	-7.2%
Light commercial vehicles	507	830	744	759	1.9%	-8.6%
All light vehicles	3,979	6,131	5,539	5,679	2.5%	7.4%
Heavy trucks (at constant scope)	36	58	n/a	n/a		
TOTAL	**4,046**	**6,188**	**n/a**	**n/a**	**n/a**	**n/a**
Production of French manufacturers in France						
Passenger cars	2,235	2,165	1,164	1,180	1.4%	-45.5%
Light commercial vehicles	258	352	282	322	14.4%	- 8.5%
All light vehicles	2,493	2,518	1,445	1,503	4.0%	-40.3%
Heavy trucks	30	55	n/a	n/a	n/a	n/a
TOTAL	**2,525**	**2,573**	**1,445**	**1,503**	**4.0%**	**-41.6%**
Vehicle exports outside France						
Passenger cars	2,526	4,110	3,842	3,962	3.1%	-3.6%
Light commercial vehicles	276	549	511	554	8.4%	1.0%
All light vehicles	2,802	4,659	4,354	4,516	3.7%	-3.1%
Heavy trucks	20	38	19	17	-7.7%	-53.7%
TOTAL	**2,822**	**4,697**	**4,373**	**4,534**	**3.7%**	**3.5%**
Automotive exports outside Europe (17 countries)						
Passenger cars	563	1,914	2,486	2,495	0.4%	30.3%
Light commercial vehicles	88	178	225	547	143.1%	207.2%
All light vehicles	651	2,092	2,711	3,042	12.2%	45.4%
Heavy trucks	8	18	11	10	-4.6%	-44.0%
TOTAL	**659**	**2,110**	**2,722**	**3,052**	**12.1%**	**44.6%**
Vehicle registrations in France						
Passenger cars	1,713	2,110	1,790	1,796	0.3%	-14.9%
Light commercial vehicles	313	461	367	372	1.3%	-19.4%
All light vehicles	2,026	2,571	2,158	2,168	0.5%	-15.7%
Heavy trucks	39.3	52.5	43.3	37.6	-13.2%	-28.5%
Coaches and buses	3.1	5.5	6.3	5.4	14.4%	-1.5%
TOTAL	**2,068**	**2,629**	**2,207**	**2,211**	**0.2%**	**-15.9%**
Registrations in Europe (17 countries) of vehicles from French groups						
Passenger cars	2,841	3,181	2,287	2,461	7.6%	-22.7%
Light commercial vehicles	432	690	497	544	9.6%	-21.1%
All light vehicles	3,273	3,871	2,783	3,005	8.0%	-22.4%
Heavy trucks	27	35	21	18	-14.0%	-49.1%
TOTAL	**3,300**	**3,906**	**2,804**	**3,022**	**7.8%**	**-22.6%**

	Units	2013	2014	Change 2014/2013
Market share of French groups (new light vehicles)				
In France	%	55.6	57.1%	1.5 point
In Europe 17 countries (excluding France)	%	14.7%	15.4%	0.7 point
In Europe 17 countries	%	21.6%	22.1%	0.5 point
Market share of French makes (new heavy trucks)				
In Europe 17 countries	%	8.1%	7.6%	-0.5 point
French manufacturers' position in world production (PSA Peugeot Citroën and Renault-Dacia-Samsung)				
Passenger cars	%	7.3%	7.3%	0.0 point
Commercial vehicles	%	3.4%	3.3%	-0.1 point
Total	%	6.3%	6.3%	0.0 point
French automobile international trade				
Exports	In € billions	40.0	40.7	+1.7%
Imports	In € billions	44.3	45.2	+2.0%
Balance	In € billions	-4.3	-4.5	+4.4%
Automotive industry contribution to foreign trade goods balance				
Exports	%	9.3%	9.5%	0.2 point
Imports	%	8.7%	9.0%	0.3 point
World key figures for French manufacturers (PSA Peugeot Citroën + Renault)				
Sales	In € billions	95.0	94.7	-1.8%
Capital expenditure	In € billions	3.3	2.8	-21.5%
No. of employees	In thousands of people	319	307	-3.8%
Jobs related to the automotive industry in France				
Automotive industry	In thousands of people	201	226	
As a share of industry (including food industries, etc.)	%	6%	7%	
Total jobs (directly and indirectly related)	In thousands of people	2,323	2,253	
As a % of the employed working population	%	9%	9%	

In addition to the collapse of Western Europe's base market in terms of the levels observed prior to the crisis, French automobile manufacturers must deal with a variety of factors. Consumers are having to make hard decisions about what to buy. In France, expenditure on automobiles now represents less than nine per cent of household consumption, compared with nearly 11% in 1990. The cost of a car purchase is now less than the expenditure required to use a vehicle (not counting fuel), and the decline in these purchase expenses occurs to the detriment of the new vehicle market. In addition, price rises of raw materials are impacting the manufacture process. Raw material prices remained near record highs up to 2011, near the peaks of 2008, especially in the case of oil. They have declined somewhat since then, but remain high. The higher cost of financing and/or the reduced availability of short- and long-term capital, made worse by the crisis, and the continuing strength of the euro until summer of 2014 against other main currencies also impacted the business of French companies. Despite everything, they must continue to meet society's demands (in terms of the environment and safety, for instance), which requires considerable research and development expenditure. This means that their line-ups are increasingly "green." In France, average CO_2 emissions per km of new passenger cars have fallen by 35 grammes since the introduction of the "incentive/penalty" [or "*bonus/malus*"] system. The amount of CO_2 produced by heavy trucks to move a metric ton of goods one kilometre has also fallen (by 29%). In 2014, in Western Europe, the new vehicle markets made progress, especially due to the vitality of the United Kingdom market and the recovery of the Italian and Spanish markets. These improved conditions have boosted the market share of French manufacturers, though it remains below its 1997 level, in a context of even stiffer competition. The share of European sales in the totality of French companies' sales will not last, due to the differences in vehicle density between that mature region and the emerging economies. These French manufacturers produced only 60% of their vehicles in their home region in 2014, compared with 80% in 2006. In Eastern Europe, markets rebounded in the member countries of the European Union, but declined elsewhere, e.g. in Russia. The rise in the Asian market in general reflects the strength of the growth in sales in China, which has been the biggest auto market since 2009. Results elsewhere in Asia were heterogeneous: a drop of more than 30% in Thailand, declines in India and Indonesia, steady growth in Malaysia. Sales of French vehicles in the region —one million units—grew strongly in 2014 (an increase of 18%). After four good years, the bottom fell out of the market in Latin America, and French manufacturers felt the effects.

To conclude, opportunities for French manufacturers shrank in Africa; sales of 270,000 vehicles in a less vibrant market.

In emerging countries, where opportunities are expected to grow long-term, French manufacturers continue to expand in terms of both sales and production, with or without a partner, to assuage the thirst for car ownership. They have resolved to make new investments and to overhaul and adapt their line-ups. Their efforts are particularly noticeable in Asia (PSA Peugeot Citroën with its two partners in China, in addition to Renault in both India and China).

+942,000
MORE VEHICLES
THE RISE BETWEEN 2007 AND 2014 OF DELIVERIES OUTSIDE EUROPE (17 COUNTRIES) BY FRENCH AUTOMAKERS

World motor vehicle production

In 2014, world vehicle production grew by 2.7% to 89.9 million vehicles, which is the fourth record since the 2009 decline. This increase represented a volume of 2.3 million vehicles. Worldwide production of vehicles was around 50 million units in 1990, growing to nearly 60 million in 2000. Before the 2009 crisis, when it plummeted, it exceeded the threshold of 70 million vehicles. Since 2000, the annual growth rate has been an average of three per cent (3%). In the developed regions, there is no consistency to the way production levels have developed compared with those of 2007: production fell in Western Europe (down 19%) and in Japan (down 16%), while it is up 13% in the NAFTA countries (Canada, USA and Mexico) and up 11% in South Korea. In emerging economies which are currently the main areas for growth in the automotive industry, production is a much higher than before the crisis. In 2014, it grew by 53% compared to 2007 levels in Asia-Pacific (more than doubling in China, up 167%); it remained stable in Latin America; and grew 20% in the new EU member states.

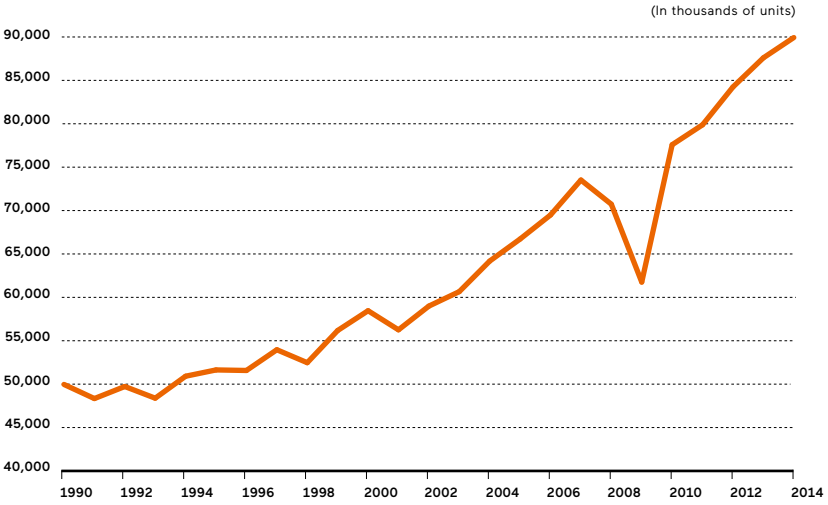
WORLD MOTOR VEHICLE PRODUCTION

(In thousands)

	2013	2014	Change %
Europe	**20,132**	**20,635**	**2.6**
of which:			
Western Europe	12,894	13,484	4.6
Germany	5,718	5,908	3.3
Belgium	504	517	2.6
Spain	2,163	2,403	11.1
France	1,740	1,821	4.7
Italy	658	698	6.0
The Netherlands	29	29	0.0
The United Kingdom	1,598	1,599	0.1
Sweden	161	154	-4.3
Central and Eastern Europe	6,091	5,980	-1.8
Turkey	1,126	1,170	4.0
North and South America	**21,081**	**21,219**	**0.7**
of which:			
NAFTA(1)	16,501	17,420	5.6
South America	4,580	3,799	-17.1
Asia-Pacific	**45,779**	**47,360**	**3.5**
of which:			
Japan	9,630	9,775	1.5
South Korea	4,521	4,525	0.1
China	22,117	23,723	7.3
ASEAN(2)	4,369	3,902	-10.7
India	3,898	3,840	-1.5
Africa	**626**	**720**	**15.0**
TOTAL	**87,596**	**89,934**	**2.7**

(1) NAFTA: Canada, USA, Mexico
(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
Source: OICA, CCFA estimates for July 2015.

CHANGES IN WORLD MOTOR VEHICLE PRODUCTION SINCE 1990



Source: OICA.

89.9 MILLION

NEW RECORD FOR THE NUMBER OF VEHICLES PRODUCED IN THE WORLD IN 2014

In Western Europe, production grew by 3% in 2014, with highly disparate outcomes. Countries such as Spain (up 11%), Italy (up 6%) and France (up 5%) are starting to take advantage of the slight recovery in the European market, while others—which lean more toward exports outside the EU—are consolidating their positions (Germany: up +3%, United Kingdom: up 0.1%).

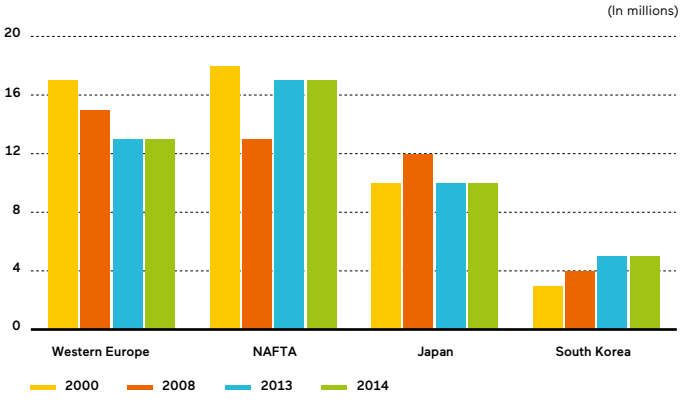
In the Americas, production continue to expand steadily in the NAFTA countries (up 6%), but it collapsed in South America (down 17%), back to pre-2009 crisis levels. As regards Asia-Pacific, which represents more than half of world production, growth of production in Indonesia (8%) increased, though at a slower rate than in previous years. In China, leading manufacturing country since 2008, production rose by 7%. Conversely, it fell in Malaysia (by 1%) and Thailand (by 23%). Production was stable in South Korea, and up slightly (2%) in Japan.

Between 2010 and 2014, global production of vehicles (amounting to 89.9 million) increased by 16%, but the results differed greatly among regions. In developed economies, production dropped by nearly 5.4 million vehicles (+13%), reaching a level of 45.2 million units. This only accounted for half of the world's production, i.e., one percentage point less than in 2010. Within these regions, North American production increased by 5.3 million units (43%), while production in Western Europe declined by 300,000 (2%). Japan's production increased by around 150,000 vehicles in 2014 (2% greater than in 2010). On the other hand, production in South Korea—a country which has benefited from more favorable exchange rates—grew by more than 250,000 units (+ 6%). In developing regions and countries, production grew by 7.1 million vehicles, relying on the following five zones:
- China (up 5.5 million), which represented 26% of world production in 2014, compared with 24% in 2010;
- Central and Eastern Europe and Turnkey (up 1.1 million, and market share of 8%, up from 7.8%);
- Indonesia, Iran, Malaysia and Thailand (up 350,000, and market share of 5.8%, up from 5.4%);
- South America (down 400,000, and market share down to 4.2% from 5.4%);
- India (up 300,0000, and market share down to 4.3% from 4.6%).

Overall, the market share of these emerging countries or regions rose from 43% to 45% in this period.

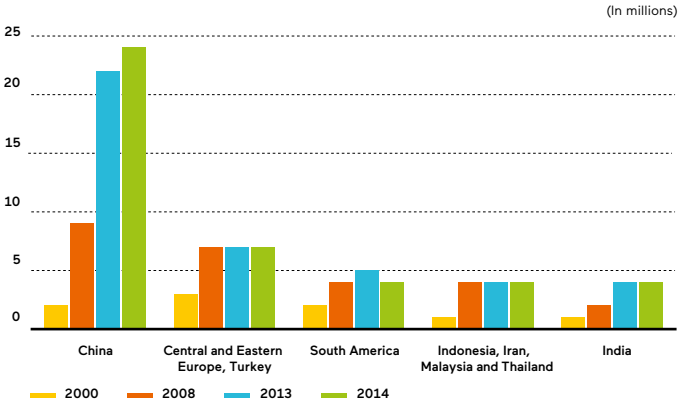
WORLD PRODUCTION ALL VEHICLES

Developed regions and countries



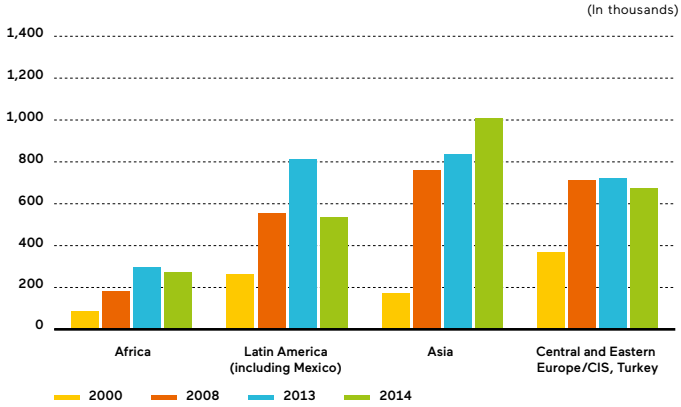
Source: CCFA,OICA.

Emerging regions and countries



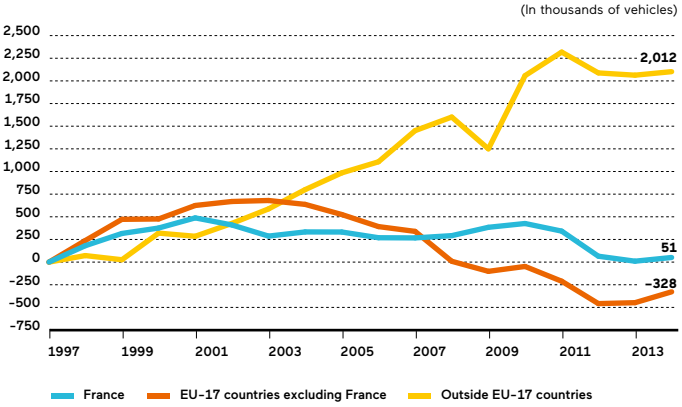
Source: CCFA,OICA.

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



Source : CCFA.

World markets of French manufacturers: evolution compared with 1997



Source: CCFA.

In this context of changing world production, French manufacturers substantially increased exports to these emerging regions. They grew by 1.3 million units between 2000 and 2008, excluding EU-17 countries, to reach 2.3 million vehicles. In 2009, deliveries had fallen, then started out again on an upward streak. In 2014, following the decline in a portion of the emerging markets in that year, deliveries fell compared with 2010, with the exception of those to Africa and Central and Eastern Europe and Turkey. The changes looked like this: up 72,000 units in Africa; up 55,000 in the Central and Eastern European countries and Turkey; down 111,000 in Latin America, including Mexico; and down 199,000 in Asia. On the other hand, exports to Italy and Spain dropped by 58,000 and 42,000 units, respectively.

50%

MARKET SHARE OF EMERGING REGIONS AND COUNTRIES IN WORLD MOTOR VEHICLE PRODUCTION IN 2014.

World rankings of automobile manufacturers

The 13 leading manufacturers—including French groups PSA Peugeot Citroën and Renault—account for around 80% of the world's production, producing more than two million vehicles each. The weakness of the European market hit the performance of PSA and Renault hard, knocking them to tenth and eleventh place respectively in the world ranking.
As in 2013 and at the time of the last crisis (in 1997), the production of the French automakers accounted for 6% of world production, a level far beneath the 9.8% top figure achieved in 2001.
The automakers became much more international in scope after 2000 and continue developing industrial sites outside their home region. European, U.S., Japanese and Korean car makers, which produced 60–70% of their output in their home regions in 2000 now only produce 40–50% there. Even manufacturers in emerging countries, such as Geely or Tata, which purchased European manufacturers, now only produce about half their output in their home region.

WORD PRODUCTION OF VEHICLES[1] IN 2014

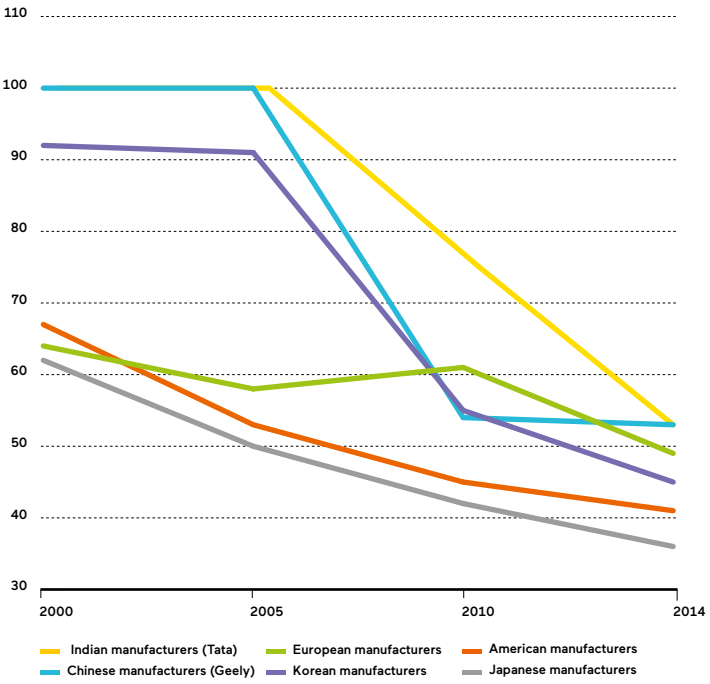
(In thousands)

Rank	GROUP	Year 2013	Year 2014	Change %
1	TOYOTA	10,325	10,475	1.5
2	VOLKSWAGEN	9,603	10,093	5.1
3	GM[2]	9,607	9,609	0.0
4	HYUNDAI	7,559	8,009	5.9
5	FORD[2]	6,077	5,970	-1.8
6	NISSAN	4,951	5,098	3.0
7	FIAT	4,682	4,866	3.9
8	HONDA	4,298	4,514	5.0
9	SUZUKI	2,842	3,017	6.1
10	**PSA**	**2,834**	**2,917**	**2.9**
11	**RENAULT**	**2,705**	**2,762**	**2.1**
12	DAIMLER AG	2,306	2,502	8.5
13	BMW	1,992	2,166	8.7
14	SAIC	1,782	2,088	17.2
15	CHANGAN	1,110	1,447	30.4
16	MAZDA	1,264	1,328	5.1
17	DONGFENG MOTOR	1,239	1,302	5.1
18	MITSUBISHI	1,229	1,262	2.7
19	BAIC	919	1,116	21.4
20	TATA	1,064	945	-11.2
21	GEELY	970	891	-8.2
22	FUJI	809	889	9,9
23	GREAT WALL	758	731	-3.6
24	FAW	718	624	-13.1
25	IRAN KHODRO	373	587	57.3
35	VOLVO - **RENAULT TRUCKS** - MACK - UD TRUCKS	232	233.6	0.7

Note: The production of Chinese manufacturers does not include joint-ventures.
(1) The vehicles include passenger cars, light commercial vehicles, heavy industrial vehicles, and coaches and buses. There may be double accounts between manufacturers.
(2) The output of GM and Ford include their activities in China.
Sources: OICA, CCFA estimates for July 2015.

SHARE OF THE HOME REGION OF THE MANUFACTURER AS A PERCENTAGE OF ITS TOTAL PRODUCTION

(As a %)



In a context of dynamic growth, world production rose by 3%, while results differ depending on the company.
Toyota Group, ranking first since 2006, continues to advance (up 1.5%) due to its presence in many markets. GM and Ford keep their volume positions as a result of the healthy state of the North American market. Volkswagen Group (up 5%), with a solid presence in emerging countries, advanced from third place in 2013 to second in 2014.
Among the Asian manufacturers, Hyundai-Kia (up 6%/4th position), Nissan (up 3%/6th position) and Honda (up 5%/8th position), and Suzuki-Maruti (up 6%/9th position) retained their places.
The European groups are increasing their output, particularly the generalists PSA Peugeot Citroën (up 2.9%), Renault (up 2.1%) and Fiat (up 3.9%), and the German upper-scale manufacturers BMW (up 8.7%) and Daimler AG (up 8.5%).
Manufacturers in emerging countries (China, India) also have different rates of growth. Some have increased output: Changan (+30%), SAIC (+17%) and Dongfeng Motor (+5%); while Tata experienced a significant decline (-11%).

6%
MARKET SHARE OF FRENCH MANUFACTURERS IN WORLD AUTOMOBILE PRODUCTION IN 2014

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

Whereas the European Union (now 28 countries) was market leader for many years, since 2010 it has become the world's second production zone, whilst remaining open. The collapse of its domestic market from 2008 to 2013 explains the reduction of both imports and production. Its expansion of exports (29% of production) has not been enough to make up for this sharp drop in production for the domestic market. In 2014, all these indicators made a recovery.
In North America, including Mexico, production continued to rise, though it is still 300,000 vehicles below the record of 2000. Production is intended for the local market, and exports represent just 10% of production. In Japan, exports represent 46% of production. Imports still only account 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 (1.4 million vehicles), just like exports (0.9 million units) represent around 5% of production.

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

	European Union[1]		USA, Canada and Mexico[3]		Japan	
Passenger cars						
Production	In thousands	Index (100=1990)	In thousands	Index (100=1990)	In thousands	Index (100=1990)
1980	10,166	80	7,196	101	7,038	72
1990	12,726	100	7,150	100	9,753	100
2000	14,779	116	7,092	99	8,359	86
2010	15,260	120	5,084	71	8,310	85
2014	15,381	121	7,082	99	8,277	85
Imports[2]	In thousands	Share of production	In thousands	Share of production	In thousands	Share of production
1980	800	8%	2,713	38%	46	1%
1990	1,495	12%	3,029	42%	186	2%
2000	2,629	18%	2,225	31%	268	3%
2010	1,900	12%	2,310	45%	186	2%
2014	1,995	13%	2,628	37%	289	3%
Exports[2]	In thousands	Share of production	In thousands	Share of production	In thousands	Share of production
1980	1,973	19%	107	1%	3,947	56%
1990	1,732	14%	288	4%	4,482	46%
2000	2,715	18%	1,130	16%	3,796	45%
2010	3,400	22%	857	17%	4,275	51%
2014	4,635	30%	1,371	19%	3,836	46%
Commercial vehicles						
Production	In thousands	Index (100=1990)	In thousands	Index (100=1990)	In thousands	Index (100=1990)
1980	1,600	100	2,138	47	4,005	113
1990	1,598	100	4,553	100	3,539	100
2000	2,327	146	8,669	190	1,782	50
2010	1,819	114	7,089	156	1,319	37
2014	1,747	109	10,338	227	1,498	42
Imports[2]	In thousands	Share of production	In thousands	Share of production	In thousands	Share of production
1980	101	6%	125	6%	1	0%
1990	258	16%	399	9%	1	0%
2000	242	10%	915	11%	8	0%
2010	310	17%	1,136	16%	2	0%
2014	319	18%	1,665	16%	1	0%
Exports[2]	In thousands	Share of production	In thousands	Share of production	In thousands	Share of production
1980	362	23%	114	5%	2,020	50%
1990	179	11%	32	1%	1,349	38%
2000	248	11%	339	4%	659	37%
2010	330	18%	177	2%	566	43%
2014	378	22%	298	3%	630	42%

(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 Automotive Reports as of 1999: Mexico is included from 2009.
Sources: Eurostat, CCFA since 1991.

46%

PERCENTAGE OF VEHICLES MANUFACTURED FOR EXPORT IN JAPAN IN 2013

Trends in the three leading world automotive markets have contrasted sharply since 1990. In the European Union (now 28 countries) vehicle production increased by nearly 20% (compared to +38% in 2007) and trade—already important—appears up by 100%. In North America, including Mexico, production has risen since 2009 by 49% over its 1990 level Imports, which were already large in 1990 and which had since continued to rise, were 25% greater than those of 1990. Exports only represented 10% of production (29% for the EU and 46% for Japan). Finally, in Japan, vehicle production increased by 26% due to the rising domestic and export markets. These markets, which had suffered a decade of decline until 2001 (29% lower than 1990), had previously grown sharply as the yen weakened and, in 2008, were 15% higher than in 1990. In 2014 they were 23% lower, chiefly due to the production of plants belonging to Japanese manufacturers outside of Japan.

World vehicle markets

In 2014, the world automotive market continued to grow (up 3% to 88.3 million vehicles), setting a new record for the fifth year in a row. Markets expanded, with the exception of Central and Eastern Europe, South America and the ASEAN countries (Association of South East Asian Nations).
The five leading markets in the world (China, USA, Japan, Brazil and Germany) account for sixty per cent (60%) of world sales. In 2005, China took third place in the rankings, and Brazil tenth.
In the main industrialized regions, where vehicle ownership rates have achieved maturity, the markets remain well under the levels previously seen, despite the advances in recent years, and their share of the world markets was only 47%, compared with 68% in 2005. In the emerging economies, markets are trending down from their highs.

GLOBAL MARKETS

	Passenger cars				Commercial vehicles				Total		Change
	2013		2014		2013		2014		2013	2014	2014/2013
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	**15,942**	**25.3**	**16,060**	**24.7**	**2,401**	**10.6**	**2,421**	**10.4**	**18,343**	**18,481**	**+0.8**
of which:											
Europe 17 countries	11,548	18.4	12,104	18.6	1,635	7.2	1,754	7.6	13,183	13,858	+5.1
Central and Eastern Europe	4,387	7.0	3,946	6.1	765	3.4	666	2.9	5,152	4,612	-10.5
North and South America	**13,555**	**21.5**	**13,179**	**20.2**	**11,480**	**50.5**	**12,301**	**53.0**	**25,035**	**25,480**	**+1.8**
of which:											
NAFTA(1)	9,039	14.4	9,188	14.1	9,725	42.8	10,719	46.2	18,765	19,908	+6.1
USA	7,585	12.1	7,688	11.8	8,298	36.5	9,154	39.4	15,883	16,842	+6.0
South America	4,516	7.2	3,991	6.1	1,755	7.7	1,581	6.8	6,270	5,572	-11.1
Asia-Pacific	**32,198**	**51.2**	**34,620**	**53.2**	**8,393**	**36.9**	**8,028**	**34.6**	**40,591**	**42,648**	**+5.1**
of which:											
China	17,928	28.5	19,701	30.3	4,056	17.8	3,791	16.3	21,984	23,492	+6.9
South Korea	1,306	2.1	1,473	2.3	251	1.1	257	1.1	1,556	1,730	+11.2
Japan	4,562	7.3	4,700	7.2	813	3.6	863	3.7	5,376	5,563	+3.5
ASEAN(2)	2,310	3.7	2,128	3.3	1,284	5.6	1,120	4.8	3,594	3,247	-9.6
Other Asia-Pacific	6,093	9.7	6,619	10.2	1,989	8.7	1,997	8.6	8,081	8,616	+6.6
Africa	**1,225**	**1.9**	**1,231**	**1.9**	**460**	**2.0**	**469**	**2.0**	**1,685**	**1,700**	**+0.9**
TOTAL	**62,920**	**100.0**	**65,089**	**100.0**	**22,734**	**100.0**	**23,219**	**100.0**	**85,654**	**88,309**	**+3.1**
Change 2014/2013			3.4%				2.1%			3.1%	

(1) NAFTA: Canada, USA, Mexico. (2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
Source: OICA.

In the United States, the market continued to expand, after the low point of 2010, to reach nearly 17 million vehicles, and so came near to its average level of the mid-2000s.
In Western Europe, the market rebounded after six low years, to 13.9 million vehicles, against 17.3 million in 2007. The countries all had different fates, from a 6% fall in the Netherlands to a 36% rise in Portugal, and encompassing a 3% rise in Germany. The market in Spain grew 20% due to successive renewals of the demand support plan that began in 2012.
In Central and Eastern Europe, the fast growth of the years stalled again (a 10% drop) after that of 2012. The Russian and Ukrainian markets slumped (by 15% and 55% respectively).
China, where access to vehicle ownership is constantly expanding, in pace with the rise in its standard of living, saw its market increase by more than 7% to 23.5 million vehicles, despite the limitation on the number of new vehicles in large cities. Its status as the world's leading automotive market remains intact. Sales were on an upward streak again in Japan (a 3% rise). However, they are still lagging the healthy sales of the 2000s. Registrations in South Korea took of by 11% to 1.7 million vehicles after declining for two years in a row. In the Asia-Pacific region (excluding China, Japan, and South Korea), growth took hold again (up 2% to 11.9 million vehicles). However, the performances of the countries making up the region varied greatly: the Philippines saw a rise of 27%, while India experienced a 2% drop; sales fell 34% in Thailand.
In South America, the market slumped 11% after four years of increase, though at a decreasing pace. The Brazilian market fell significantly (7%). Volumes were lower in Africa, but markets continued to grow, though Algeria recorded a decline of around 20%. The two other major markets in the region, Morocco (up 1%) and South Africa (down 1%) were relatively stable.

CHINA

THE WORLD'S LEADING MARKET SINCE 2009

The world's vehicle fleet

In 2013, the world's fleet of vehicles (passenger cars and commercial vehicles) stood at 1.2 billion units (of which more than 70% were passenger cars), representing a rise of 3% over the prior year. Numbers of vehicles are practically stable (with rises between 0 and 1%, inclusive) in the developed countries, where markets are mature, and growing strongly in the emerging markets. The USA has the most vehicles in the world—250 million—ahead of China (127 million) and Japan (77 million). France comes in eighth place worldwide (38 million units) behind Brazil, which rose one place from 2012. Vehicle density in the world was on average 174 vehicles per thousand inhabitants—up +21% over 2005. However, density figures vary from 43 vehicles per thousand inhabitants in Africa to 649 in the NAFTA zone (USA, Canada and Mexico). Asia (excluding Japan and South Korea) has a density of 67; South America –167; while Europe, Japan and South Korea boast densities of greater than 500.

THE WORLDWIDE FLEET OF VEHICLES

	Total		Change
	2011	2013	2013/2012
	thousands	thousands	%
Europe	**367,872**	**370,496**	**+0.7**
of which:			
Western Europe	243,695	244,861	+0.5
Central and Eastern Europe	123,935	125,392	+1.2
North and South America	**384,984**	**392,112**	**+1.9**
of which:			
NAFTA(1)	306,495	309,918	+1.1
USA	251,497	252,715	+0.5
South America	78,489	82,193	+4.7
Asia-Pacific	**352,597**	**380,334**	**+7.9**
of which:			
China	109,220	126,701	+16.0
South Korea	18,870	19,401	+2.8
Japan	76,126	76,619	+0.6
Other Asia-Pacific	148,381	157,613	+6.2
Africa	**38,410**	**40,272**	**+4.8**
TOTAL	**1,143,864**	**1,183,213**	**+3.4**
Change 2013/2012		3.4%	

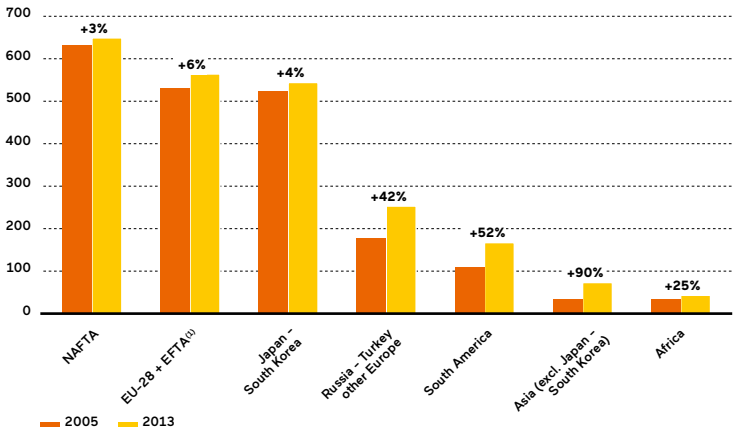
(1) NAFTA: Canada, USA and Mexico.
Source: OICA.

1.2 BILLION

NUMBER OF VEHICLES IN THE WORLD

VEHICLE DENSITY BY REGION

(Number of cars and commercial vehicles per 1,000 inhabitants)



(1) European Free Trade Association.
Source: OICA.

In 2013, the mature regions represented 60% of vehicle ownership and 17% of the world's population. Those regions have lost around 10 points to the emerging economies since 2005. Within the Europe zone, where more than a third of the world's cars reside, vehicle ownership expanded more in the east than in the west (*cf. p. 19*). The rate of vehicle ownership varies in Europe, from 148 in Albania to 737 in Iceland; nearly a quarter of Romanians own vehicles (253), while the range for the major West European countries is 550–600. The number of vehicles in this region rose by nearly 50 million units over 2005, of which three quarters outside of Western Europe (Russia added 13 million units). In the Americas, the NAFTA zone accounts for 26% of the world's vehicles, the United States boasting a level of vehicle ownership of 790 per 1,000 inhabitants. The picture is different in South America, an emerging region, which accounted for just 7% of the world's vehicles in 2013. Ownership density in South America is just 167 per thousand. The number of vehicles in America has grown by more than 30 million units since 2005, in nearly equal portions between the NAFTA countries and South America. The three countries with the greatest increase in number of vehicles are Brazil, the United States and Mexico, with, respectively 17, 15 and 13 million units. In the mature markets of Japan and South Korea (together 8% of all cars in the world), ownership density is 603 and 394 respectively. The picture is different in more populous developing countries, where density is low: India – 20; China – 91; and Indonesia – 77. Since 2005, nearly the entire rise in number of vehicles occurred in Asia, outside of Japan and South Korea, with China (adding 95 million units) far ahead of India (which added 15 million) and Indonesia (10 million).

World trade in automotive products

Global trade in automotive products grew by 4% in 2013, according to the World Trade Organization (WTO), valued at US$1.350 billion, 9% above the level reached in 2008. Between 2005 and 2013, 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$64 billion; in Japan it rose from US$110 billion to US$131 billion and in the EU it rose from US$80 billion to US$188 billion. Despite a markedly lower automotive market in 2013 than in 2005, the US deficit remained quite high, and increased to US$126 billion. On the other hand, the positive balance of US$9 billion recorded in Canada in 2005 became a US$12 billion deficit, as a result of the place taken by Mexico in trade within NAFTA. In Brazil, the US$7 billion

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

Exports (FOB)/Imports (CIF) to/from the major regions

(In US$ billions)

Areas	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															
2010	99.5	189.8	**-90.3**	60.2	91.7	**-31.5**	9.7	33.6	**-23.9**	1.2	42.9	**-41.7**	28.4	21.5	**6.8**
2012	132.0	250.4	**-118.4**	74.3	117.6	**-43.3**	12.8	47.6	**-34.8**	1.8	53.6	**-51.7**	43.1	31.7	**11.4**
2013	134.5	260.1	**-125.5**	77.8	n/a	**n/a**	11.6	n/a	**n/a**	1.4	n/a	**n/a**	43.7	n/a	**n/a**
Canada															
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**
2012	62.2	71.4	**-9.2**	60.7	54.8	**5.9**	0.3	5.9	**-5.6**	0.0	6.2	**-6.2**	1.1	4.5	**-3.4**
2013	60.0	71.6	**-11.6**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**
European Union[2]															
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**
2012	615.3	438.7	**176.5**	57.4	13.8	**43.6**	376.4	376.4	**0.0**	10.7	16.2	**-5.5**	170.8	32.4	**138.4**
2013	655.8	467.7	**188.1**	62.9	n/a	**n/a**	403.5	n/a	**n/a**	11.0	n/a	**n/a**	178.3	n/a	**n/a**
Japan															
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**
2012	166.0	20.4	**145.5**	59.4	2.1	**57.3**	15.5	11.1	**4.4**				91.0	7.2	**83.8**
2013	151.8	20.5	**131.4**	57.4	n/a	**n/a**	13.9	n/a	**n/a**				80.6	n/a	**n/a**
South Korea															
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**
2012	72.0	9.8	**62.2**	20.5	1.5	**19.0**	8.9	5.0	**4.0**	0.8	1.6	**-0.8**	41.8	1.8	**40.0**
2013	74.5	10.8	**63.7**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**
China (excl. Hong Kong)															
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**
2012	43.1	74.0	**-30.9**	9.9	10.0	**-0.1**	4.9	41.3	**-36.4**	2.8	16.3	**-13.5**	25.6	6.4	**19.2**
2013	46.0	78.0	**-32.1**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**	n/a	n/a	**n/a**
Brazil															
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**
2012	13.0	21.7	**-8.6**	1.6	4.0	**-2.4**	0.4	4.7	**-4.3**	0.0	1.4	**-1.4**	11.0	11.6	**-0.6**
2013	14.4	23.5	**-9.1**	1.5	n/a	**n/a**	0.4	n/a	**n/a**	0.0	n/a	**n/a**	12.5	n/a	**n/a**

Trade of the main European Union countries[3]															
	Germany			France			Spain			Italy			The United Kingdom		
2010	195.7	79.3	**116.3**	54.1	58.7	**-4.7**	47.5	31.4	**16.1**	29.1	39.7	**-10.6**	30.9	45.5	**-14.6**
2012	228.1	93.2	**134.9**	53.0	57.2	**-4.3**	46.7	29.4	**17.3**	31.2	30.0	**1.2**	38.6	50.8	**-12.3**
2013	237.2	96.9	**140.3**	52.4	59.0	**-6.5**	53.2	33.5	**19.7**	34.1	30.6	**3.4**	41.3	56.4	**-15.2**

(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.

$78 BILLION

RECORD LEVEL OF CHINESE IMPORTS IN PRODUCTS OF THE AUTOMOTIVE INDUSTRY

In 2013, world trade in automotive products accounted for 7% of the world's goods exports and 11% of the world's manufactured product exports. 2013 was marked by a 3% rise in the value of the euro against the dollar, whereas the exchange rate between the yen and the dollar plummeted by 18%.

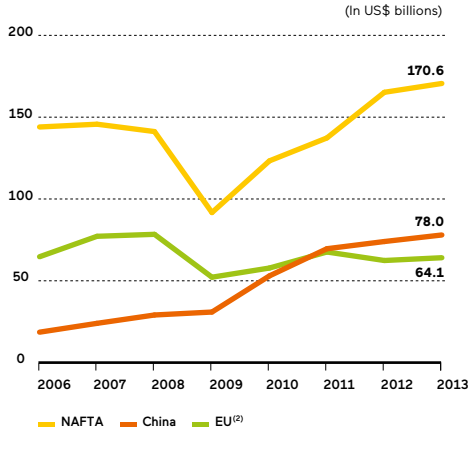
In light of low market levels in the NAFTA countries and the European Union, the share of intraregional trade in world trade continued its fall, going as low as 59% in 2012 (as against 64% in 2007). In NAFTA and Europe (excluding CIS), this share exceeded 70% and in South America it exceeded 80%, while it was hardly more than 30% for Asia-Pacific. In 2013, Germany was still the largest exporter of automotive products with an 18% share worth 237 billion dollars.

Japan, in second place, exported goods to the value of US$152 billion, of which US$57 billion to North America (making up 38% of its total exports, compared with more than 50% at the start of the 2000s). Japan's exports to China dropped to US$14.2 billion from 2011 to 2013, due to the geopolitical situation. By comparison, Japan exports goods valued at US$13.9 billion to the EU-28.

EU-28 automotive exports reached $659 billion. Trade within the EU accounted for over 61% of this total (73% in 2009). Exports from the EU to China were valued at €40 billion. EU exports to Russia were valued at US$20 billion; to Africa – US$20 billion; and to the Middle East – US$14 billion. On the basis of Eurostat data, more than half of the EU's exports to non-EU countries are due

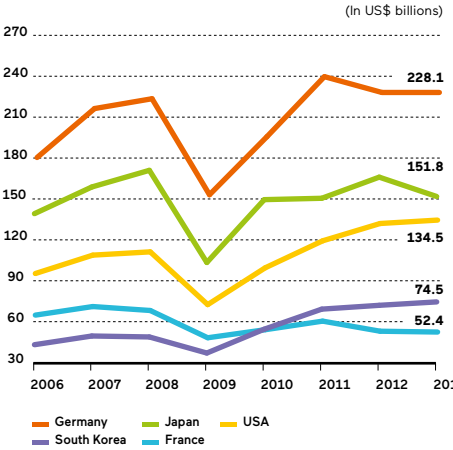
surplus gave way to a US$9 billion deficit. The deficit of China, which meanwhile became the world's leading vehicle market, grew from US$4 billion to US$32 billion. India's surplus grew from US$1 billion to US$6 billion, on the back of an expansion of exports, from a value of less than US$3 billion to more than US$11 billion. Not counting intra-zone trade, imports to the European Union were overtaken for the first time by those to China (at a value of US$64 billion vs. US$78 billion) in 2013. Nonetheless, these levels of imports lag those of the NAFTA countries, which amounted to over US$170 billion for the first time. The other countries that were large importers of automotive products in 2013 were Russia (US$37 billion), Australia (US$28 billion) and Saudi Arabia (US$23 billion).

IMPORTS FROM THE MAIN REGIONS FOR AUTOMOTIVE PRODUCTS
(not including intra-regional trade)



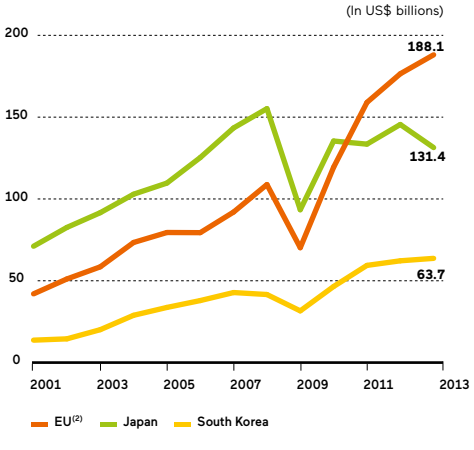
Source: GATT/WTC.

MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



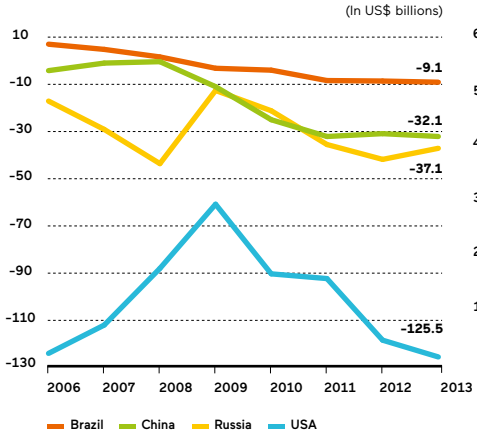
Source: GATT/WTC.

SURPLUSES IN AUTOMOTIVE PRODUCTS



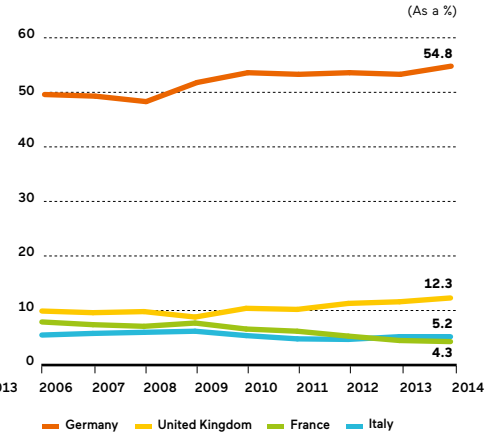
Source: GATT/WTC.

DEFICITS IN AUTOMOTIVE PRODUCTS



Source: GATT/WTC.

SHARE IN EXPORTS FROM THE EU TO THE NON-EU – Road vehicles (SITC 78)



Source: Eurostat.

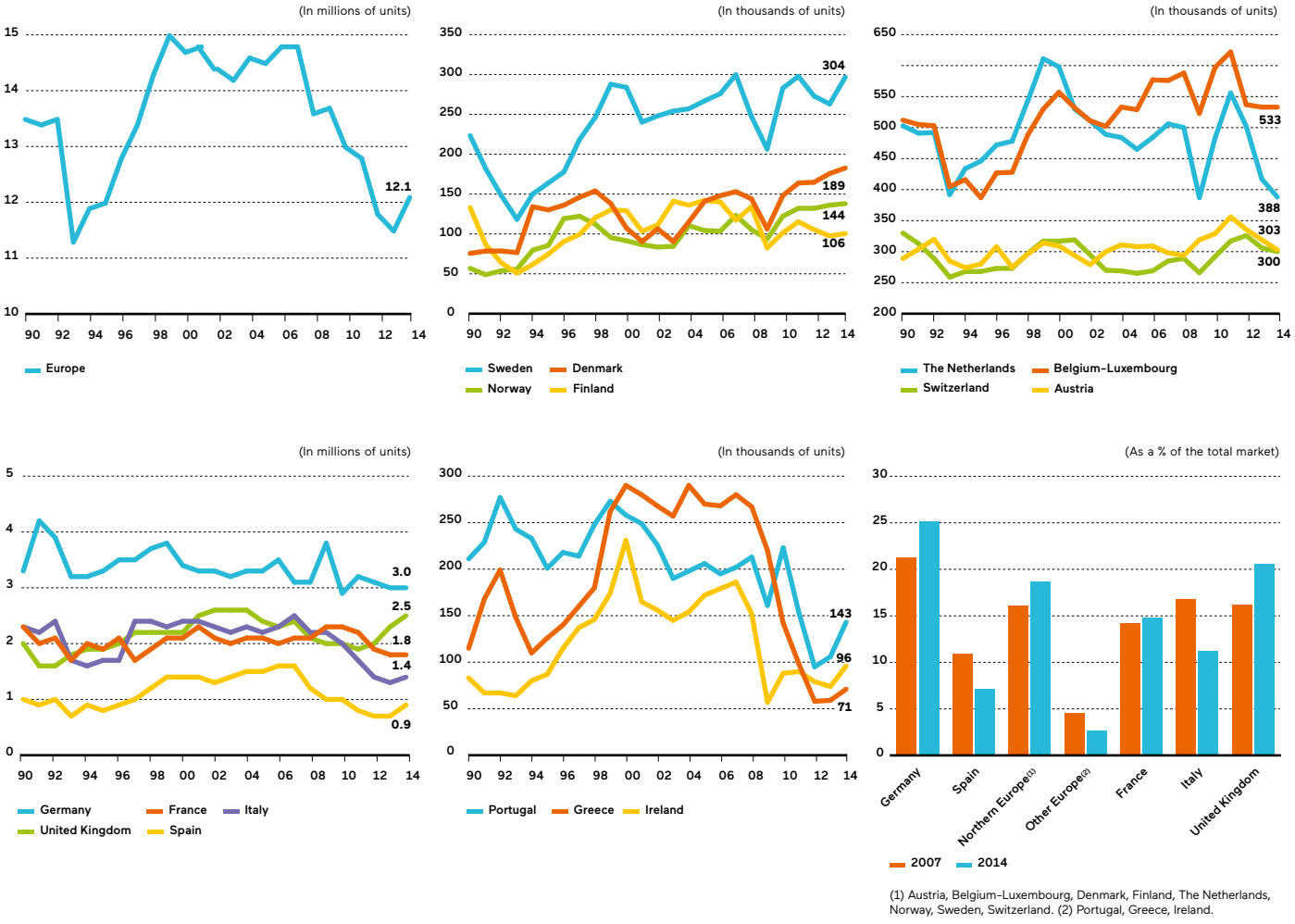
to Germany (55% in 2013), ahead of the United Kingdom (12%), Italy, Spain and France (at around 5% each).
France accounted for 4% of world exports, worth US$52 billion (inclusive of intra-EU trade), against almost 8% in 2004. The United States is still the world's leading importer of automotive products at $260 billion; after its domestic market bounced back, its deficit for automotive products stood at $126 billion, i.e., a level similar to the $120 billion recorded between 2004 and 2006. Chinese imports, up 6% to US$78 billion in 2013. Since 2005, Chinese imports have grown by 25% per year. China's imports came from the EU-28 (56% against 42% in 2009), followed by Japan (22% against 36% in 2009), NAFTA (13%) and South Korea (7%). Reflecting the evolution of their oil resources, since 2005, the imports of Russia, Saudi Arabia, and the UAE have risen sharply. Saudi Arabia increased its imports by an annual average of 18% and the UAE by 11%. The low level of Italy's domestic market led to a drop in imports, leaving it with a positive balance for automotive sector.

$188 BILLION
THE EU'S 2013 SURPLUS IN AUTOMOTIVE PRODUCTS

New passenger car registrations per country

The Western European market (12.1 million new cars, amounting to more than 90% of the European market) rose by 4.8% in 2014 over 2013, after four years of downward slide. Since 2007, the decrease comes to 18%, meaning the disappearance of 2.7 million units. For the seventh consecutive year, the market was under 14 million units, representing one fifteenth of the European car fleet. The changes diverge greatly with the geographical area. Northern Europe, including Germany, fell by 4% since the pre-crisis level, whereas Southern Europe plummeted by nearly 50% (a drop of 2.2 million units). In Southern Europe, the largest declines were in Spain (down 47%), Italy (down 45%) and Greece (down 75%). France is in the middle of the pack, with a decrease of 15%.
The Northern European markets, including Germany and the United Kingdom, account for nearly two thirds of the European market, whereas they took a little more than half prior to the crisis. Southern Europe's share (Italy, Spain, Portugal and Greece) now come to one fifth of the European market—down from one third prior to the crisis.

NEW PASSENGER CAR REGISTRATIONS IN EUROPE



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

+10 POINTS

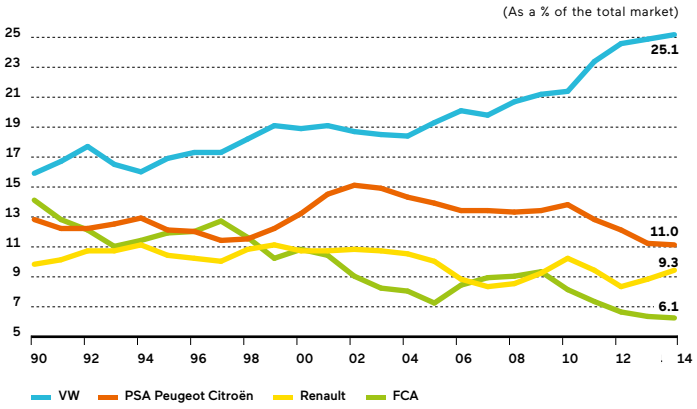
THE RISE IN NORTHERN EUROPE'S SHARE OF THE MARKET FOR NEW PASSENGER CARS IN WESTERN EUROPE SINCE 2007

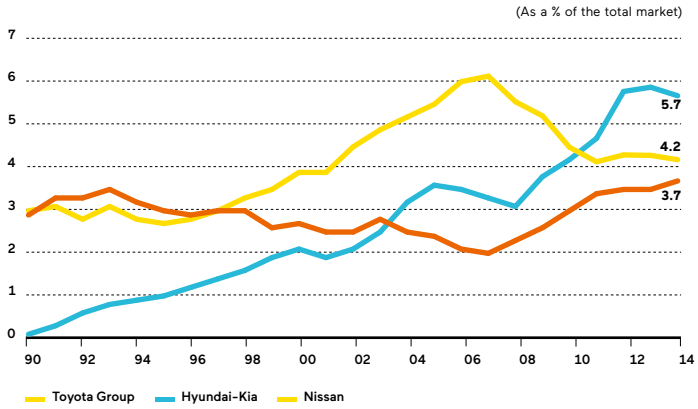
The West European market covers 17 countries (the 15 European Union countries before 2004 plus Switzerland and Norway). These countries have similar environments and comparable economic conditions. Since 1990, this market has included the former East Germany.
The market has experienced serious crises: in 1993, a decline of 16% (2.2 million units), and from the last quarter of 2008, with a decrease of 8% (or 1.2 million units). The support policies smoothed demand in 2009. However, while the 1993 crisis hit all European countries, and they all recovered afterward, in the second part of the 1990s, the 2008 crisis had very contrasted impacts in Northern versus Southern Europe.

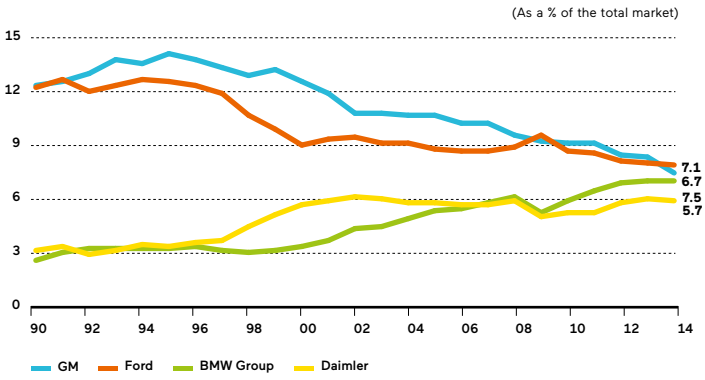
New passenger car registrations per group

In 2014, the penetration of French manufacturers on the West European market had a 0.5 point lift, after three years of decline, to a share of 20%. In a highly competitive context, the difficulties of the French and Southern European markets, where they have a strong presence, continue to hit them hard, considering that they now represent just a fifth of the market, compared with a quarter prior to the crisis. French manufacturers rely on their makes, which complement each other.
The Renault Group relies on Renault (7% market share) and Dacia (2%); Dacia amounted to only 0.5% of the market in 2007.
PSA Group, meanwhile, now includes three makes: PSA, meanwhile, now encompasses three makes: Peugeot (6%), Citroën (4%) and, since 2009, DS (1%). Six major 'generalist' European automakers manufacturing a full line of vehicles held around 6% of the market or more. The market shares of Volkswagen and Nissan are increasing.

MARKET SHARES OF GROUPS[1] IN EUROPE







(1) Based on the scope of consolidation as of 1/1/2015. See page 66 for group definitions.

The Volkswagen Group (VW), with its four main makes, has maintained its position since 1999, and accounts for more than 20% of the market. In fact it achieved a new record (25%) in 2014, thanks to the rising German economy.
The market share of French groups Renault and PSA Peugeot Citroën (20% jointly) recovered, but remains below its 2007 level. It was more than 25% between 2001 and 2003, the best period in which the French and Southern European markets accounted for 45% of the Western European market, compared with 35% in 2014. The share of the Dacia make increased, while that of DS is just emerging.
The market share of General Motors (GM) was 7.1%, representing a 0.7 point decline. GM's Opel took 6.8% market share, while Chevrolet dropped to just 0.3%, reflecting the late 2013 decision to pull out of the European market. In 2014, Ford's market share was 7.5%. In the mid-1990s, the penetration of these two American groups was around 12% each. Fiat Group now includes the Chrysler makes. The makes of the Fiat Group are now reasonably stable at 6.1% penetration; down from nearly 13% in 1997 and 15% in 1989. In 2014, 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, achieving 5.7% of the market. BMW, including the Mini, consolidated its position, retaining its high of the year before (6.7%).
Toyota's market share grew continuously from 1995 to 2007 but dropped thereafter. Since then, it has plateaued at around 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) was 5.7% by 2014.

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

Range analysis in 2014

French manufacturers broadened their vehicle ranges over the years, offering around 50 models in 2014, up from 27 in 2000. In the last few years they have also considerably expanded the number of four-wheel drives (C4-Cactus, 2008, Captur, Kadjar) and have refreshed the models for their lower ranges (C1, 108, 308, Clio, Sandero).

Groups	Makes	Economy and low ranges	Low-mid range	High-mid range	Premium range
PSA PEUGEOT CITROËN	CITROËN	C-Zéro, C1, C3, C4-Cactus, Nemo, Berlingo	C4, C4 Air Cross, Jumpy, Jumper	C5	C8
	DS	DS3	DS4	DS5	
	PEUGEOT	i0n, 107, 108, 207, 208, 2008, Bipper, Partner	308, RCZ, 3008, 4008, 5008, Expert, Boxer	508	807
RENAULT GROUP	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE	Mégane, Fluence, Master	Laguna, Trafic, Kadjar, Koleos	Espace, Latitude
	DACIA	Logan, Sandero, Duster, Dokker	Lodgy		
BMW	BMW	i3	1, 2 Series	4 Serie, X1	3, 5, 6, 7, X3, X4, X5, X6, Z4, I8 Series
	MINI	Mini			
DAIMLER	MERCEDES	Citan	A, B classes, CLA, Vito	GLA, Viano	C, E, S, CL, SL, CLS, CLK, SLK, R, G, GL, GLK, ML classes
	SMART	Fortwo, Forfour			
FIAT	ALFA ROMEO	Mito	Guiletta		4C
	CHRYSLER-JEEP	Renegade		Wrangler, Compass, Cherokee	Grand Cherokee
	FIAT	Panda, 500, Punto, Sedici, Fiorino, Doblo,	Bravo, Scudo, Ducato	Freemont	
	LANCIA	Ypsilon	Delta		Thema, Flavia, Voyager
FORD EUROPE	FORD	Ka, Fiesta, B-Max, T. Courier, T. Connect, Ecosport	Focus, (Grand) C-Max, Kuga, Transit, T. Custom	Mondeo	Mustang, Galaxy, S-Max
GEELY	VOLVO		C30	S40, V40, V50	S60, S80, V60, V70, C70, XC60, XC90
GM EUROPE	OPEL	Agila, Corsa, Adam, Meriva, Combo, Mokka	Astra, Ampera, Zafira, Movano	Cascada, Insignia, Antara, Vivaro	
HONDA	HONDA	Jazz	Civic, CR-Z, Insight	Accord, CR-V	
HYUNDAI	HYUNDAI	I10, I20, IX20	I30, Veloster, Elantra, H-1	IX 35, I40, Santa Fe	Genesis
	KIA	Picanto, Soul, Venga	Rio, Cee'd, Carens	Optima, Sportage	Sorento
MAZDA	MAZDA	2	3, 5, MX5, CX-5	6	
MITSUBISHI	MITSUBISHI	i-MiEV, Colt	Lancer, Spacestar, ASX	Outlander	Pajero
NISSAN	NISSAN	Pixo, Micra, Note, Juke	Leaf, Pulsar, Primastar, NV200	Qashqai, X-Trail	370Z, Murano, Pathfinder, GT-R, NV400
SUBARU	SUBARU	Trezia		Impreza, Legacy, Forester	BRZ
SUZUKI	SUZUKI	Alto, Splash, Swift, SX4, Jimny		Grand Vitara	
TATA GROUP	JAGUAR				XF, XJ, XK, F-TYPE
	LAND ROVER			Freelander, RR Evoque, Defender	Discovery, Range Rover
TOYOTA	LEXUS		CT 200 H		GS, IS, LS, RX, NX
	TOYOTA	IQ, Aygo, Yaris, Verso-S, Urban Cruiser	Verso, Auris, Corolla	Avensis, Prius, RAV4	GT86, Land Cruiser
VOLKSWAGEN GROUP	AUDI	A1, S1	A3, S3	A4, A5, TT, Q3, RS4, RS5	A6, A7, A8, R8, Q5, Q7, RS6, RS7
	PORSCHE				911, Boxster, Cayman, Macan, Cayenne, Panamera
	SEAT	Mii, Ibiza	Leon, Altea	Toledo, Exeo	Alhambra
	SKODA	Citigo, Roomster, Yeti	Fabia, Rapid	Octavia	Superb
	VOLKSWAGEN	Up!, Polo, Caddy	Golf, Jetta, New Beetle, Touran, Eos, Crafter	Passat, Scirocco, Tiguan, Transporter	Sharan, Phaeton, Touareg

Source: CCFA.

51 and 89
MODELS AND BODY STYLES
OFFERED BY FRENCH MANUFACTURERS

Breakdown and rank by model

Of the 16 best-selling models in Europe in 2014, six are made by Renault, Peugeot or Citroën.

RANGES AND BODY STYLES IN 2014

(As a % of new registrations by country)

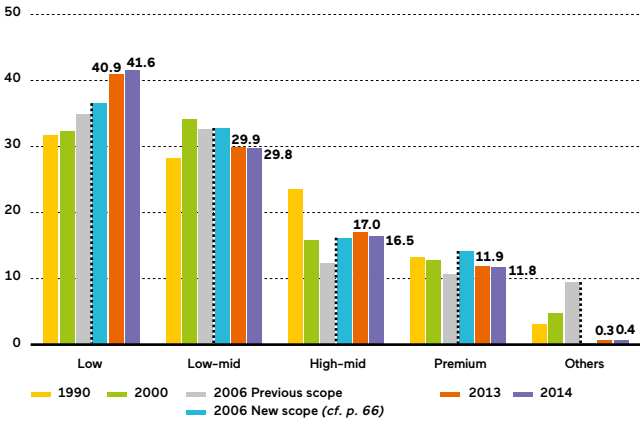
	Small	Lower medium	Upper medium	Executive	Others
Germany	30	34	18	17	1
Austria	34	34	19	13	0
Belgium	38	31	18	13	0
Denmark	57	25	12	6	0
Spain	38	38	18	7	0
Finland	20	34	29	16	1
France	54	30	11	5	0
Greece	61	24	12	3	0
Ireland	28	33	29	9	0
Italy	63	19	12	6	0
Luxembourg	30	32	19	19	0
The Netherlands	47	28	16	9	0
Portugal	44	33	13	10	0
The United Kingdom	43	27	17	13	0
Sweden	18	27	25	29	1
European Union 15 countries	**42**	**30**	**16**	**12**	**0**
Norway	22	32	28	18	0
Switzerland	31	28	22	17	2
All 17 countries	**42**	**30**	**17**	**12**	**0**

	Sedans	Station wagons	Coupés	Convertibles	MPVs	Others
Germany	42	19	2	2	12	23
Austria	40	16	1	1	16	25
Belgium	44	15	1	1	17	22
Denmark	64	16	0	0	8	10
Spain	58	5	1	0	12	23
Finland	43	29	0	0	7	21
France	53	7	1	1	15	24
Greece	82	1	0	0	5	13
Ireland	65	5	1	0	6	23
Italy	57	7	1	0	13	22
Luxembourg	43	11	3	2	13	29
The Netherlands	56	20	0	1	8	15
Portugal	58	20	1	1	6	14
The United Kingdom	59	7	2	2	10	21
Sweden	32	37	0	0	5	25
European Union 15 countries	**51**	**12**	**1**	**1**	**12**	**22**
Norway	42	22	0	0	5	31
Switzerland	40	15	2	2	11	31
All 17 countries	**51**	**12**	**1**	**1**	**12**	**22**

Source: CCFA.

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

(As a % of the total market)



RANKING OF THE SIXTEEN LEADING MODELS IN 2014

Models	Rank	Market share
Volkswagen Golf	1	4.6%
Ford Fiesta	2	2.4%
Ford Focus	3	2.4%
Renault Clio	**4**	**2.4%**
Volkswagen Polo	5	2.2%
Fiat 500	6	2.2%
Opel Corsa	7	1.9%
Renault Mégane	**8**	**1.9%**
Peugeot 207-208	**9**	**1.8%**
Audi A3	10	1.6%
Nissan Qashqai	11	1.6%
Citroën C3	**12**	**1.4%**
Citroën C4	**13**	**1.4%**
BMW Series 3	14	1.3%
Opel Astra	15	1.3%
Renault Captur	**16**	**1.3%**
Peugeot 308		**1.3%**
Peugeot 2008		**1.1%**
Dacia Sandero		**1.1%**
Dacia Duster		**0.9%**
Renault Twingo		**0.7%**
Peugeot 3008		**0.6%**
Citroën C1		**0.4%**
Citroën DS3		**0.4%**
Peugeot 508		**0.3%**

Source: CCFA.

The diversity of models available remained broad in 2014; the market shares of the 16 best-selling vehicles in Europe fell to 32% in 2014, compared with 40% in 2000.
The diversity of the low range from French manufacturers exploded, from eight to around 40 models. In Europe, 72% 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. Following the end of the scrap incentive schemes, this market share declined by more than two points in 2011, but by 2014 it was nearly back to its 2000 level of 73%.
In the years from 1990 to the early 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. In 2014, the "Other" continued category continued to benefit from the expansion of SUVs in the lower-end range (Peugeot 2008, Renault Captur, etc.); it grew by two points and now represents a fifth of the market (compared with 13% in 2010).
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 has continued from 2010, with the exception of Germany where the upper range regained market share more in line with the long-term structure (35%).

8 out of 16
BEST-SELLING
MODELS IN EUROPE IN 2014 WERE IN THE LOW RANGE

Technical characteristics of new passenger cars

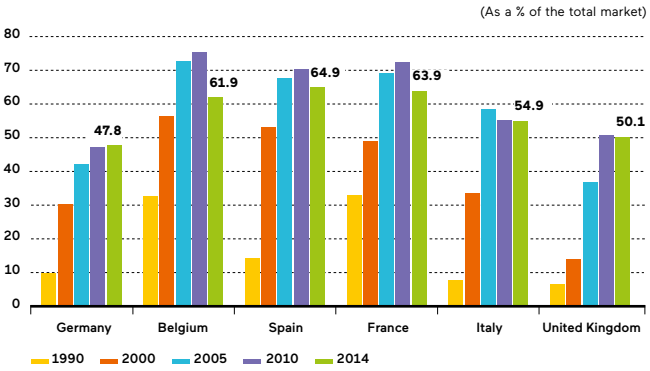
The proportion of new diesel-powered cars in Europe as a percentage of total registrations grew significantly between 1997 and 2007, and has now settled to about 50%. In 2014, it was practically stable at 53%, just three points less than the 2011 high. In this market of 6.4 million units, French manufacturers' share was 23% in 2014 (28% in 2010), representing about 1.5 million new diesel cars, while it was around 17% for all other fuels. This volume of diesel cars represents 60% of the total sales of new passenger cars from French manufacturers in Europe 17 countries.

TECHNICAL CHARACTERISTICS FOR NEW PASSENGER CARS IN EUROPE IN 2014

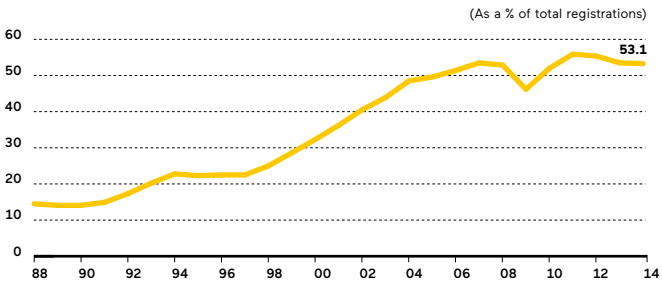
	Average cylinder capacity cc	Average power kW	4WD %	Diesel %
Germany	1,718	102	15.8	47.8
Austria	1,637	89	21.2	56.8
Belgium	1,593	86	6.8	61.9
Denmark	1,369	74	1.9	31.7
Spain	1,578	84	6.2	64.9
Finland	1,631	97	16.9	38.9
France	1,519	81	6.6	63.9
Greece	1,383		2.7	63.5
Ireland	1,583	81	4.9	73.2
Italy	1,479	76	9.8	54.9
Luxembourg	1,858	112	23.0	72.0
The Netherlands	1,431	83	5.8	27.1
Portugal	1,516	81	2.1	71.2
The United Kingdom	1,643	95	11.7	50.1
Sweden	1,783	106	31.3	58.9
European Union 15 countries	**1,606**	**90**	**11.4**	**53.6**
Norway	1,738	96	32.4	48.7
Switzerland	1,813	116	37.5	37.0
All 17 countries	**1,613**	**91**	**12.3**	**53.1**

Source: CCFA.

DIESEL MARKET SHARE PER COUNTRY



EUROPEAN DIESEL PASSENGER CAR MARKET



-127cc

REDUCTION BETWEEN 2007 AND 2014 IN THE AVERAGE DISPLACEMENT OF NEW PASSENGER CARS IN EUROPE

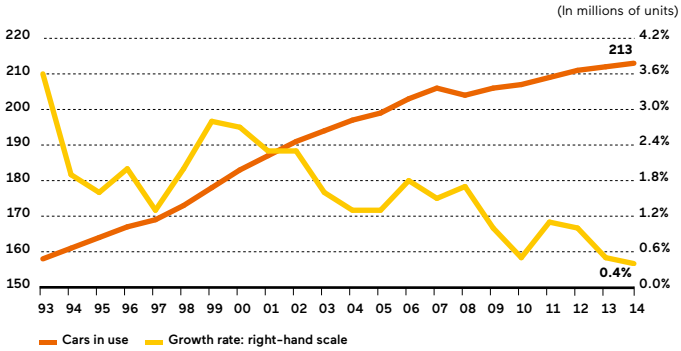
In Europe, average cylinder capacity and horsepower of car engines differ greatly from country to country. They depend mostly on the economic, tax and geographical conditions of each domestic market. In 2008 and 2009, the slow and regular upward trend toward the highest horsepower stopped, as low range cars gained in popularity. 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. The trends continue in 2014: capacity has declined again (by 8 cc) and horsepower is still on the rise (up by 1 Kw).
The market share of 4WD grew for the fifth consecutive year (up 0.3 point); it stood at 12% for the European market as a whole (1.5 million units), up from 8% in 2009. The vehicle type 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 came to 16%, a small rise over 2013, but it has risen by more than 5 points since 2007.

The market share of diesel vehicles in Europe is largely dependent on local regulations and tax rules. In Europe, in a buoyant market in 2014, the share of sales of diesel cars remained practically stable at 53%; overall, the volume increase amounted to 280,000 units. In Belgium, France, Ireland, Luxembourg, Portugal and Spain, more than two out of every three new cars registered are still diesel cars. However, the share of diesel rose slightly in Italy (+ 1.1 point to 55%) and Germany (+ 0.3 point to 47%).
Following a change in tax regulations, Scandinavian countries, in which the percentage of diesel cars was traditionally very low, went on a buying spree to reach high levels by 2012 (around two thirds of the market in Norway and Sweden). However, this figure has since declined by about 9 points.
In terms of passenger cars, diesel vehicle ownership continued to grow, although at a slower rate than for the three previous years, reaching 40% in 2014, up by one point.

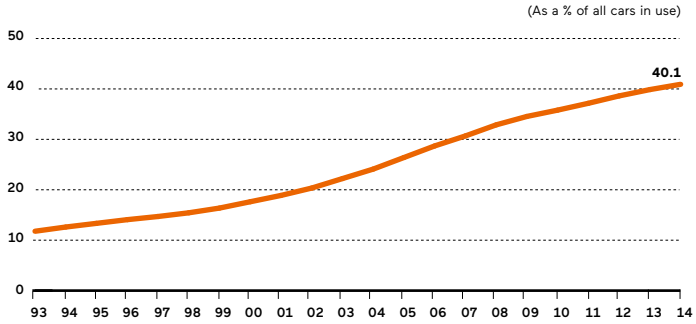
Passenger cars in use in Europe

The number of cars in Western Europe increased 0.4% as at January 1, 2014, though that figure includes widely varying figures between the lows observed in Southern European countries and the increases greater than the norm in Northern Europe, with France located just beneath that norm. In the new EU member states and in Turkey, where the rates of vehicle ownership are lower, the economic and financial crisis pounded the pace of growth of car ownership: to nearly 4%, as opposed to 5–7% between 2005 and 2009. The lower-cost demand is still mostly satisfied by imports of used vehicles. In 2013, the new EU member states and Turkey accounted for 19% of the number of cars in Europe, as opposed to 15% in 2005.
After fluctuating between 32 and 34% between 2000 and 2009, the share of cars over ten years old in Western Europe rose for the fifth consecutive year, reaching 40%, 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 just over 60%.

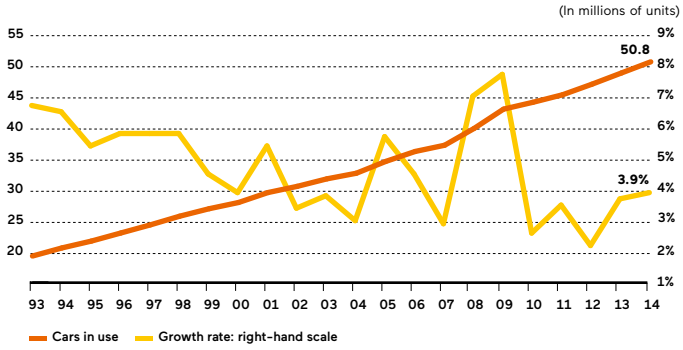
IN EUROPE 17 COUNTRIES: EU-15, SWITZERLAND AND NORWAY



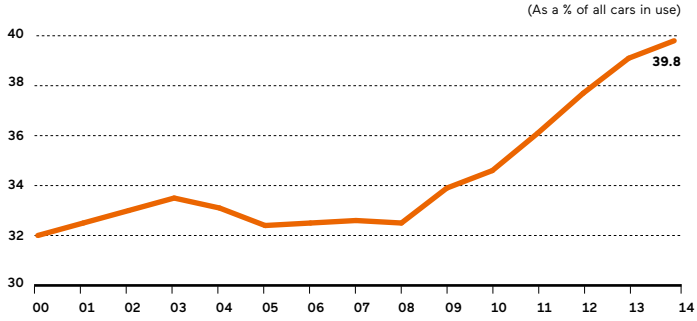
DIESEL CAR OWNERSHIP IN EU-17



IN THE 12 NEW EU MEMBER STATES AND TURKEY



SHARE OF CARS OVER TEN YEARS OLD IN EU-17



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

On January 1, 2014, the number of passenger cars in use in Western Europe (European Union 15 countries, Switzerland and Norway) stood at 213 million units. The financial and economic crisis amplified the weakened growth of the number of cars in use, nearing that of the population. Declines were seen in all Southern European countries: Spain (- 1%), Greece (- 0.8%), Portugal (- 0.4%), and Italy (- 0.3%). In France (up 0.2%), growth was small, while it was higher in the United Kingdom (up 1.4%) and Germany (up 1.0%).
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 40% on January 1, 2015. In five countries, the diesel engine is the majority: Austria, Belgium, France, Luxembourg, and Spain. On the other hand, this share, although growing, is lower in Germany (30%) and the United Kingdom (34%), although it is slightly above average in Italy (40%). The new EU countries and Turkey did not behave as a group: The number of vehicles fell in Slovenia (down 0.2%), after remaining stable the year before. There was more expansion in Hungary (up 1.8%), after some improvement in 2012, which followed three years of declines of at least 1%. In Romania growth was in excess of 4%, and in Poland 3%. In Croatia, an EU member country since July 2013, the number of cars increased slightly after a big drop (- 5%) the previous year, but remains close to its 2007 level. Within these new EU member states and Turkey, the percentage of cars with diesel engines is 28%, up nearly two points per year for several years.

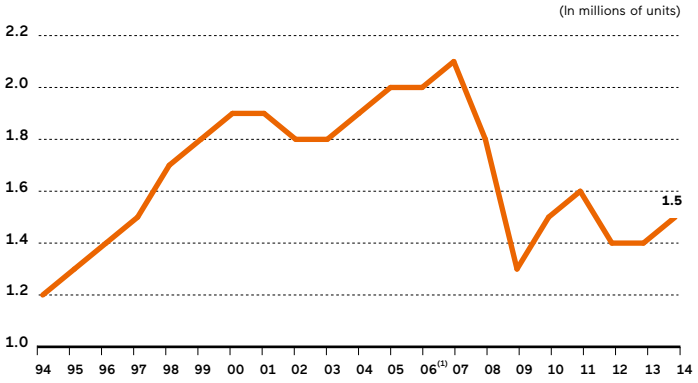
40%

SHARE OF VEHICLES IN USE IN WESTERN EUROPE THAT WERE OVER TEN YEARS OLD IN 2014

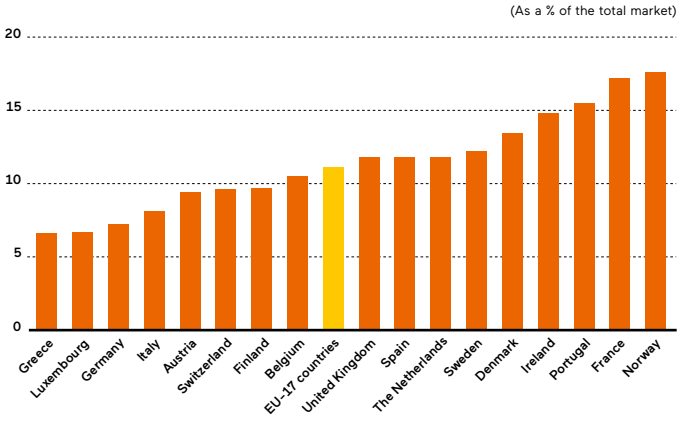
New light commercial vehicles in Europe

The Western European light commercial vehicle market, severely affected by the 2009 crisis, has since fluctuated around 1.5 million units, which is down around 600,000 units from its record level in 2007. Between 2007 and 2014, the German and United Kingdom markets were slightly lower (by 6,000 and 18,000 vehicles respectively). In the other major markets, the declines in volume vary from 89,000 for France to 162,000 for Spain, encompassing 118,000 for Italy. Southern Europe, including France, now represents 55% of the European market, up from 42% in 2007. In 2014, French manufacturers saw their sales advance by 9% to 542,000 units, giving them 36% of the market. With a presence in every segment and due to the increase of their market share in certain countries (up 3 points in the United Kingdom), French manufacturers were able to maintain their market share at a quite high level, more than 3 points higher than that recorded in 2007.

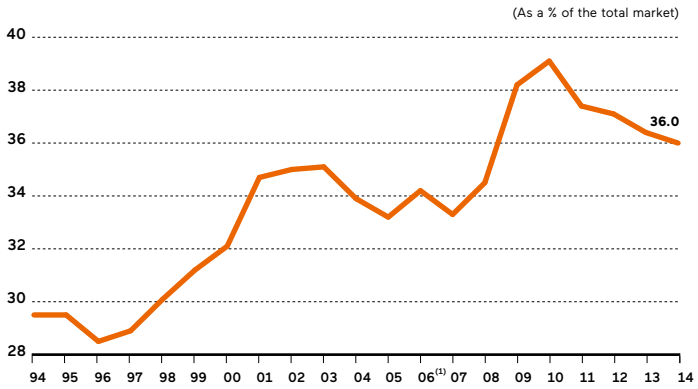
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (17 COUNTRIES)



SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2014

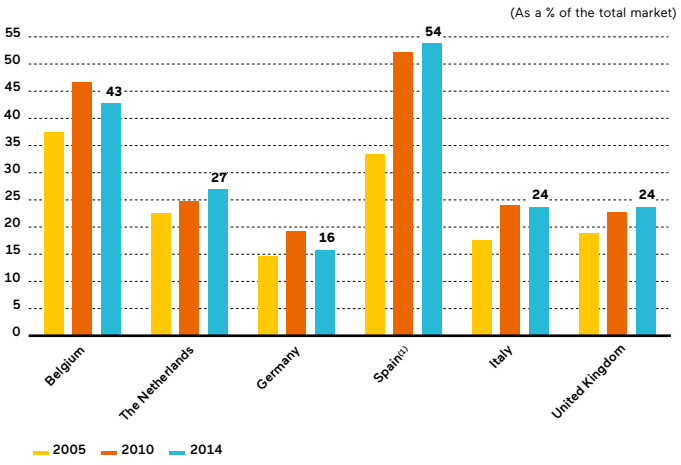


FRENCH MARKET SHARE



(1) In 2006, there was a change of scope in Spain: *see the notes on page 66.*

MARKET SHARE OF FRENCH MANUFACTURERS IN MAJOR EUROPEAN COUNTRIES



36%

SHARE OF FRENCH MANUFACTURERS IN SALES OF LIGHT COMMERCIAL VEHICLES IN WESTERN EUROPE IN 2014

Light commercial vehicles are defined here 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 7% in Greece to 19% in Norway. In total, it fell to 18% in 2014. 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 had 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 2014, five of the ten best-selling models are by French manufacturers (Berlingo, Kangoo, Partner, Master and Trafic).

In Spain and Belgium, French manufacturers had a market share of well over 40% in 2014. In Germany and Italy, countries with national manufacturers, their share was also up on 2005, in Germany to 16% and in Italy to 24%. France remains the leading European market (372,000 units) ahead of the United Kingdom (330,000 units), Germany (234,000 units), Italy (119,000 units) and Spain (114,000 units).

Heavy truck market and production in Europe

The European market for heavy trucks weighing more than 5 metric tons contracted by 9% in 2014. It stands at 232,000 units, a drop of 34% (i.e., 119,000 units) compared to 2008. Starting in 2003, the market was in a bullish phase, before plateauing at a record level (more than 350,000 vehicles) in 2007–2008, before plummeting in 2009. Unlike the 1993 crisis, when the market recovered its high levels five years later, the 2009 crisis proved much more long-lasting.
European production fell by 10% to 380,000 units over the previous year. The serious crisis of 2009 followed five years of high-level stability of the domestic market and the ongoing rise in exports of heavy vehicles outside the European Union (15 countries), especially to Eastern Europe and Asia. Since then, there have been wide variations up or down each year. Production is now at the same level as in 2003.

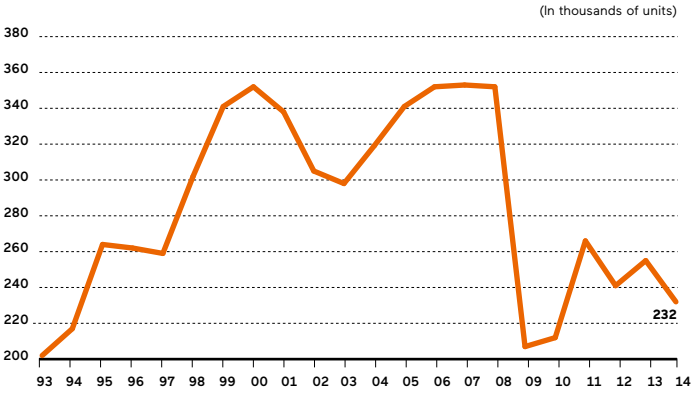
HEAVY TRUCK MARKET AND PRODUCTION IN WESTERN EUROPE

(In thousands of units)

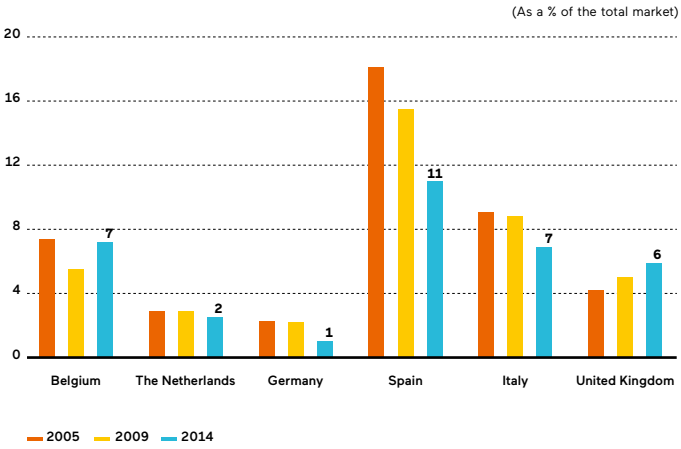
	2004	2013	2014	Change 2014/2013
New heavy truck registrations				
5.1 t to 15.9 t	86	55	45	
16 t and over	234	199	187	
TOTAL	**319**	**255**	**232**	
Heavy truck production				
5.1 t to 15.9 t	108	-	-	-
16 t and over	324	-	-	-
TOTAL	**432**	**420**	**380**	**-10%**

Source: CCFA.

NEW HEAVY TRUCK REGISTRATIONS IN EUROPE



RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



RENAULT TRUCKS' MARKET SHARE IN EUROPE

-9%

DROP IN NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE IN 2014

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 nearly 150,000 more vehicles. Compared with the two dark years for heavy trucks—1993 and 2009—the market is finding it harder to pick up since the last crisis than in the nineties; in 2014, five years later, the market is 12% larger, compared with 50% larger in 1998.

Demand continued to focus on the 16 T-and-over segment, which accounted for 81% of total registrations, including both trucks and road tractors.
Renault Truck's international expansion was affected by the slump in the Southern European markets. That region's share within Western Europe not including France shrank from 24% to 13% between 2007 and 2014. Renault Truck's penetration outside France, amounting to 3%, is also down compared with what it was in 2008 (6%). Overall, registrations of Renault Trucks have fallen, and its market share in Europe stands at 8%.

French manufacturers in the new EU member states

In 2014, production of vehicles expanded (up by 6.4% to 3.6 million vehicles) and established a new record above of those of the two previous years. Sales of new vehicles grew by 13%, to one million units. The difference between production and sales of new vehicles was therefore 2.6 million units. The local new vehicle market is notably lower than its 2007 level (down by 33%). 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; Toyota in the Czech Republic; Renault in Slovenia and Romania via the acquisition of auto manufacturer Dacia. The companies' presence in these countries favors sales there, and those are expected to rise, given the low ownership levels (i.e., numbers of vehicles per 1,000 inhabitants), compared with those in France or Germany.

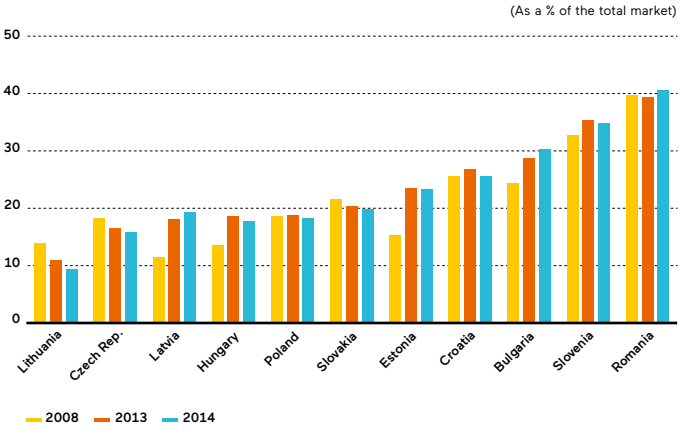
THE MARKET AND VEHICLE PRODUCTION IN THE MAIN COUNTRIES OF CENTRAL AND EASTERN EUROPE

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

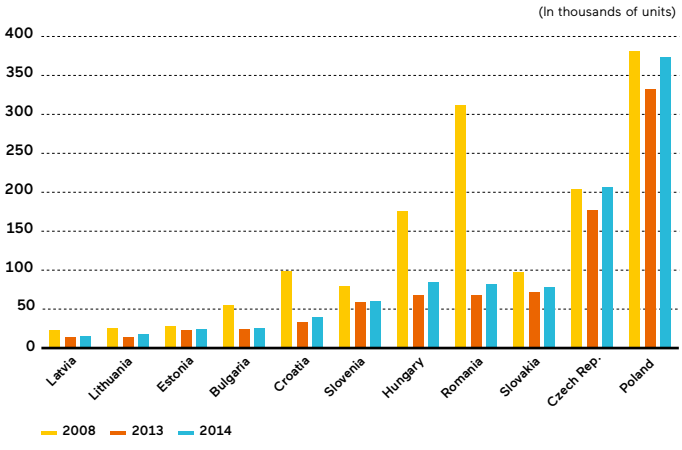
	2013	2014	Change
Vehicle production			
Passenger cars	3,297	3,515	6.6%
Light commercial vehicles	119	120	1.4%
Heavy trucks			
New vehicle registrations			
Passenger cars	776	885	14.0%
Light commercial vehicles	103	118	14.6%
Heavy trucks	48,1	46,6	-3.1%

(1) Not including Malta and Cyprus
Sources: CCFA, OICA.

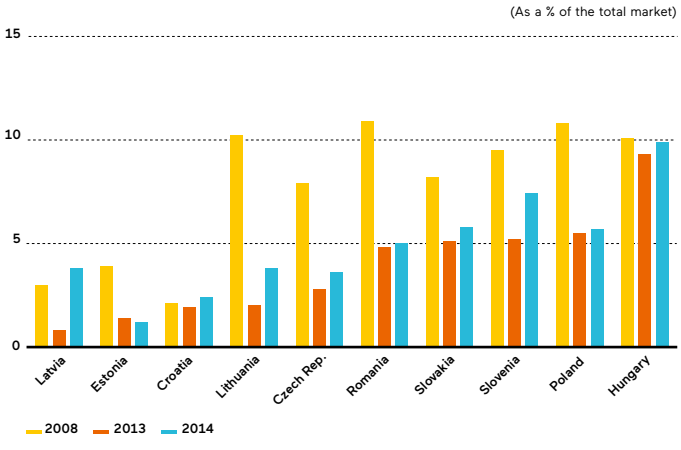
FRENCH MANUFACTURER MARKET SHARE: NEW LIGHT COMMERCIAL VEHICLES



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



FRENCH MANUFACTURER MARKET SHARE: NEW HEAVY TRUCKS



1 in 5
NEW LIGHT VEHICLES
SOLD IN THE MAJOR NEW EU COUNTRIES IS MANUFACTURED BY A FRENCH GROUP

Although the EU-15 is dominated by replacement demand, this is not the case in new and future member states and neighboring countries, where the potential for first-time car ownership is significantly higher. Central and Eastern European Countries (CEEC) produced 3.6 million vehicles in 2014. Their activity progressed just like that of Western Europe after the recovery of the European market.
In 2014, production was higher for the sixth year in a row, thanks to the domestic demand of the region, this being defined as the sum of new vehicle registrations plus imports of used vehicles. This imbalance has lasted since the 2009 crisis.
In 2014, new vehicle sales recovered to one million units, after remaining stable the previous year. Sales increased in all the countries and more sharply, with the exception of Slovakia, in those countries that showed a decline in 2013 (Croatia, Romania and the Czech Republic).

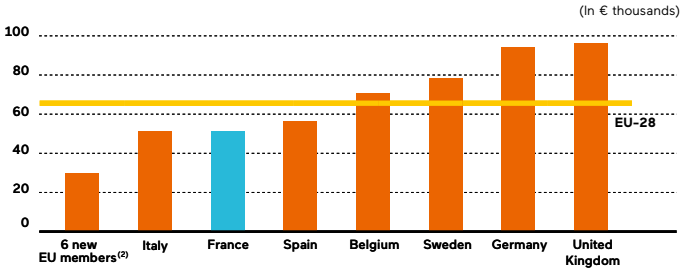
The automotive industry in the European Union

In 2012, The European automotive industry employed 2.3 million people, 45% of whom worked in vehicle manufacture. Since 2005, on an equivalent scale, the numbers employed have developed differently, depending on the part of the continent: declining in Western Europe by 270,000 (about equivalent to the previous year), while increasing in the new EU member states by 110,000. Value added per employee ranged from €30,000 a year in the six main new EU member states to €94,000 in Germany. In France, this figure was €51,000, below the European average of €66,000, as a result of the low level of output. Per capita personnel costs ranged from €15,000 in the six main new EU member states to €70,000 in Germany, a ratio of around one to five; in France they were €54,000, above the European average of €47,000.

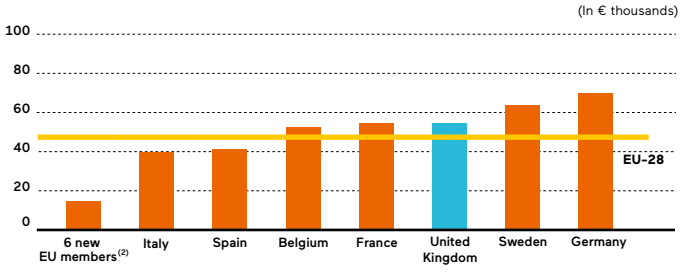
THE AUTOMOTIVE INDUSTRY IN THE EU-28 IN 2012[1]

	Units	European Union (28 countries)	Germany	France	6 new EU member states[2]	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**Thousands**	**2,291**	**813**	**244**	**575**	**135**	**135**	**163**	**67**	**38**
of which automobile assembly	Thousands	1,037	495	137	137	68	60	60	44	21
of which body and trailer manufacturers	Thousands	156	43	24	-	17	9	12	4	5
Automotive equipment manufacturing	Thousands	1,098	274	83	438	51	65	91	19	12
Sales	**€ millions**	**846,839**	**385,095**	**102,076**	**106,402**	**68,618**	**48,429**	**53,333**	**32,710**	**18,072**
Production	**€ millions**	**711,741**	**325,127**	**59,455**	**102,696**	**62,758**	**45,678**	**44,427**	**23,469**	**17,495**
Production/Sales	%	84.0	84.4	58.2	96.5	91.5	94.3	83.3	71.7	96.8
Value added (to factor costs)	**€ millions**	**150,213**	**76,649**	**12,460**	**17,055**	**12,997**	**7,638**	**8,322**	**5,253**	**2,709**
Value added/production	%	21,1	23.6	21.0	16.6	20.7	16.7	18.7	22.4	15.5
Value added per employee	€ thousands	65.6	94.3	51.1	29.7	96.2	56.7	51.1	78.6	70.5
	Base 100: 6 new EU member states	221	318	172	100	324	191	172	265	238
Goods and services purchased	**€ millions**	**699,540**	**307,828**	**88,425**	**90,265**	**55,540**	**42,259**	**46,582**	**27,641**	**15,531**
Purchases as a % of output	%	98.3	94.7	148.7	87.9	88.5	92.5	104.9	117.8	88.8
Personnel costs	**€ millions**	**108,637**	**56,763**	**13,210**	**8,515**	**7,320**	**5,561**	**6,444**	**4,250**	**2,018**
Personnel costs per employee	€ thousands	47.4	69.9	54.2	14.8	54.2	41.3	39.6	63.6	52.5
	Base 100: 6 new EU member states	320	472	366	100	366	279	267	429	355
Gross operating surplus (GOS)	**€ millions**	**41,576**	**19,885**	**-750**	**8,595**	**5,677**	**2,077**	**1,878**	**1,003**	**692**
GOS/VA	%	27.7	25.9	-6.0	50.4	43.7	27.2	22.6	19.1	25.5

VALUE ADDED PER EMPLOYEE EXPRESSED IN THOUSANDS OF EURO



PERSONNEL COSTS PER EMPLOYEE



(1) Since 2008, data has been published in a classification of new economic activity involving in particular a change to the scope of the automotive industry (inclusion of manufacture of electrical and electronic equipment).
(2) 6 main new EU member states: Hungary, Poland, Czech Republic, Slovakia and Slovenia: body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
Sources: Eurostat and CCFA estimates.

The automotive industry, one of the key industries of the European economy, includes:
- automobile manufacturing;
- body and trailer manufacturing;
- automotive equipment manufacturing.

The data in the above table come from surveys of national companies and have been adjusted for consistency by Eurostat. Due to difficulties in collecting and standardizing statistics at both the national and European level, only data up to 2012 were available. Germany accounted for 35% of the total employees in the automotive industry. France represented 11%, against an average of around 6% for Spain, Italy and the United Kingdom. The people employed in the six new member countries (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) reached 25%. The automotive industries differed significantly from country to country in terms of structure and wages.

In Germany and Sweden, the percentage of employees in the industry involved in automotive manufacturing was higher than 60%, while in France it was 56%, as opposed to 24% in the six main new EU member states. It was between 37% and 50% in Italy, Spain and the United Kingdom.

The share of employer social contributions in personnel costs stood at 30% in France, compared to 17% in Germany, while the average for Europe stood at around 22%.

–270,000
PEOPLE
THE FALL IN STAFF NUMBERS IN THE AUTOMOTIVE INDUSTRY IN WESTERN EUROPE FROM 2005 TO 2012

French automobile manufacturers in 2014

PSA Peugeot Citroën: www.psa.fr

In 2014, in a context of growth in the world market and of mild recovery in the base market compared with a low level, PSA Peugeot Citroën Group sales rose by 4.3%. The best growth was in Europe (8%), where the Group still holds second place (for passenger cars and light commercial vehicles). Outside that region, the company achieved record sales in China (734,000 units). The Group's commitment to international expansion is based mainly on long-term, targeted cooperation initiatives with other automobile manufacturers. In China, the Group works with Dongfeng Motor, with which it is developing a strategic partnership and plans to build a fourth factory, and with China Changan Automobile Group. PSA and General Motors continue their cooperation in Europe with the aim of developing two vehicles on common platforms and a new model of light utility vehicle on the basis of PSA platforms.
The PSA Peugeot Citroën Group has a workforce of around 190,000 employees worldwide, including 84,000 in France, working at around twenty sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head office, etc.). In addition to the assembly plants *(cf. opposite)*, the Group has a number of large sites in France, such as Vélizy (R&D), Trémery (engines), Vesoul (spare parts warehouse) and Valenciennes (gearboxes), which employ several thousand people. In technology, the Group has three priority goals: develop technologies that reduce consumption and polluting emissions (the car using 2 liters to go 100 km, hybrid models); the self-driving connected vehicle (introduction of delegated driving); and the technology serving the attractiveness of the brands.
In 2014, the Group launched the "Back in the race" plan, which shoots for four objectives: Peugeot, Citroën and DS, three brands recognized world-wide; a concentrated global product plan; profitable growth on the international scene; and modernization in order to improve competitiveness, particularly in Europe.
In 2013, a new structure was planned to be implemented starting in 2014 so as to take part in the turnaround of the company and to maintain the Group's technological and industrial bases in France.

Renault: www.renault.com

Renault's worldwide sales increased by 3.2% due to the recovery of the European market. The Renault make is ranked third in the European light vehicle market. Sales outside Europe represented 46% of sales, compared with 50% the year before, due to the slowdown in the emerging markets.
As time has gone by, the cooperation started in 1999 with Nissan in the scope of the Alliance has become optimized and new synergies (in terms of production, as well as electric vehicles) have been introduced. In 2014, the Alliance began four convergence projects in key functions: engineering (products and technology); assembly and logistics; purchasing; and human resources. 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, extended to Nissan, with an increased shareholding in 2014, aims to speed up their growth and strengthen their presence in Russia. Renault has four lines of development for the vehicle of tomorrow: safety; well-being on board (delegation of driving); reduction of environmental impact (the car going 100 km on 2 liters of fuel, the self-driving car, zero emissions); and mobility accessible to all.
The Renault Group has a workforce of around 117,000 employees worldwide, including 46,000 in France, working at around fifteen sites (assembly plants, plants for manufacturing engines and mechanical systems, R&D centers, head office, etc.). Large numbers of employees may work outside of assembly sites.
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. The major initiatives in the 2014–2016 period concern updating the range, expanding internationally and renewed ambition for Europe, enhancing our competitiveness, increasing our synergies with the Alliance and reining in capital expenditure. In 2013, the group planned a reorganization to maintain the sites in France and expand their activity.

Renault Trucks: www.renault-trucks.com

Renault Trucks continued to suffer from the weakness of the European market (down 10%), and especially the weakness of the markets in Southern Europe where it has a solid base. It had 8% market share in Western Europe. Since 2009, Renault Trucks has been using new assembly sites outside Western Europe. It has a partnership with Volvo in Russia and also has interests in four other countries: Morocco, South Africa, Uruguay and Iraq. Within the AB Volvo Group, which has more than 90,000 employees world-wide, Renault Trucks employs 9,000 people in France (activities such as assembly, production of mechanical systems in Vénissieux, research in Saint-Priest, etc.). Beyond industrial cooperation, synergies among the Group's five makes (Renault, Volvo, Mack, UD Trucks and Eicher) continue to play out. Application of the Euro VI standard early in 2013 led to the complete overhaul and simplification of the entire range, which should translate into gains in market share.

FRENCH MANUFACTURERS IN 2014

	Units	PSA Peugeot Citroën	Renault
Sales	€ millions	53,607	41,055
Capital expenditure	€ millions	1,297	1,544
Net income	€ millions	-555	1,998
Employees worldwide(1)	**No. of people**	**189,786**	**117,395**
of which France	*No. of people*	*83,830*	*46,365*

319,000
PEOPLE
WORLDWIDE EMPLOYEES OF FRENCH MANUFACTURERS

	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	36,085	18,829	951	99	-2,357	38,518	2,594	- 57
Operating income	€ millions	63	673	126	37	6	861	751	- 3
Capital expenditure(2)	€ millions	1,294		3			1,541	3	
Employees worldwide(1)	**No. of people**	**103,894**	**82,382**				**114,543**	**2,852**	

(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.

Europe

FRANCE
01. Batilly
02. Blainville
03. Bourg-en-Bresse
04. Dieppe
05. Douai
06. Flins
07. Hordain
08. Limoges
09. Maubeuge
10. Mulhouse
11. Poissy
12. Rennes
13. Sandouville
14. Sochaux

SPAIN
15. Barcelona (Nissan)
16. Palencia
17. Valladolid
18. Vigo
19. Villaverde

ITALY
20. Val di Sangro

PORTUGAL
21. Mangualde

CZECH REPUBLIC
22. Kolin (Toyota)

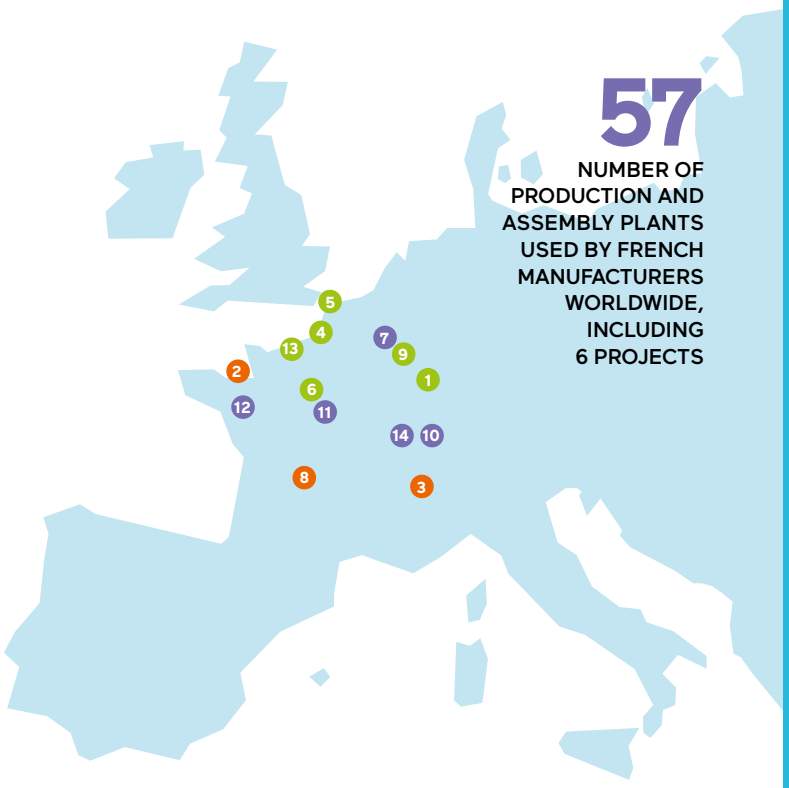
ROMANIA
23. Pitesti (Dacia)

RUSSIA
24. Kaluga (PSA-Mitsubishi)
24. Kaluga (Volvo Trucks)
25. Moscow
26. Togliatti (AvtoVAZ)

SLOVAKIA
27. Trnava

SLOVENIA
28. Novo Mesto

TURKEY
29. Bursa
29. Bursa (Tofas)



57
NUMBER OF PRODUCTION AND ASSEMBLY PLANTS USED BY FRENCH MANUFACTURERS WORLDWIDE, INCLUDING 6 PROJECTS

● PSA PEUGEOT CITROËN ● SEVELSUD ● RENAULT ● RENAULT TRUCKS

America

ARGENTINA
30. Buenos Aires
31. Santa Isabel

BRAZIL
32. Curitiba
33. Porto Real
34. Sete Lagoas (Fiat)

COLOMBIA
35. Medellin

Africa

SOUTH AFRICA
36. Rosslyn (Nissan)

ALGERIA
37. Oued Tlelat

MOROCCO
38. Ameur Seflia (plan)
39. Casablanca
40. Tangier

NIGERIA
41. Kaduna (PAN Nigeria Ltd) (plan)

Asia

CHINA
42. Chengdu (plan)
43. Shenzhen
44. Wuhan
44. Wuhan (plan)

SOUTH KOREA
45. Busan (Renault Samsung Motors)

INDIA
46. Chennai (Renault-Nissan)

JAPAN
47. Mizushima (Mitsubishi)
48. Okazaki (Mitsubishi)

KAZAKSTAN
49. Kustanay (plan)

MALAYSIA
50. Gurun
51. Tan Chong Motor (plan)

VIETNAM
52. -

World production of French manufacturers

In 2014, world-wide production by French auto makers increased by 3% after two declining years, amounting to 5.7 million vehicles. Since 2007, despite two record years, 2010 and 2011, it has dropped by 8%. However, since 1996, production had grown by 50% representing mean annual growth of 2% thanks, initially, to the increase of opportunities in Europe outside France and then, to opportunities outside Europe. 4.9 million passenger cars were produced, compared with 5.6 million in the record years of 2010 and 2011; 744,000 light commercial vehicles compared with 847,000 in the all-time record year of 2008. Compared with 2007, production fell by 7%, or 380,000, for cars, and 9%, or 116,000 vehicles, for light commercial vehicles.

PRODUCTION OR ASSEMBLY SITES/TOTAL PRODUCTION PER MODEL

Group/Make	Model	Launch date	Production or assembly sites in 2014	Production (in units) Total at the end of 2014
PSA PEUGEOT CITROËN				
Peugeot, Citroën	i0n, C-ZERO	2010	Japan (Mitsubishi)	6,700 / 6,400
Peugeot, Citroën	107, C1	2005	Kolin (Czech Rep.)	819,000 / 828,700
Peugeot	207	2006	Villaverde (Sp.), Argentina, Porto Real (Braz.), China	2,572,800
Peugeot	208	2012	Poissy, Mulhouse, Trnava (Slovakia), Porto Real (Braz.)	881,600
Citroën, DS	C3, DS3	2002/2008/2009	Poissy, Porto Real (Braz.), Trnava (Slovakia)	3,916,200 / 339,900
Citroën	C3-XR	2014	China	1,400
Peugeot, Citroën	301 / C-Elysée	2012	Vigo (Sp.), China	195,400 / 189,500
Peugeot	307	2001	China	3,723,400
Peugeot	308	2007	Sochaux, China, Argentina	1,867,300
Peugeot	RCZ	2010	Austria (Magna Steyr)	63,700
Peugeot	2008	2013	Mulhouse, Porto Real (Braz.) China	286,600
Peugeot	3008	2009	Sochaux, China	733,400
Peugeot	5008	2009	Sochaux	293,500
Citroën, DS	C4, DS4	2004/2010/2011	Mulhouse, Vigo (Sp.), China, Russia, Argentina	3,609,200 / 115,200
Citroën	C4 Cactus	2014	Madrid	47,000
Peugeot, Citroën	4008 / C4 Air Cross	2012	Japan (Mitsubishi)	27,000 / 46,940
Citroën, DS	C5, DS5	2008/2011	Rennes-la-Janais, Sochaux, China	1,311,400 / 90,200
Peugeot	408	2010	Russia, China, Argentina	360,100
Peugeot	508	2010	Rennes-la-Janais, China	415,000
Peugeot, Citroën	807, C8	2002	Hordain	193,700 / 151,700
Peugeot, Citroën	Bipper, Nemo	2008	Turkey (Tofas)	207,300 / 218,000
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (Sp.), Mangualde (Port.), Argentina	2,383,100 / 2,864,400
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	562,100 / 518,300
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (Italy), Brazil	941,500 / 815,900
RENAULT GROUP				
Renault	Twingo	2007/2014	Novo Mesto (Slovenia)	911,284 / 58,178
Renault	Pulse	2011	India	12,531
Renault	Clio	1998/2005/2012	Flins, Turkey, Novo Mesto (Slovenia), Dieppe, Argentina, Colombia	5,767,426 / 2,883,736
Renault	ZOE	2012	Flins	23,151
Renault	Captur	2013	Valladolid (Sp.)	306,829
Renault	Logan	2005/2013	Russia, Brazil, Morocco, Algeria, Colombia	1,454,376 / 162,586
Renault	Latitude	2010	South Korea	40,988
Renault	Sandero	2007/2012	Brazil, Morocco, Colombia, South Africa (Rosslyn), Russia	993,291 / 130,902
Renault	Duster	2010	Russia, Brazil, Colombia, India	731,640
Renault	Fluence / Fluence ZE	2009/2011	Turkey, India, Argentina, Russia	466,695 / 4,584
Renault	Mégane	2008/2009	Douai, Palencia (Sp.), Turkey, Russia	2,202,530 / 115,177
Renault	Scala	2012	India	12,771
Renault	Laguna	2007	Sandouville	345,159
Renault	Espace	2002	Sandouville	378,964
Renault	Kangoo / Kangoo ZE	1997/2007/2011	Maubeuge, Argentina	2,672,622 / 883,201 / 18,411
Renault	Master	2010	Batilly, Brazil	458,684
Renault	Trafic	2001/2014	Sandouville, Barcelona (Sp., Nissan)	722,945 / 31,498
Dacia	Logan	2012	Pitesti (Romania)	207,712
Dacia	Sandero	2012	Pitesti (Romania)	288,134
Dacia	Duster	2010	Pitesti (Romania)	635,845
Dacia	Lodgy	2012	Tangier (Morocco)	99,978
Dacia	Dokker	2012	Tangier (Morocco)	118,966
RSM	SM3 / Fluence	2009/2013	Busan (South Korea)	190,985 / 733
RSM	SM 5 / Latitude	2010	Busan (South Korea)	206,441
RSM	QM5 (Koleos)	2007	Busan (South Korea), India	55,761
RSM	SM7	2011	Busan (South Korea)	22,062
RSM	Rogue	2014	Busan (South Korea)	26,471

See notes on page 74. Sources: CCFA, PSA Peugeot Citroën, Renault.

216 MILLION

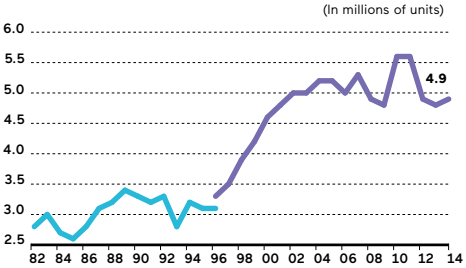
VEHICLES PRODUCED BY FRENCH AUTOMOBILE MANUFACTURERS WORLDWIDE SINCE 1898

Markets for new French vehicles

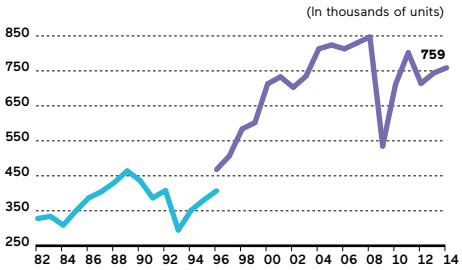
In 2014, the domestic opportunities for French manufacturers and sales outside of France grew by 4% each, after two down years. French manufacturers' market share in their markets rose to 21% (19% for passenger cars, 27% for light commercial vehicles and 32% for heavy trucks). Export markets represented 79% of the French automobile manufacturers' sales, compared with two-thirds in 2000 and less than 60% in 1990.
Exports outside the European Union in 2014 stood at around 55% of the total markets of French manufacturers, just a little higher than in 2010. The recovery of the Southern European markets and the decline in some emerging markets led to a 4-point drop in this ratio. In total, it fell to 30% in 2000.

WORLD PRODUCTION OF FRENCH MANUFACTURERS

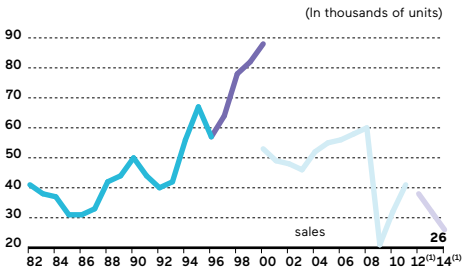
New passenger cars



New light commercial vehicles (up to 5 metric tons)

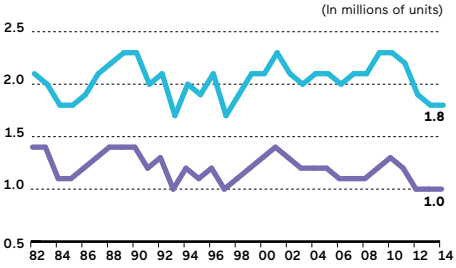


New heavy trucks over 5 metric tons

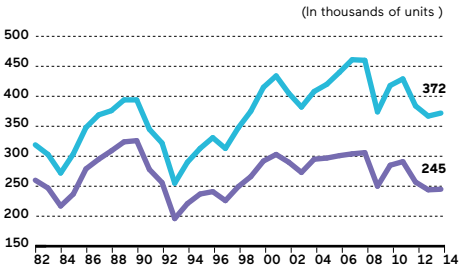


VEHICLE REGISTRATIONS IN FRANCE

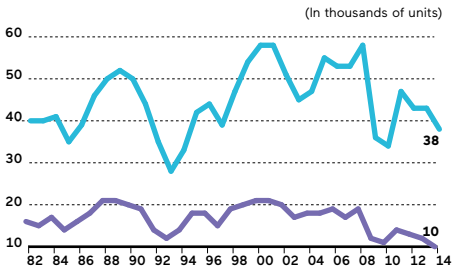
New passenger cars



New light commercial vehicles (up to 5 metric tons)

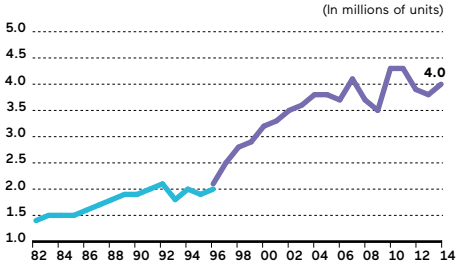


New heavy trucks over 5 metric tons

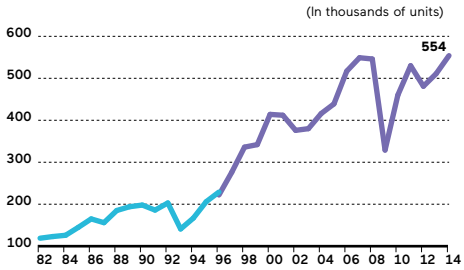


FRENCH EXPORTS

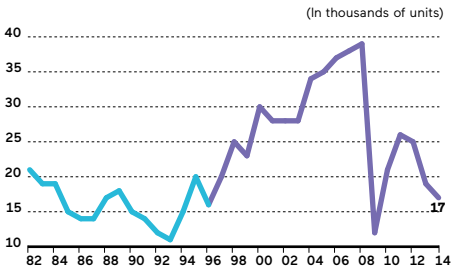
New passenger cars



New light commercial vehicles (up to 5 metric tons)



New heavy trucks over 5 metric tons



Total registrations — French make registrations

(1) Starting in 2012, the scope of heavy trucks includes invoices for 7 metric tons and greater *(see note page 77)*.

From 1997 to 2001, registrations of vehicles from French manufacturers in France had increased due to an available range that was not only rich in new models, but also high-powered and affordable. 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 "incentive/penalty" ("*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. From 2011 to 2013, before the slight recovery of 2014, the end of the scrap incentive system led to falling sales, specifically for French manufacturers. Piror to that, the impact of the crisis in the countries in which they had a major presence impacted their exports of passenger cars outside France. French passenger car exports reached 4.0 million units in 2014, a rise of 3%. Exports of light commercial vehicles increased again, climbing 8% to 554,000 units, whereas exports of heavy trucks plummeted by 8% to 17,000 units.

21%

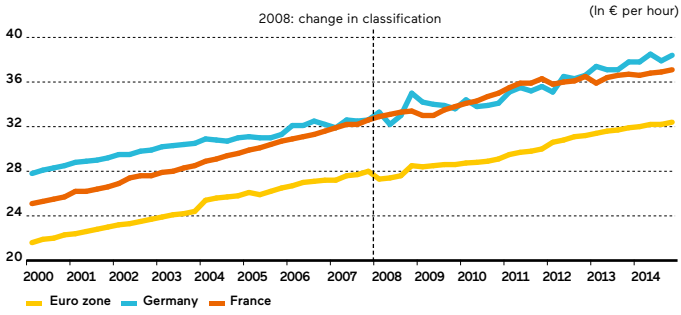
SHARE OF THE FRENCH MARKET IN MARKETS FOR FRENCH MANUFACTURERS

Competitive factors in the French automotive industry

In a highly competitive global market, French automobile manufacturers must be efficient and deal with issues that the whole industry is facing. These include the burden of mandatory levies on the factors of production and the exchange rate, as well as other issues that are unique to the automotive industry, such as the opening of the base market to competition... All these issues impact the margin rates (the ratio of gross operating surplus to value added). Margin size has an impact on the financing of investment and the improvement of companies' competitive position. Several reports in recent years, including the "Pact for the competitiveness of French industry" (2012), had demonstrated the sustained weakness of margins of French industry compared with other eurozone countries. This Pact led the government to draw up a "National pact for growth, competitiveness and employment", which, among other things, created the Competitiveness and Employment Tax Credit (*Crédit d'Impôt 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 (SMIC). Since the average wage in this industry,

LABOR COSTS IN THE MANUFACTURING INDUSTRY

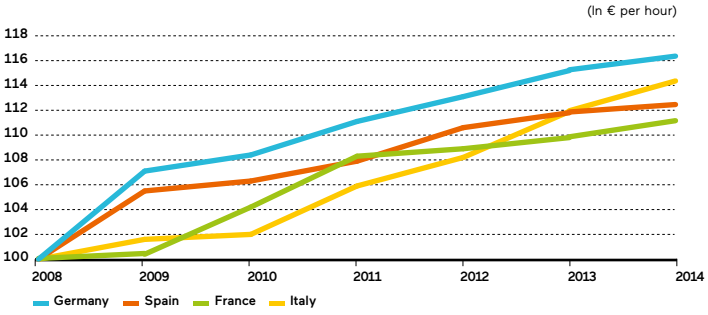
Results of the four-yearly ECMOSS survey and extrapolation using the quarterly index of labor costs.



Source: Eurostat.

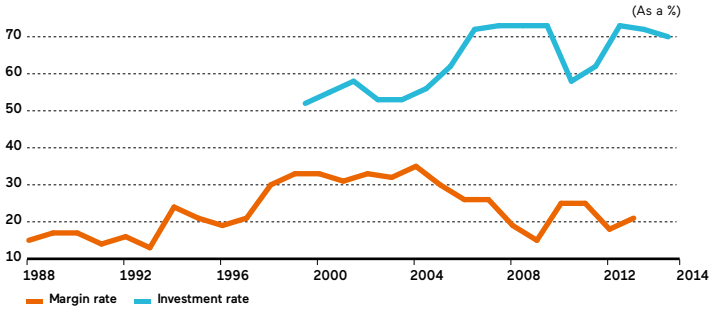
LABOR COSTS IN THE MANUFACTURING INDUSTRY

Results of the four-yearly ECMOSS surveys and extrapolation using quarterly indices of labor costs (Index 100 = 2008, according to annual averages).



Source: Eurostat.

MARGIN RATE (GOS/VA) AND INVESTMENT RATE (GFCF/GOS) OF THE AUTOMOTIVE INDUSTRY



The margin rate is the ratio of the gross operating surplus to the value added before tax, and the investment rate is the ratio of gross fixed capital formation to value added, before tax.
Source: INSEE (national account, base 2010).

10 POINTS

THE DIFFERENCE BETWEEN FRANCE AND GERMANY FOR HOURLY LABOR COSTS IN MANUFACTURING BETWEEN 2000 AND 2014, TO FRANCE'S DISADVANTAGE

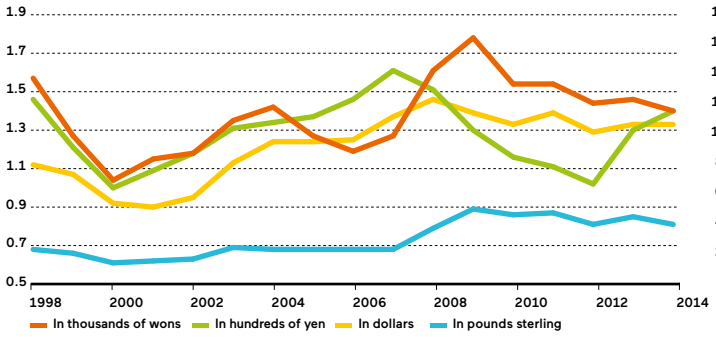
Competitiveness is defined as an industry's ability to withstand competition and expand in markets. It is relative, in that it is determined in comparison with the other market operators.

To continue to grow, the French car industry must guarantee performance comparable to that of its European, American, Japanese, Korean and in the future, Chinese, even Indian competitors. Margin rate (operating income/sales) is one of the tools that can be used to measure this performance of automotive groups. In 2014, it stood at 3.9% for Renault and 1.7% for PSA. And yet, the margin rate of the German groups stood at 6.3% for Volkswagen, 11.3% for BMW and 8.3% for Daimler. In a European context that lost more than 4 million light vehicles (passenger cars and light commercial vehicles) between 2007 and 2014, the performance of European general manufacturers was not profitable; they suffered losses before turning around in 2014. Beyond the problems of globalized competition and industry (payroll, social and tax 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, mandatory levies on the factors of production affect automotive manufacturing directly and indirectly through the chain of supply.

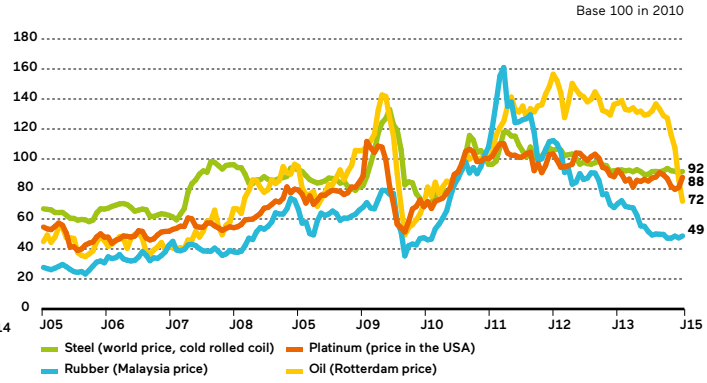
which is exposed to international competition, is higher than the CICE ceiling (still more in the automobile industry); the industry obtains only a 20% benefit. Implementation of the Responsibility Pact starting in 2015, providing for a lowering of the contributions made by employers as well as taxation, should help level out this discrepancy that France has.
The prices of raw materials in euro have increased hugely since 2001, yet it is difficult to pass on such price hikes to consumers in the current climate of stiff competition. This is particularly the case in so-called developed countries in light of the multiple trade-offs made by households in terms of consumption.
Nonetheless, raw materials prices have declined relative to 2010. At the start of 2015, oil seemed to be down by 28%, rubber had fallen 51%, and steel by just 8%.
Last, in terms of freight transport by road, more than one public opinion indicator give encouraging signals for 2015 which, if they come to pass, could stimulate purchases of both light commercial vehicles and heavy trucks.

EURO EXCHANGE RATE VARIATION

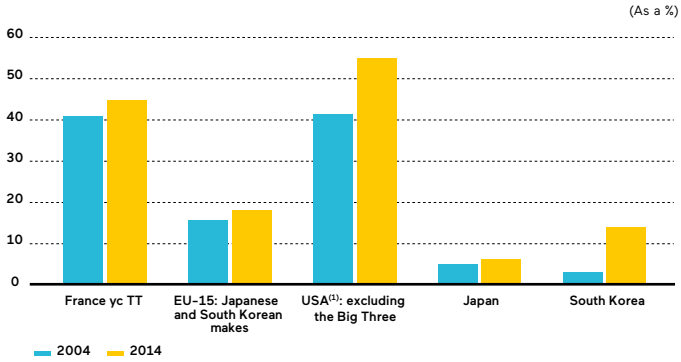


Source: IMF.

RAW MATERIAL PRICES IN EURO

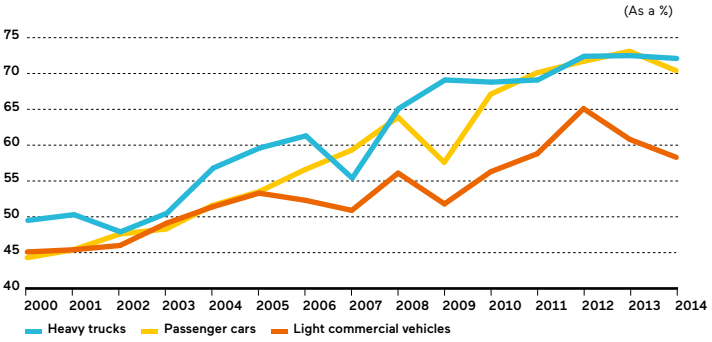


SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS



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

SHARE OF EXPORTS BY FRENCH MANUFACTURES OUTSIDE THE EUROZONE (12 COUNTRIES)



Source: CCFA.

Furthermore, the exchange rate can significantly alter trade terms because of the increasingly large share of production outside of the eurozone.
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 2014, 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.

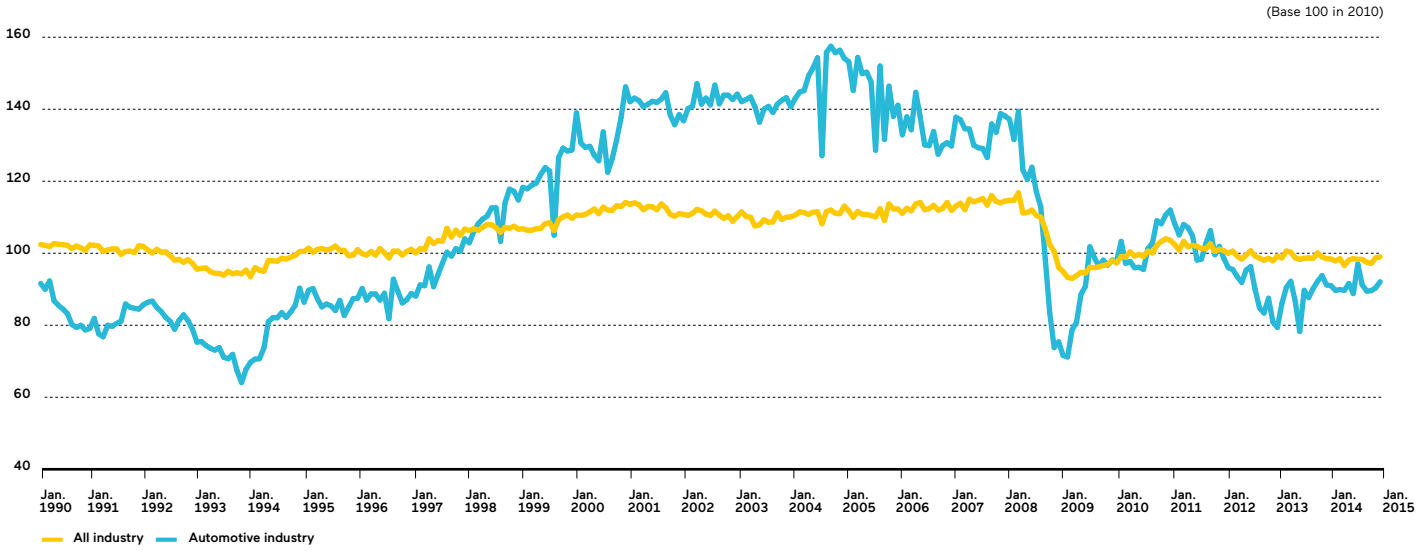
70%

SHARE OF NON-EUROZONE IN FRENCH MANUFACTURERS' EXTERNAL SALES (ALL VEHICLES)

Consolidation of the automotive industry

Registrations of new light vehicles (passenger cars and light commercial vehicles) in Western Europe stood at 13.6 million units in 2014 against 16.9 million in 2007, which is a reduction of 20%. 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 91 in 2014. The automotive industry restructured to deal with such a major crisis.
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.
In the context of the *Conseil National de l'Industrie* (CNI – National Industry Council), the *Comité Stratégique de Filière de l'Automobile* (CSFA – Strategic Committee of the Automotive Branch) was created. The CSFA brings together the entire industry, upstream and downstream, including employees unions.

INDUSTRIAL PRODUCTION INDEX



Source: CVS-CJO data by INSEE

The economic and financial crisis had significant effects on the automotive sector, upstream starting with the suppliers and downstream as far as vehicle sales/maintenance, including freight transport, manufacturers of equipment and 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 has relied on a regional level on the *Associations Régionales de l'Industrie Automobile* (ARIA – Regional Associations of the Automotive Industry). 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. Some of its research programs (e.g., a car that consumes just 2 liters every 100 km, a driverless car and installation of electric charging stations on streets) are associated with many plans included in the "New industrial France" policy launched by the government in September 2013. A second phase of the policy will be launched in 2015 with nine industrial solutions, including ecological mobility. The PFA is also a member of the CSFA.
The CSFA was created in 2010, together with ten other Strategic Branch Committees, following the *États Généraux de l'Industrie* (EGI – Industry Summit) held the same year. It includes automobile and heavy truck manufacturers with a presence in France, "Tier 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.). Bodybuilders 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. In 2014, some objectives of the contract have already been fulfilled, such as defining the priority paths for research and development (relying on the work done by the CTA) and the extension of the FMEA for three additional years *(see opposite page)*. CSF's 2015 priorities will concern bringing forward and speeding up R&D work, developing the players and collaboration within the industry.

2009

YEAR IN WHICH THE *PLATEFORME DE LA FILIÈRE AUTOMOBILE* (AUTOMOTIVE BRANCH PLATFORM – PFA) WAS CREATED

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, which were both rolled up into Bpifrance in 2013) and research and development capabilities (Research Tax Credit and Future Investments). In all, the FSI and the FMEA provided nearly € 400 million to companies. In 2015, the FMEA amended its strategy to support the ambitious members of the industry that had external expansion and growth plans, and became the *Fonds Avenir Automobile* (the Automobile Future Fund).

INVESTMENT FUNDS

	Goals and provisions	List of recipients
Strategic investment fund (FSI) (2008–2013) Bpifrance Mid & Large Cap (since 2013)	At the outset: Sovereign wealth fund set up by the public authorities to meet the equity capital needs of companies with potential for growth and competitiveness for the economy. At the end of 2014, the capital was in excess of fifteen billion euro.	Gruau, Mécachrome, Valéo
Fund for the modernization of automotive equipment manufacturers Tier 1 (FMEA Tier 1) (2009–2014)	To take minority holdings in companies working in the automotive branch which are undertaking industrial projects that create value and competitiveness for the economy. Total investments come to between five and sixty million euro. Initial provision of €600 million equally distributed among PSA Peugeot Citroën, Renault SA and the FSI (which is now Bpifrance).	Agrati, Atelier des Janves, Bourbon, Cooper Standard France*, Defta, Delfingen, Electropoli*, Faurecia AC, FSD SNOP, Maike Automotive, Mecaplast, Metaltemple, Michel Thierry*, SAFE, Saint-Jean Industries, Savoy International*, Sofedit / Gestamp, Sora*, Trèves
Fund for the modernization of automotive equipment manufacturers Tier 2 (FMEA Tier 2) (2009–2014)	Fund specifically aimed at smaller automotive suppliers (Tier 2 and higher). Total investments come to between €1 and 5 million. Initial provision of € 50 million. The funds arise out of the FAA (Renault, PSA, Bpifrance) and the large Tier-1 equipment makers: Valeo, Faurecia, Plastic Omnium, Hutchinson and Bosch.	Adduxi, Altia, Citèle, Devillé, Embaltech*, FMX, Maike Automotive, PJ Industry, Saint-Jean Engine*, SPPP, Tecma
Fonds Avenir Automobile (FAA) (since 2015)	Support for profitable companies in the automotive industry that have plans to consolidate their industry positively, to start operations abroad, to diversify their customer base or to expand their capital, as well as companies with new technologies aimed at the automobile of the future. Acquisition of minority equity stakes for unit amounts of between one and fifty million euro. The funds invested come from Renault, PSA and Bpifrance.	See above.
Fonds Avenir Automobile Tier 2 (FAA Tier 2) (since 2015)	Fund specifically aimed at smaller automotive suppliers (Tier 2 and higher) Total investments come to between €1 and 5 million. The funds arise out of the FAA (Renault, PSA, Bpifrance) and the large Tier-1 equipment makers: Valeo, Faurecia, Plastic Omnium, Hutchinson and Bosch.	See above.

* Companies taken out of the portfolio at the end of 2014
Source: Bpifrance.

In connection with long-term financing, since it was created the Strategic Investment Fund (FSI), now Bpifrance Participations since the public investment bank Bpifrance was created, had invested in three companies in the automotive sector. As for the Fund for the modernization of automotive equipment manufacturers tier 1 (FMEA Tier 1) to which French manufacturers contributed €400 million in addition to the more than € 200 million contributed by the FSI, it has invested €330 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 47 billion euro investment program (35 billion in 2010, then 12 billion more in 2013), is to strengthen productivity and improve the competitive edge of French companies. The € 1,150 million dedicated to the automotive sector concern financing for projects concerning the vehicle of 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 shared mobility and energy. 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. The planned 10-year budget is around € 300 million, a third of which is financed by the manufacturing companies.

French automakers are also members of the Jules Verne Technological Research Institute (IRT) at Nantes. The 10-year budget is of the order of €350 million, partially funded by "future investments." It specializes in advanced production technologies for composite, metal and hybrid structures. It focuses on the transportation equipment, including the car, as well as energy.

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 2012, the manufacturing industry received 60% of the total Research Tax Credits, representing €5.3 billion. The automotive industry was the third highest recipient of Research Tax Credits, representing 6.5%, or €344 million.

Loans from the European Investment Bank (EIB) and 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.

€330 MILLION

IN 19 EQUIPMENT MANUFACTURING COMPANIES: MAGNITUDE OF INVESTMENT BY FMEA TIER 1 (NOW THE FAA) IN THE AUTOMOTIVE INDUSTRY AT THE END OF 2014

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 (excl. 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.

THE INDUSTRIAL PORTION OF THE AUTOMOTIVE INDUSTRY ACCORDING TO THE *DIRECTION GÉNÉRALE DES ENTREPRISES* (DGE)

(As a number of "full-time equivalent" employees)

Core	Periphery	Total
211,000	230,000	441,000

Sources: DGE, survey in 2012 of companies in the automotive industry; INSEE Clap 2011. DGE calculations.

AUTOMOBILE-CONNECTED JOBS 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* No. 122, September 2012.
Nord-Pas-de-Calais	18,928	17,692	n/a	2011	INSEE NPDC, *La filière automobile en Nord-Pas-de-Calais*, February 2014, October 2012, September 2010.
Sud Alsace (Mulhouse) and Nord Franche-Comté	9,400	3,500	2,345	2007	INSEE Alsace, *Chiffres pour l'Alsace* No. 2, March 2009.
North Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	INSEE Franche-Comté - *L'essentiel* No. 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* No. 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.

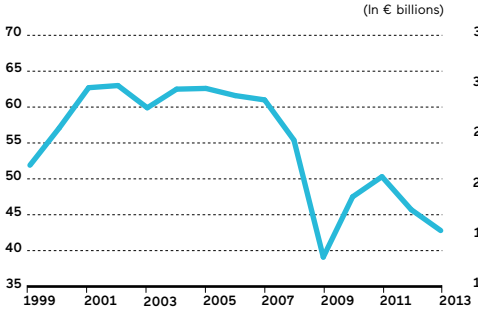
The INSEE Outlook Report of March 2012 shows that one unit of value added in the automotive sector generates 4.1 units of value added in the national economy.
The automotive industry has the highest value added multiplier after the aviation and space industry. In addition, industrial sites generate local 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, sub-contractors and service providers and, on the other hand, induced jobs, which are those that are required to fulfill the consumption needs of employees (direct and indirect) and their families. The DGE (2015) produced a study on the automotive industry *(cf. page 58)* that describes the sector by way of a core and a periphery. The core activities (manufacturers, equipment makers, body builders) require products or industrial services to be produced, which illustrate INSEE's multiplicator effect.
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 from February 2014 indicate that the automotive industry had 36,000 employees in 2011, including 19,000 in automotive manufacturing. Moreover, in this region, more than 40% 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.
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.

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

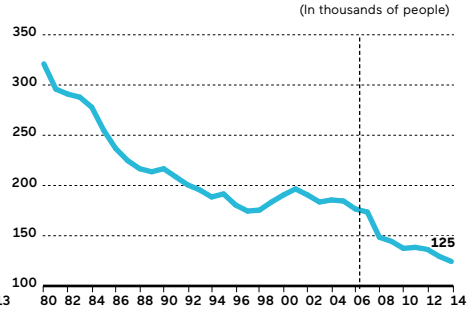
Economic ratios of the automotive industry in France

As a crossroads between many different technologies, the automotive industry needs considerable investments. Automotive manufacturing has been reinvesting almost 3% of its total revenues since the start of the crisis in late 2009. 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 5% of the gross fixed investments exclusive of contributions in 2011, compared with 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 the next few pages*) for which "automotive" competitiveness clusters are particularly appropriate.

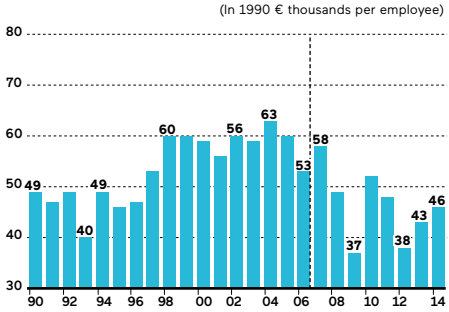
TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR



AUTOMOTIVE MANUFACTURING EMPLOYEES(1)

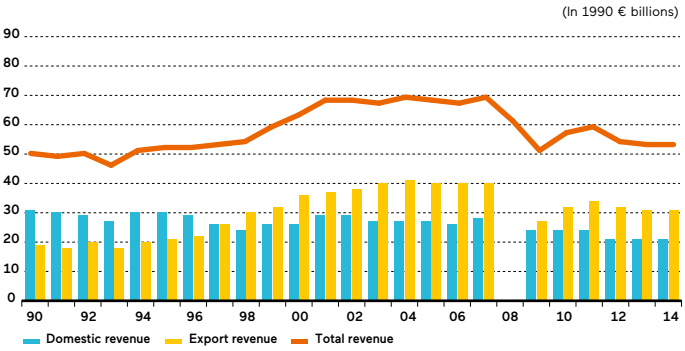


VALUE ADDED PRODUCED BY THE AUTOMOTIVE MANUFACTURING INDUSTRY(1)

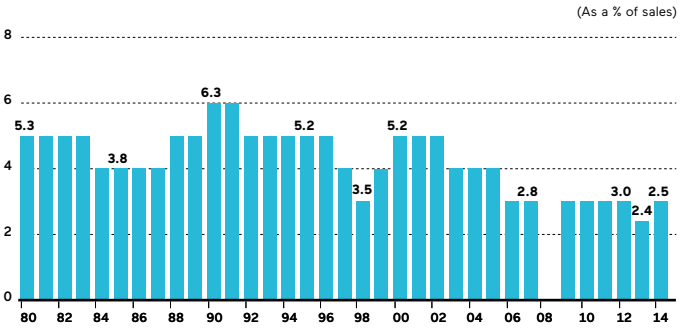


Source: INSEE, National accounts base 2010 (see also page 58).

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



CAPITAL EXPENDITURE BY THE AUTOMOTIVE MANUFACTURING INDUSTRY(1)



(1) CCFA estimates for 2013: see also pages 80 and 81 (in particular for concept changes).

Every year, INSEE conducts surveys of French companies, providing a primary source of information about French industry. This survey was previously performed by the statistics office of the French State Secretariat for Industry (SESSI). These surveys have been overhauled with the new ESANE information system. A new economic activity categorization was launched in early 2008 *(see pages 80 and 81)*. 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 59)*.

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 euro 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 2014, the rise enabled it to be € 17 higher than its 2009 level. The automotive manufacturing industry dedicated almost 3% of sales to capital expenditure representing nearly €2 billion to develop new models and optimize its production capacity. These figures do not include research and development costs (see *page 34*). The share of export sales has increased constantly since 1990, when it reached 38%, now oscillating around 60%, compared with 35% for the whole of the manufacturing industry.

2.7%

AVERAGE OF THE SHARE OF SALES DEVOTED TO INVESTMENT INTO AUTOMOTIVE CONSTRUCTION

Research and development expenditure in the automotive sector

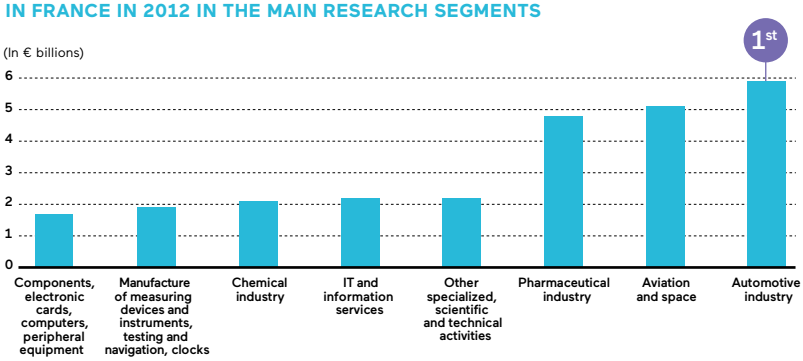
In 2012, the French automobile industry remained the leader of all other industries in France in terms of corporate research and development spending. Its expenditure was € 5.9 billion, accounting for 15% of total corporate spending on research and development. After rising strongly between 2001 and 2006 (+ 24%), R&D expenditure in the automotive industry reached a plateau 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 made a strong recovery (+ 11%) reaching a record level in 2011, before falling in 2012 (down 5%). It represents 47% 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; this is even more significant with the transition from the Euro 5 to the Euro 6 standard. 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 2012

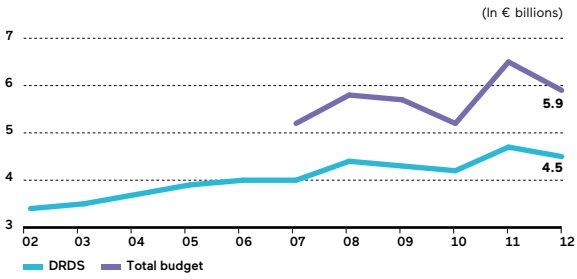
	DRDS[1]	ERDS[2]		Total budget	Of which public financing[3]	
	In € millions	In € millions	In € millions	As a % of total	In € millions	As a % of total
Automotive industry	4,481	1,408	5,889	15.0%	35	1.4%
Aviation and space	3,182	1,906	5,088	13.0%	684	27.8%
Pharmaceutical industry	3,141	1,648	4,789	12.2%	40	s
Other specialized, scientific and technical activities	1,779	391	2,170	5.5%	213	8.6%
IT and information services	2,015	150	2,165	5.5%	92	3.7%
Chemical industry	1,636	434	2,069	5.3%	138	5.6%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,528	369	1,897	4.8%	212	8.6%
Components, electronic cards, computers, peripheral equipment	1,481	230	1,711	4.4%	174	7.1%
Manufacture of electrical equipment	991	293	1,284	3.3%	41	s
Manufacture of machinery and equipment not included elsewhere	1,093	180	1,273	3.3%	45	1.8%
Manufacture of communication equipment	979	207	1,186	3.0%	247	10.0%
Publishing, audiovisual, and broadcasting	908	157	1,065	2.7%	55	2.2%
Other branches	6,857	1,707	8,563	21.9%	487	19.8%
TOTAL	**30,071**	**9,080**	**39,150**	**100.0%**	**2,464**	**100.0%**

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

TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2012 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



The Office for research-related statistics of the French Ministry of Education carries out surveys on research and development (R&D) spending by companies and in the wider public sphere. The total R&D budget is broken down into domestic spending, which covers work performed in France, regardless of the origin of funding, and external spending, corresponding to work performed by other companies or public research organizations. A portion of the latter work may be performed outside of France. From 2008, data are published in a new economic category. Since 1999, the leading R&D segment in France has been the automotive industry, except in 2007 when it was ranked second. Since the 2008 crisis, the industry has invested more than € 23 billion into it. The R&D segment in France stimulates its suppliers such as the plastics and electronics industries. In 2012, 25% 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 2012, 33,000 equivalent full-time employees (including 18,200 researchers) worked in automotive R&D. These figures were up 1% compared to 2003 (+ 32% 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 2014. France also has three major equipment manufacturers in the top twenty. The automotive industry still files more patents than any other industry.

15%

SHARE OF THE AUTOMOTIVE INDUSTRY IN THE TOTAL RESEARCH AND DEVELOPMENT BUDGET OF COMPANIES IN 2012

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 had aimed 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 came into effect with the performance contracts for 2013–2018.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2012

	Mov'eo	Vehicle of the Future	LUTB	iDforCAR
With a...	world-wide implication	domestic implication	domestic implication	domestic implication
Number of companies with a business unit in a competitiveness cluster	266	160	137	98
Of which SMEs (under 250 employees)	*189*	*91*	*70*	*59*
Employees of business units involved in the cluster (number of people)(1)	74,026	49,892	54,651	29,168
Spending by public bodies on cluster projects (in € thousands)(2)	73,101	39,574	5,580	n/a
Spending by business units on cluster projects (in € thousands)(2)	233,443	143,042	3,673	n/a
Total spending (in € thousands)(2)	306,544	182,616	9,253	n/a
Number of labeled projects(2)	54	26	8	19

(1) Information concerning employees is calculated on the basis of 2011 data.
(2) 2011 data.
Sources: DGCIS survey, INSEE, DIACT, competitiveness clusters

In 2014, the automotive industry continued its research and development throughout its clusters. Within them, it worked to respond to the challenges of industrial excellence and sustainable mobility. This transverse action brings together automakers, equipment manufacturers, innovative small and mid-sized companies, research laboratories and training organizations including universities.
The internationally oriented Mov'eo cluster (www.pole-moveo.org) covers the greater Paris region (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 2014, efforts were focused mainly on cooperation with the other competitiveness clusters, including those outside the automotive industry, and on the "Institute for Excellence in Carbon-Free Energy" VeDeCoM which was officially launched. The measures specified in the new performance contract are in place. The cluster is also involved in six of the 34 "industrial revitalization plans" launched by the government in September 2013: cars that consume less than 2 liters per 100 kilometers, electric charging stations, battery autonomy and power, self-driving cars, recycling and green materials, and the "factory of the future."
The *Véhicule du Futur* cluster (www.vehiculedufutur.com) draws on the traditional catchment areas of the automotive industry, Alsace and Franche-Comté, with interaction with Germany and Switzerland. Its mission revolves around two main pillars: innovation 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 cluster focuses on the urban vehicle (eco-design, energy consumption, recycling, etc.) and the organization of mobility (e.g., intermodal connections). In 2014, it developed a program on the factory of the future.
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: modeling and mobility management, engines and drive trains, safety and security, vehicle architecture, intelligent transport system. In 2014, fifteen new projects were approved for a total budget of € 36 million. 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.
Situated in western France (Brittany, Pays de La Loire, Poitou-Charentes), the iDforCAR cluster (www.id4car.org) focuses on special vehicles and sustainable mobility. The four strategic fields of activity are: intelligent on-board systems, vehicle materials and architecture, innovative vehicles and use, and information and communications to do with sustainable mobility.
It is also possible that clusters that do not specialize in the automotive sector also have interests in this field. For instance, three quarters of the markets for Elastopole, a national-scale cluster that covers the regions of Centre, the greater Paris region (*Ile-de-France*), Auvergne and Pays de Loire, which focuses on rubber and polymers, are in the automotive sector. It also cooperates with automotive clusters. I-Trans, a world-class cluster in Nord – Pas-de-Calais and Picardy, specializing in sustainable land transportation, is at the meeting point between rail and automotive.

661
NUMBER OF COMPANIES THAT HAD A BUSINESS UNIT BELONGING TO A COMPETITIVENESS CLUSTER IN 2012

French automotive foreign trade

While global trade was up 3% in 2014, Europe also enjoyed a more dynamic economic environment. Exports of French automotive products were worth just € 39 billion. The automotive industry was still one of the leading exporters, along with aeronautics and food, accounting for 9% of total exports. Two companies in the industry featured in the top five exporters In 2013 in the Customs Department listing.
The recovery of the European market led to a rise in exports (up 2%); imports also advanced (2%), with an ever larger share of flows of new cards coming from Germany (valued at € 9 billion euro). The automotive industry had a trade deficit of € 4.5 billion.
The positive balance for "parts and engines" dropped to € 4.4 billion. The surplus is partially explained by the production of sites of French manufacturers outside of France with French supplies, for example for thruster units (surplus of € 2.2 billion).

FRENCH AUTOMOTIVE FOREIGN TRADE

(In € billions)

	New cars	New light commercial vehicles	New heavy trucks	Parts and engines	Automotive industry sector	Used vehicles	Automotive sector	All products[1]	Share of the automotive
Exports (FOB)									
2013	13.2	2.4	2.3	20,8	38.8	1.2	40.0	428.8	9.3%
2014	13.7	3.0	2.6	20,3	39.5	1.2	40.7	428.9	9.5%
% change 2014/2013	+3.2	+22.3	+12.6	-2.8	+1.8	-0.9	+1.7	+0.0	
Imports (CIF)									
2013	21.2	2.9	3.4	15.7	43,1	1.1	44.3	506.8	8.7%
2014	22.3	3.0	3.0	15.8	44,0	1.1	45.2	500.4	9.0%
% change 2014/2013	+5.0	+4.1	-12.6	+1.0	+2.1	-2.6	+2.0	-1.3	
Balances									
2013	-8.0	-0.4	-1.1	+5.2	-4.4	+0.1	-4.3	-78.1	
2014	-8.6	-0.0	-0.4	+4.4	-4.6	+0.1	-4.5	-71.5	
Coverage rate[2]									
2013	62	85	67	133	90	107	90	85	
2014	61	100	86	128	90	109	90	86	

(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.

In 2014, the automotive industry's share of all goods exports stood at 9%, against 12 % in 1997. As for imports, they accounted for 9% as in 1997, the last time there was a crisis in the French new vehicle market. Exports by the automotive industry were in excess of € 50 billion in the mid-2000s before falling to € 34 billion in 2009 with the crisis. Since then, they have fluctuated between €39 and €40 billion. Exports of passenger cars accounted for more than €25 billion in 2004–2005 before plummeting to €13.7 billion in 2009. After that, they varied between €13 and €16 billion, due partially to the weakness of the Southern European markets where French auto makers are heavily concentrated. The deficit grew to € 8.6 billion by 2014.
After falling sharply in 2009, exports of light commercial vehicles and heavy trucks had made a clear recovery in the following two years. Then, in 2013 and more so in 2014, light commercial vehicles increased to € 3.0 billion. Heavy trucks declined for two years in a row before bouncing back to € 2.6 billion in 2014. Imports of new light commercial vehicles grew, while those of heavy truck dropped sharply. The deficits turned around to be near equilibrium for light commercial vehicles and € 0.4 billion for heavy trucks.
Exports of parts and motors reduced by 3%, whereas imports of them grew by 1%. The deficit worsened to € 4.4 billion after an improvement the previous year.

€39 BILLION
EXPORTS OF AUTOMOTIVE PRODUCTS FROM FRANCE IN 2014

EXPORTER RANKINGS — YEAR 2013

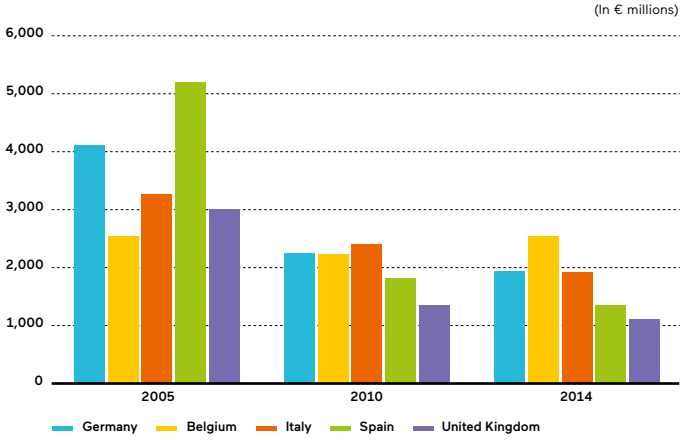
Rank	Company[1]
3	Peugeot Citroën Automobile SA
4	Renault SAS
22	Automobiles Peugeot
25	Renault Trucks

(1) In these rankings, Customs uses the company, rather than the group.
Source: Customs.

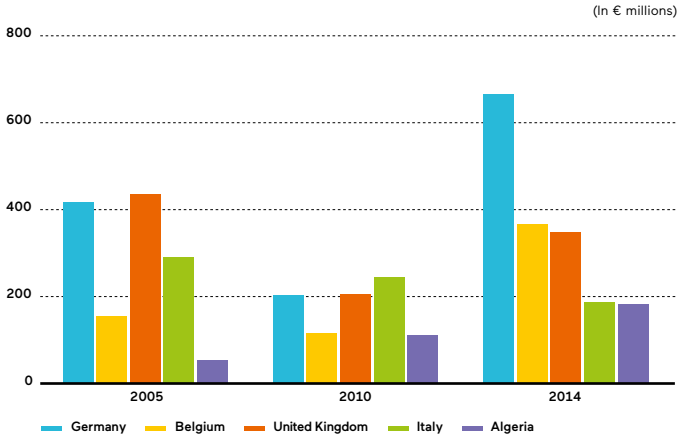
The major clients of the French automotive industry are European. However, they also include emerging economies, Eastern Europe and North Africa. The five leading destination countries of new passenger cars from France are predominantly European, including three of the four other largest markets in the European Union. In 2014, Belgium (€ 2.5 billion) is in the lead, ahead of Germany and Italy (around € 1.9 billion each). Algeria is ranked ninth, with € 322 million. The top customer for exports of light commercial vehicles is Germany, at € 665 million. Algeria (€ 184 million) replaces Spain in the five top purchasing countries in the passenger car classification. In 2014, the values of these exports of light commercial vehicles were higher than those of 2005. While exports of commercial vehicles larger than five metric tons to the United Kingdom and Algeria continued to be buoyant, they did not offset the deep plunge of the Southern European markets. Exports of parts and motors recovered from their 2010 level. The five leading destinations are European, with Germany in the lead (€ 4.2 billion). China (€ 776 million), Slovakia (€ 758 million) and Brazil (€ 433 million) are in the range of sixth to tenth. Imports of new passenger cars from Germany (€ 7.2 billion), from the United Kingdom (€ 1.6 billion) and from Japan (€ 962 billion) are at a high level.

LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE

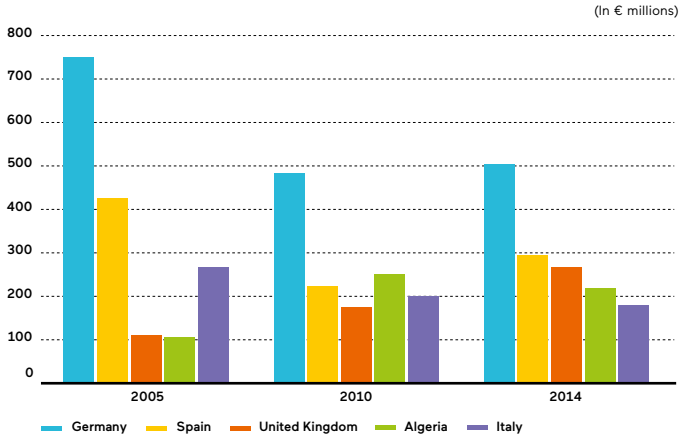
New passenger cars*



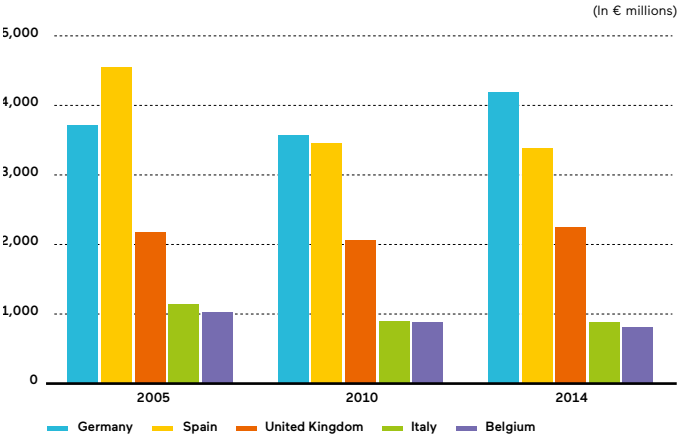
New light commercial vehicles*



New heavy vehicles (including coaches and buses)*



Parts and engines*



* Sources: customs data processed by CCFA.

GERMANY

LEADING BUSINESS PARTNER OF THE AUTOMOTIVE INDUSTRY IN FRANCE

Passenger cars by engine type (diesel, hybrid, and electric, etc.)

Since 2002, there have been more diesel passenger car registrations than registrations of vehicles running on other fuels. In 2014, they represented 64% of total registrations, down after a record level reached in 2012 (73%) due to the introduction of three-cylinder gasoline engines. Hybrid and electric engines are emerging in France, with market shares of 2.4% and 0.6%, respectively. In Western Europe as a whole, the development is slower and they represent only 1.8% and 0.5% of the market. One fifth of all hybrid cars registrations and one quarter of all electric car registrations in Europe were in France, and the French share of the overall market was 15%.

DIESEL PASSENGER CARS

	1990	2000	2005	2010	2012	2013	2014	% change 2014/2013
Production								
In units	804,007	1,648,448	2,328,108	2,178,408	1,883,359	1,848,122	1,835,289	-0.7
As a % of total production	24.4%	35.8%	45.0%	38.8%	38.7%	38.6%	37.3%	
Exports								
In units	292,061	975,038	1,500,989	1,346,022	1,208,770	1,256,429	1,278,930	+1.8
As a % of total exports	15.5%	33.7%	39.1%	31.3%	30.9%	32.7%	31.1%	
Registrations								
In units	762,054	1,046,485	1,466,296	1,593,173	1,384,544	1,199,729	1,146,658	-4.4
As a % of total registrations	33.0%	49.0%	69.2%	70.8%	72.9%	67.0%	63.8%	
Cars in use								
In units	3,775,000	9,980,000	14,348,000	18,165,000	19,377,000	19,645,000	19,836,000	+1.0
As a % of all cars in use	16.0%	35.6%	47.7%	58.0%	61.3%	62.1%	62.4%	

Source: CCFA.

ELECTRIC AND HYBRID PASSENGER CAR REGISTRATIONS

	2008		2009		2010		2011		2012		2013		2014	
	Units	Market share	Units	Market share	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%	8,779	0.5%	10,561	0.6%
Hybrids	8,468	0.4%	9,876	0.4%	9,655	0.4%	13,641	0.6%	27,889	1.5%	46,745	2.6%	43,143	2.4%

Source: CCFA.

In 2014, France had the second highest number of new diesel car registrations in Europe with 1.1 million, behind Germany with 1.5 million units. 62% of cars in use in France on January 1st, 2015 had diesel engines. The increase in this ratio has been declining significantly over recent years.
In Western Europe, the market share of new diesel cars has remained practically stable at 53%, representing 6.4 million units. In this market, French manufacturers hold a share of 23%. Looking beyond Europe, the market share of diesel cars in India is around 50%, and in South Korea between 2011 and 2014 it grew by 20 or so percentage points, to nearly 40%. In 2014, 1.8 million diesel cars were produced by French manufacturers, down 24% from the record level of 2004. The diesel car share of total production (37%), down slightly from 2013, is still considerably lower than in 2004 (47%). French manufacturers also supply diesel motors to other brands, pursuant to cooperation agreements.
In 2014, registrations of new hybrid passenger cars came to 43,100 units, down 8% after growing 68% the year before; registrations of electric cars grew by 20%, to 10,600 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. In France, French car makers have products in these segments (Renault Zoé, 3008 hybrid, etc.).

MAIN NEW DIESEL PASSENGER CAR RANKINGS IN 2014

with Temporary Transit

Rank	Make	Model	% market
1	Renault	Mégane	7.1
2	Renault	Clio	6.1
3	Citroën	C4	5.7
4	Peugeot	308	4.6
5	Peugeot	208	3.8
6	Citroën	C3	3.4
7	Peugeot	2008	3.4
8	Renault	Captur	3.3
9	Dacia	Duster	3.2
10	Peugeot	3008	2.9

Source: CCFA.

-9 POINTS
THE REDUCTION IN THE PERCENTAGE OF NEW DIESEL-POWERED PASSENGER CARS REGISTERED IN FRANCE COMPARED WITH 2012

New passenger car registrations by model, range and body style

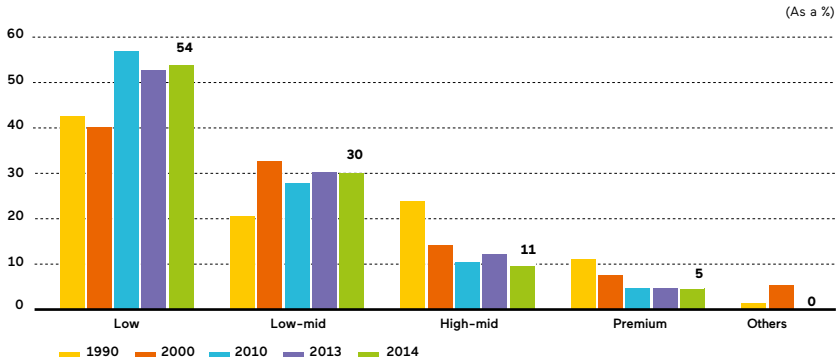
The range structure of new cars has developed significantly over the last twenty years. The changes are quite significant. The preponderance of the economy and low range in France reached a peak in 2010 due to the "incentive/penalty" system and the scrap incentive scheme. A slight dip ensued. However, with the updating of the economy passenger car models (108, C1, Twingo) in 2013- 2014, and the filling-out of the economy 4WD range (C4-Cactus, 2008, Captur, Duster) this segment was boosted to 54% of sales in 2014. MPVs lost their attractiveness since 2010 (down 4 points to 15%), but 4WDs more than made up for the loss (up 14 points to 23%). Station wagons putter along consistently at 7% of the market.

RANKINGS OF MAIN NEW PASSENGER MODELS IN 2014

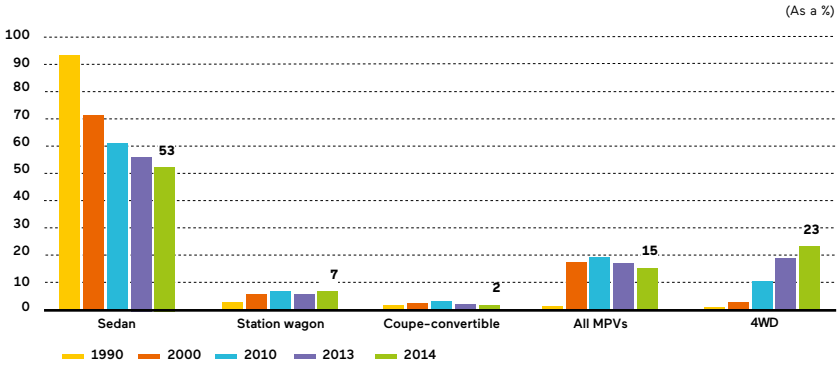
Rank	Make	Model	% market
1	**Renault**	**Clio**	**6.4**
2	**Renault**	**Mégane**	**5.2**
3	**Peugeot**	**206-207-208**	**5.1**
4	**Citroën**	**C3**	**4.3**
5	**Citroën**	**C4**	**4.0**
6	**Peugeot**	**308**	**3.6**
7	**Renault**	**Captur**	**3.5**
8	**Peugeot**	**2008**	**3.0**
9	**Dacia**	**Sandero**	**2.5**
10	Volkswagen	Golf	2.4
11	**Renault**	**Twingo**	2.3
12	Volkswagen	Polo	2.2
13	**Dacia**	**Duster**	**2.2**
14	**Peugeot**	**3008**	**2.1**
15	Fiat	500	1.7
16	Nissan	Qashqai	1.7
17	Toyota	Yaris	1.5
18	Ford	Fiesta	1.4
19	Ford	Focus	1.2
20	Opel	Corsa	1.0
21	**Peugeot**	**508**	**1.0**
22	Mini	Mini	1.0
23	Volkswagen	Tiguan	1.0
24	**DS**	**DS3**	**1.0**
25	Audi	A3	0.9
26	Nissan	Juke	0.9
27	Opel	Mokka	0.9
28	**Peugeot**	**5008**	**0.8**
29	Toyota	Auris	0.7
30	**Citroën**	**C1**	**0.7**

Source: CCFA.

MARKET SHARE BY RANGE



MARKET SHARES BY BODY



NEW PASSENGER CAR REGISTRATIONS BY RANGE

Ranges	1990		2000		2010		2013		2014	
	units	%	units	%	units	%	units	%	units	%
Low	986,532	42.7	855,161	40.1	1,283,902	57.0	943,609	52.7	967,138	53.9
Low-mid	477,631	20.7	695,146	32.6	627,694	27.9	542,972	30.3	538,578	30.0
High-mid	555,053	24.0	303,028	14.2	234,664	10.4	219,656	12.3	205,487	11.4
Premium	256,381	11.1	163,293	7.7	105,313	4.7	84,216	4.7	84,682	4.7
Others	33,533	1.5	117,256	5.5	96	0.0	3	0.0	0	0.0
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**1,790,456**	**100.0**	**1,795,885**	**100.0**

Source: CCFA.

23%

SHARE OF NEW PASSENGER CARS REGISTERED IN 2014 IN THE 4WD BODY SEGMENT

NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Bodies	1990		2000		2010		2013		2014	
Sedan	2,155,724	93.4	1,527,676	71.6	1,377,498	61.2	1,009,809	56.4	947,136	52.7
Station wagon	61,418	2.7	119,739	5.6	153,476	6.8	101,712	5.7	119,523	6.7
Coupe-convertible	36,269	1.6	50,527	2.4	70,353	3.1	33,472	1.9	29,046	1.6
All MPVs	28,682	1.2	369,434	17.3	430,857	19.1	300,656	16.8	273,105	15.2
of which compact MPVs	-	-	241,190	11.3	233,363	10.4	178,683	10.0	167,079	9.3
4WD	17,129	0.7	57,116	2.7	205,106	9.1	333,005	18.6	415,662	23.1
Others	9,908	0.4	9,392	0.4	14,379	0.6	11,802	0.7	11,413	0.6
TOTAL	**2,309,130**	**100.0**	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**1,790,456**	**100.0**	**1,795,885**	**100.0**

Source: CCFA.

Used passenger cars

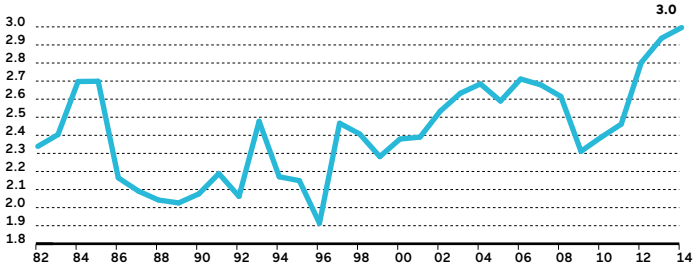
In 2014, used passenger car registrations picked up by 2.4% after two years of decline, to 5,446,000 units.
Now, more than five million used passenger cars have been sold since 2000. Every year, two to three used cars are exchanged for every new car: relative to the total number of cars in use, around 17% change hands every year.
On average, households keep their car for five and a half years (whereas in 2010 it was five and 1995 - four years).
The used/new ratio is stable at a record level of 3.0, well in excess of the levels recorded during previous downturns in the new car market, in 1993 (2.5) and 1997 (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 70,000 kilometers, and more than a 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 vehicles replaced in 2012.

USED PASSENGER CARS

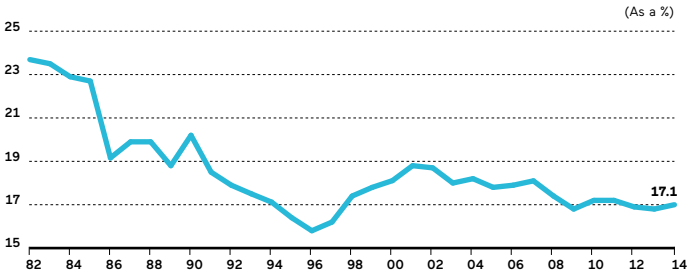
	Units	1990	2000	2005	2010	2013	2014
Registrations							
New cars	Thousands	2,309	2,134	2,118	2,252	1,790	1,796
Used cars	Thousands	4,759	5,082	5,383	5,386	5,318	5,446
Used/new ratio		2.1	2.4	2.5	2.4	3.0	3.0
Cars less than 5 years old	% used	52	40	40	37	35	34
of which:							
- cars less than 1 year old	% used	12	12	10	8	8	8
- cars less than 1 year old	% new	25	29	25	19	23	24
Cars more than 5 years old	% used	48	60	60	63	65	66
Used diesel-powered cars	Thousands			2,996	3,558	3,636	3,720
	% used			55.7	66.1	68.4	68.3
Total (on 12/31)	Thousands	23,550	28,060	30,100	31,300	31,650	31,800
Used/total ratio	%	20.2%	18.1%	17.9%	17.2%	16.8%	17.1%

Source: CCFA.

USED/NEW CAR RATIO



USED/TOTAL RATIO



Passenger cars are durable goods that consumers purchase, use, maintain and eventually sell on the second-hand market.
Used cars are purchased and sold through dealers or directly between consumers. Those less than five years old are usually sold through dealers. 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 2014, demand for new cars increased slightly by 0.3% to 1.8 million units whilst demand for used cars climbed 2.4% to 5.4 million units. The used/new ratio remained stable, at 3.0. 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 (the "incentive/penalty" [or "*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 66% in 2014. 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 424,000 registrations, i.e., 24% of the new market, a stable position in relation to 2013, but this weighting is higher than during the years of the scrap incentive plan when new car prices were more competitive. Since 2001, registrations of used cars less than one year old have declined steadily as a percentage of total registrations, only accounting for 8% in 2014, versus 12% in 2001.
Diesel cars made up 68% of all used cars in 2014, up 2 points over 2010, and 13 points over 2005.

58%
PERCENTAGE OF CARS OWNED BY HOUSEHOLDS THAT HAVE BEEN BOUGHT USED

New vehicle registrations in French overseas departments (DOM)

The annual markets for new vehicles in France's overseas departments developed more recently than in continental France, and accounted for 60,000 to 75,000 vehicle registrations from 1998 to 2012. The five French Overseas Departments are Guadeloupe, French Guiana, Martinique, Mayotte, and Reunion Island. Since then, the market hovers around 60,000 units, down 20% compared with 2007. Given the geographic environment, commercial vehicles over 5 metric tons account for a smaller proportion of registrations in overseas departments (1.3%) than in mainland France (2.3%). In contrast, the proportion of light commercial vehicles has hardly changed (16.7% versus 16.8% in mainland France). French manufacturers suffer from intense competition in passenger cars; their market share was below 50% from 2006 to 2013, though in 2014 it climbed 3 points to be at 51.3%. 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 29%.

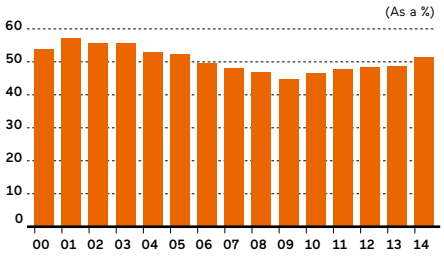
NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS (*DOM*)

New passenger cars	2000	2005	2010	2013	2014	Change 2014/2000	Change 2014/2013
Guadeloupe	13,691	14,359	13,438	12,427	12,599	-8.0%	1.4%
French Guiana	4,031	4,085	4,382	4,256	4,248	5.4%	-0.2%
Martinique	14,424	14,749	13,147	11,091	11,325	-21.5%	2.1%
Mayotte(1)				935	1,055		12.8%
Reunion Island	21,463	25,142	20,295	19,465	20,605	-4.0%	5.9%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**53,609**	**58,335**	**51,262**	**48,174**	**49,832**	**-7.0%**	**3.4%**
Light commercial vehicles (up to 5 t)	**2000**	**2005**	**2010**	**2013**	**2014**	**Change 2014/2000**	**Change 2014/2013**
Guadeloupe	2,685	2,772	2,394	2,198	2,023	-24.7%	-8.0%
French Guiana	1,143	1,169	1,239	1,186	1,210	5.9%	2.0%
Martinique	2,368	2,732	2,016	1,804	1,909	-19.4%	5.8%
Mayotte(1)				201	213		6.0%
Reunion Island	5,200	6,021	4,166	4,433	4,760	-8.5%	7.4%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**11,396**	**12,694**	**9,815**	**9,822**	**10,115**	**-11.2%**	**3.0%**
Commercial vehicles including coaches and buses (over 5 t)	**2000**	**2005**	**2010**	**2013**	**2014**	**Change 2014/2000**	**Change 2014/2013**
Guadeloupe	146	196	135	91	151	3.4%	65.9%
French Guiana	66	99	85	100	76	15.2%	-24.0%
Martinique	187	183	84	123	117	-37.4%	-4.9%
Mayotte(1)				38	46		21.1%
Reunion Island	362	464	293	335	392	8.3%	17.0%
TOTAL FRENCH OVERSEAS DEPARTMENTS	**761**	**942**	**597**	**687**	**782**	**2.8%**	**13.8%**

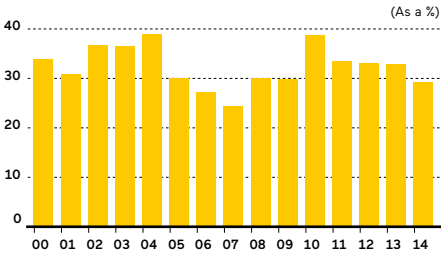
Source: CCFA. (1) From April 1, 2011.

FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS

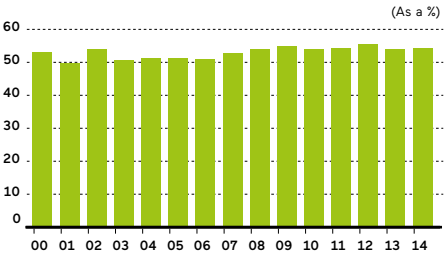
New passenger cars



New heavy trucks



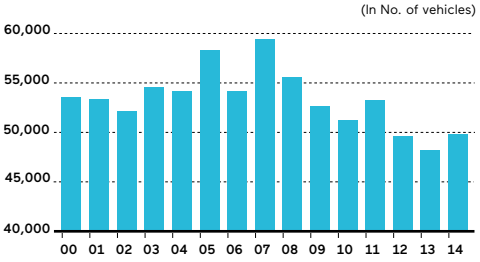
New light commercial vehicles



+3 POINTS

THE INCREASE IN MARKET SHARE OF FRENCH AUTOMAKERS FOR PASSENGER CARS

NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



Household car ownership

In 2014, multi-car households accounted for 34% 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 92%). In the greater Paris region, 62% of households own cars (the 2000 figure was 60%).
Sixty-three percent (63%) of the least well-off households (earning less than € 15,000 per year) have at least one car. 79% of older households own a vehicle, compared with 69% in 2000. The number of people in this age group that has a drivers license and the proportion of drivers continues to increase.

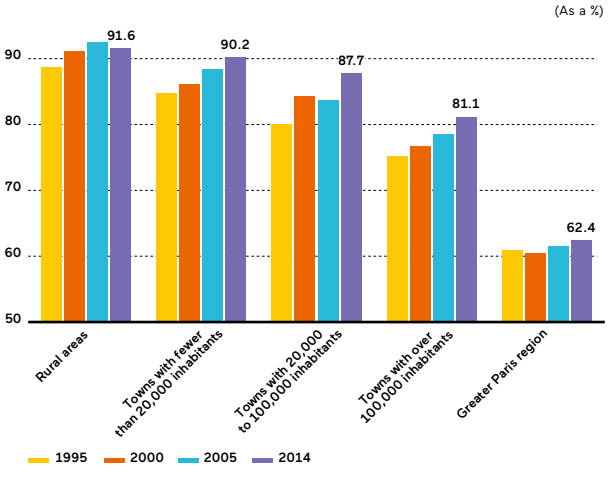
CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR)

	1990	1995	2000	2005	2010	2014
By socio-professional category						
Farmers	95.9%	98.9%	91.1%	100.0%	92.1%	88.0%
Farm workers	74.7%	-	-	-	-	-
Tradesmen, craftsmen, business owners	95.2%	89.4%	90.6%	91.2%	91.1%	87.2%
Self-employed professionals, executives	94.4%	85.5%	84.6%	83.7%	84.1%	84.7%
Middle management	93.3%	88.7%	90.8%	87.6%	89.8%	87.2%
White collar workers	78.3%	75.9%	77.5%	80.9%	82.5%	82.0%
Blue collar workers	87.2%	89.7%	88.7%	89.1%	91.2%	89.4%
Non-working population	54.6%	65.8%	70.9%	72.8%	77.1%	77.7%
of which retired persons	59.4%	70.9%	76.0%	76.2%	80.1%	80.9%
By area of residence						
Rural areas	82.1%	88.6%	91.1%	92.4%	92.7%	91.6%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	88.4%	90.2%	90.2%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	83.7%	87.1%	87.7%
Towns with over 100,000 inhabitants	74.2%	75.1%	76.6%	78.5%	80.8%	81.1%
Greater Paris	77.0%	60.8%	60.4%	61.5%	63.6%	62.4%
Inner Paris	47.3%					
By location of residence						
Town center	-	67.6%	69.4%	69.2%	73.0%	73.0%
Suburb	-	79.3%	80.5%	80.9%	83.2%	81.2%
Peri-urban area	-	88.5%	89.8%	91.2%	91.6%	91.4%
Rural area	-	85.3%	90.4%	92.6%	94.8%	93.9%
By age of head of household						
Under 25	-	51.2%	49.3%	63.3%	64.9%	84.0%
25 to 34	-	85.1%	82.4%	82.3%	83.9%	80.2%
35 to 44	-	86.7%	86.3%	87.5%	88.0%	86.5%
45 to 54	-	87.5%	87.4%	86.1%	88.1%	86.0%
55 to 64	-	84.9%	87.0%	86.7%	86.9%	84.9%
Over 65	-	61.9%	69.0%	70.8%	76.2%	78.8%
All	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.5%**	**82.8%**
Vehicles with a woman as their main driver	-	-	40.4%	40.7%	41.5%	41.8%

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

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 2014; 20% of the least well-off households have at least one car, at over 60%.
• In towns with over 100,000 inhabitants, the car ownership rate has not declined: 81% of these households owned vehicles in 2014, compared with 75% in 1995. This ratio has been rising since 2007 in the greater Marseille region (81%); it falls slightly in the greater Paris region (62%), and the regions of Lyons (71%) and Lille (77%).
• Rural households, large households, and workers typically own more vehicles.
• The employee and non-working categories (incl. retired persons) have relatively lower rates, although their car ownership rates have increased considerably since 2000 (by 4.5 and 6.8 points respectively).
Every year, 2% to 3% of households get rid of their cars. Changes in family situation (death, divorce, etc.), the cost of upkeep, health problems, the alternative of public transit, and parking issues are the main causes.

CAR OWNERSHIP BASED ON AREA OF RESIDENCE



73%
CAR OWNERSHIP RATES IN TOWN CENTERS

Household vehicles in use

Daily car use has dropped regularly in recent years, with 71% of the total car fleet used every day in 2014 compared with 79% in 2000. The share of vehicles used for commuting still exceeded 50%. In 2014, business trips other than commutes rose to 15%. The fleet ages slowly and typically, except in periods in which the market levels are high such as at the start of the 2000s or during the implementation of the scrap incentive plan. Households are holding on to their cars for longer: in 2014, for 5.4 years; in 2000 for 5 years; and in 1995 for 4 years. The average number of kilometers on the odometer stands at around 104,000 kilometers, i.e. 11,000 kilometers more than in 2000 and 35,000 kilometers more than in 1990. The average number of kilometers on the odometer of a diesel car, which is driving further each year, is advantaging, and is now at 115,700; while gasoline-powered cars are used less intensively, and their average number of kilometers has dropped to 86,700.

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

	Units	1980	1990	1995	2000	2005	2010	2014
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	8.7
Average ownership period	Years		3.7	4.1	4.4	4.7	5.0	5.4
Breakdown by automotive group								
Renault (including Dacia)	%	36.2	33.3	33.3	33.3	30.2	28.6	28.4
PSA Peugeot Citroën (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	38.2	37.0
Foreign makes	%	16.7	28.4	30.5	31.4	33.2	33.2	34.6
Breakdown by power category for tax purposes								
2 and 3 HP	%	12.3	3.4	1.6	0.7	43.3	44.4	48.9
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	39.0
8 HP and above	%	17.5	12.8	10.9	8.8	10.1	13.1	12.1
Breakdown by vehicle range								
Low range	%		39.4	43.4	45.1	44.5	46.8	49.4
Low-mid	%		20.8	24.3	27.3	32.2	30.9	30.4
High-mid	%		26.0	22.2	19.9	16.2	11.5	8.5
Premium range	%		8.7	7.0	7.0	5.7	5.0	2.8
Others	%		5.1	3.2	0.8	1.4	5.7	8.9
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 – Gasoline	%		16.2	38.4	49.1	51.1	40.1	39.0
Premium leaded - AVSR	%		65.6	28.8	11.9			
Diesel	%		18.2	30.9	38.1	48.9	59.9	61.0
Average kilometers on odometer	km		69,500	84,080	93,140	99,460	103,470	104,180
Percentage of vehicles used on daily or near daily basis	%		75.1	77.4	78.7	75.7	71.8	71.4
Percentage of vehicles used for travel to and from work	%		55.4	54.3	55.1	55.2	53.7	51.8

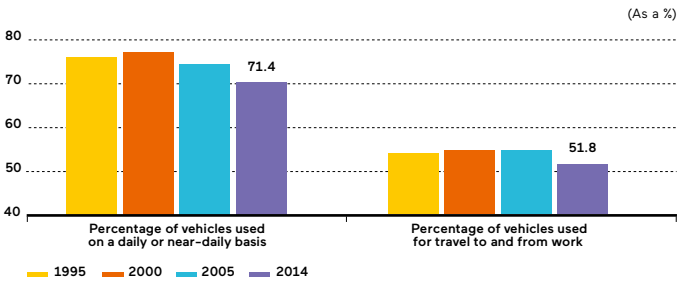
Note: Years after 2007 cannot be compared directly with previous years; the scope of light commercial vehicles has been enlarged.
Source: PARCAUTO TNS-SOFRES survey processed by CCFA and IFSTTAR.

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. In 2014, nearly two-thirds of cars on the road were more than five years old; the number of cars 10 years old or greater reached an historic high of 31%. The average age of a gasoline car was 10.3 years, and that of a diesel – 7.8 years. 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 49% and 30% of the total number of cars in use in 2014, to the detriment of high mid-range models, where the share is 9%. Luxury or comfort equipment are increasingly popular; in 2014, 73% of cars were fitted with air conditioning. In terms of safety equipment, numbers have also risen: 67% of vehicles have ABS, 44% a speed-limiting device, and 35% a central stability system (ESP); the numbers in 2007 were 47% for speed-limiting devices and 18% for [latter two]. Customers are starting to want "Stop & Start" equipment installed, and it extends to 11% of all new cars.

71% and 52%

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

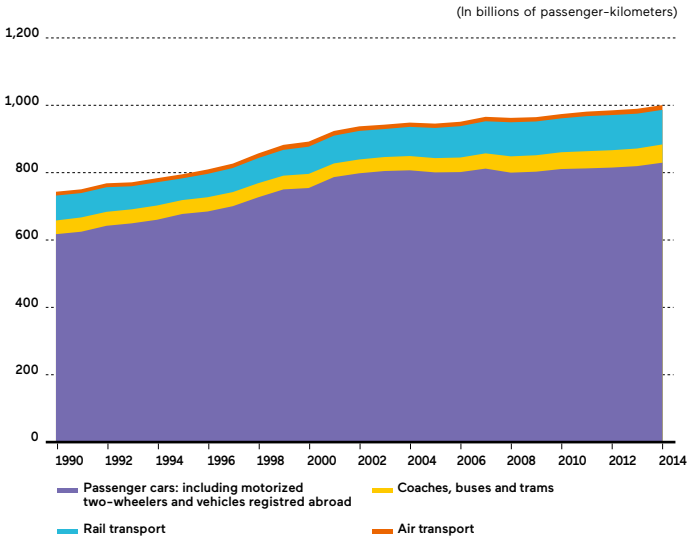
VEHICLE USE



Domestic passenger transport

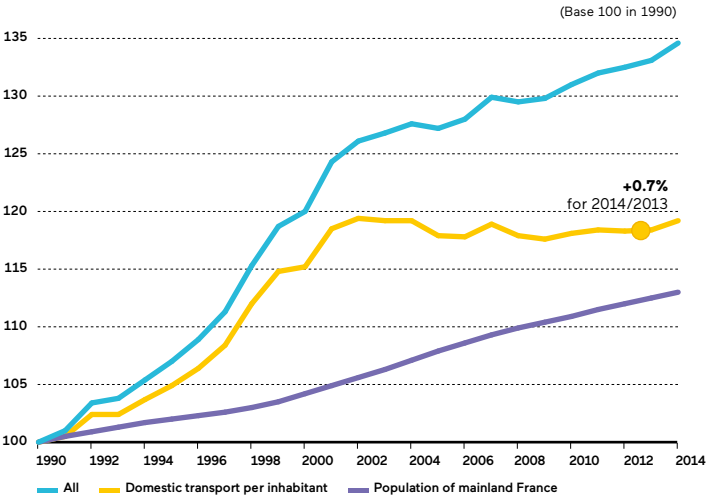
Personal transportation is both a social and an economic issue: it makes exchanges possible between people, is the source of the creation of riches and jobs, and is specially suited in many sectors, such as health and tourism.
When expressed as passenger-kilometers, which under-represents urban transport and focuses on domestic transport to the exclusion of long-distance international transport, roads emerge as the dominant mode for passenger travel: 83% for passenger cars and 5% for coaches, buses and trams in 2014.
The passenger car and the light commercial vehicle are both able to provide transportation from door to door. They accommodate people's restrictions (elderly people, children, the disabled, carriage of heavy or awkward objects) and are appropriate for traveling to places of residence that are spread out or which are too small to have good public transport options.

DOMESTIC PASSENGER TRANSPORT



Sources: MEDDE/SOeS, INSEE.

CHANGES IN DOMESTIC PASSENGER TRANSPORT



Sources: MEDDE/SOeS, INSEE.

+0.7%

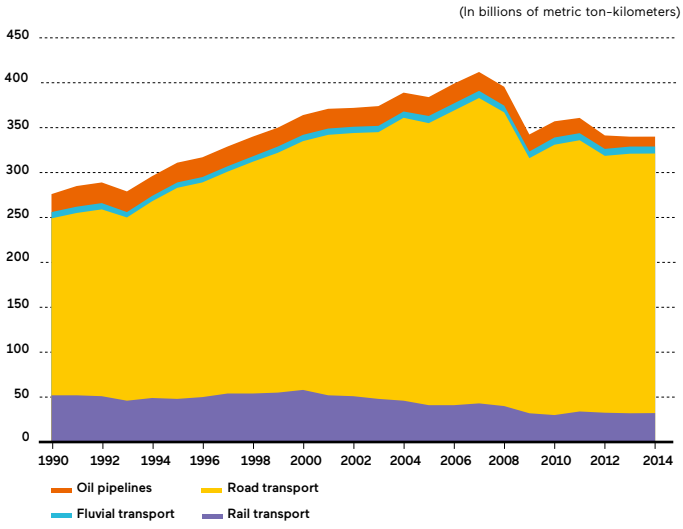
DECLINE IN 2014 IN DOMESTIC PASSENGER TRANSPORT IN ALL MODE, EXPRESSED IN PASSENGER-KILOMETERS PER NUMBER OF INHABITANTS.

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 2013. In 2014, there was a slight rise in the domestic transportation of passengers (up 0.7%), chiefly associated with the increase in the number of passenger kilometers in passenger cars (up 0.8%).

Domestic freight transport

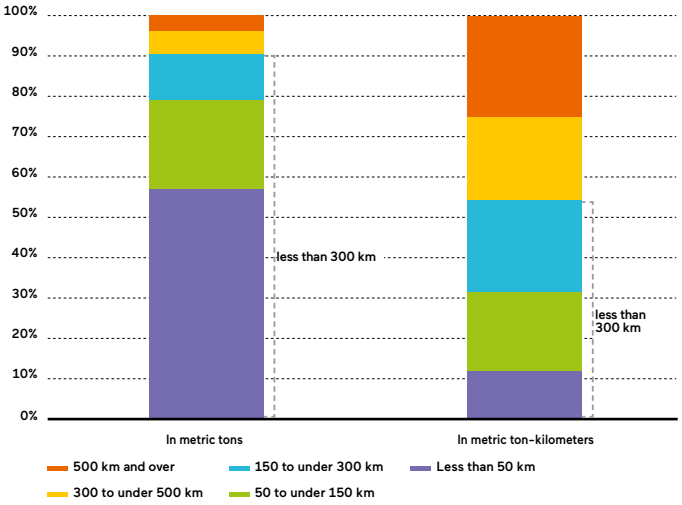
Transporting freight drives the economy, enabling production sites to connect with each other and with consumer sites, which in turn link to reprocessing-recycling plants. The time dimension must be added to this spatial model, often associated with town and country planning. Each mode of transport—road, 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. It retains a stable share of freight shipping (around 85% of the ton-kilometers done) and distances shorter than 300 kilometers predominate, meaning that there are few choices: 57% by weight of the French freight loads are delivered within a radius of 50 kilometers.

DOMESTIC FREIGHT TRANSPORT IN FRANCE



Sources: MEDDE/SOeS.

BREAKDOWN OF FREIGHT TRANSPORT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2014



Source: Road Freight Haulage survey by MEDDE/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 but also, for some years now, to the arrival of foreign players who take increasing market share from French carriers. 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 and the type of freight or goods traded are often critical when choosing the appropriate mode of transport. Some liquids can be transported via pipelines, thereby avoiding any disruptions in supply; ports are used for trade with distant countries. Domestic demand from economic players 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, road 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. Roads remain the dominant mode of shipping goods, accounting for 85% by weight. The French Ministry of Transport's Road Freight Haulage Survey shows that nearly 60% of French freight metric tons is carried less than 50 km from their source, and that 54% of French metric ton-kilometers travel less than 300 km.

STABILITY

OF DOMESTIC FREIGHT TRANSPORT MEASURED IN METRIC TONS-KILOMETERS IN 2014 COMPARED WITH 1998

Road traffic

Road traffic increased by an annual average of 2% between 1990 and 2004, and then remained relatively stable until 2012 (+ 0.2% per year). Nonetheless, in 2013 and 2014, it grew at a healthier rate (respectively 0.7% and 0.8%). The low level of economic activity is still applying a damper to road shipping of goods, as shown by the drop (of 1.5%) in the traffic of heavy trucks in 2014. However, even though there has been a sharp decline (of 4.5%) in the traffic of heavy trucks registered in France, foreign heavy trucks saw 5% more kilometers added to their itineraries.
In the sector of road transport of people, the traffic of passenger cars registered in France increased (1%) in 2014, against a backdrop of declining prices for fuel and the expansion of new transportation modes (such as car sharing). Buses and coaches also traveled further in 2014 (1.7% more).

OVERVIEW OF ROAD TRAFFIC

	Units	1990	2000	2013	2014	Average annual change as a %		
						04/90	14/04	14/13
Total vehicles (annual averages)	**Thousands of vehicles**					**+1.8**	**+0.7**	**+0.4**
New passenger		23,280	27,770	31,622	31,726	+1.8	+0.7	+0.3
of which: gasoline		19,760	18,150	12,099	11,985	-1.2	-3.2	-0.9
diesel		3,520	9,621	19,523	19,741	+9.9	+4.1	+1.1
Light commercial vehicles (LCV)		4,223	5,062	5,939	5,971	+1.9	+0.9	+0.5
of which: gasoline		2,279	1,302	397	352	-5.3	-10.5	-11.3
diesel		1,944	3,761	5,543	5,619	+6.0	+2.4	+1.4
Heavy trucks (> 5t)		535	551	551	551	+0.5	-0.4	-0.1
Coaches and buses		68	81	92	92	+1.5	+0.9	+0.5
Kilometers (annual averages)	**Thousands of km**							
New passenger		13.4	13.5	12.7	12.8	+0.0	-0.5	+0.4
of which: gasoline		11.9	10.7	8.2	8.3	-1.2	-1.9	+1.5
diesel		21.3	18.8	15.5	15.4	-1.4	-1.3	-0.3
Light commercial vehicles (LCV)		**14.6**	**15.5**	**16.0**	**16.0**	**+0.5**	**+0.1**	**+0.0**
of which: gasoline		9.9	8.3	7.3	7.4	-1.3	-1.0	+1.4
diesel		20.2	18.0	16.6	16.5	-1.0	-0.6	-0.5
Heavy trucks (> 5t)		36.1	41.2	33.3	32.0	+0.9	-2.4	-4.0
Coaches and buses		31.0	30.2	36.1	36.6	-0.0	+1.7	+1.3
Consumption per vehicle	**Liters/100 km**							
Passenger cars: gasoline		8.68	8.12	7.50	7.50	-0.8	-0.4	+0.0
Passenger cars: diesel		6.73	6.74	6.21	6.20	-0.1	-0.7	-0.2
LCV: gasoline		9.39	9.29	8.12	8.00	-0.5	-0.8	-1.4
LCV: diesel		9.77	9.67	9.00	9.00	-0.3	-0.4	-0.0
Heavy trucks: diesel		36.23	36.62	34.81	34.10	+0.0	-0.6	-2.0
Buses and coaches: diesel		32.00	32.99	32.46	30.50	+0.1	-0.7	-6.0
Fuel consumption (all road transportation)	**Millions of liters**							
Gasoline		24,110	18,729	9,667	9,626	-2.9	-4.9	-0.4
Diesel		17,977	30,779	38,157	38,157	+5.0	+0.7	-0.0
Total		42,086	49,508	47,824	47,783	+1.4	-0.7	-0.1
Total traffic	**Billions of vehicle-km**	**420**	**518**	**568**	**572**	**+2.0**	**+0.3**	**+0.8**
of which: Light vehicles		389	476	523	542	+2.0	+0.6	+3.6
of which: Heavy goods trucks		22.4	29.5	27.1	26.7	+2.6	-1.8	-1.5
Road traffic								
Passengers in passenger cars[1]	Billions of passenger-km	617.3	754.4	819.4	829.6	+1.9	+0.3	+1.2
Passengers in coaches and buses	Billions of passenger-km	40.6	42.1	52.3	54.2	+0.3	+2.5	+3.6
Freight	Billions of metric ton-km	195.7	276.8	288.6	288.5	+3.5	-0.9	-0.0

(1) Including vehicles registered abroad and motorized two-wheelers.
Sources: The accounts of the Nation's transportation, MEDDE/SOeS, INSEE.

Automobile traffic is estimated by comparing vehicle counts on national, regional, local and urban **roads** with the average number of kilometers covered per year by all the vehicles in use and fuel consumption data. It also includes data on vehicles registered abroad.
Road transportation accounted for 88% of all domestic transport for passengers 2014 and 85% for freight.
In 2014, the number of French-registered vehicles on the road rose by 0.4%, comparable to previous years, but far lower than in the 1990s.
More drivers are continuing to adopt diesel (from 66.7% of vehicles in 2013 to 67.3% in 2014), though at a slower rate (0.8%). Diesel motors were to be found in 79% of light vehicles in France, up from 55% in 2000 and 31% in 1990.
For gasoline engines, four cars out of five are now compatible with premium unleaded (95-E10), which accounts for 32% of all gasoline-powered deliveries.
The average unit consumption of passenger cars continues to decline with the improvement in technical performance, despite the impact of overconsumption associated with the incorporation of biofuels, whose energy quotient is lower than that of conventional fuels.
Over the last ten years, the average unit consumption of diesel cars dropped by 6%, and that of gasoline-powered cars, by 4%.

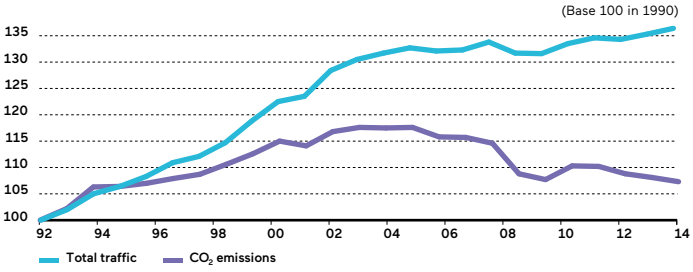
79%

SHARE OF DIESEL ENGINES IN THE LIGHT VEHICLE TRAFFIC IN FRANCE

Road traffic and CO_2 emissions

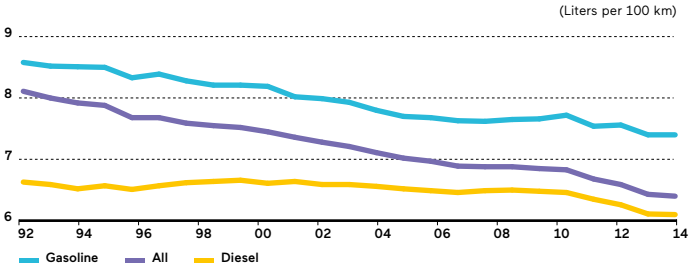
The number of French and foreign vehicles on French roads has increased by 36% since 1990, while the corresponding CO_2 emissions have risen by only 7%. The credit for enhanced energy efficiency stems from a variety of factors. The average consumption per registered vehicle on the road in France (including impacts on overconsumption associated with biofuels) decreased by nearly 20% between 1990 and 2014, 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 incentive/penalty ("*bonus/malus*") system implemented in 2008. On the other hand, the quantity of CO_2 emissions, net of renewable energy, required for a heavy truck to transport one metric ton of freight one kilometer across France dropped by 29% between 1990 and 2014, despite the impact of the financial and economic crisis.

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



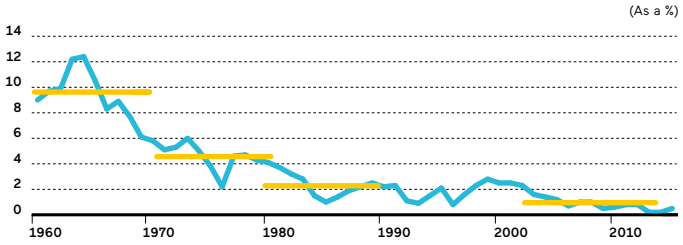
Sources: CITEPA and Traffic Statistics.

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



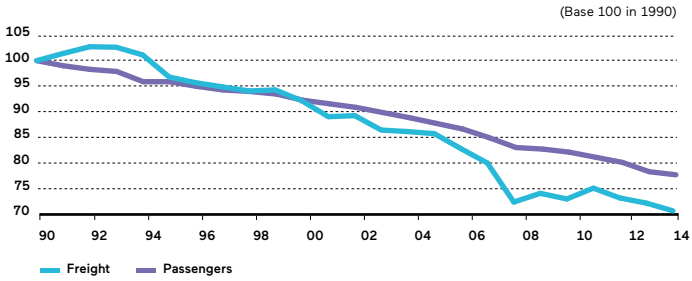
Source: Traffic Statistics.

ANNUAL GROWTH RATE OF PASSENGER CARS ON THE ROAD IN FRANCE



Source: CCFA.

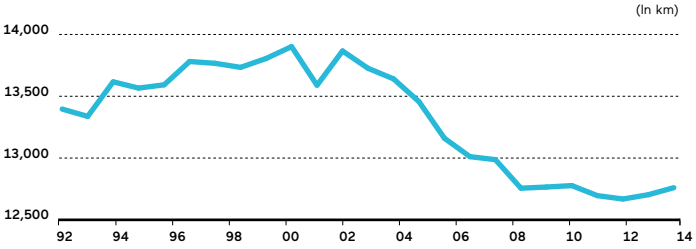
CHANGE IN TRANSPORT ENERGY EFFICIENCY(2)



Sources: MEDDE/SOeS, CCFA calculations.

(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 of CO_2 emissions due to the use of biofuels is not considered.

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 2014, the first estimates from the *Centre Interprofessionnel Technique d'études de la pollution atmosphérique* (CITEPA – Technical Interprofessional Center for Studies of Atmospheric Pollution) for road transport report CO_2 emissions net of renewable energy sources of 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 2012, CO_2 emissions net of renewable energy sources for road traffic can be broken down, according to CITEPA estimations, to 56% for cars, 20% for light commercial vehicles and 23% for heavy trucks, including coaches and buses (26% in 2007).

-10%

REDUCTION IN CO_2 EMISSIONS FOR ROAD TRAFFIC BETWEEN 2004 AND 2014 ACCORDING TO CITEPA

Passenger transport price indices

In 2014, because of the drop in fuel prices, the growth rate in the price index for passenger cars (purchases and use) became negative (minus 0.2%). The index of rail passenger prices increased by 2%, which is in the range of recent years, of between 2 and 3% inclusive, except for 2012, when it rose by 4%. The price index for the road transport of passengers (not including taxis) rose for the third year in a row, powering ahead in 2014 by 3%.
Since 2009, real price indices for different modes of passenger transport changed in very different ways: from a drop of 6% for road transport of passengers (not including taxis) to a rise of 8% for private vehicles, with a slight fall (7%) for air transport and an increase of 6% for rail transport.

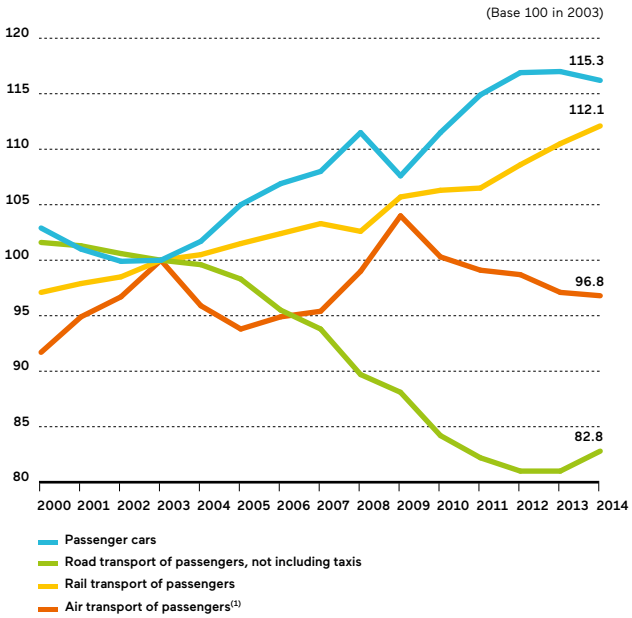
ANNUAL VARIATION IN PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES

(As a %)

	Passenger cars	Passenger road transport, not including taxis	Passenger rail transport	Passenger road transport	Taxis	Passenger air transport(1)
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
2013	1.0%	0.8%	2.6%	1.4%	2.6%	-0.7%
2014	-0.2%	2.7%	2.0%	3.1%	3.8%	0.2%

(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.

PASSENGER TRANSPORTATION METHOD PRICE INDICES



Source: INSEE.

The price indices of the various passenger transport modes show evolutions in prices inclusive of tax. So, for air transport, this includes airport tax; in other modes, infrastructure-related costs are only shown insofar as they can be included in the retail price. Furthermore, only the part paid directly by the household is considered. For example, if a region or a local authority decides, in the context of a town or country planning strategy or social measures, to subsidize a part of transport-related expenses, this will appear as a reduction in household expenses. Fuel surcharges are included in the index for air transport of passengers.
The indices for rail and road transport of passengers predominantly 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 in the chart above by the consumer price index.
After remaining close to their 1995 levels, the tax-adjusted price indices for different modes of passenger transport have had varied evolutions since 2003. From 2003 to 2014, the tax-adjusted personal car index (purchases and use of private cars) rose 16%, and sharply exceeded its 2000 level. The index for rail transport increased by 12%, continuing the growth started in 2000, while the index for road transport of passengers (excluding taxis) fell by 17%; it is important to remember that only the part paid directly by the households is taken into consideration.

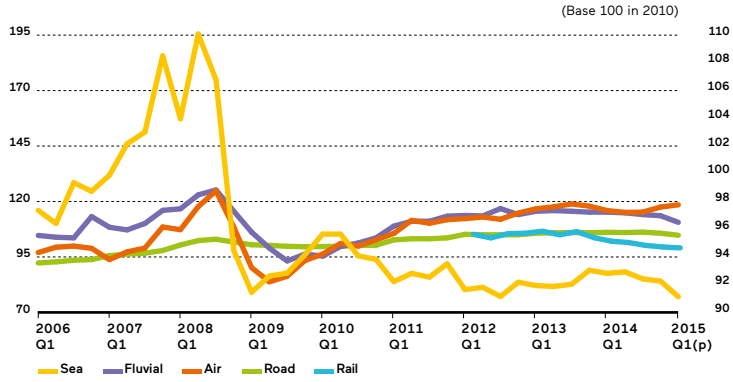
+0.8% and +4.6%

RESPECTIVE RISES IN THE PRICE INDICES LINKED TO PRIVATE VEHICLES AND RAIL TRANSPORT OF PASSENGERS

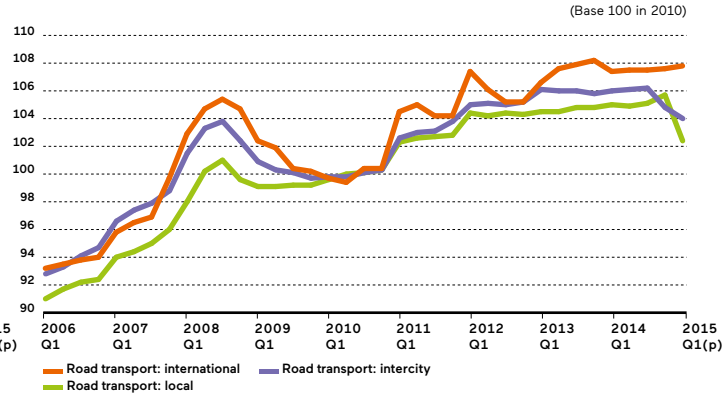
Freight transport price indices

In 2014 the road freight price index remained stable (advancing just 0.1%) for the first time since 2010. Between the first quarter of 2014 and the first quarter of 2015, the index even declined by 1.2% due to the fall in diesel fuel prices. The freight shipping indices other than by road were inconsistent among themselves. They were up (2.9%) in sea transport, but declined in river transport (by 0.9%), air (by 1.6%) and rail (by 4.4%). Since 2006, the price index of freight transport by road rose by 1.6% per year on average, from 1.5% for intercity to 1.7% for international and proximity freight transport by road. Over the same period, the fluvial index showed a lesser change (a 0.9% increase per year), varying from - 0.1% for international transport to 1.9% for domestic transport. In river transport, the price index has been published only since 2014, with a history dating to the first quarter of 2012. Over the observation period, a 0.4% decline is evident, chiefly due to a heavy fall in 2014 (by 4.4%).

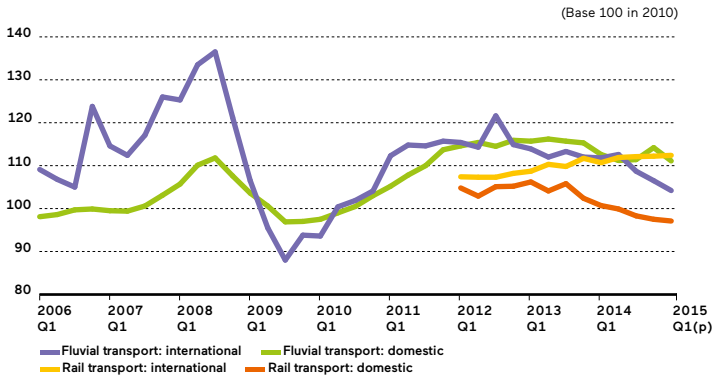
FREIGHT TRANSPORT PRICE INDICES IN FRANCE



FREIGHT TRANSPORT PRICE INDICES: ROAD



FREIGHT TRANSPORT PRICE INDICES IN FRANCE



Source: MEDDE/SOeS.

Freight transport price indices are calculated by the statistics department of the French Transport Ministry (SOeS). For road, river and rail transport, the indices are drawn up using the so-called representative services methodology, defined by the loading and unloading locations, the type of freight transported, and the characteristics of the contract binding the shipper and the carrier. Prices are sampled quarterly. 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. In rail transport, the index followed since 1st quarter 2012 is drawn up on the basis of representative services, provided by a sampling of 22 shippers to the rail transport operators. Monitored since 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. The indices are developed from the so called unit value methodology, which includes the fuel and security surcharges paid to the airline providing the transportation. The maritime price indices have also been monitored since 2006. They include transport on behalf of others provided by companies registered in France with maritime freight as their core business (bulk and ferry). It is based on international price indices, unit prices and tariffs. The road freight price index remained stable in 2014 (rising just 0.1%), but exhibited contrasting trends between neighborhood that was up slights (0.5%), intercity (- 0.2%) and international (- 0.1%), each slightly down. Compared with fluvial and air transport, the infra-annual variations are less considerable, even though fuel accounted for between 20% and 30% of the total cost of road haulage, as shown by the CNR survey *(cf. page 51)*.

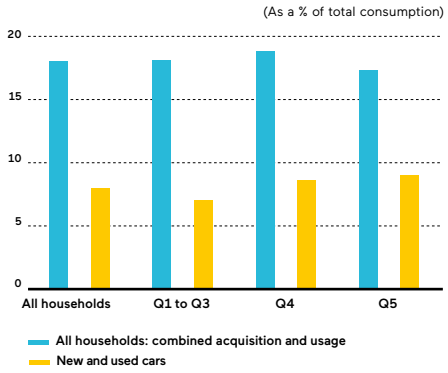
In connection with the major volatility of fuel prices, the air freight price index has fluctuated greatly since 2006. After rising in 2013, the index fell in 2014 (by 1.6%). The price index for maritime freight is very volatile, following the changes in bulk prices. After two years of significant decline, it grew 4% in 2013, then 2.9% in 2014. Available since 2000, the fluvial freight price index increased every year, with the exception of the drop in 2009. It declined in 2014 by 0.9%. To conclude, the rail freight index continued its decline which began in the third quarter of 2013. Over 2014, it fell by 4.4%, but with large variances between the domestic, which plummeted by 5.3%, and the international which achieved a rise of 1.4%.

STABILITY
IN 2014 OF THE ROAD HAULAGE PRICE INDEX

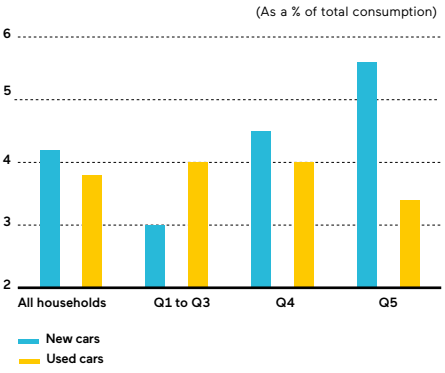
Household motoring costs

Due to the rise in fuel prices between 2006 and 2011 (of more than 20%), car-owning households increased their automobile-related expenditures by nearly two points, to 18% of their budget. Fuel accounted for 80% of that rise; for the highest earning 20% (Q5), the proportion was two thirds, while for the 60% lowest earning households (Q1–Q3), the fuel component accounted for more than 90% of the rise. In 2011, the fuel component represented a little more than 4% of the budget of Q5 households, while it was 6% for Q1–Q3 households. Changes occurred between 2006 and 2011 in the distribution of expenditure on purchases of new cars (NC) and used cars (UC) and maintenance, repairs, parts & accessories (MRPA), some of which can be partially explained by purchases made using a scrap incentive plan in 2010–2011. For Q1-Q3 households, while the weighting of the MRPA component increased slightly, the rise in the weighting of the NC component was nearly offset by the decline in the UC component. For Q4-Q5 households, the weighting of the NC component mushroomed from 1% to more than 5%, while that of UC rose slightly, while the MRPA component declined 0.4 point to well under 2%.

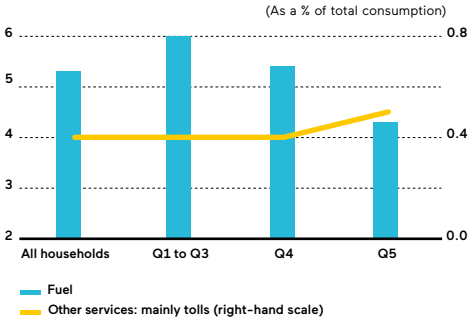
CAR BUDGET



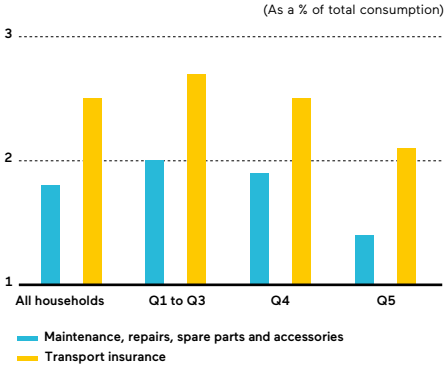
CAR PURCHASES



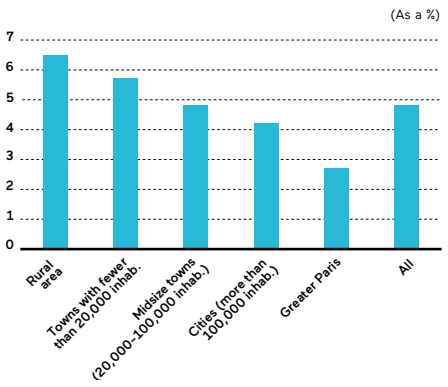
FUEL AND OTHER USE-RELATED SERVICES (mainly tolls)



MAINTENANCE, REPAIRS, SPARE PARTS AND TRANSPORT INSURANCE



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



Source: INSEE, 2011 Family budget survey.

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 (i.e. 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. the 20% of households with the highest earners, ahead of Q4 and then the combination of Q1 to Q3.

In 2010–2011, the vehicle budget for all car-owning households amounted to just over 18% 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 9% for the fifth quintile. Nearly 60% of households in Q1–Q3 buy used cars compared with nearly two thirds in 2005–2006), whereas nearly two thirds of Q5 households buy new cars.

While nearly 5% of total consumption is devoted to fuel, only the richest quintile spends much less on consumption for this item. The same goes for transport insurance. As these items are taxed most heavily, it looks as if car-owning Q1-Q3 households pay more taxes than households in the richest quintile for the use of their vehicles in proportion to their consumption.

By breaking down all households (car owners or not) into categories of residence location, fuel appears to play a higher role the smaller the town. This means that households in the Paris area spend 3% of their consumption on fuel whereas people in rural areas spend more than 6%.

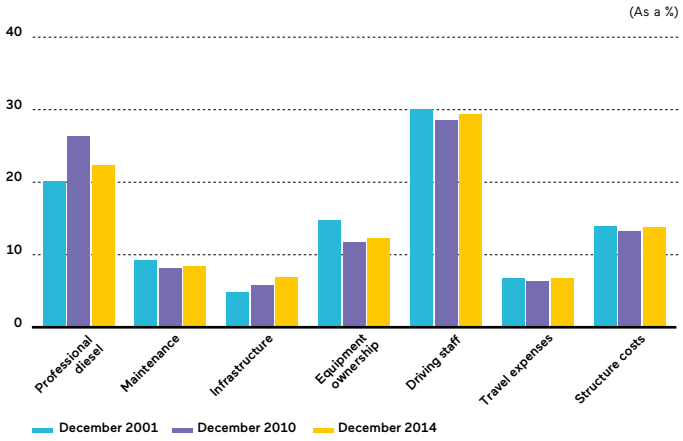
6%

WEIGHT OF FUEL IN THE TOTAL CONSUMPTION OF THE LEAST WELL-OFF HOUSEHOLDS (Q1–Q3)

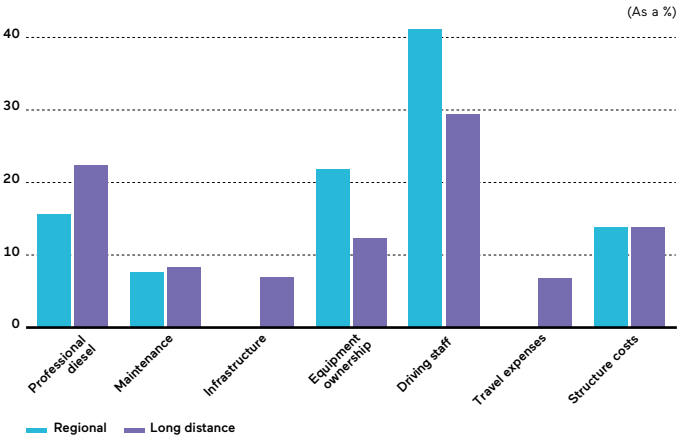
Road freight cost price

According to the CNR, between 2002 and 2014, the annual mean of the cost price for long-distance and regional road freight rose by 33%, or an average of more than 2.4% a year.
The share of commercial diesel in the cost price of long-distance road freight rose to 22%, as opposed to 26% in 2010 and 20% in 2001.
In 2014, the cost of equipment ownership (road tractors and semi-trailers) represented 12.3% of the total cost (as opposed to 11.7% in 2010 and 14.7% in 2001), and the share associated with infrastructure went as high as 6.9%.

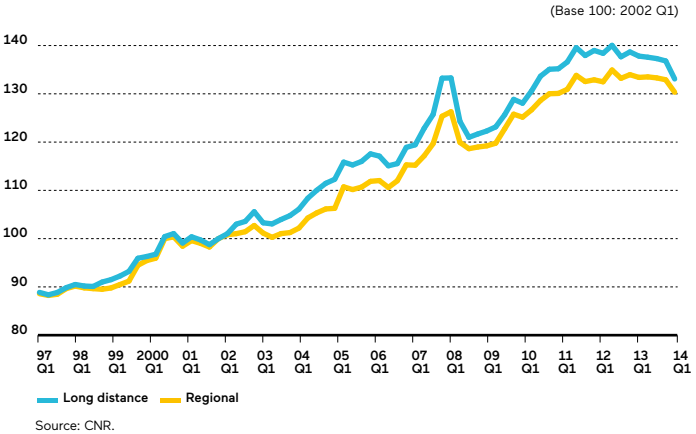
ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2014



ROAD FREIGHT COST PRICE



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, commercial diesel, together with substantial increases in oil prices, took an increasingly large role in the production cost of long-distance road freight; during that period, its share rose from 20% to nearly 28% of the total price. In 2008, because of the drop in oil prices after the summer, the share of diesel fell to 22% before increasing to reach 29% in 2011 and dropping slightly in the next three years, to be 22% in 2014. From 2001- 2014, infrastructure costs increased by 2 points to 6.9%. On the other hand, equipment ownership (road tractors and semi-trailers) and maintenance (upkeep and repairs) dropped by 2.4 and 0.9 percentage points respectively, a little more than the decline for haulage employees (down 0.7 percentage points). In the case of regional transport, fuel accounted for 16% of combined costs in December 2014; this lower percentage is one of the causes of the weak growth of more than two points in the regional index between 2002 and 2014 when compared with the long-distance index. The share for equipment ownership rose by between 20% and 22% over the same period.

–6 POINTS
DROP IN THE SHARE OF COMMERCIAL DIESEL IN THE CNR INDEX OF LONG-DISTANCE ROAD FREIGHT COSTS SINCE 2011

Automotive price indices

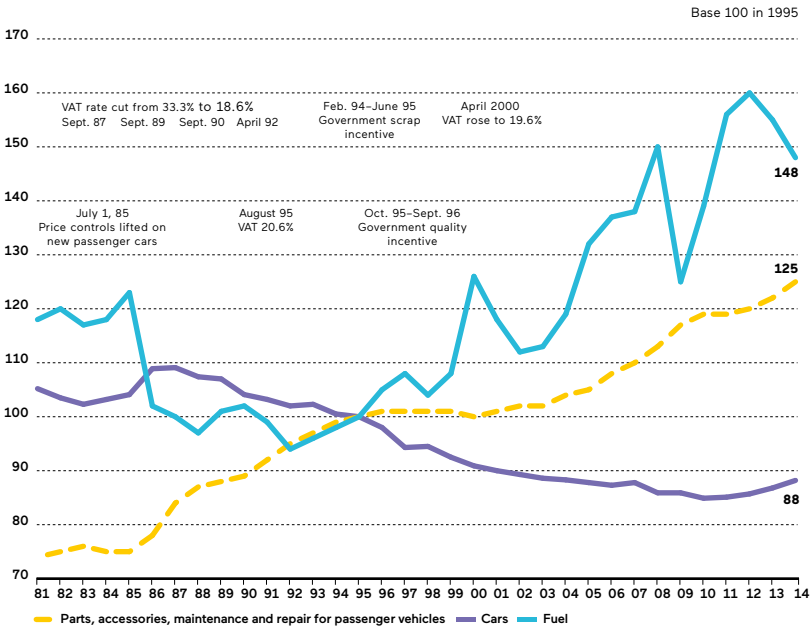
In 2014, the new passenger car price index rose by 2.1%, 1.6 percentage points faster than inflation. Since 2013, the new car price index has decreased by 1% in real terms, before advancing slightly in 2014. The tightening of the green penalty ("*malus*") scales contributed to this rise. This downward trend over several years has also been observed for Europe as a whole. In 2014, the real price fuel index fell again, but remains at a high level (148 compared with 160 at the peak in 2012, i.e., a decline of 8%). The price index for spare parts, accessories, and vehicle maintenance and repair rose by 2.6% in 2014. The changes within that figure, however, are divergent; ranging from a decline of 1.5% for tires to an increase of 3.1% for the hourly cost of labor for repairing private cars.

YEAR-ON-YEAR AUTOMOTIVE PRICE CHANGES

	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Fuel prices
2012	2.0%	2.6%	2.5%	4.9%
2013	0.9%	2.2%	2.7%	-2.5%
2014	0.5%	2.1%	2.6%	-4.0%

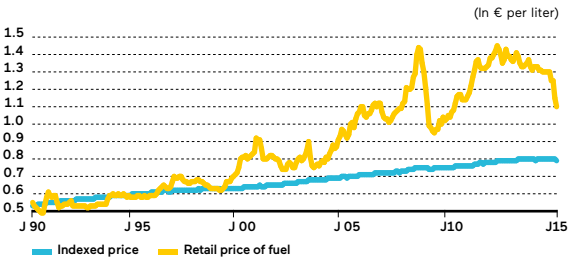
Source: INSEE, CCFA presentation.

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



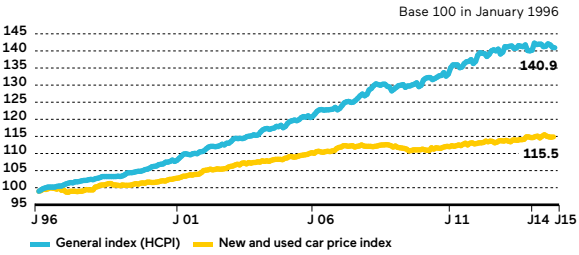
Source: INSEE, CCFA presentation.

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



Sources: SOeS, INSEE, CCFA calculations.

HARMONIZED PRICE INDICES FOR THE EUROZONE (17 COUNTRIES)



Source: Eurostat.

-6.0%

IN THE PRICE OF FUEL IN 2014 COMPARED WITH 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 "incentive/penalty" 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. Since 1992, car prices have continued to decline steadily in real terms due to the regular impact of competition and occasional impact of government support measures (the incentive/penalty ["*bonus/malus*"] system and scrap incentive scheme since 2008). However, the increase in the green penalties led to a 2.5% price rise in January 2014 over December 2013. Since 2003, many factors have led to an increase in the index of real prices of repairs and maintenance, including labor (cost of work, development of skills, etc.) and parts (improved reparability, raw material prices, increased quality of service, greater diversity of models requested by consumers). 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 and strains on household's purchasing power. In 2014, the general price index rose 31% compared to 2000, whilst that of new and used car purchases only grew by 12%.

Consumer spending on private vehicles

The stability of the prices enabled household purchasing power to rise in 2014 (by 1.1%), after stagnating in 2013. Expenditure on household consumption also continued to recover, rising 0.6% in 2014 (compared with 0.4% in 2013). Similarly, purchases of new vehicles was boosted (by 2%) after two years in a row of decline, reaching €23.8 billion. However, over the long term, the share of a car purchase in household consumption is reducing, at the expense of the new vehicle.
In 2014, households' fuel purchases contracted again due to the impact of the reduction in the crude oil price. Fuel cost €37 billion, declining 3.7% over 2013. This amount is the same as that spent on purchases of new and used cars, whereas it was much lower at the start of the 1990s.

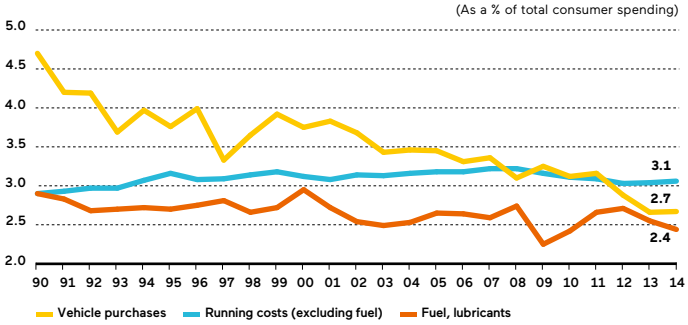
HOUSEHOLD CONSUMER SPENDING ON TRANSPORT

(Amount and % of total consumer spending for the year)

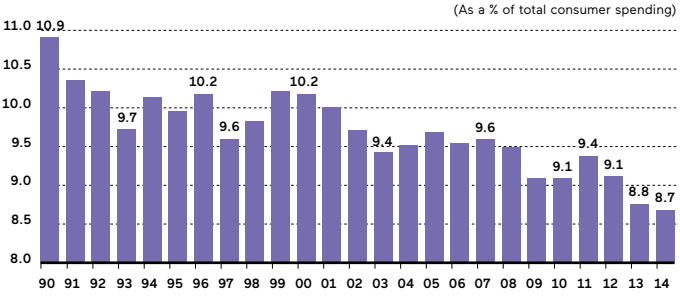
	Unit	1990		2000		2013[1]		2014[1]		Change 2014/2013
Vehicle purchases	€ billions	33.9	4.7%	37.9	3.8%	39.9	2.6%	40.5	2.7%	+1.5%
- New and used cars		31.3	4.3%	34.1	3.4%	35.4	2.3%	36.0	2.4%	+1.5%
of which new cars		25.6	3.5%	24.5	2.4%	23.4	1.5%	23.8	1.6%	+2.0%
– Caravans, motorcycles, bicycles		2.6	0.4%	3.8	0.4%	4.5	0.3%	4.6	0.3%	+1.4%
Running costs	€ billions	41.8	5.8%	61.3	6.1%	84.1	5.5%	83.4	5.5%	-0.8%
- Maintenance, repairs, spare parts and accessories		16.6	2.3%	24.0	2.4%	33.7	2.2%	34.1	2.3%	+1.2%
of which automotive equipment manufacturing		7.2	1.0%	11.1	1.1%	17.1	1.1%	17.4	1.1%	+1.5%
of which automotive service		7.1	1.0%	9.2	0.9%	11.8	0.8%	11.9	0.8%	+0.5%
- Fuel and lubricants		20.9	2.9%	29.8	2.9%	38.4	2.5%	37.0	2.4%	-3.7%
- Tolls, parking fees, rental, driving lessons		4.3	0.6%	7.5	0.7%	12.0	0.8%	12.3	0.8%	+2.8%
Insurance	€ billions	2.9	0.4%	3.9	0.4%	7.6	0.5%	7.7	0.5%	+2.0%
TOTAL consumer spending on private vehicles	**€ billions**	**78.6**	**10.9%**	**103.1**	**10.2%**	**131.6**	**8.7%**	**131.7**	**8.7%**	**+0.1%**
Public transport	€ billions	10.3	1.4%	15.2	1.5%	26.0	1.7%	26.5	1.7%	+1.7%
Total consumer spending for the year	**€ billions**	**721**	**100%**	**1,010**	**100%**	**1,503**	**100%**	**1,517**	**100%**	**+0.9%**
Number of households (mainland France)	Thousands	21,632		24,256		27,775		27,973		+0.7%
Spending on passenger cars per household	€	3,633		4,249		4,738		4,707		-0.7%
Spending on passenger cars per vehicle-owning household	€	4,749		5,291		5,702		5,685		-0.3%

(1) These are provisional data and can be readjusted for three years. Source: INSEE – Household consumer spending, 2014 – base 2010

PERCENTAGE OF HOUSEHOLD BUDGET ALLOCATED TO OWNING A CAR, 1990 TO 2014



TOTAL VEHICLE-RELATED EXPENDITURE



According to the national accounting data, which are based on different concepts than those obtained by the family budget survey (cf. page 50), in 2014 households spent € 131 billion (up 0.1%) on their individual transport (compared with € 137 billion in 2011). This amount represents 83% 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 ratio varied between 9% and 11% from the start of the 1990s until the 2009 crisis. Since then, it has fluctuated around 9%, and only reached 8.7% in 2014.
Within this consumer spending, purchases of vehicles is now in second place behind operating costs (not including fuel), whereas prior to 2012 it was the leading facet of expenditure. The downward trend of vehicle purchases is pressuring the budget ratio, which was only 2.7% in 2014, as against 4.3% in 1990. This drop comes at the expense of purchases of new cars, which now account for just 66% of vehicle purchases, compared with 82% 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 declining since 2008 (when it was 2.5%) and has now stabilized at around 2.3%.
Household spending on car insurance, which corresponds to the service—namely spending minus reimbursements—came to €7.7 billion.

2.7%

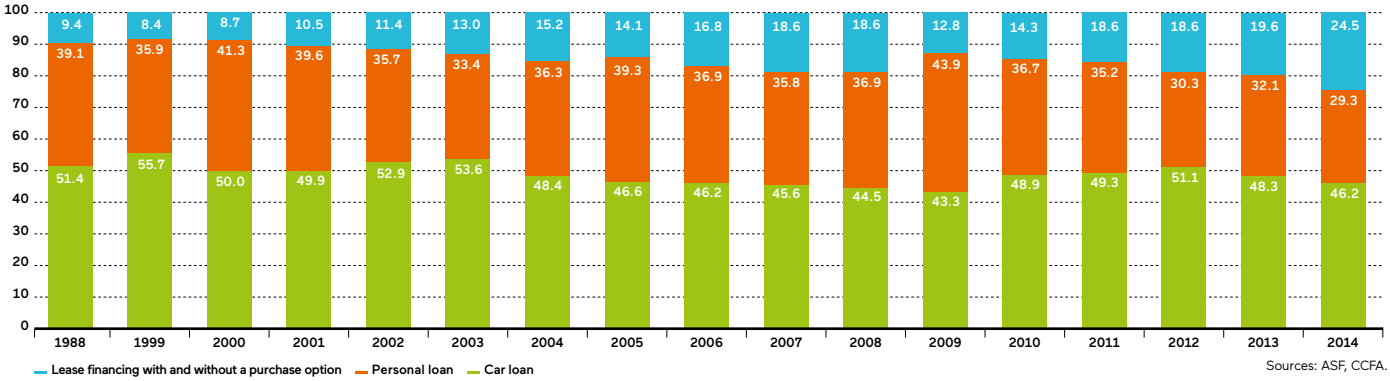
SHARE OF VEHICLE PURCHASES AS A PERCENTAGE OF TOTAL HOUSEHOLD SPENDING FOR 2014

Automobile financing

In 2014, 63% of new cars purchased by consumers were bought on credit. 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 (46%) ahead of personal loans (29%) and lease-financing (24.5%). Lease-financing can be broken down into lease financing with a purchase option (93%) and lease-financing without a purchase option (7%). Conventional loans reached a peak in 2012, then lost nearly 5 points in two years, while over the same period, the share of lease-financing (with or without purchase option) gained 6 points. The use of personal loans also declined over the same period, then even more between 2013 and 2014, losing 3 points in a year.
For new vehicles used by companies (passenger cars and light commercial vehicles and heavy trucks), the large increase of 2014 was reflected in a rise in financing, after a decline for two consecutive years. This financing was chiefly via lease-financing with a purchase option and long-term leasing, and a slightly larger increase was seen in passenger cars over the other categories.

CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES

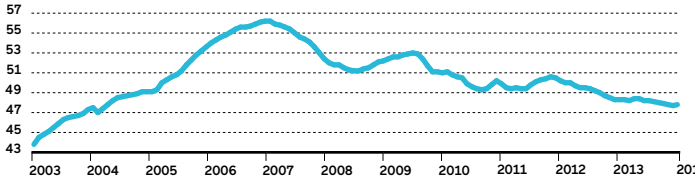
(As a %)



Sources: ASF, CCFA.

TOTAL AMOUNTS OVER TWELVE MONTHS OF NEW CONSUMER LOANS TO INDIVIDUALS (NOT INCLUDING OVERDRAFTS)

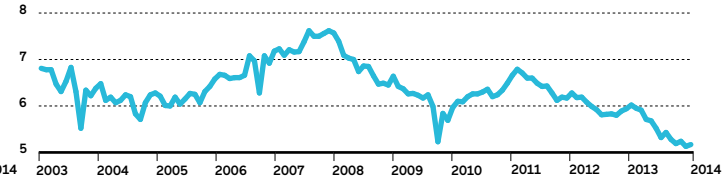
(In € billions)



Source: Banque de France.

INTEREST RATES OF NEW CONSUMER LOANS TO INDIVIDUALS (NOT INCLUDING OVERDRAFTS)

(As a %)



Source: Banque de France.

Buyers of new and used cars have the choice of paying cash or purchasing the vehicle on credit.
There are three types of financing on offer:
• **car or conventional loans** provided either by the finance subsidiaries of the manufacturers and importers, or by the subsidiaries of financial or banking groups, which are independent from the manufacturers;
• **lease financing, with or without a purchase option (LPP);** 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, use of 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 12% between January 2008 and July 2011, due to the financial and economic crisis, production of consumer loans fluctuated between €49 billion and €50 billion until mid-2012, declining to €48 billion in 2013 and remaining at that level. Within these new loans, there was an increase in the financing of new passenger cars by individuals in 2014, due to the stabilization of the auto market. Financing has evolved significantly over recent years, in favor of lease-financing with a purchase option, which shot up in 2014 by 16%, to the detriment of conventional dedicated loans, which dropped 6%.

24.5%

SHARE OF NEW CARS PURCHASED ON CREDIT BY CONSUMERS IN FRANCE USING LEASE-FINANCING WITH OR WITHOUT PURCHASE OPTION.

Car and motorcycle sales and repairs

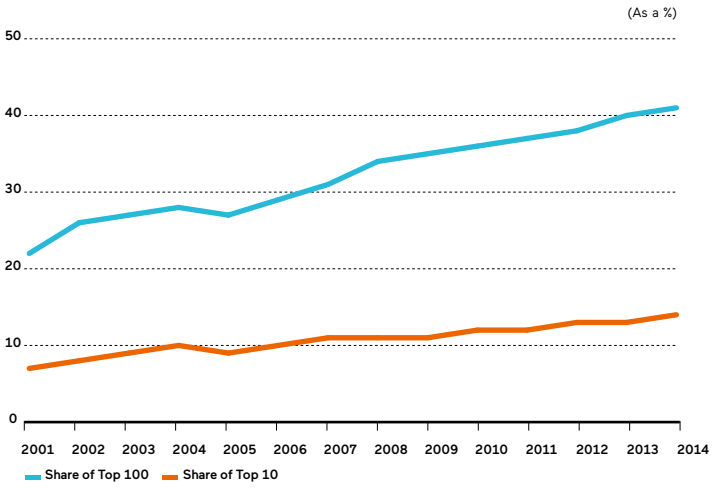
Motor vehicle sales in 2014 generated gross revenue of € 72 billion, a little higher than in 2013, after the two years of decline that followed the end of the market support measures (amounting to a drop of 9% between 2011 and 2013). By 2014, volumes were back to 2008–2009 levels. After increasing by more than 4% per year between 2000 and 2008, car maintenance and repairs dropped by 3.5% per year by value between 2008 and 2012. Since then, revenues have stabilized at around € 20 billion. According to the INSEE, 6.5% of companies working in automotive sales and repairs were controlled by one group in 2009, compared with 6.1% in 2007 (excluding franchises). They represented 50% of the staff in this industry and 49% of the value added. This concentration of companies is found in the statistics of sales of new vehicles by automobile retail groups. Between 2001 and 2012, each retail group belonging to the ten largest sold on average each year more than 1,000 new vehicles more. The one hundred largest groups each saw their sales grow by more than 300 new vehicles per year. These changes are connected with an increased geographical coverage and an expansion of outlets selling more than one brand. The ten largest groups sold nearly 300,000 new vehicles in 2014, making 14% of total sales for revenue of € 9.8 billion. The 100 largest groups represented 40% of total sales, or 890,000 new vehicles for revenues of € 29.5 billion.

LIGHT VEHICLE SALES NETWORKS IN FRANCE ON JANUARY 1, 2014

Makes	Primary dealership
Renault	697
Peugeot	423
Citroën	435
French makes	**1,555**
Ford	291
Opel	255
Fiat	198
Volkswagen	321
BMW	154
Mercedes-Benz	168
Japanese makes	1,129
South Korean makes	497
Other makes	1,351
TOTAL	**5,919**

Sources: CNPA, CCFA.

SHARE OF THE LARGE RETAIL GROUPS IN THE SALE OF NEW CARS



Source: *Argus*, Journal de l'Automobile, CCFA.

REVENUE FROM VEHICLE SALES AND REPAIRS

(In current € billions, including VAT)

Activity	2009	2010	2011	2012	2013	2014	Change 2014-2013
Motor vehicle sales	70.8	73.3	77.0	72.2	70.3	71.9	2.3%
Automotive maintenance and repairs	22.5	20.5	20.4	20.2	20.1	20.1	-0.2%
Retail sales of automotive equipment	6.7	6.5	7.1	7.5	7.8	7.7	-0.7%
Motorcycle sales and repairs	2.8	2.9	2.9	2.7	2.6	2.7	3.1%
Retail fuel sales	11.2	13.3	14.9	16.7	16.1	15.3	-4.7%
TOTAL	**113.9**	**116.5**	**122.4**	**119.4**	**116.9**	**117.7**	**-2.1%**

Source: INSEE - National Accounts, base 2010 of national accounts: provisional results

Vehicles require special care throughout their service life: this care includes continuous supervision whenever and wherever necessary with optimum servicing in order to maintain the vehicle's initial qualities.
Vehicle manufacturers, their official dealers and their 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 high quality of service from both sales and customer support, dealer networks are based on carefully selected distributors and repair specialists capable of meeting make and customer service requirements.

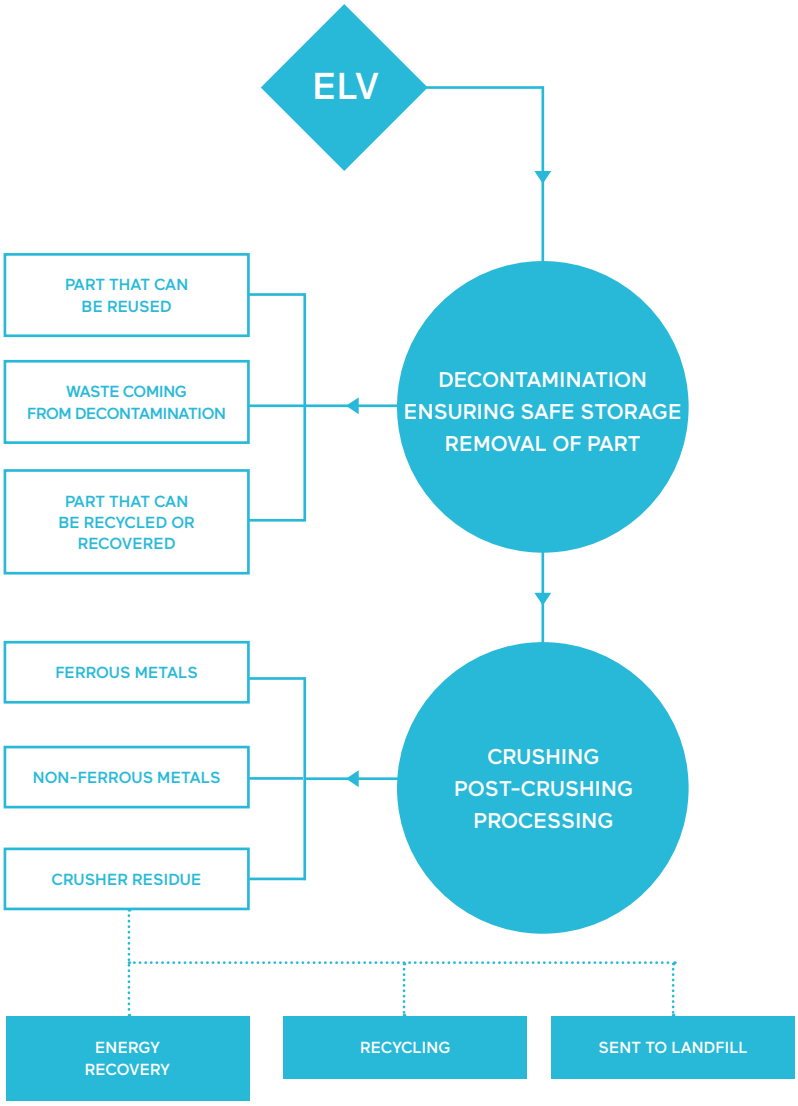
€72 BILLION

NET TURNOVER, IN 2014, OF CAR SALES AND REPAIRS IN FRANCE, ACCORDING TO INSEE

Recycling

Recycling is all those techniques used to process waste after it is recovered, aiming to reintroduce all or part of it into the production cycle. Automotive recycling involves the vehicle and its consumables (tires, oils, batteries). ADEME supplies some data on the magnitude of recycling in the automotive industry. An end-of-life vehicle (ELV) is a vehicle whose last owner designates it for destruction. More than 1.1 million ELVs were processed by the

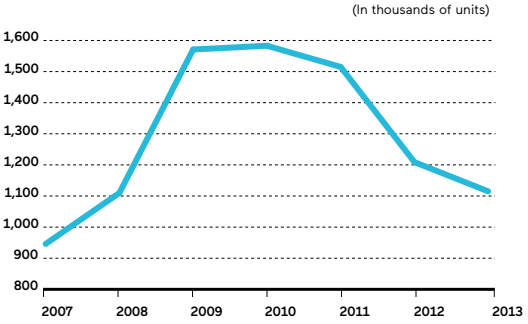
SIMPLIFIED CHART OF PROCESSING OF AN ELV



1.1 MILLION
ELV PROCESSED IN 2013 (DOWN 7.8% OVER 2012)

1,600 and 59
THE RESPECTIVE NUMBERS OF ACCREDITED ELV CENTERS AND CRUSHERS

NUMBER OF END-OF-LIFE VEHICLES (ELVS) DEALT WITH



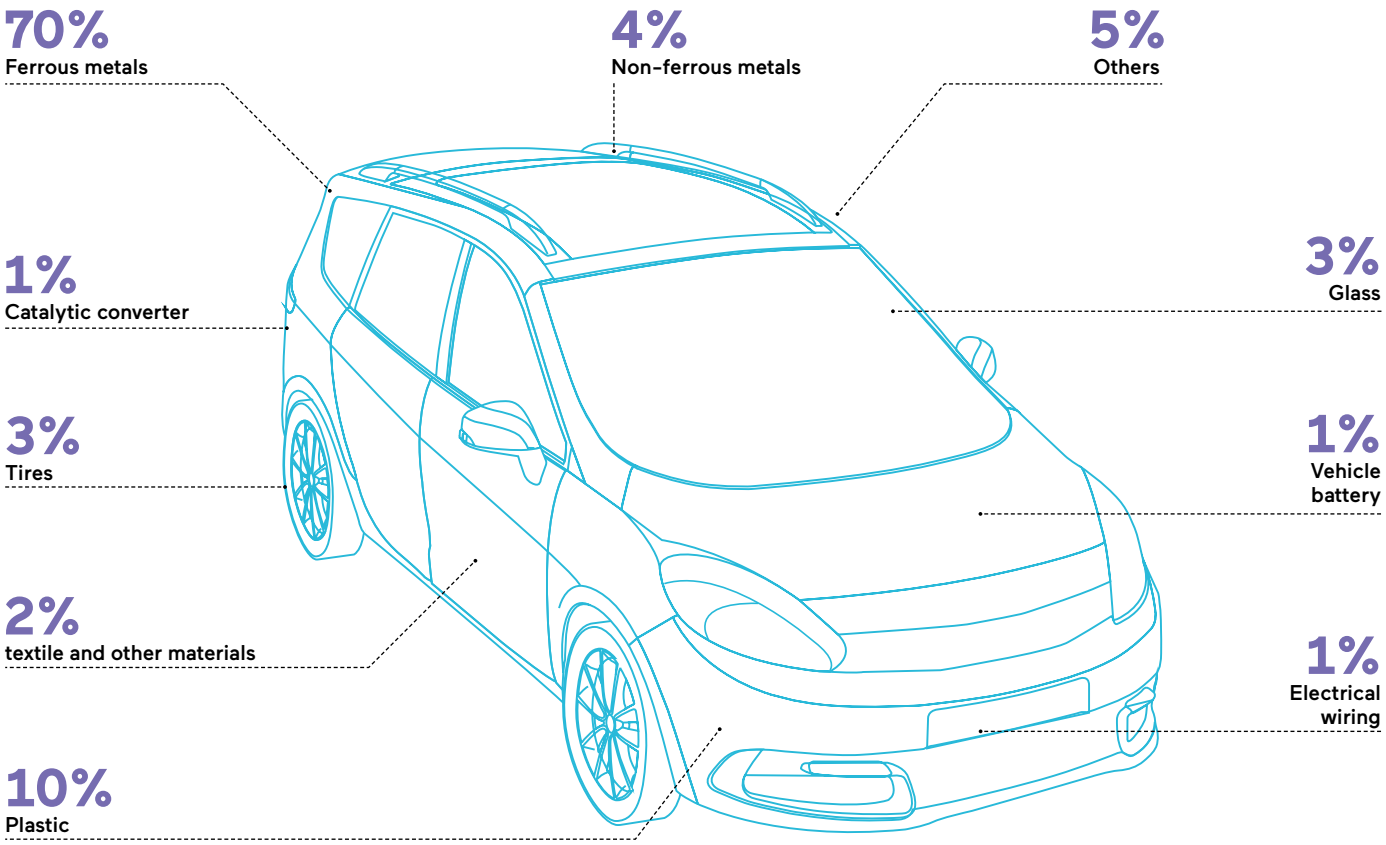
Source: Ademe.

In France, around 1.1 million vehicles were dealt with by the certified end-of-life vehicle process in 2013 and dealt with by around 1,600 certified establishments: ELV centers. First, the vehicles are decontaminated: fluids are drained (oils, fuels, brake fluid, air-conditioning fluid, etc.), batteries removed, pyrotechnic devices stored safely. Some of the vehicle's parts, if in good working order, are then recovered, sorted, and checked, before being reused (e.g., engines, doors, headlights). The vehicle is then crushed so as to separate the various materials that make it up. Those materials, when sorted, can be used again to manufacture other products. Selling the used spare parts contributes to reaching the recycling rates and to enabling the ELV centers to break even. The level of collection and processing of the ELVs and the automobile components is associated with the market situation of new vehicles, the economic context, the introduction over the given period of a system supporting the removal of older vehicles from the fleet, the technical progress that reduces the frequency of replacing components. The processing of the end-of-life vehicles must comply with levels of performance defined in European regulations: 85% recovery, of which 80% recycling today, and 95% recovery, of which 85% recycling as of 2015.
In 2013, the material breakdown of an ELV generates: 75% metals (ferrous metals: 70% non-ferrous metals: 4% and electrical wiring: 1%), 10% plastics, 3% tires and 1% starting battery. The average weight of a passenger car is around one metric ton. Some consumable portions of vehicles are also recyclable

certified processes in 2013, compared with 1.5 million between 2009 and 2011 (the period of the scrap incentive program), and fewer than one million units in 2007. Certified ELV centers accept ELVs at no charge and are responsible for decontaminating them, recovering certain used parts and sending the vehicle to the approved crusher.

COMPOSITION OF AN END-OF-LIFE VEHICLE IN 2013

Source: Ademe, Syderep 2014.



during the vehicle's life. The number of automobile batteries marketed came to 7.9 million units in 2013 (down 4% over 2012), one quarter of them coming from French manufacturers. They weigh the equivalent of 125,000 metric tons. Almost all (99.9%) of vehicle batteries were lead-containing batteries; the remainder (0.1%) were traction and starter batteries from hybrid vehicles, which are increasing in number (up 29% over 2012). The collection rate is at its lowest level since 2009 (down 11% over 2012), to 184,381 metric tons. French operators processed more than 212,000 tons of batteries, of which four fifths came from France, down by 12% over 2012 due to the lower collection rate.

The increase in tire collection since 2004 (200,000 metric tons) is considerable (390,000 in 2013). However, although the amounts collected dropped 1% between 2012 and 2013, the collection rate is better (86% as against 80% in 2012), due largely to the significant reduction in the amounts marketed in 2012. The processing rate of used tires increased by 1.3% over 2012, to 92%. Fifty-one percent (51%) of these tires go for energy recovery, 21% for granulation, 11% for resale on the used parts market, 10% for public works, and 5% for recapping.

Maintaining the vehicles on the road generates 240,000 metric tons of used motor oil each year. One of the requirements of recycling these oils, which are collected free of charge by certified collectors, is that they not be mixed with any other liquids (including water, cooling fluids and solvents). The oils are then regenerated where possible (accounting for a third of the volume) or subject to energy recovery.

Production of the automotive industry and its economic impact

After the upticks recorded in 2010 and 2011, the output of the automotive industry declined again in 2012 (down 9%) and 2013 (down 5%) to € 53 billion, equivalent to just 9% above its level in 2009, the year of the financial crisis. Meanwhile, it had been fluctuating between €70 and €77 billion per year between 2000 and 2007. In the new 2010 basis, in which the research and development expenditure is accounted for as "gross fixed capital formation" (GFCF), total purchases (or intermediate consumption), including from the industry itself, represent more than four times its value added (VA). In 2013, total purchases came to €43 billion, a boost to many sectors of the economy. Since 2009, however, VA has been fluctuating between around €10 billion, well below the more than €13 billion recorded between 2000 and 2005. It would appear not to be sufficient to finance both employees' salaries and the gross fixed capital formation (as well as return on capital). The investment rate (the ratio of GFCF to VA), the guarantor of future output in a highly capital-intensive industry, is kept at a high level in this tough period for European automotive markets, whereas the margin rate (the ratio of gross operating surplus to VA) is low *(cf. the graph on page 28)*.

ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

		2000	2005	2010	2011	2012[1]	2013[1]
Purchases from other industries	**%**	**71.7**	**76.3**	**75.6**	**75.7**	**76.5**	**76.1**
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	20.1	19.6	19.5
of which: manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	4.2	3.7	3.7
manufacture of electrical equipment	%	3.1	3.4	3.5	3.6	3.5	3.6
Manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	12.3	12.4	12.2
Other industries (including coking and refining), *of which*:	%	35.8	39.8	39.7	39.7	40.5	40.0
metallurgy and metalworking	%	16.0	16.7	17.5	17.2	17.9	17.3
Manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	10.0	10.4	10.3
Other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.5	4.3	4.3
chemical industry	%	2.6	2.8	3.0	3.0	3.2	3.3
Manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.9	1.8	1.7	1.8	1.9
wood, paper and printing industries	%	1.4	1.4	1.6	1.6	1.5	1.5
Extraction, energy and water industries, *of which*:	%	1.6	1.5	2.0	1.7	2.2	2.2
Electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	0.9	1.3	1.3
water, sanitation, waste management and decontamination	%	0.7	0.7	0.8	0.8	0.8	0.8
Construction	%	0.3	0.4	0.3	0.3	0.3	0.3
Motorcycle and car sales and repairs	%	0.7	1.1	1.0	0.9	1.0	1.1
Transport and storage	%	1.2	1.3	1.5	1.5	1.5	1.5
Information and communication	%	0.4	0.4	0.5	0.5	0.4	0.4
Financial and insurance services	%	0.8	0.7	0.9	1.0	1.0	1.0
Real estate activities	%	0.2	0.2	0.2	0.2	0.2	0.2
Corporate services, *of which*:	%	7.7	7.7	7.3	7.6	7.5	7.4
Legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.1	2.2	2.2
Scientific research and development	%	0.0	0.0	0.0	0.0	0.0	0.0
other specialized, scientific and technical activities	%	2.8	2.7	2.6	2.4	2.5	2.6
administrative and support services	%	3.4	3.1	2.7	3.1	2.8	2.6
Other commercial sector industries	%	2.3	2.1	2.1	2.2	2.3	2.3
All commercial sector purchases	%	13.4	13.6	13.4	13.8	13.9	14.0
Purchases within the industry	**%**	**28.3**	**23.7**	**24.4**	**24.3**	**23.5**	**23.9**
Total industry production at base prices	**Current € billion**	**70.3**	**75.6**	**58.3**	**60.9**	**55.3**	**52.7**
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
Total purchases [2]	**Current € billion**	**57.1**	**62.6**	**47.5**	**50.3**	**45.7**	**42.8**
As a % of production at base prices	%	81.2	82.7	81.5	82.7	82.7	81.3
Value added by the industry	**Current € billion**	**13.2**	**13.0**	**10.8**	**10.5**	**9.5**	**9.8**
As a % of production at base prices	%	18.8	17.3	18.5	17.3	17.3	18.7
Gross operating surplus (GOS)	**Current € billion**	**-**	**-**	**2.6**	**2.6**	**1.7**	**2.0**
As a % of value added (margin rate)	%	-	-	24.6	24.5	17.9	20.3

(1) These data are provisional (2) Total purchases (intermediate consumption) refers to the value of goods and services transformed or consumed fully during the production process. The distribution of purchases by industry is expressed by volume. In the new 2010 the research and development costs are no longer included in intermediate consumption, but in GFCF. It does not include the depreciation of fixed production assets, which is recorded in uses of capital employed.
Source: INSEE – National accounts (base 2010).

Of the total purchases of the automotive industry, which represent more than 80% of its output, just one quarter is made from the industry itself, the other three quarters being made from other industries.
Intermediate goods accounted for 40% of purchases, including metallurgy and metalwork; the metalworking industry remained the leading supplier, accounting for 17% of total purchases.

Purchases from manufacturers of machines and equipment (excluding electrical, electronic and IT products) accounted for 12% of total purchases in the automotive industry. In the 2010 basis, in which research and development expenditure is accounted for as GFCF, the automotive industry devotes 14% of its purchases to the tertiary sector, particularly in the activities of support to companies (7%).

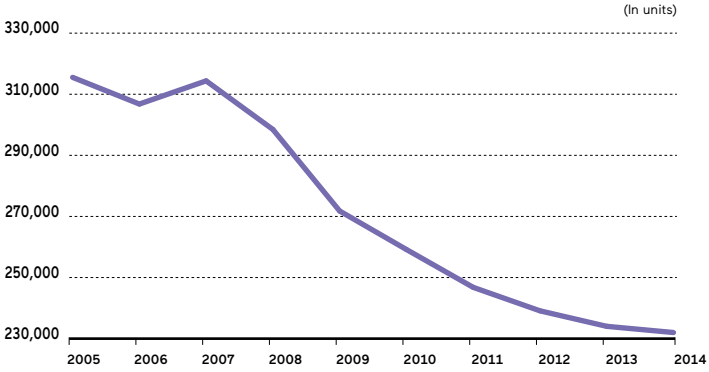
€53 BILLION
OUTPUT OF THE AUTOMOTIVE SECTOR IN 2013

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 a study by the DGE, the French automotive industry employs 441,000 "equivalent full-time" (EFT) employees in the core businesses (manufacturers, equipment makers and body makers) and 230,000 in the periphery. The periphery includes eleven business sectors including glass, textile, rubber and plastic products and metal products.
Automotive OEM suppliers, members of CLIFA, estimate their revenues at more than € 40 billion in 2014, compared with € 50 billion in 2007. According to Eurostat, automobile assembly and the French equipment supplying industry each occupy second place in Europe in their respective industries in terms of revenues.

WORKFORCE OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY

(In units)



Sources: FIEV, professional organizations.

WORKFORCE[1] OF THE AUTOMOTIVE INDUSTRY BY ACTIVITY

(In thousands)

Assemblers or engine makers	**126**
OEMs	66
Metal products	**50**
Manufacture of rubber and plastic products	48
Metallurgy	38
Manufacture of IT, electronic and optical products	26
Production of mechanical parts	**26**
Production of electrical equipment	18
Body builders or developers	**19**
Chemicals	**16**
Production of glass products	**5**
Textiles	**2**
Refined oil products	**1**
Production leather items	**0**

* In Full Time Equivalent positions
Sources: DGE, survey in 2012 of companies in the automotive industry; INSEE Clap 2011. DGE calculations.

REVENUES OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY (2014)

(In € billions)

FIEV	
Fédération des Industries des équipements pour Véhicules (French Automotive Equipment Industries Association)	15.6
FIM	
Fédération des Industries Mécaniques (Federation of Mechanical Industries)	10.1
SNCP[1]	
Syndicat National du Caoutchouc et des Polymères (National Union of Rubber and Polymer Workers)	5.0

GPA[1]	
Groupement Plasturgie Automobile (Automotive Plastic Converters Association)	5.0
FIEEC	
Fédération des Industries Électriques, Électroniques et de Communication (Federation of Electric, Electronic and Communication Industries)	4.3
Fondeurs de France	2.0
Glass industry[1]	0.3

Sources: FIEV, professional organizations. (1) 2012 data.

According to figures published by the FIEV, employees for 2014 in the automotive industry not including manufacturers stood at nearly 230,000, including 74,000 for equipment (FIEV), 63,000 for mechanics (FIM), 34,000 for tires and rubber (SNCP, 2012 figures) and 25,000 for plastics (GPA, 2012 figures). Equipment manufacturers have two types of markets: the first type with a total worth of €13.3 billion in 2014, producing equipment for assembly chains, and the second type dealing with spare parts, with a total worth of around €2.3 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 more than €40 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 nearly 40% of its business in terms of revenue. To show the true scale 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 58).

1st CUSTOMER

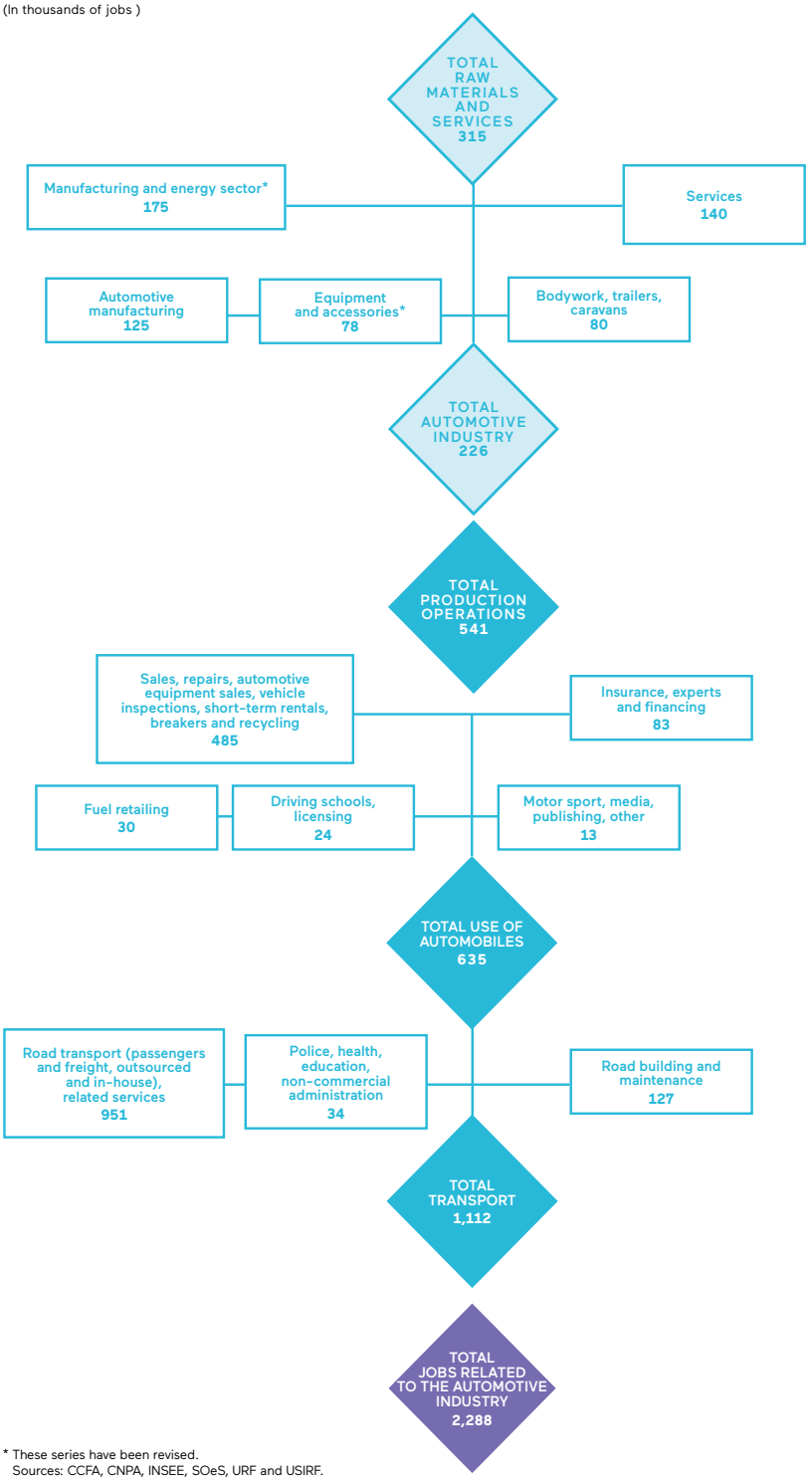
THE FRENCH AUTOMOTIVE INDUSTRY IS THE LARGEST CUSTOMER OF THE PLASTICS, INDUSTRIAL RUBBER AND INDUSTRIAL METALWORKING SERVICES SECTORS

Employment

In the broadest sense, in 2014 the industry provided work for 2.3 million people, representing more than 9% of France's employed working population. The automotive industry alone directly employed 226,000 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.

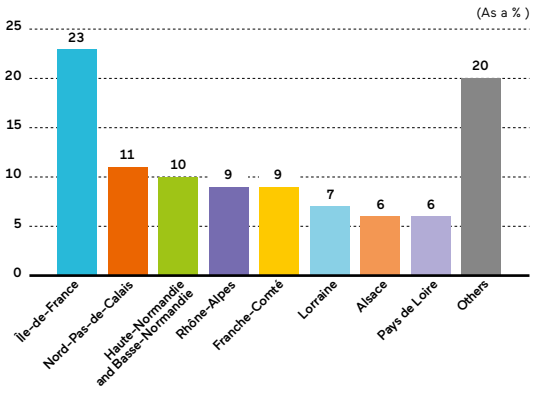
JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2014

(In thousands of jobs)



* These series have been revised.
Sources: CCFA, CNPA, INSEE, SOeS, URF and USIRF.

GEOGRAPHIC BREAKDOWN OF AUTOMOTIVE INDUSTRY EMPLOYEES ON JANUARY 1ST, 2013

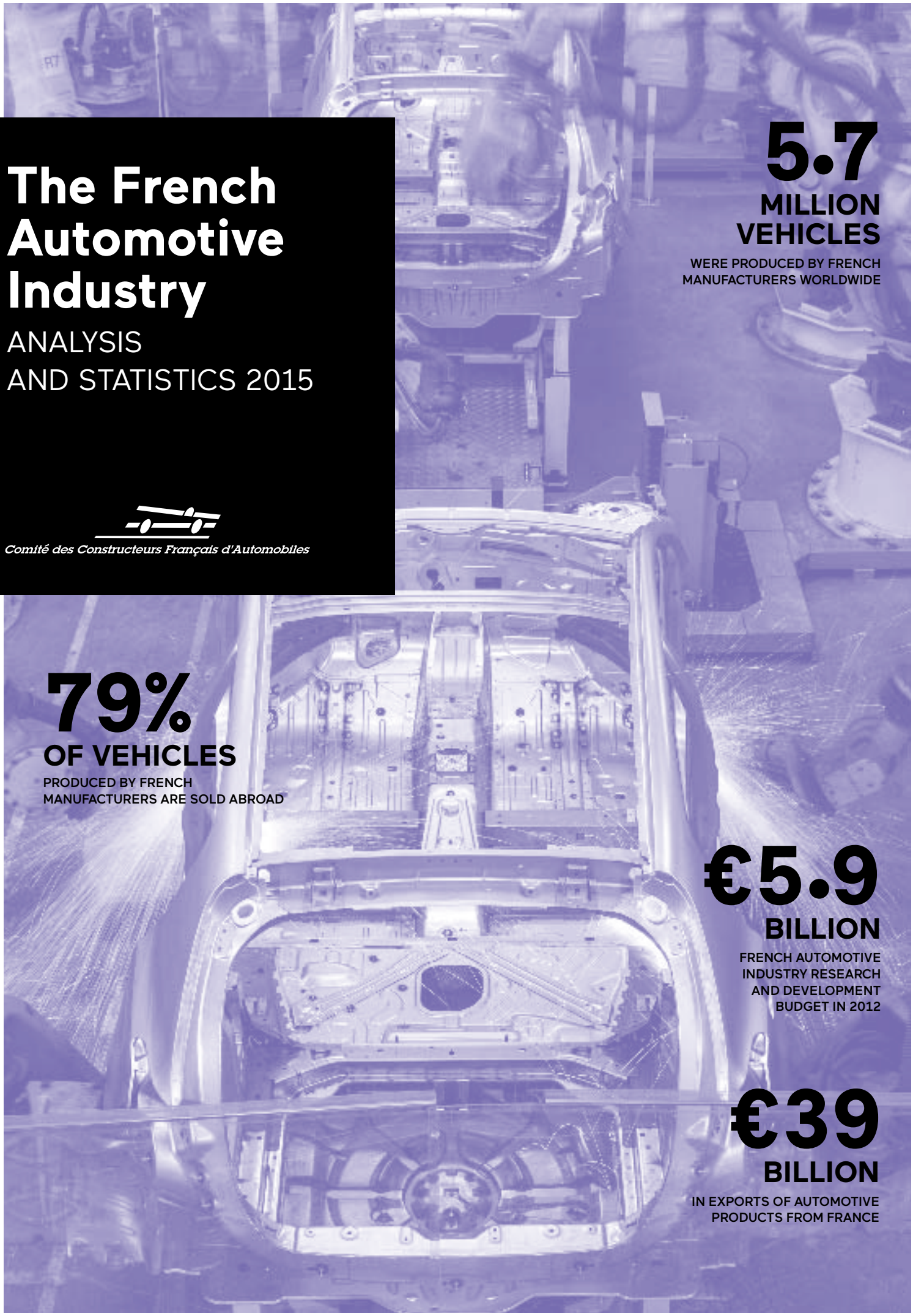


Source: INSEE.

As the driving force behind industrial output in France, the automotive industry and its suppliers directly and indirectly created 541,000 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 (*cf. pages 80- 81*), 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. Vehicle usage provided jobs for more than 640,000 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 one 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. According to INSEE data, as at January 1st, 2013, the greater Paris region accounted for 22% of the personnel of the automotive industry (including manufacturers, equipment manufacturers and bodybuilders). The other major regions for the automotive industry were the Nord-Pas-de-Calais (11%), Rhône-Alpes and Franche-Comté (9% each), Alsace and Lorraine (6% each), Upper and Lower Normandy, as well as Pays de la Loire (around 5% each).

9%

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



The French Automotive Industry

ANALYSIS AND STATISTICS 2015

Comité des Constructeurs Français d'Automobiles

5.7
MILLION VEHICLES
WERE PRODUCED BY FRENCH MANUFACTURERS WORLDWIDE

79%
OF VEHICLES
PRODUCED BY FRENCH MANUFACTURERS ARE SOLD ABROAD

€5.9
BILLION
FRENCH AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT BUDGET IN 2012

€39
BILLION
IN EXPORTS OF AUTOMOTIVE PRODUCTS FROM FRANCE

PASSENGER CARS*

(In units)

	1980	1990	2000[2]	2008	2010	2011	2012	2013	2014
Europe	**11,983,548**	**15,231,409**	**17,407,047**	**18,381,339**	**17,341,941**	**18,279,084**	**17,403,987**	**17,745,241**	**18,226,169**
Western Europe	**10,401,320**	**13,061,853**	**14,778,879**	**12,849,218**	**12,138,971**	**12,445,044**	**11,324,878**	**11,441,467**	**11,865,581**
Germany	3,520,934	4,660,657	5,131,918	5,532,030	5,552,409	5,871,918	5,388,459	5,439,904	5,604,026
Belgium	882,001	1,160,412	912,233	680,131	528,996	560,779	504,076	465,504	481,637
Spain	1,028,813	1,679,301	2,366,359	1,943,049	1,913,513	1,839,068	1,539,680	1,754,668	1,898,342
France[1]	**2,938,581**	**3,294,815**	**2,879,810**	**2,145,935**	**1,924,171**	**1,931,030**	**1,682,814**	**1,458,220**	**1,499,464**
Italy	1,445,221	1,874,672	1,422,284	659,221	573,169	485,606	396,817	388,465	401,317
The Netherlands	80,779	121,300	215,085	59,223	48,025	40,772	24,895	0	
Portugal	61,000	60,221	178,509	132,242	114,563	141,779	115,735	109,698	117,744
The United Kingdom	923,744	1,295,611	1,641,452	1,446,619	1,270,444	1,343,810	1,464,906	1,509,762	1,528,148
Sweden	235,320	335,853	259,959	252,287	177,084	188,969	162,814	161,080	154,173
Central and Eastern Europe	**1,582,228**	**2,002,000**	**2,330,692**	***4,910,554***	**4,599,576**	**5,194,306**	**5,501,813**	**5,670,170**	**5,626,879**
Turkey	**31,529**	**167,556**	**297,476**	**621,567**	**603,394**	**639,734**	**577,296**	**633,604**	**733,439**
America	**8,663,060**	**8,450,862**	**10,022,089**	**9,202,759**	**8,228,067**	**8,761,800**	**10,124,903**	**10,394,353**	**9,799,028**
NAFTA	**7,526,658**	**7,747,823**	**8,371,806**	**6,189,535**	**5,084,330**	**5,624,553**	**6,956,179**	**7,106,013**	**7,082,340**
of which: Canada	846,777	1,072,281	1,550,500	1,195,436	967,077	990,482	1,040,298	965,191	913,533
USA	6,376,825	6,077,449	5,542,217	3,776,641	2,731,105	2,976,991	4,105,874	4,368,835	4,253,098
Mexico	303,056	598,093	1,279,089	1,217,458	1,386,148	1,657,080	1,810,007	1,771,987	1,915,709
South America	**1,136,402**	**703,039**	**1,650,283**	**3,013,224**	**3,143,737**	**3,137,247**	**3,168,724**	**3,288,340**	**2,716,688**
of which: Argentina	218,516	81,107	238,921	399,236	508,401	577,233	497,376	506,539	363,711
Brazil[3]	977,697	663,097	1,351,998	2,545,729	2,584,690	2,519,389	2,589,236	2,722,979	2,314,789
Asia-Pacific	**8,796,971**	**11,910,333**	**13,573,073**	**25,058,888**	**32,414,823**	**32,481,277**	**35,159,735**	**37,201,988**	**39,219,660**
of which: China	-	-	605,000	6,737,745	13,897,083	14,485,326	15,523,658	18,084,169	19,919,795
South Korea	55,000	986,751	2,602,008	3,450,478	3,866,206	4,221,617	4,167,089	4,122,604	4,124,116
India	30,538	176,015	517,957	1,846,051	2,831,542	3,040,144	3,296,240	3,155,694	3,158,215
Japan	7,038,108	9,947,972	8,359,434	9,928,143	8,310,362	7,158,525	8,554,503	8,189,323	8,277,070
Africa	**277,058**	**209,603**	**213,444**	**382,095**	**356,872**	**375,585**	**381,377**	**403,821**	**483,206**
of which: South Africa	277,058	209,603	230,577	321,124	295,394	312,265	274,873	265,257	277,491
TOTAL	**29,720,637**	**35,802,207**	**41,215,653**	**53,025,081**	**58,341,703**	**59,897,746**	**63,070,002**	**65,745,403**	**67,728,063**

COMMERCIAL VEHICLES*

(In units)

	1980	1990	2000[2]	2008	2010	2011	2012	2013	2014
Europe	**2,563,596**	**2,688,509**	**2,783,468**	**3,396,455**	**2,549,317**	**2,674,986**	**2,453,409**	**2,365,139**	**2,408,675**
Western Europe	**1,663,080**	**1,671,915**	**2,326,653**	**2,325,472**	**1,686,875**	**1,676,587**	**1,497,474**	**1,452,221**	**1,618,218**
Germany	357,619	315,895	394,697	513,700	353,576	275,035	260,801	278,318	303,522
Belgium	47,029	91,784	121,061	44,367	26,306	nd	nd	38,000	35,195
Spain	152,846	374,049	666,515	598,595	474,387	534,261	439,499	408,670	504,636
France[1]	**439,852**	**474,178**	**468,551**	**423,043**	**305,250**	**311,898**	**284,951**	**282,000**	**322,000**
Italy	166,635	246,178	316,031	364,553	265,017	304,742	274,951	269,741	296,547
The Netherlands[4]	32,102	29,832	52,234	73,271	46,081	32,379	30,754	29,183	29,196
Portugal	58,000	77,466	68,215	42,913	44,166	50,463	47,831	44,318	43,765
The United Kingdom	389,170	270,133	172,442	202,896	123,019	120,189	112,039	88,110	70,731
Sweden	63,080	74,415	41,384	56,012	40,000	n/a	n/a	n/a	n/a
Central and Eastern Europe	**900,516**	**975,000**	**323,203**	***545,440***	**371,279**	**449,002**	**460,253**	**420,988**	**353,451**
Turkey	**19,352**	**41,594**	**133,471**	**525,543**	**491,163**	**549,397**	**495,682**	**491,930**	**437,006**
America	**2,599,948**	**5,032,605**	**9,761,798**	**7,683,330**	**8,139,331**	**9,032,009**	**9,961,555**	**10,687,077**	**11,420,196**
NAFTA	**2,349,318**	**4,775,818**	**9,325,214**	**6,754,191**	**7,088,685**	**7,853,153**	**8,841,625**	**9,395,102**	**10,337,555**
of which: Canada	527,522	850,566	1,411,136	886,805	1,101,112	1,144,639	1,423,066	1,414,643	1,480,357
USA	1,634,846	3,702,787	7,257,640	4,916,900	5,031,439	5,684,544	6,226,752	6,697,597	7,407,601
Mexico	186,950	222,465	656,438	950,486	956,134	1,023,970	1,191,807	1,282,862	1,449,597
South America	**250,630**	**256,787**	**436,584**	**929,139**	**1,050,646**	**1,178,856**	**1,119,930**	**1,291,975**	**1,082,641**
of which: Argentina	63,153	5,337	100,711	197,850	208,139	251,538	267,119	284,468	253,618
Brazil[3]	187,477	251,450	329,519	670,247	797,038	888,472	813,272	989,401	831,329
Asia-Pacific	**4,344,363**	**4,492,406**	**4,497,938**	**6,448,515**	**8,515,432**	**8,094,235**	**8,549,396**	**8,576,545**	**8,140,662**
of which: China	-	-	1,464,000	2,561,435	4,367,678	3,933,550	3,748,150	4,032,656	3,803,095
South Korea	65,012	334,879	512,990	376,204	405,535	435,477	394,677	398,825	400,816
India	83,379	186,640	283,403	486,277	725,531	887,267	878,473	742,731	681,945
Japan	4,004,776	3,538,824	1,781,362	1,647,501	1,318,558	1,240,105	1,388,574	1,440,858	1,497,595
Africa	**127,698**	**125,174**	**115,305**	**203,918**	**158,204**	**181,052**	**205,019**	**221,834**	**236,402**
of which: South Africa	127,698	125,174	126,787	241,841	176,655	220,280	264,551	280,656	288,592
TOTAL	**9,675,970**	**12,399,000**	**17,158,509**	**17,732,218**	**19,362,284**	**19,982,282**	**21,169,379**	**21,850,595**	**22,205,935**

(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 2015.

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

WORLD MOTOR VEHICLE PRODUCTION BY MANUFACTURER AND ECONOMIC REGION, 2014**

(In thousands)

Manufacturers/ Economic areas	North America NAFTA	South America	European Union 28 countries	Other European countries and Turkey	Japan	South Korea	China	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**4,007**	**1,835**	**12,101**	**951**	**21**	**153**	**4,833**	**704**	**24,606**
BMW	364		1,445				287	69	2,166
FCA	2,818	783	919	190			123	33	4,866
DAIMLER AG (light vehicles)	233		1,542	2			150	46	1,973
PSA		152	1,950	48	21		745	1	2,917
RENAULT		380	1,381	532		153		316	2,762
VOLKSWAGEN (light vehicles)	593	521	4,835	179			3,528	240	9,895
American manufacturers	**6,496**	**1,086**	**2,034**	**355**	**0**	**629**	**4,418**	**784**	**15,801**
FORD	2,958	412	1,091	272			883	353	5,970
GM	3,364	673	895	83		629	3,535	431	9,609
NAVISTAR	78	0							78
PACCAR	97	0	48						145
Japanese manufacturers	**5,910**	**467**	**1,378**	**273**	**9,649**	**26**	**3,587**	**5,835**	**27,124**
FUJI	193				696				889
HONDA	1,807	134	120	12	958		856	627	4,514
ISUZU				7	268		41	225	541
MAZDA	102	7			934		207	79	1,328
MITSUBISHI	69	28		9	641		76	440	1,262
NISSAN	1,754	34	641	106	881	26	1,176	480	5,098
SUZUKI		2	146		1,059		266	1,543	3,017
TOYOTA	1,986	262	470	139	4,211		966	2,442	10,475
South Korean manufacturers	**768**	**179**	**631**	**440**	**0**	**3,592**	**1,790**	**611**	**8,012**
Hyundai-Kia	768	179	631	440		3,589	1,790	611	8,009
Chinese manufacturers	**0**	**0**	**418**	**0**	**0**	**0**	**11,281**	**2**	**11,701**
GEELY			418				471	2	891
SAIC							2,088		2,088
Indian manufacturers	**0**	**0**	**461**	**0**	**0**	**151**	**0**	**1,051**	**1,664**
TATA			461			11		473	945
All manufacturers	**17,181**	**3,568**	**17,023**	**2,672**	**9,670**	**4,552**	**25,909**	**9,358**	**89,934**

(As % of total production)

Manufacturers/ Economic areas	North America NAFTA	South America	European Union 28 countries	Other European countries and Turkey	Japan	South Korea	China	Other Asian, Pacific and African countries	TOTAL
European manufacturers	**16%**	**7%**	**49%**	**4%**	**0%**	**1%**	**20%**	**3%**	**100%**
BMW	17%		67%				13%	3%	100%
FCA	58%	16%	19%	4%			3%	1%	100%
DAIMLER AG	12%	0%	78%				8%	2%	100%
PSA		5%	67%	2%	1%		26%		100%
RENAULT		14%	50%	19%		6%		11%	100%
VOLKSWAGEN	6%	5%	49%	2%			36%	2%	100%
American manufacturers	**41%**	**7%**	**13%**	**2%**	**0%**	**4%**	**28%**	**5%**	**100%**
FORD	50%	7%	18%	5%			15%	6%	100%
GM	35%	7%	9%	1%		7%	37%	4%	100%
NAVISTAR	100%								
PACCAR	67%		33%						100%
Japanese manufacturers	**22%**	**2%**	**5%**	**1%**	**36%**	**0%**	**13%**	**22%**	**100%**
FUJI	22%				78%				
HONDA	40%	3%	3%	0%	21%		19%	14%	100%
ISUZU					50%		8%	42%	100%
MAZDA	8%	1%			70%		16%	6%	100%
MITSUBISHI	5%	2%			51%			35%	100%
NISSAN	34%	1%	13%	2%	17%		23%	9%	100%
SUZUKI		0%	5%		35%		9%	51%	100%
TOYOTA	19%	2%	4%	1%	40%		9%	23%	100%
South Korean manufacturers	**10%**	**2%**	**8%**	**5%**		**45%**	**22%**	**8%**	**100%**
Hyundai-Kia	10%	2%	8%	5%		45%	22%	8%	100%
Chinese manufacturers	**0%**	**0%**	**4%**	**0%**	**0%**	**0%**	**96%**	**0%**	**100%**
GEELY			47%				53%	0%	100%
SAIC							100%		
Indian manufacturers	**0%**	**0%**	**28%**	**0%**	**0%**	**9%**	**0%**	**63%**	**100%**
TATA			49%			1%		50%	100%
All manufacturers	**19%**	**4%**	**19%**	**3%**	**11%**	**5%**	**29%**	**10%**	**100%**

Sources: CCFA, OICA.

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

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Germany	2,426,187	3,349,788	3,378,343	2,916,259	3,173,634	3,082,504	2,952,431	3,036,773
Belgium	399,240	473,506	515,204	547,340	572,211	486,737	486,065	482,939
Spain	504,051	988,270	1,381,515	982,015	808,051	699,589	722,703	855,308
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,251,669**	**2,204,229**	**1,898,760**	**1,790,473**	**1,795,885**
Italy	1,717,432	2,307,055	2,415,600	1,961,580	1,749,740	1,403,010	1,304,648	1,360,293
The Netherlands	450,076	502,732	597,640	482,531	555,812	502,544	416,717	387,835
Poland				315,855	277,427	272,719	289,913	327,709
The United Kingdom	1,513,761	2,008,934	2,221,670	2,030,846	1,941,253	2,044,609	2,264,737	2,476,435
Europe (15 countries)	**9,690,146**	**13,125,133**	**14,312,087**	**12,559,450**	**12,353,094**	**11,299,363**	**11,097,524**	**11,658,202**
Europe (17 countries)	**10,065,460**	**13,516,933**	**14,725,982**	**12,981,443**	**12,810,397**	**11,765,469**	**11,547,560**	**12,104,346**
Central and Eastern Europe	**1,900,000**	**1,600,474**	**2,551,000**	**3,515,830**	**4,353,099**	**4,419,549**	**4,387,020**	**3,946,261**
Russia				1,912,794	2,653,688	2,755,384	2,649,181	2,286,877
Turkey	31,000	215,000	456,696	509,784	593,519	556,280	664,655	587,331
Canada	948,967	886,217	849,132	694,349	681,956	748,530	755,615	755,500
USA	8,760,937	9,300,678	8,846,625	5,635,432	6,089,403	7,241,900	7,585,341	7,687,619
Mexico	286,000	353,000	603,010	503,748	592,101	649,333	698,217	745,250
Argentina	215,177	77,306	224,950	489,304	626,037	600,915	684,379	432,696
Brazil	793,028	532,791	1,188,818	2,644,706	2,647,250	2,851,540	2,763,718	2,504,161
China				13,757,794	14,472,416	15,495,240	17,927,730	19,700,569
South Korea	45,972	626,126	1,057,620	1,318,257	1,324,095	1,325,229	1,305,570	1,473,281
India				2,387,197	2,510,313	2,781,919	2,553,979	2,570,531
Indonesia				541,475	602,291	780,785	880,032	879,461
Iran				1,410,403	1,452,965	901,268	691,709	1,106,700
Japan	2,854,185	5,102,659	4,259,771	4,203,181	3,509,036	4,572,333	4,562,282	4,699,590
Malaysia				543,594	535,113	552,189	576,657	588,341
Thailand				346,644	360,441	660,214	663,746	411,402
Australia				592,122	559,314	576,955	566,454	531,596
South Africa				337,130	396,292	440,002	450,561	439,264
WORLD	**28,500,000**	**34,825,967**	**38,689,767**	**55,447,927**	**57,352,882**	**60,473,312**	**62,756,512**	**64,958,981**

Sources: CCFA. CCFA – OICA from 2009, which uses data from its members and thus local definitions of vehicle types.

NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Germany	175,687	203,389	314,804	282,157	334,820	311,498	305,287	319,945
Belgium	34,478	46,670	66,125	60,157	71,300	63,782	61,074	61,174
Spain	105,934	249,185	335,684	132,104	123,353	91,402	100,261	131,973
France	**323,291**	**446,983**	**477,204**	**457,215**	**482,823**	**432,971**	**416,917**	**415,042**
Italy	122,293	159,322	268,057	202,573	193,209	142,754	116,166	132,349
The Netherlands	47,926	68,791	114,354	59,781	71,945	69,349	64,399	62,806
Poland				49,356	59,799	55,813	63,284	64,771
The United Kingdom	274,143	293,473	301,523	262,730	308,230	289,154	330,976	366,590
Europe (15 countries)	**1,276,097**	**1,718,369**	**2,245,881**	**1,646,742**	**1,789,682**	**1,568,952**	**1,561,706**	**1,681,256**
Europe (17 countries)	**1,313,650**	**1,769,569**	**2,310,844**	**1,711,882**	**1,867,948**	**1,646,028**	**1,635,430**	**1,753,789**
Central and Eastern Europe	**850,000**	**874,072**	**579,060**	**595,752**	**702,846**	**826,321**	**764,958**	**665,939**
Russia				194,341	247,924	386,167	349,469	258,789
Turkey	19,000	43,015	199,825	251,129	270,920	261,340	228,469	220,000
Canada	335,827	416,041	736,951	889,039	938,265	967,648	1,024,908	1,133,937
USA	2,476,777	4,845,360	8,965,048	6,136,787	6,951,210	7,544,036	8,298,102	9,154,354
Mexico	166,000	198,000	302,944	344,606	344,679	375,241	402,325	431,055
Argentina	59,881	17,481	81,995	163,098	220,814	231,111	279,538	181,152
Brazil	187,233	180,000	302,288	870,360	986,003	950,531	1,003,652	993,851
China				4,304,142	4,032,698	3,811,195	4,056,349	3,791,324
South Korea	58,502	328,151	372,840	247,693	263,000	237,000	250,516	257,041
India				653,193	777,424	813,589	687,323	606,232
Indonesia				223,235	291,873	335,445	349,779	328,558
Iran				232,440	235,229	143,162	113,041	180,900
Japan	2,161,305	2,674,834	1,703,114	752,967	701,188	797,388	813,231	863,297
Malaysia				61,562	65,010	75,564	79,136	78,124
Thailand				453,713	433,640	763,366	666,926	470,430
Australia				443,452	449,123	535,177	569,773	581,628
South Africa				155,777	175,949	183,919	200,184	205,240
WORLD	**9,150,000**	**13,410,615**	**18,723,143**	**19,558,998**	**20,796,267**	**21,707,819**	**22,718,305**	**23,205,661**

Sources: CCFA. OICA from 2009, which uses data from its members and thus local definitions of vehicle types.

DIESEL PASSENGER CAR PRODUCTION BY MAKE AND COUNTRY

(In units)

	1980	1990	2000	2008	2009	2010	2011	2012	2013	2014
French manufacturers										
Citroën	33,996	213,010	453,604	585,347	542,860	586,769	576,670	486,782		
Peugeot	133,332	334,469	593,349	556,254	484,583	622,644	632,660	554,931		
PSA Peugeot Citroën[1]	167,328	547,479	1,046,953	1,141,601	1,027,443	1,209,413	1,209,330	1,041,713	932,595	936,425
Renault	69,335	256,528	601,495	754,033	716,955	812,306	795,363	645,955		
Dacia	-	-	-	81,153	66,948	132,548	173,917	172,730		
Renault Samsung Motors	-	-	-	41,272	12,280	24,141	35,058	22,961		
Renault-Dacia-Samsung	69,335	256,528	601,495	876,458	796,183	968,995	1,004,338	841,646	915,527	898,864
Total[2]	**236,663**	**804,007**	**1,648,448**	**2,018,059**	**1,823,626**	**2,178,408**	**2,213,668**	**1,883,359**	**1,848,122**	**1,835,289**
TOTAL gasoline + diesel	**2,938,581**	**3,294,815**	**4,598,617**	**4,900,579**	**4,806,612**	**5,610,340**	**5,604,600**	**4,862,707**	**4,794,079**	**4,920,471**
Diesel share	8.1%	24.4%	35.8%	41.2%	37.9%	38.8%	39.5%	38.7%	38.6%	37.3%
Germany										
Mercedes[2]	216,053	141,547	278,772	397,553	329,107	363,443	381,500	366,408	400,324	
Opel	32,742	76,441	288,651	238,910	200,410	236,982	226,521	170,847	143,919	
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,238,822	985,365	1,095,790	1,258,667	1,165,913	1,210,951	
Ford	5,344	90,117	179,130	348,715	317,161	347,553	343,328	277,704	206,654	
BMW	33,520	28,135	194,794	416,432	386,557	448,604	478,091	482,369	522,549	
Total[2]	**465,788**	**662,007**	**1,788,999**	**2,640,456**	**2,227,276**	**2,502,419**	**2,709,347**	**2,491,390**	**2,514,363**	**2,635,285**
TOTAL gasoline + diesel	**3,520,934**	**4,660,657**	**5,131,918**	**5,532,030**	**4,964,509**	**5,552,330**	**5,871,918**	**5,388,459**	**5,439,904**	**5,604,026**
Diesel share	13.2%	14.2%	34.9%	47.7%	44.9%	45.1%	46.1%	46.2%	46.2%	47.0%
Spain										
Total[2]	**n/a**	**150,221**	**681,262**	**910,000**	**830,000**	**1,000,000**	**1,030,000**	**812,016**	**885,850**	**1,004,877**
TOTAL gasoline + diesel	**n/a**	**1,679,301**	**2,445,421**	**1,943,049**	**1,812,688**	**1,913,513**	**1,839,068**	**1,539,680**	**1,719,700**	**1,851,111**
Diesel share	n/a	8.9%	27.9%	47.0%	46.0%	52.0%	56.0%	53.0%	52.0%	54.0%
Italy										
Alfa Romeo	3,851	11,176	77,532	72,405	49,822	60,095	79,687	44,023	39,249	32,493
Fiat	76,513	87,985	223,889	207,314	142,357	150,786	112,145	63,350	60,206	69,632
Lancia		17,679	40,891	36,817	31,229	28,571	32,460	12,568	6,339	1,745
Others	0	297	0	4,763	1,040	1,449	0	0	0	18,593
Total[2]	**80,364**	**117,137**	**342,312**	**321,299**	**224,448**	**240,901**	**224,292**	**119,941**	**105,794**	**122,463**
TOTAL gasoline + diesel	**1,445,221**	**1,874,672**	**1,422,243**	**659,221**	**661,100**	**573,169**	**485,606**	**396,817**	**388,465**	**401,317**
Diesel share	5.6%	6.2%	24.1%	48.7%	34.0%	42.0%	46.2%	30.2%	27.2%	30.5%
The United Kingdom										
Honda	0	0	596	73,016	11,812	35,908	22,177	30,525	54,800	51,731
Jaguar-Land Rover	0	25,374	69,775	161,051	98,242	137,824	162,523	202,097	212,041	213,349
Mini	0	0	0	40,327	31,586	34,752	39,679	35,044	29,529	31,280
Nissan	0	3,200	54,396	118,096	116,139	173,050	226,357	216,048	201,379	233,884
Opel	0	7,695	125,880	34,441	26,955	35,206	79,657	50,704	42908	25,205
Peugeot	0	50,942	37,432	0	0	0	0	0	0	0
Toyota	0	0	38,931	106,271	54,257	55,599	44,298	39,702	49,468	44,879
Others	774	34,740	57,413	2,095	1,739	1,814	1,375	955	924	1,376
Total	**774**	**121,951**	**384,423**	**535,297**	**340,730**	**474,153**	**576,066**	**575,075**	**591,049**	**601,704**
TOTAL gasoline + diesel	**923,744**	**1,295,611**	**1,641,317**	**1,447,550**	**999,288**	**1,274,070**	**1,340,842**	**1,464,906**	**1,509,762**	**1,528,148**
Diesel share	0.1%	9.4%	23.4%	37.0%	34.1%	37.2%	43.0%	39.3%	39.1%	39.4%

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

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

(In thousands of units and as a % of total registrations)

	2005[2]	2008	2009	2010	2011	2012	2013	2014
PSA Peugeot Citroën	**2,111**	**1,902**	**1,892**	**1,849**	**1,689**	**1,471**	**1,345**	**1,395**
	13.6%	12.8%	13.0%	13.4%	12.4%	11.7%	10.9%	10.7%
Renault Group	**1,635**	**1,310**	**1,353**	**1,416**	**1,303**	**1,057**	**1,092**	**1,234**
	10.5%	8.8%	9.3%	10.2%	9.6%	8.4%	8.9%	9.5%
FCA Group	1,085	1,281	1,311	1,080	950	801	741	766
	7.0%	8.6%	9.0%	7.8%	7.0%	6.4%	6.0%	5.9%
Ford Group	1,269	1,238	1,300	1,128	1,092	949	919	960
	8.2%	8.3%	8.9%	8.2%	8.0%	7.6%	7.5%	7.4%
General Motors	1,590	1,362	1,264	1,196	1,173	1,011	968	924
	10.2%	9.2%	8.7%	8.6%	8.6%	8.1%	7.9%	7.1%
Volkswagen Group	3,041	3,094	3,107	2,984	3,216	3,114	3,090	3,306
	19.5%	*20.8%*	*21.3%*	21.6%	23.6%	24.8%	25.1%	25.5%
Daimler	830	792	685	676	673	667	689	715
	5.3%	5.3%	4.7%	4.9%	4.9%	5.3%	5.6%	5.5%
BMW Group	772	823	709	753	812	801	795	833
	5.0%	5.5%	4.9%	5.4%	6.0%	6.4%	6.5%	6.4%
Nissan	361	338	369	407	464	436	424	481
	2.3%	2.3%	2.5%	2.9%	3.4%	3.5%	3.4%	3.7%
Toyota-Lexus-Daihatsu	852	842	770	629	572	548	543	563
	5.5%	5.7%	5.3%	4.5%	4.2%	4.4%	4.4%	4.3%
Other Japanese makes	911	934	850	718	619	537	558	603
	5.8%	6.3%	5.8%	5.2%	4.5%	4.3%	4.5%	4.6%
Hyundai-Kia	569	510	603	614	686	773	767	773
	3.7%	3.4%	4.1%	4.4%	5.0%	6.2%	6.2%	6.0%
Volvo	249	224	206	231	256	231	231	255
	1.6%	1.5%	1.4%	1.7%	1.9%	1.8%	1.9%	2.0%
Tata Group	128	114	90	100	97	128	139	146
	0.8%	0.8%	0.6%	0.7%	0.7%	1.0%	1.1%	1.1%
Other makes (including MG-Rover, Saab)	168	96	54	53	42	23	20	33
	1.1%	**0.6%**	**0.4%**	**0.4%**	**0.3%**	**0.2%**	**0.2%**	**0.3%**
TOTAL EU + SWITZERLAND + NORWAY	**15,572**	**14,860**	**14,564**	**13,832**	**13,644**	**12,546**	**12,322**	**12,987**
	100.0%	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Year-on-year change		-7.8%	-2.0%	-5.0%	-1.4%	-8.0%	-1.8%	5.4%

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

(In thousands of units and as a % of total registrations)

	2005[2]	2008	2009	2010	2011	2012	2013	2014
PSA Peugeot Citroën	**389**	**402**	**321**	**344**	**354**	**307**	**303**	**330**
	18.1%	19.7%	22.3%	21.9%	21.0%	20.8%	20.7%	20.3%
Renault Group	**331**	**299**	**223**	**266**	**279**	**240**	**233**	**258**
	15.4%	14.7%	15.4%	17.0%	16.5%	16.3%	15.9%	15.9%
FCA Group	284	314	220	233	246	197	195	208
	13.2%	15.4%	15.3%	14.9%	14.5%	13.4%	13.3%	12.8%
Ford Group	235	240	162	171	187	164	171	213
	10.9%	11.8%	11.2%	10.9%	11.1%	11.1%	11.7%	13.1%
General Motors	153	141	74	78	93	76	75	84
	7.1%	6.9%	5.1%	5.0%	5.5%	5.2%	5.1%	5.2%
Volkswagen Group	212	234	156	185	215	213	208	225
	9.9%	*11.5%*	*10.8%*	11.8%	12.8%	14.4%	14.2%	13.9%
Daimler	166	183	130	140	147	140	148	159
	7.7%	9.0%	9.0%	8.9%	8.7%	9.5%	10.1%	9.8%
Nissan	103	67	45	43	54	48	45	46
	4.8%	3.3%	3.1%	2.7%	3.2%	3.3%	3.1%	2.8%
Toyota-Lexus-Daihatsu	65	63	39	39	42	34	31	38
	3.0%	3.1%	2.7%	2.5%	2.5%	2.3%	2.1%	2.3%
Other Japanese makes	81	47	33	38	35	25	27	30
	3.8%	2.3%	2.3%	2.4%	2.1%	1.7%	1.9%	1.9%
Hyundai-Kia	52	12	7	6	5	4	4	4
	2.4%	0.6%	0.5%	0.4%	0.3%	0.3%	0.2%	0.2%
Other makes (including MG-Rover, Saab)	78	37	33	27	31	29	27	30
	3.6%	1.8%	2.3%	1.7%	1.8%	1.9%	1.8%	1.9%
TOTAL EU + SWITZERLAND + NORWAY	**2,149**	**2,041**	**1,442**	**1,569**	**1,688**	**1,476**	**1,467**	**1,624**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-10.0%	-29.3%	8.8%	7.6%	-12.6%	-0.6%	10.7%

(1) For the scope of the new EU member states, see page 69. (2) Not including Bulgaria in 2005. 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 Chrysler Automobiles = Alfa Romeo + Fiat + Iveco + Lancia + Ferrari + Chrysler + Jeep + Dodge + other. Ford Group = Ford Europe + Ford USA + other Ford.
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 + Fuso + other
BMW Group = BMW + Mini + Rolls-Royce.
Other Japanese makes: Mazda, Mitsubishi, Subaru, Suzuki, etc.
Tata Group = Jaguar + Land-Rover + Tata.
The scope of consolidation of the Groups as of 1/1/2015.

NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY BY COUNTRY AND BY GROUP IN 2014 *(cf. note page 66)*

(In thousands of units and as a % of total registrations)

	Total	PSA Peugeot Citroën	Citroën - DS	Peugeot	Renault Group	FCA Group	Volkswagen Group	Ford Group	General Motors	BMW-Mini	Daimler	Japanese makes	South Korean makes
Germany	3,037	106	52	54	155	85	1,208	210	226	273	296	268	154
	100%	3.5%	1.7%	1.8%	5.1%	2.8%	39.8%	6.9%	7.4%	9.0%	9.8%	8.8%	5.1%
Austria	303	18	8	10	24	13	109	19	22	18	13	34	28
	100%	6.0%	2.6%	3.4%	7.9%	4.3%	35.8%	6.2%	7.3%	5.9%	4.3%	11.0%	9.4%
Belgium	483	71	32	38	61	18	105	25	34	37	26	51	33
	100%	14.7%	6.7%	8.0%	12.5%	3.7%	21.8%	5.1%	7.1%	7.7%	5.3%	10.6%	6.9%
Denmark	189	31	13	18	14	4	47	15	10	5	6	35	19
	100%	16.5%	6.8%	9.7%	7.5%	2.1%	25.1%	7.9%	5.3%	2.5%	2.9%	18.7%	10.1%
Spain	855	117	55	63	102	36	202	59	69	38	33	112	69
	100%	13.7%	6.4%	7.3%	11.9%	4.3%	23.7%	6.9%	8.1%	4.5%	3.9%	13.0%	8.1%
Finland	106	5	2	3	3	1	31	7	5	5	6	27	8
	100%	4.6%	2.1%	2.4%	2.9%	0.9%	29.1%	7.0%	4.5%	4.9%	5.3%	25.5%	7.7%
France	**1,796**	**536**	**231**	**305**	**456**	**63**	**241**	**75**	**65**	**66**	**53**	**172**	**46**
	100%	29.9%	12.9%	17.0%	25.4%	3.5%	13.4%	4.2%	3.6%	3.7%	3.0%	9.6%	2.5%
Greece	71	5	3	2	3	5	15	4	7	4	3	18	5
	100%	7.6%	4.8%	2.8%	4.2%	7.4%	20.6%	5.2%	10.1%	5.0%	4.3%	25.7%	7.2%
Ireland	96	4	1	3	8	1	25	9	6	5	2	22	13
	100%	4.5%	1.5%	3.0%	7.9%	0.7%	25.6%	9.8%	6.6%	4.7%	2.2%	23.1%	13.0%
Italy	1,360	124	53	71	120	378	190	92	83	63	62	144	76
	100%	9.2%	3.9%	5.2%	8.8%	27.8%	14.0%	6.7%	6.1%	4.6%	4.6%	10.5%	5.6%
Luxembourg	50	5	2	3	6	2	14	2	2	6	4	4	2
	100%	10.0%	4.6%	5.5%	11.8%	4.3%	28.5%	4.7%	4.7%	11.2%	7.6%	7.8%	4.9%
The Netherlands	388	56	19	37	35	18	91	21	24	19	12	61	26
	100%	14.5%	4.9%	9.5%	9.0%	4.6%	23.4%	5.4%	6.1%	4.9%	3.2%	15.8%	6.6%
Portugal	143	21	7	13	20	7	31	6	9	12	12	19	4
	100%	14.4%	5.2%	9.2%	13.8%	5.1%	21.9%	4.0%	6.1%	8.5%	8.1%	13.1%	2.5%
The United Kingdom	2,476	187	83	104	90	82	514	327	272	203	129	392	161
	100%	7.5%	3.4%	4.2%	3.6%	3.3%	20.7%	13.2%	11.0%	8.2%	5.2%	15.8%	6.5%
Sweden	304	13	6	7	15	8	81	11	7	20	12	48	27
	100%	4.3%	1.9%	2.4%	4.8%	2.5%	26.7%	3.7%	2.2%	6.5%	3.8%	15.8%	8.7%
Europe (15 countries)	**11,658**	**1,300**	**569**	**731**	**1,110**	**722**	**2,904**	**881**	**842**	**773**	**668**	**1,407**	**671**
	100%	11.2%	4.9%	6.3%	9.5%	6.2%	24.9%	7.6%	7.2%	6.6%	5.7%	12.1%	5.8%
Norway	144	9	3	7	2	1	37	8	3	11	7	45	7
	100%	6.5%	1.9%	4.5%	1.2%	0.5%	25.4%	5.4%	2.3%	7.3%	4.6%	31.1%	4.6%
Switzerland	300	23	11	11	16	17	93	13	16	25	20	50	16
	100%	7.5%	3.7%	3.8%	5.5%	5.6%	30.9%	4.3%	5.2%	8.5%	6.6%	16.5%	5.5%
Europe (17 countries)	**12,102**	**1,332**	**583**	**749**	**1,128**	**739**	**3,033**	**902**	**861**	**809**	**695**	**1,501**	**694**
	100%	11.0%	4.8%	6.2%	9.3%	6.1%	25.1%	7.5%	7.1%	6.7%	5.7%	12.4%	5.7%
Bulgaria	21	2	1	1	4	0	5	2	1	1	0	4	1
	100%	8.7%	3.3%	5.4%	19.3%	1.1%	23.2%	7.2%	4.2%	4.5%	1.9%	20.4%	6.3%
Croatia	34	4	2	2	3	1	11	2	4	1	1	5	3
	100%	12.5%	5.8%	6.7%	9.3%	2.1%	31.5%	5.2%	11.7%	3.0%	1.5%	13.6%	8.4%
Estonia	21	2	1	1	2	1	5	1	1	0	0	8	2
	100%	9.0%	3.2%	5.8%	10.2%	2.7%	21.4%	3.0%	3.6%	1.9%	1.5%	36.1%	8.0%
Hungary	67	4	2	2	7	2	15	8	9	2	1	14	4
	100%	5.2%	2.4%	2.8%	9.7%	3.0%	22.9%	11.1%	13.8%	2.7%	2.1%	21.2%	6.1%
Latvia	12	1	0	1	1	0	4	0	0	0	0	4	1
	100%	8.7%	2.6%	6.1%	6.3%	3.5%	28.9%	3.2%	3.9%	3.6%	2.2%	29.7%	6.7%
Lithuania	14	0	0	0	1	2	4	1	0	1	0	4	1
	100%	1.6%	0.7%	0.9%	5.9%	16.2%	28.2%	4.0%	3.4%	4.1%	1.5%	25.4%	6.7%
Poland	325	22	10	12	29	11	87	23	28	9	6	71	33
	100%	6.9%	3.1%	3.8%	9.0%	3.4%	26.6%	7.0%	8.5%	2.6%	1.8%	21.7%	10.1%
Czetch Rep.	192	13	5	7	16	4	86	13	7	5	3	16	26
	100%	6.5%	2.8%	3.7%	8.1%	1.9%	44.8%	6.5%	3.8%	2.5%	1.7%	8.4%	13.3%
Romania	70	2	0	1	26	2	15	6	4	2	2	7	3
	100%	2.4%	0.5%	1.8%	37.7%	3.1%	21.6%	8.2%	5.6%	2.5%	2.8%	9.4%	4.5%
Slovakia	72	7	3	4	6	1	26	2	4	2	2	10	11
	100%	9.8%	4.0%	5.8%	8.1%	1.7%	35.7%	2.9%	5.8%	3.0%	2.8%	13.4%	15.4%
Slovenia	54	6	3	3	11	2	16	3	4	1	1	5	3
	100%	12.0%	5.7%	6.3%	20.2%	4.1%	30.5%	4.9%	8.2%	2.6%	1.5%	9.4%	6.4%
11 new EU member states	**885**	**63**	**27**	**36**	**106**	**26**	**273**	**58**	**63**	**24**	**17**	**146**	**88**
	100%	7.1%	3.1%	4.0%	11.9%	3.0%	30.9%	6.6%	7.2%	2.7%	1.9%	16.5%	9.9%
Europe (28 countries)	**12,987**	**1,395**	**610**	**785**	**1,234**	**766**	**3,306**	**960**	**924**	**833**	**712**	**1,648**	**781**
	100%	10.7%	4.7%	6.0%	9.5%	5.9%	25.5%	7.4%	7.1%	6.4%	5.5%	12.7%	6.0%

NEW PASSENGER CAR REGISTRATIONS BY GROUP IN WESTERN EUROPE

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

(In thousands of units and as a % of total registrations)

	1990	2000	2010[1]	2011	2012	2013	2014
PSA Peugeot Citroën	**1,719**	**1,930**	**1,776**	**1,620**	**1,407**	**1,282**	**1,332**
	12.7%	13.1%	13.7%	12.7%	12.0%	11.1%	11.0%
Renault Group	**1,315**	**1,559**	**1,305**	**1,195**	**967**	**1,005**	**1,128**
	9.7%	10.6%	10.1%	9.3%	8.2%	8.7%	9.3%
FCA Group	1,890	1,575	1,035	916	770	716	739
	14.0%	10.7%	8.0%	7.2%	6.5%	6.2%	6.1%
Ford Group	1,540	1,248	1,063	1,033	901	873	902
	11.4%	8.5%	8.2%	8.1%	7.7%	7.6%	7.5%
General Motors	1,560	1,720	1,119	1,099	944	906	861
	11.5%	11.7%	8.6%	8.6%	8.0%	7.9%	7.1%
Volkswagen Group	2,138	2,776	2,757	2,979	2,887	2,862	3,033
	15.8%	*18.8%*	21.3%	23.3%	24.5%	24.8%	25.1%
Daimler	438	811	662	659	653	672	695
	3.2%	5.5%	5.1%	5.1%	5.6%	5.8%	5.7%
BMW Group	364	499	735	792	780	775	809
	2.7%	3.4%	5.7%	6.2%	6.6%	6.7%	6.7%
Nissan	395	392	384	436	408	400	453
	2.9%	2.7%	3.0%	3.4%	3.5%	3.5%	3.7%
Toyota-Lexus-Daihatsu	406	576	582	531	507	497	506
	3.0%	3.9%	4.5%	4.2%	4.3%	4.3%	4.2%
Other Japanese makes	789	701	651	563	487	504	542
	5.8%	4.8%	5.0%	4.4%	4.1%	4.4%	4.5%
Hyundai-Kia	18	303	539	604	687	679	686
	0.1%	2.1%	4.2%	4.7%	5.8%	5.9%	5.7%
Volvo	235	230	222	245	222	221	245
	1.7%	1.6%	1.7%	1.9%	1.9%	1.9%	2.0%
Tata Group	44	112	97	94	124	135	142
	0.3%	0.8%	0.7%	0.7%	1.1%	1.2%	1.2%
Other makes (including MG-Rover, Saab)	666	304	47	37	19	18	30
	4.9%	2.1%	0.4%	0.3%	0.2%	0.2%	0.2%
TOTAL EUROPE 17 countries	**13,517**	**14,738**	**12,975**	**12,802**	**11,763**	**11,545**	**12,102**
	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	0.9%	-2.1%	-5.0%	-1.3%	-8.1%	-1.9%	4.8%

(1) In 2006, 135,500 light commercial vehicles, none of which were French makes, were reclassified as passenger cars in Spain. The scope of the groups corresponds to their situation on 1/1/2015 *(see page 66)*.

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

(In thousands of units and as a % of total registrations)

	1990	2000	2009	2010 (1)	2011	2012	2013	2014
PSA Peugeot Citroën	**251**	**349**	**299**	**326**	**330**	**286**	**281**	**307**
	16.5%	18.1%	22.5%	22.1%	20.9%	20.8%	20.6%	20.4%
Renault Group	**278**	**272**	**208**	**251**	**261**	**224**	**215**	**237**
	18.3%	14.1%	15.6%	17.0%	16.5%	16.3%	15.8%	15.7%
FCA Group	163	275	200	214	225	178	174	184
	10.7%	14.2%	15.1%	14.5%	14.3%	12.9%	12.8%	12.2%
Ford Group	195	180	151	161	176	154	161	199
	12.9%	9.3%	11.4%	10.9%	11.1%	11.2%	11.8%	13.2%
General Motors	81	92	70	75	89	73	72	79
	5.3%	4.8%	5.3%	5.1%	5.6%	5.3%	5.3%	5.2%
Volkswagen Group	134	202	136	170	200	197	194	210
	8.9%	*10.5%*	10.2%	11.6%	12.7%	14.3%	14.2%	13.9%
Daimler	74	178	121	133	141	133	140	151
	4.9%	9.2%	9.1%	9.0%	8.9%	9.7%	10.3%	10.0%
Nissan	105	100	41	41	51	46	43	44
	6.9%	5.2%	3.1%	2.8%	3.2%	3.3%	3.2%	2.9%
Toyota-Lexus-Daihatsu	81	69	35	37	40	31	28	35
	5.3%	3.6%	2.7%	2.5%	2.5%	2.3%	2.1%	2.3%
Other Japanese makes	69	102	31	36	33	23	25	28
	4.6%	5.3%	2.3%	2.4%	2.1%	1.7%	1.9%	1.9%
Hyundai-Kia	0	44	5	5	5	3	3	3
	0.0%	2.3%	0.4%	0.4%	0.3%	0.3%	0.2%	0.2%
Other makes	85	69	31	26	30	28	26	29
	5.6%	3.6%	2.3%	1.8%	1.9%	2.0%	1.9%	1.9%
TOTAL EUROPE 17 countries	**1,516**	**1,931**	**1,327**	**1,475**	**1,580**	**1,376**	**1,364**	**1,506**
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	-2.6%	5.6%	-27.6%	11.1%	7.1%	-12.9%	-0.8%	10.4%

NEW PASSENGER CAR REGISTRATIONS IN NEW EU MEMBER STATES[1]

(In thousands of units and as a % of total registrations)

	2005[2]	2008	2009	2010	2011	2012	2013	2014
PSA Peugeot Citroën	**99**	**110**	**75**	**73**	**69**	**64**	**63**	**63**
	9.5%	8.6%	8.3%	8.5%	8.2%	8.2%	8.1%	7.1%
Renault Group	**193**	**172**	**116**	**112**	**108**	**90**	**87**	**106**
	18.7%	13.6%	12.8%	13.0%	12.9%	11.5%	11.3%	11.9%
FCA Group	50	71	59	45	34	30	25	26
	4.8%	5.6%	6.6%	5.3%	4.0%	3.9%	3.2%	3.0%
Ford Group	59	91	71	65	59	48	46	58
	5.7%	7.2%	7.9%	7.5%	7.0%	6.2%	6.0%	6.6%
General Motors	132	139	76	76	74	67	61	63
	12.7%	11.0%	8.4%	8.9%	8.8%	8.5%	7.9%	7.2%
Volkswagen Group	257	297	220	226	238	227	228	273
	24.8%	*23.5%*	24.5%	26.4%	28.2%	28.9%	29.4%	30.9%
Daimler	11	21	14	13	14	14	17	20
	1.1%	1.6%	1.5%	1.6%	1.7%	1.8%	2.2%	2.2%
BMW Group	11	20	14	17	20	21	21	24
	1.0%	1.5%	1.6%	2.0%	2.4%	2.7%	2.7%	2.7%
Nissan	19	25	21	23	28	28	24	28
	1.8%	1.9%	2.3%	2.6%	3.3%	3.6%	3.1%	3.1%
Toyota-Lexus-Daihatsu	60	86	56	47	41	41	47	57
	5.8%	6.8%	6.2%	5.5%	4.8%	5.2%	6.0%	6.5%
Other Japanese makes	91	128	81	67	56	50	53	61
	8.7%	10.1%	9.0%	7.9%	6.6%	6.4%	6.9%	6.9%
Hyundai-Kia	39	88	83	75	81	86	89	88
	3.8%	6.9%	9.2%	8.7%	9.7%	10.9%	11.4%	9.9%
Volvo	7	11	10	9	10	9	9	10
	0.6%	0.8%	1.1%	1.1%	1.2%	1.2%	1.2%	1.2%
Tata Group	2	4	3	3	3	3	4	4
	0.2%	0.3%	0.3%	0.3%	0.4%	0.4%	0.5%	0.4%
Other makes (including MG-Rover, Saab)	7	5	3	6	5	5	1	3
	0.7%	0.4%	0.3%	0.7%	0.6%	0.6%	0.2%	0.3%
TOTAL NEW EU MEMBER STATES	**1,035**	**1,267**	**900**	**857**	**841**	**783**	**777**	**885**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-2.0%	-29.0%	-4.8%	-1.8%	-6.9%	-0.8%	13.9%

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN NEW EU MEMBER STATES[1]

(In thousands of units and as a % of total registrations)

	2005[2]	2008	2009	2010	2011	2012	2013	2014
PSA Peugeot Citroën	**20**	**37**	**22**	**18**	**25**	**20**	**22**	**23**
	13.6%	17.8%	19.0%	19.5%	22.9%	20.0%	21.2%	19.3%
Renault Group	**35**	**32**	**15**	**15**	**18**	**16**	**18**	**21**
	24.4%	15.2%	13.2%	16.3%	16.2%	16.3%	17.1%	17.8%
FCA Group	21	35	20	19	21	20	21	23
	14.7%	16.7%	17.1%	19.8%	19.0%	19.6%	20.1%	19.6%
Ford Group	14	21	11	10	11	10	10	14
	9.8%	10.3%	9.7%	10.1%	10.2%	10.1%	10.2%	11.5%
General Motors	8	9	4	3	4	3	3	5
	5.2%	4.2%	3.1%	3.2%	3.6%	3.3%	3.4%	4.5%
Volkswagen Group	21	35	20	14	15	16	14	15
	14.7%	*16.6%*	17.5%	14.9%	13.7%	15.5%	13.6%	13.1%
Daimler	10	16	9	7	6	7	7	8
	6.8%	7.5%	8.1%	7.9%	5.9%	7.1%	7.2%	6.7%
Nissan	2	6	4	2	3	2	2	2
	1.4%	2.8%	3.9%	2.5%	2.9%	2.2%	1.9%	1.5%
Toyota-Lexus-Daihatsu	2	7	4	2	3	3	3	3
	1.6%	3.2%	3.1%	2.2%	2.5%	3.0%	2.8%	2.8%
Other Japanese makes	3	5	2	2	3	2	2	2
	2.3%	2.5%	1.9%	2.1%	2.4%	1.7%	1.7%	1.8%
Hyundai-Kia	5	4	2	1	0	0	0	1
	3.2%	1.7%	1.5%	0.7%	0.3%	0.2%	0.1%	0.4%
Other makes (including MG-Rover, Saab)	4	3	2	1	1	1	1	1
	2.5%	1.5%	1.9%	0.8%	0.5%	1.0%	0.8%	0.9%
TOTAL NEW MEMBER STATES	**145**	**208**	**115**	**95**	**108**	**100**	**103**	**118**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		5.0%	-44.7%	-17.5%	14.2%	-7.3%	2.5%	14.8%

(1) New EU member states not including Cyprus and Malta, including Croatia. (2) Not including Bulgaria in 2005. The scope of the groups reflects their situation as at 01/01/2015 *(cf. Page 66)*.

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Germany	2,426,187	3,349,788	3,378,343	2,916,259	3,173,634	3,082,504	2,952,431	3,036,773
Austria	227,548	288,618	309,427	328,563	356,145	336,010	319,035	303,318
Belgium	399,240	473,506	515,204	547,340	572,211	486,737	486,065	482,939
Denmark	73,774	80,654	112,688	153,583	169,744	170,587	181,896	188,612
Spain[1]	504,051	988,270	1,381,515	982,015	808,051	699,589	722,689	855,308
Finland	103,167	139,095	134,646	107,346	121,171	111,147	103,314	106,259
France	**1,873,202**	**2,309,130**	**2,133,884**	**2,251,669**	**2,204,229**	**1,898,760**	**1,790,456**	**1,795,885**
Greece	35,700	115,480	290,222	141,501	97,680	58,479	58,696	71,222
Ireland	93,563	82,584	230,989	88,445	89,927	79,494	74,364	96,343
Italy	1,717,432	2,307,055	2,415,600	1,961,578	1,749,085	1,403,024	1,304,573	1,360,430
Luxembourg	21,500	38,422	41,896	49,726	49,881	50,398	46,624	49,793
Norway	95,550	*61,901*	*97,376*	127,754	138,345	137,967	142,151	144,202
The Netherlands	450,076	502,732	597,640	482,527	555,812	502,455	416,733	387,551
Portugal	58,357	210,924	257,834	223,464	153,404	95,309	105,921	142,826
The United Kingdom	1,513,761	2,008,934	2,221,670	2,030,846	1,941,253	2,044,609	2,264,737	2,476,435
Sweden	192,588	229,941	290,529	289,684	304,984	279,899	269,558	303,948
Switzerland	279,764	329,899	316,519	292,453	316,846	325,948	305,928	300,110
European Union[2]	8,568,735	12,467,479	14,312,087	12,554,546	12,347,211	11,299,001	11,097,092	11,657,642
Europe (17 countries)	**10,065,460**	**13,516,933**	**14,725,982**	**12,974,753**	**12,802,402**	**11,762,916**	**11,545,171**	**12,101,954**

(1) In 2006, 135,500 light commercial vehicles were reclassified as passenger cars in Spain. (2) European Union: nine countries in 1980, 10 in 1985, 12 from 1990 to 1994, 15 from 1995.

NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

(In units and as a % of total registrations)

	1980	1990	2000	2010	2011	2012	2013	2014
Germany	193,841	327,046	1,023,997	1,220,675	1,493,614	1,482,980	1,400,556	1,450,190
	8.0%	9.8%	30.3%	41.9%	47.1%	48.1%	47.4%	47.8%
Austria	7,425	74,197	191,402	167,106	194,519	189,496	180,847	172,382
	3.3%	25.7%	61.9%	50.9%	54.6%	56.4%	56.7%	56.8%
Belgium	54,897	154,804	290,301	415,728	431,059	334,305	314,844	299,149
	13.8%	32.7%	56.3%	76.0%	75.3%	68.7%	64.8%	61.9%
Denmark	2,352	3,305	14,898	72,670	81,415	68,215	58,119	59,852
	3.2%	4.1%	13.2%	47.3%	48.0%	40.0%	32.0%	31.7%
Spain[1]	-	140,740	734,256	693,905	568,246	482,049	479,318	565,409
		14.2%	53.1%	70.7%	70.3%	68.9%	66.3%	66.1%
Finland	-	7,215	-	44,574	50,905	42,846	38,372	41,299
		5.2%		41.5%	42.0%	38.5%	37.1%	38.9%
France	**186,050**	**762,054**	**1,046,485**	**1,593,173**	**1,596,155**	**1,384,544**	**1,199,729**	**1,146,658**
	9.9%	33.0%	49.0%	70.8%	72.4%	72.9%	67.0%	63.8%
Greece	-	60	2,006	5,661	9,722	23,384	33,993	45,383
		0.1%	0.7%	4.0%	10.0%	40.0%	57.9%	63.7%
Ireland	-	12,413	23,259	55,016	62,911	58,089	53,838	70,520
		15.0%	10.1%	62.2%	70.0%	73.1%	72.4%	73.2%
Italy	138,562	179,779	812,203	901,310	965,301	745,257	703,122	747,020
	8.1%	7.8%	33.6%	45.9%	55.2%	53.1%	53.9%	54.9%
Luxembourg	-	8,206	21,110	37,403	38,194	38,348	34,230	35,825
		21.4%	50.4%	75.2%	76.6%	76.1%	73.4%	71.9%
Norway	-	1,581	8,761	95,733	104,665	88,530	74,693	70,190
		2.6%	9.0%	74.9%	75.7%	64.2%	52.5%	48.7%
The Netherlands	30,450	54,738	134,426	98,477	156,508	142,697	103,518	105,018
	6.8%	10.9%	22.5%	20.4%	28.2%	28.4%	24.8%	27.1%
Portugal	-	10,426	62,417	149,046	106,811	67,239	76,575	101,710
		4.9%	24.2%	66.7%	69.6%	70.5%	72.3%	71.2%
The United Kingdom	5,850	128,160	313,149	936,448	981,516	1,038,770	1,127,758	1,240,175
	0.4%	6.4%	14.1%	46.1%	50.6%	50.8%	49.8%	50.1%
Sweden	-	1,335	18,325	147,802	187,605	186,970	165,717	179,093
		0.6%	6.3%	51.0%	61.5%	66.8%	61.5%	58.9%
Switzerland	-	9,998	29,466	88,760	104,227	120,421	113,255	111,072
		3.0%	9.3%	30.4%	32.9%	36.9%	37.0%	37.0%
Europe (17 countries)[1]	**619,427**	**1,866,021**	**4,726,461**	**6,723,487**	**7,133,373**	**6,494,140**	**6,158,484**	**6,440,945**
% diesel in Europe	7.1%	13.9%	32.1%	51.8%	55.7%	55.2%	53.3%	53.2%
Year-on-year change		+0.7%	+1 0.7%	+6.9%	+6.1%	-9.0%	-5.2%	+4.6%

(1) In 2006, 135,500 light commercial vehicles were reclassified as passenger cars in Spain.

NEW HYBRID OR ELECTRIC POWERED PASSENGER CARS REGISTRATIONS IN WESTERN EUROPE

(In units and as a % of total registrations)

	Power	2005	2008	2009	2010	2011	2012	2013	2014
Germany	electric	0	0	14	160	1,731	2,451	5,800	8,283
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.3%
	hybrid	3,559	6,126	8,000	10,174	11,788	20,617	25,330	26,312
		0.1%	0.2%	0.2%	0.3%	0.4%	0.7%	0.9%	0.9%
Austria	electric	0	2	39	112	631	426	654	1,281
		0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.2%	0.4%
	hybrid	460	665	1,055	1,248	1,310	2,174	2,595	2,360
		0.1%	0.2%	0.3%	0.4%	0.4%	0.6%	0.8%	0.8%
Belgium	electric	0	0	0	47	263	562	479	992
		0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%
	hybrid	471	1,877	1,839	4,073	6,676	5,875	6,304	8,523
		0.1%	0.4%	0.4%	0.7%	1.2%	1.2%	1.3%	1.8%
Denmark	electric	2	5	78	50	460	527	533	1,637
		0.0%	0.0%	0.1%	0.0%	0.3%	0.3%	0.3%	0.9%
	hybrid	5	48	58	148	263	431	1,099	1,233
		0.0%	0.0%	0.1%	0.1%	0.2%	0.3%	0.6%	0.7%
Spain	electric	0	0	1	69	367	439	811	1,076
		0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
	hybrid	908	4,277	4,582	6,253	10,061	10,073	10,152	12,458
		0.1%	0.4%	0.5%	0.6%	1.2%	1.4%	1.4%	1.5%
France	**electric**	**6**	**4**	**12**	**184**	**2,630**	**5,663**	**8,779**	**10,561**
		0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.5%	0.6%
	hybrid	**2,857**	**8,468**	**9,876**	**9,655**	**13,635**	**27,889**	**46,745**	**43,143**
		0.1%	0.4%	0.4%	0.4%	0.6%	1.5%	2.6%	2.4%
Italy	electric	28	120	60	112	306	524	864	1,099
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	hybrid	1,132	2,796	7,311	4,841	5,161	6,836	15,156	21,488
		0.1%	0.1%	0.3%	0.2%	0.3%	0.5%	1.2%	1.6%
Norway	electric	7	177	117	355	1,996	3,950	7,882	18,094
		0.0%	0.2%	0.1%	0.3%	1.4%	2.9%	5.5%	12.5%
	hybrid	337	1,762	1,973	3,144	3,645	6,116	9,827	10,774
		0.3%	1.6%	2.0%	2.5%	2.6%	4.4%	6.9%	7.5%
The Netherlands	electric	0	2	22	96	846	828	2,618	2,914
		0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.6%	0.8%
	hybrid	2,940	11,814	16,275	16,099	14,868	25,614	43,639	26,738
		0.6%	2.4%	4.2%	3.3%	2.7%	5.1%	10.5%	6.9%
The United Kingdom	electric	0	179	55	167	1,098	1,262	2,512	6,697
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.3%
	hybrid	5,766	15,385	14,645	22,148	23,398	25,892	30,203	45,148
		0.2%	0.7%	0.7%	1.1%	1.2%	1.3%	1.3%	1.8%
Sweden	electric	1	0	21	9	181	268	435	1,240
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.4%
	hybrid	1,947	4,153	3,058	3,628	2,909	3,539	5,823	10,410
		0.7%	1.6%	1.4%	1.3%	1.0%	1.3%	2.2%	3.4%
Switzerland	electric	13	21	53	199	446	523	1,177	1,804
		0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.4%	0.6%
	hybrid	1,413	3,118	3,905	4,210	5,358	6,945	7,225	6,949
		0.5%	1.1%	1.5%	1.4%	1.7%	2.1%	2.4%	2.3%
Western Europe (including countries not presented)	**electric**	**57**	**515**	**475**	**1,611**	**11,263**	**17,707**	**32,969**	**56,617**
		0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.3%	0.5%
	hybrid	**23,210**	**66,711**	**76,525**	**90,198**	**102,979**	**146,287**	**208,934**	**222,108**
		0.2%	0.5%	0.6%	0.7%	0.8%	1.2%	1.8%	1.8%

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

(In units)

	1980	1990	2000	2010 [1]	2011	2012	2013	2014
Germany	101,393	125,384	212,290	202,446	239,298	224,957	217,966	233,882
Austria	15,473	21,539	27,243	28,130	32,677	31,643	30,849	31,320
Belgium	30,609	52,490	54,090	56,006	65,027	57,899	56,734	56,886
Denmark	15,711	19,649	33,092	16,848	24,881	24,626	24,532	29,133
Spain[1]	88,042	229,821	299,246	116,770	104,698	77,088	85,855	114,247
Finland	12,574	27,507	15,056	11,550	15,165	12,298	11,194	11,359
France	**277,887**	**393,795**	**414,966**	**417,612**	**429,254**	**384,050**	**367,331**	**372,074**
Greece	45,124	29,480	23,008	10,935	6,459	3,780	3,534	5,066
Ireland	8,640	24,136	41,474	10,486	11,378	10,893	11,016	16,704
Italy	109,270	156,995	225,517	177,887	171,512	117,387	101,858	119,442
Luxembourg	1,014	1,863	3,083	3,291	3,666	3,485	3,325	3,600
Norway	11,395	20,582	31,627	30,422	37,030	33,416	32,293	30,717
The Netherlands	33,498	53,080	96,570	49,863	58,970	56,693	50,756	51,927
Portugal	38,597	64,236	152,836	45,756	35,048	16,046	18,222	26,290
The United Kingdom	212,042	247,728	245,163	231,539	266,923	247,936	278,957	329,761
Sweden	12,038	26,362	31,854	38,543	46,868	39,970	37,690	42,223
Switzerland	18,091	22,753	24,121	26,507	31,070	33,537	31,938	31,689
European Union[2]	790,064	1,398,657	1,875,488	1,417,662	1,511,824	1,308,751	1,299,819	1,443,914
Europe (17 countries)[1]	**1,031,398**	**1,517,400**	**1,931,236**	**1,474,591**	**1,579,924**	**1,375,704**	**1,364,050**	**1,506,320**

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

(In units)

	1980	1990	2000	2010 [1]	2011	2012	2013	2014
Germany	59,061	73,770	96,830	75,014	90,902	82,020	82,233	81,030
Austria	5,642	7,222	8,508	5,138	7,257	6,474	7,320	6,706
Belgium	8,604	10,690	11,061	7,133	9,449	8,277	7,400	7,638
Denmark	3,179	3,539	4,597	2,682	3,560	3,654	4,233	3,628
Spain	23,208	30,432	33,700	13,215	15,790	12,539	12,900	15,896
Finland	4,497	4,218	3,072	2,368	2,794	2,749	3,076	2,168
France	**41,846**	**50,028**	**57,918**	**34,221**	**47,363**	**43,378**	**43,265**	**37,559**
Greece	1,178	497	1,633	1,081	459	166	317	335
Ireland	3,511	2,748	4,666	1,011	1,079	1,113	1,553	1,747
Italy		31,973	38,388	17,532	18,859	13,273	13,324	11,957
Luxembourg	690	1,136	1,451	803	1,274	1,011	966	1,020
Norway	3,056	2,106	3,564	3,126	3,933	4,695	4,688	4,657
The Netherlands	13,346	14,804	16,835	9,390	12,551	11,896	13,057	10,201
Portugal	8,370	7,186	7,403	3,116	2,651	1,881	2,201	3,071
The United Kingdom	57,489	45,794	51,864	27,988	37,925	38,995	49,796	35,033
Sweden	6,703	5,998	5,549	4,605	5,855	5,369	4,698	5,089
Switzerland	3,955	4,832	4,733	3,388	4,326	3,847	3,503	4,425
European Union[2]	187,726	272,597	343,475	205,297	257,768	232,795	246,339	223,078
Europe (17 countries)	**244,335**	**296,973**	**351,772**	**211,811**	**266,027**	**241,337**	**254,530**	**232,160**

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

(In units)

	1980	1990	2000	2010 [1]	2011	2012	2013	2014
Germany	6,058	4,235	5,684	4,697	4,620	4,521	5,088	5,033
Austria	676	450	706	733	576	702	688	871
Belgium	585	580	974	909	669	576	626	982
Denmark	579	311	419	450	334	320	288	330
Spain	1,511	2,376	2,738	2,119	2,865	1,775	1,506	1,830
Finland	625	429		300	218	337	225	436
France	**3,558**	**3,160**	**4,320**	**5,382**	**6,206**	**5,545**	**6,321**	**5,409**
Greece		625	374	325	84	90	25	43
Ireland		24	121	47	75	232	163	206
Italy		3,825	4,152	3,931	3,200	2,200	2,401	1,797
Luxembourg	53	57	108	173	194	155	167	156
Norway	684	380	427	1,052	1,005	831	910	697
The Netherlands	1,082	1,069	949	524	427	688	587	649
Portugal		482	806	418	259	179	155	170
The United Kingdom	5,792	3,324	4,496	3,203	3,382	3,798	3,648	3,373
Sweden	943	863	1,071	1,302	1,359	1,202	1,080	1,207
Switzerland	371	580	491	476	606	440	534	568
European Union[2]	17,707	20,068	26,918	24,513	24,468	22,320	22,968	22,492
Europe (17 countries)	**22,517**	**22,770**	**27,836**	**26,041**	**26,079**	**23,591**	**24,412**	**23,757**

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

NEW PASSENGER CAR REGISTRATIONS IN NEW EU MEMBER STATES

(In units)

	2000	2005	2009	2010	2011	2012	2013	2014
Bulgaria			21,478	15,646	18,631	20,986	20,718	21,203
Croatia	62,009	70,541	44,918	38,587	41,561	31,360	27,802	33,962
Estonia	10,600	19,640	9,946	10,295	17,070	19,424	19,694	21,135
Hungary	133,233	198,982	60,189	43,476	45,094	53,059	56,139	67,476
Latvia	7,300	16,602	5,367	6,365	10,980	10,665	10,636	12,452
Lithuania	6,158	10,467	7,515	7,970	13,234	12,165	12,163	14,461
Poland	478,752	235,522	320,206	333,490	297,937	270,895	288,998	325,371
Czech Republic	148,592	151,699	167,708	169,580	173,595	174,320	164,746	192,314
Romania	64,432	215,554	130,195	106,333	94,619	72,143	57,710	70,172
Slovakia	55,090	57,125	74,717	64,033	68,254	69,268	66,000	72,252
Slovenia	67,665	59,324	57,967	61,142	60,193	50,091	51,585	53,959
TOTAL new EU countries(1)	**907,400**	**749,361**	**855,288**	**818,330**	**799,607**	**753,016**	**776,191**	**884,757**

NEW LIGHT COMMERCIAL VEHICLE (UP TO 5 METRIC TONS) REGISTRATIONS IN THE NEW EU MEMBER COUNTRIES

(In units)

	2000	2005	2009	2010	2011	2012	2013	2014
Bulgaria			4,275	3,211	2,979	3,054	3,346	4,225
Croatia	3,360	7,671	4,777	2,845	3,653	3,658	5,309	5,240
Estonia	1,500	2,944	1,206	1,406	2,478	2,801	2,943	3,296
Hungary	26,686	20,479	10,619	9,337	11,564	11,058	11,573	16,066
Latvia	900	1,753	555	649	1,926	2,307	2,380	2,688
Lithuania	1,270	3,371	884	1,044	1,939	1,715	1,967	2,160
Poland	33,653	35,985	43,764	42,852	47,206	40,862	42,532	47,643
Czech Republic	14,786	16,024	13,258	11,318	13,149	11,669	11,768	13,344
Romania	14,789	35,842	15,397	10,404	11,791	12,269	10,046	11,399
Slovakia	5,812	14,428	15,722	6,953	5,717	5,135	5,094	5,661
Slovenia	6,274	6,897	4,452	4,744	5,791	5,820	6,072	6,373
TOTAL new EU countries(1)	**90,900**	**101,881**	**110,132**	**91,918**	**104,540**	**96,690**	**103,030**	**118,095**

NEW LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN THE NEW EU MEMBER STATES

(In units)

	2000	2005	2009	2010	2011	2012	2013	2014
Bulgaria			25,753	18,857	21,610	24,040	24,064	25,428
Croatia	65,369	78,212	49,695	41,432	45,214	35,018	33,111	39,202
Estonia	12,100	22,584	11,152	11,701	19,548	22,225	22,637	24,431
Hungary	159,919	219,461	70,808	52,813	56,658	64,117	67,712	83,542
Latvia	8,200	18,355	5,922	7,014	12,906	12,972	13,016	15,140
Lithuania	7,428	13,838	8,399	9,014	15,173	13,880	14,130	16,621
Poland	512,405	271,507	363,970	376,342	345,143	311,757	331,530	373,014
Czech Republic	163,378	167,723	180,966	180,898	186,744	185,989	176,514	205,658
Romania	79,221	251,396	145,592	116,737	106,410	84,412	67,756	81,571
Slovakia	60,902	71,553	90,439	70,986	73,971	74,403	71,094	77,913
Slovenia	73,939	66,221	62,419	65,886	65,984	55,911	57,657	60,332
TOTAL new EU countries(1)	**998,300**	**851,242**	**965,420**	**910,248**	**904,147**	**849,706**	**879,221**	**1,002,852**

NEW HEAVY TRUCK, COACH AND BUS (OVER 5 METRIC TONS) REGISTRATIONS IN THE NEW EU MEMBER COUNTRIES

(In units)

	2000	2005	2009	2010	2011	2012	2013	2014
Bulgaria*			800	1,000	1,300	800	1,300	1,300
Croatia	612	1,463	1,164	599	721	636	708	994
Estonia	400	927	337	502	798	848	1,034	910
Hungary	2,900	4,400	1,800	2,408	4,335	4,051	5,263	5,177
Latvia	1,000	1,284	322	520	1,406	1,525	1,323	954
Lithuania	1,000	2,297	519	1,355	2,756	2,789	3,456	2,373
Poland	7,464	11,079	8,172	11,611	16,800	16,461	19,748	17,884
Czech Republic	6,400	8,200	5,824	5,750	8,201	7,416	8,787	10,201
Romania	3,113	5,019	2,370	2,686	4,014	3,060	3,491	4,168
Slovakia	1,796	3,754	2,322	2,870	3,962	3,856	4,131	4,063
Slovenia	1,876	1,635	867	985	1,467	1,131	1,255	1,607
TOTAL new EU countries(1)	**22,800**	**33,500**	**23,300**	**29,700**	**45,000**	**41,900**	**50,500**	**49,600**

(1) New EU member states: eight countries in 2000; 10 countries between 2006 and 2012; 11 countries from 2013.

*CCFA estimates.

WORLD VEHICLE PRODUCTION BY MAKE

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Citroën	536,415	783,224	1,168,470	1,452,847	1,437,065	1,243,983	1,261,890	1,176,273
DS								115,835
Peugeot	734,461	1,369,359	1,708,968	2,152,331	2,144,894	1,667,424	1,552,416	1,602,350
Autres	-	-	-	-	-	-	19,587	22,670
PSA Peugeot Citroën[1]	**1,647,221**	**2,152,583**	**2,877,438**	**3,605,178**	**3,581,959**	**2,911,407**	**2,833,893**	**2,917,128**
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	2,099,027	2,254,331	2,150,993	2,128,489	2,091,282
Dacia	-	-	55,183	341,090	327,393	358,036	443,879	517,537
Renault Samsung Motors	-	-	14,517	276,169	243,365	155,872	132,307	153,150
Renault-Dacia-Samsung[2]	**1,659,099**	**1,571,264**	**2,426,316**	**2,716,286**	**2,825,089**	**2,664,901**	**2,704,675**	**2,761,969**
C.B.M.	105							
Renault Trucks [3]	**54,086**	**60,263**	**96,040**	**31,874**	**41,169**	**n/a**	**n/a**	**n/a**
of which: Mack Trucks	-	*15,423*	*34,562*					
Etalmobil (Sovam)	113	75	44	0	0	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**	**6,353,338**	**6,448,217**	**5,576,308**	**5,538,568**	**5,679,097**
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	2010	2011	2012	2013	2014
Citroën	49,034	93,259	192,238	180,462	193,224	162,053	169,728	177,494
Peugeot	127,428	81,439	186,917	210,252	227,231	195,652	198,577	195,048
Autres	-	-	-	-	-	-	19,587	22,670
PSA Peugeot Citroën[1]	**200,979**	**174,698**	**379,155**	**390,714**	**420,455**	**357,705**	**387,892**	**395,212**
Renault (including Trafic II)	166,760	254,334	312,801	302,706	364,584	342,043	335,987	341,427
Dacia	-	-	12,580	17,704	17,409	13,853	20,610	21,987
Renault-Dacia-Samsung[2]	**166,760**	**254,334**	**325,381**	**320,410**	**381,993**	**355,896**	**356,597**	**363,414**
C.B.M.	105							
Renault Trucks [3]	**54,086**	**60,263**	**96,040**	**31,874**	**41,169**	**n/a**	**n/a**	**n/a**
of which: Mack Trucks	-	*15,423*	*34,562*	-	-	-	-	-
Etalmobil (Sovam)	113	75	44	0	0	0	0	0
Unic	17,809							
Heuliez[4]	-	231	391	-	-	-	-	-
Irisbus-Renault[4]	-	-	2,547	-	-	-	-	-
TOTAL	**439,852**	**489,601**	**803,558**	**742,998**	**843,617**	**713,601**	**744,654**	**758,626**
KD and CKD units	68,587	79,271						

(1) Including Talbot up to 1985. (2) Renault acquired Dacia in 1999 and Samsung Motors' assets in September 2000. The Renault Trafic II is manufactured by IBC—a General Motors subsidiary—in the United Kingdom and by Nissan in Spain. Since 2006, some Renault Trafic II vehicles have been classified as passenger cars. (3) Between 1990 and 2000, Mack was integrated in Renault V.I. In 2001, the heavy trucks activity of Renault was combined with that of AB Volvo. Renault V.I. was renamed Renault Trucks. (4) On 1st January 1999, Renault V.I. (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

VEHICLE PRODUCTION IN FRANCE BY FRENCH AND FOREIGN AUTOMOBILE MANUFACTURERS*

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Foreign manufacturers								
Bugatti				40	-	-	-	-
Fiat	-	-	10,377	888	0	0	-	-
Heuliez-Opel				0	0	0	0	0
Lancia	-	-	2,265	1,561	0	0	-	-
Smart	-	-	101,365	97,373	103,560	105,321	102,565	92,887
Toyota	-	-	0	158,512	149,153	200,521	192,166	226,208
Passenger cars	**-**	**-**	**114,007**	**258,374**	**252,713**	**305,842**	**294,731**	**319,095**
Light commercial vehicles (Fiat)	**-**	**-**	**39,428**	**19,450**	**19,786**	**15,148**	**-**	**-**
Heavy trucks (Scania)	**-**	**-**	**10,710**	**9,594**	**n/a**	**n/a**	**n/a**	**n/a**
Irisbus-Heuliez	-	-	-	451	n/a	n/a	n/a	n/a
Irisbus	-	-	-	2,473	n/a	n/a	n/a	n/a
Evobus	-	-	535	551	n/a	n/a	n/a	n/a
Coaches and buses	-	-	535	3,475	n/a	n/a	n/a	n/a
Total foreign makes	**-**	**-**	**164,680**	**290,893**	**287,819**	**n/a**	**n/a**	**n/a**
French manufacturers								
Total French makes	**-**	**-**	**3,183,290**	**1,938,528**	**2,007,070**	**1,646,775**	**1,445,489**	**1,502,806**
Foreign and French manufacturers								
TOTAL ALL VEHICLES	**-**	**-**	**3,347,970**	**2,229,421**	**2,294,889**	**1,967,765**	**1,740,220**	**1,821,464**

Source: CCFA. * Since 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. Since 2012, only the invoicing data has been available for Renault Trucks.

PRODUCTION OF PASSENGER CARS BY MAKE*

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Citroën	536,366	689,965	976,232	1,272,385	1,243,841	1,081,930	972,073	998,779
DS							120,089	115,835
Peugeot	607,033	1,287,920	1,522,051	1,942,079	1,917,663	1,471,772	1,353,839	1,407,302
PSA Peugeot Citroën(1)	**1,446,242**	**1,977,885**	**2,498,283**	**3,214,464**	**3,161,504**	**2,553,702**	**2,446,001**	**2,521,916**
Renault	1,492,339	1,316,930	2,043,815	1,796,321	1,889,747	1,808,950	1,792,337	1,749,855
Dacia	-	-	42,603	323,386	309,984	344,183	423,269	495,550
Renault Samsung Motors	-	-	14,517	276,169	243,365	155,872	132,307	153,150
Renault-Dacia-Samsung(1)	**1,492,339**	**1,316,930**	**2,100,935**	**2,395,876**	**2,443,096**	**2,309,005**	**2,348,078**	**2,398,555**
TOTAL	2,938,581	3,294,815	4,599,218	5,610,340	5,604,600	4,862,707	4,794,079	4,920,471
KD and CKD units	467,879	208,241	-	-	-	-	-	-
of which production in France	**-**	**-**	***2,765,803***	***1,665,797***	***1,678,317***	***1,376,972***	***1,163,730***	***1,180,381***
Citroën	-	-	504,323	468,398	516,994	455,925	236,463	220,516
DS							117,222	89,013
Peugeot	-	-	1,094,756	722,214	716,461	584,997	496,762	563,618
PSA Peugeot Citroën (1)	**-**	**-**	**1,599,079**	**1,190,612**	**1,233,455**	**1,040,922**	**850,447**	**873,147**
Renault	-	-	1,166,724	475,185	444,862	336,050	313,283	307,234
Renault-Dacia-Samsung (1)	**-**	**-**	**1,166,724**	**475,185**	**444,862**	**336,050**	**313,199**	**307,234**

(1) See the notes on page 66.

PASSENGER CAR PRODUCTION BY MODEL IN 2014

(In units)

Makes / Models	World production	Production in France	Production outside France
PSA Peugeot Citroën	**2,521,916**	**873,147**	**1,648,769**
Citroën	**998,779**	**220,516**	**778,263**
C-ZERO	404		404
C1	64,572		64,572
C2			
C3	232,387	135,772	96,615
C4	428,997	63,962	365,035
C4 Aircross			
ZX	28,508		28,508
C-ELYSEE	123,181		123,181
C5	54,116	19,242	34,874
C8	1,540	1,540	
NEMO	4,842		4,842
BERLINGO	60,232		60,232
DS	**115,835**	**89,013**	**26,822**
DS3	55,637	55,637	
DS4	20,338	20,338	
DS5	35,359	13,038	22,321
DS6	4,501		4,501
Peugeot	**1,407,302**	**563,618**	**843,684**
ION	774		774
107	19,927		19,927
108	45,950		45,950
206	20,927		20,927
207	12,986		12,986
208	289,027	56,893	232,134
2008	207,678	159,761	47,917
301	106,981		106,981
307	4,507		4,507
308	290,440	180,342	110,098
RCZ	6,659		6,659
3008	153,183	83,208	69,975
5008	34,203	34,203	
408	73,940		73,940
4008	6,983		6,983
508	73,746	47,565	26,181
807	1,646	1,646	
BIPPER	4,989		4,989
PARTNER	52,756		52,756

Makes / Models	World production	Production in France	Production outside France
Renault-Dacia-Samsung	**2,398,555**	**307,234**	**2,091,321**
Renault	**1,749,855**	**307,234**	**1,442,621**
TWINGO	110,822		110,822
CLIO	411,368	112,258	299,110
CAPTUR	209,863		209,863
ZOE	12,718	12,718	
PULSE	4,339		4,339
LOGAN	283,073		283,073
SANDERO	49,977		49,977
DUSTER	211,392		211,392
MEGANE	252,579	108,725	143,854
FLUENCE	63,309		63,309
LAGUNA	14,294	14,294	
KOLEOS	53,015		53,015
ESPACE	6,653	6,653	
KANGOO	53,382	49,417	3,965
TRAFIC	9,902		9,902
MASTER	3,144	3,144	
DIVERS	25	25	0
Dacia	**495,550**	**0**	**495,550**
LOGAN	187,797		187,797
SANDERO	73,613		73,613
DUSTER	174,273		174,273
DOKKER	34,108		34,108
LODGY	25,759		25,759
Renault Samsung Motors	**153,150**	**0**	**153,150**
ROGUE	26,471		26,471
SM3/ FLUENCE	33,566		33,566
SM5/ LATITUDE	31,954		31,954
QM5 (KOLEOS)	56,158		56,158
SM7	5,001		5,001
TOTAL	4,920,471	1,180,381	3,740,090

Source: CCFA. NB: Renault also produced 2,248 Twizys at its Valladolid plant (Spain).

*Since 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. Since 2012, only the invoicing data has been available for Renault Trucks.

World production of French manufacturers

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

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
Citroën	49,034	93,259	192,238	180,462	193,224	162,053	169,728	177,494
Peugeot	127,428	81,439	186,917	210,252	227,231	195,652	198,577	195,048
Others	-	-	-	-	-	-	19,587	22,670
PSA Peugeot Citroën(1)	**200,979**	**174,698**	**379,155**	**390,714**	**420,455**	**357,705**	**387,892**	**395,212**
Renault (including Trafic II(2))	166,760	254,334	312,801	302,706	364,584	342,043	335,987	363,414
Dacia	-	-	12,580	17,704	17,409	13,853	20,610	21,987
Renault-Dacia-Samsung(1)	**166,760**	**254,334**	**325,381**	**320,410**	**381,993**	**355,896**	**356,597**	**341,427**
Renault Trucks(1)	11,632	7,464	8,321	0	0	0	0	0
TOTAL	**379,457**	**436,567**	**712,899**	**711,124**	**802,448**	**713,601**	**744,489**	**758,626**
KD and CKD units	68,587	79,271	-	-	-	-	-	-
of which production in France	**-**	**-**	***370,538***	***243,029***	***292,112***	***269,803***	***281,759***	***322,425***
Citroën	-	-	53,561	42,882	48,540	38,684	38,793	40,680
Peugeot	-	-	67,629	38,514	42,115	34,598	30,656	33,201
Autres	-	-	-	-	-	-	19,587	22,670
PSA Peugeot Citroën(1)	**-**	**-**	**121,190**	**81,396**	**90,655**	**73,282**	**89,036**	**96,551**
Renault	-	-	240,985	161,633	201,457	196,521	192,723	225,874
Renault-Dacia-Samsung(1)	**-**	**-**	**240,985**	**161,633**	**201,457**	**196,521**	**192,723**	**225,874**
Renault Trucks(1)	-	-	8,321	0	0	0	0	0
Others	-	-	42	0	0	0	0	0

(1) See notes on page 74. (2) As of 2006, some Renault Trafic II vehicles are classified as passenger cars.

LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2014

(In units)

Makes	Models	World production	Production in France	Production outside France
PSA Peugeot Citroën		**395,212**	**96,551**	**298,661**
Citroën		**177,494**	**40,680**	**136,814**
	C1	78		78
	C3	10,156	10,153	3
	C4	2,838	2,838	
	NEMO	11,475		11,475
	BERLINGO	78,290		78,290
	JUMPY	27,689	27,689	
	JUMPER	46,968		46,968
Peugeot		**195,048**	**33,201**	**161,847**
	107	58		58
	206	231		231
	208	11,724	28	11,696
	307	3,469	24	3,445
	308	3,238	3,238	
	BIPPER	12,924		12,924
	PARTNER	80,985		80,985
	EXPERT	29,911	29,911	
	BOXER	52,508		52,508
Others		**22,670**	**22,670**	**0**
Renault-Dacia-Samsung		**363,414**	**225,874**	**137,540**
Renault		**341,427**	**225,874**	**115,553**
	TWINGO	58		58
	CLIO	25,299	20	25,279
	MEGANE	3,647		3,647
	KANGOO	109,070	88,547	20,523
	LOGAN	8,806		8,806
	TRAFIC	74,903	31,508	43,395
	MASTER	114,411	105,799	8,612
	DIVERS	5,233		5,233
Dacia		**21,987**		**21,987**
	DOKKER	21,987		21,987
TOTAL		**758,626**	**322,425**	**436,201**

Source: CCFA.

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

(In units)

	1980	1990	2000	2010	2011	2012[3]	2013	2014
Renault Trucks[1]	**39,475**	**50,493**	**87,719**	**31,874**	**41,169**	**38,231**	**32,295**	**25,702**
of which Mack Trucks	-	*15,423*	*34,562*					
Others[2]	17,836	4	2	0	0	0	0	0
TOTAL	57,311	50,497	87,721	31,874	41,169	38,231	32,295	25,702
of which production in France	**-**	**-**	***44,402***	***29,702***	***36,641***	**-**	**-**	**-**
Renault Trucks[1]	**-**	**-**	**44,400**	**29,702**	**36,641**	**-**	**-**	**-**
Others[2]	-	-	2	0	0	-	-	-

(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 the heavy trucks now concerns invoices of seven metric tons and more.

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

(In units)

	1980	1990	2000	2010	2011	2012[3]	2013	2014
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 units)

	2012	2013	2014
More than 16 metric tons	30,771	25,302	21,266
7 to 16 metric tons	7,460	6,993	4,436
Less than 7 metric tons	13,941	11,661	12,946
TOTAL	**52,172**	**43,956**	**38,648**

Source: CCFA.

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

(In units)

		1980	1990	2000 [1]	2010	2011	2012	2013	2014
Up to 3.5 t		318,633	402,994	577,926	531,452	579,153	501,018	543,866	544,739
	G	281,031	128,422	55,883	61,998	75,209	61,258	61,407	52,488
	D	37,602	274,572	521,229	469,178	500,840	433,587	476,896	486,431
	EL			814	276	3,104	6,173	5,563	5,820
From 3.5 t to 5.1 t		60,824	33,573	134,973	179,672	223,181	212,583	200,788	213,887
	G	14,675	1,961	1,724	0	0	0	0	0
	D	46,149	31,612	133,249	179,672	223,181	212,583	200,788	213,887
From 5.1 t to 12 t	D	25,538	6,377	13,593	2,453	3,134	n/a	n/a	n/a
From 12 t to 16 t	D	12,541	8,251	5,009	3,066	3,504	n/a	n/a	n/a
From 16 t to 20 t	D	6,909	5,518	7,304	4,484	4,935	n/a	n/a	n/a
Over 20 t	D	3,054	3,650	6,255	5,543	6,892	n/a	n/a	n/a
Road tractors	D	9,269	11,278	20,998	16,328	22,818	n/a	n/a	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**	**61,998**	**75,209**	**61,258**	**61,407**	**52,488**
Total diesel		**144,097**	**343,806**	**710,243**	**680,724**	**765,304**	**n/a**	**n/a**	**n/a**
Total electric		**49**	**0**	**814**	**276**	**3,104**	**6,173**	**5,563**	**5,820**
Total CNG or LPG				**332**	**-**	**-**	**-**	**-**	**-**
TOTAL ALL CATEGORIES		439,852	474,189	768,996	742,998	843,617	nd	nd	nd

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]	2010	2011	2012	2013	2014
Passenger cars derivatives								
Citroën	26,904	22,942	29,449	14,972	19,009	15,147	13,590	13,072
Peugeot	69,411	55,208	41,451	33,403	29,884	21,514	22,650	18,720
PSA Peugeot Citroën[2]	103,229	78,150	70,900	48,375	48,893	36,661	36,240	31,792
Renault-Dacia	30,420	56,245	60,320	48,167	50,301	35,871	34,325	37,810
TOTAL	**133,649**	**134,395**	**131,220**	**96,542**	**99,194**	**72,532**	**70,565**	**69,602**
Small vans								
Citroën	45,573	67,257	100,832	98,042	97,352	79,911	88,466	89,765
Peugeot	27,002	18,537	70,443	97,608	105,486	91,826	96,754	93,909
PSA Peugeot Citroën[2]	90,178	85,794	171,275	195,650	202,838	171,737	185,220	183,674
Renault-Dacia	126,779	129,335	147,670	97,142	105,631	113,034	137,447	109,070
TOTAL	**216,957**	**215,129**	**318,945**	**292,792**	**308,469**	**284,771**	**322,667**	**292,744**
Large vans								
Citroën	23,813	32,209	61,957	67,448	76,863	66,995	67,672	74,657
Peugeot	33,031	47,623	75,023	79,241	91,861	82,312	79,173	82,419
Others	-	-	-	-	-	-	19,587	22,670
PSA Peugeot Citroën[2]	56,844	79,832	136,980	146,689	168,724	149,307	166,432	179,746
Renault	40,508	84,681	104,811	148,404	181,960	171,622	157,682	189,314
Renault Trucks	-	-	8,321	0	0	0	0	0
Sovam-Etalmobil	86	71	42	0	0	0	0	0
TOTAL	97,438	164,584	250,154	295,093	350,684	320,929	324,114	369,060
4WD								
Peugeot		1,730						
Pick-ups, small vans, others								
Renault-Dacia-Samsung	-	-	12,580	26,697	44,101	35,369	27,308	27,220

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

Deliveries of French automakers outside France

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(1)	2010	2011	2012	2013	2014
Europe(1)	**1,202,834**	**1,645,276**	**2,636,150**	**2,331,256**	**2,239,833**	**2,012,131**	**2,007,183**	**2,233,561**
of which: European Union(2)	*946,760*	*1,479,316*	*2,261,904*	*1,893,455*	*1,711,698*	*1,492,650*	*1,469,718*	*1,659,147*
Germany	202,939	277,424	337,743	299,072	296,411	273,409	237,280	266,233
Austria	35,775	36,175	41,510	50,767	53,685	49,411	42,564	41,119
Belgium-Luxembourg	105,966	144,896	172,806	182,241	169,058	154,540	149,689	142,305
Denmark	4,059	13,919	30,239	27,801	32,647	36,597	39,950	46,744
Spain	100,640	297,846	556,934	302,663	242,557	202,154	203,460	259,366
Greece		11,458	54,270	10,744	7,325	8,232	6,039	9,015
Italy	381,626	324,952	353,616	317,851	264,073	223,923	222,666	254,347
The Netherlands	84,063	95,340	120,438	108,951	127,494	112,575	87,484	95,028
Portugal	14,729	59,459	68,375	58,750	40,936	24,472	29,262	41,692
The United Kingdom	156,071	245,989	432,507	280,244	230,494	210,254	243,338	275,266
Sweden	13,060	18,001	31,473	16,691	16,495	24,075	23,680	28,570
10 new EU member states				130,576	123,358	121,294	117,872	133,722
12, then 13 new EU member states(3)				176,330	164,337	153,469	159,864	185,575
of which: CEEC/CIS(3)	*23,619*	*31,569*	*164,814*	*206,868*	*280,527*	*308,339*	*288,395*	*375,470*
Hungary		2,040	23,887	6,156	6,777	8,767	9,599	10,725
Poland		806	59,093	53,521	44,251	48,847	46,709	52,141
Romania			7,520	41,804	35,349	27,578	29,677	37,989
Russia			6,042	158,018	217,917	263,335	243,839	354,701
of which: Switzerland	*51,821*	*43,832*	*45,654*	*50,740*	*50,150*	*44,778*	*38,722*	*37,530*
of which: Turkey		*13,069*	*148,264*	*168,456*	*184,505*	*155,003*	*201,600*	*152,800*
Africa	**133,213**	**45,675**	**69,865**	**171,484**	**201,174**	**292,971**	**257,752**	**230,637**
of which: South Africa	*22,439*	*0*	*13,913*	*14,711*	*15,291*	*12,070*	*21,661*	*13,933*
North Africa	15,542	20,432	37,236	139,790	170,222	258,295	211,448	186,116
Nigeria	61,133	8,319	8,860	210	1,909	433	1,049	1,244
America	**145,204**	**29,360**	**230,270**	**559,780**	**634,508**	**646,567**	**703,734**	**458,990**
of which: Argentina	*11,899*	*516*	*97,605*	*149,746*	*189,560*	*189,169*	*243,448*	*122,434*
Brazil			80,205	320,930	368,887	349,360	349,337	274,577
Colombia	11,885	9,112	16,659	6,329	7,146	3,852	2,383	2,695
Mexico		20	1,408	24,822	19,034	12,373	10,454	8,382
Asia(1)	**26,178**	**96,645**	**166,261**	**1,201,459**	**1,218,993**	**905,283**	**833,072**	**1,001,386**
of which: Japan	*883*	*14,264*	*15,976*	*12,346*	*12,001*	*13,660*	*13,180*	*12,687*
China		3,960	54,334	392,569	435,130	468,799	587,311	766,683
Iran	12,836	29,852	45,722	516,121	538,004	224,639	28,547	27,913
India				4,488	12,100	35,157	64,368	44,849
South Korea				157,824	112,161	54,588	63,711	114,027
Pacific	**6,290**	**5,761**	**9,984**	**14,079**	**13,830**	**15,314**	**16,827**	**16,793**
of which: Australia	*2,398*	*820*	*2,765*	*9,761*	*8,928*	*10,939*	*11,827*	*11,933*
TOTAL ALL CATEGORIES	**1,529,652**	**1,881,998**	**3,174,447**	**4,306,065**	**4,336,759**	**3,898,019**	**3,842,199**	**3,961,884**
KD and CKD units	471,744	208,241						

NEW COMMERCIAL VEHICLES BY DESTINATION

(In units)

	1980	1990	2000(1)	2010	2011	2012	2013	2014
Europe(1)	**88,235**	**174,998**	**379,289**	**357,998**	**404,818**	**341,640**	**368,180**	**434,133**
of which: European Union(2)	*74,382*	*156,268*	*312,421*	*312,293*	*344,414*	*286,108*	*321,887*	*384,461*
Germany	17,490	23,581	50,081	46,406	52,459	57,935	67,191	82,541
Austria	2,185	3,702	4,697	6,797	7,431	7,361	6,873	6,711
Belgium-Luxembourg	11,455	18,383	22,857	29,330	30,768	27,603	32,353	27,736
Spain	71	44,110	57,516	28,263	29,001	19,310	26,866	29,591
Italy	26,207	19,923	35,910	39,690	38,409	21,845	35,519	45,236
The Netherlands	8,234	7,995	23,087	13,848	17,061	15,868	13,822	14,273
Portugal	2,805	14,291	34,551	18,557	15,514	7,167	9,663	13,238
The United Kingdom	8,390	21,127	55,647	60,997	61,885	64,248	70,458	97,429
10 new EU member states				28,891	37,428	30,996	33,389	38,022
12, then 13 new EU member states(3)				33,784	44,067	37,332	40,842	49,636
of which: CEEC/CIS(3)	361	2,781	25,100	16,121	24,544	24,118	18,814	20,937
Poland	301	97	5,624	14,258	17,529	14,210	15,429	17,487
of which: Switzerland	*3,317*	*2,921*	*4,293*	*8,500*	*9,436*	*9,528*	*8,266*	*7,944*
Africa	**75,802**	**18,320**	**16,074**	**27,769**	**29,007**	**46,758**	**41,457**	**40,132**
of which: North Africa	*18,334*	*8,588*	*13,509*	*24,690*	*25,344*	*42,231*	*37,558*	*36,911*
America	**5,875**	**5,453**	**36,682**	**85,810**	**112,910**	**107,161**	**109,866**	**75,224**
Asia(1)	**6,930**	**11,302**	**8,260**	**5,632**	**6,302**	**6,729**	**5,562**	**6,634**
Pacific	**776**	**1,364**	**1,797**	**2,208**	**2,238**	**2,940**	**4,069**	**4,547**
TOTAL ALL CATEGORIES	**178,126**	**213,502**	**444,516**	**480,430**	**556,356**	**506,303**	**530,355**	**571,759**
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 from 1990 to 1994; 15 countries between 1995 and 2003; 25 countries between 2004 and 2005; 27 countries from 2006 to 2012; 28 countries since 2013. (3) CEEC/CIS, excluding the ten new countries that joined the European Union in 2004 and 2005, the 12 new countries that joined the European Union from 2006 to 2012, and the 13 that joined in 2013. 13 new EU member countries since 2013
Source: CCFA.

Physical and financial data for the automobile manufacturing industry

Physical and financial data are taken from surveys (known as the EAE reports) conducted every year of French companies in the automotive manufacturing industry. Since 2008, they have been replaced by the ESANE information system, combining both survey and administrative data. These statistics are one of the main sources of information for French industry.
The SESSI, formerly the statistics department of the Government Secretariat 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.
Significant variations can occur to the scope of companies from one year to the next, as the result of events such as the creation, reorganization, acquisition or sale. 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	2000	2001	2009	2010	2011	2012	2013[1]	2014[1]
Physical data										
Employees[2]	Units	320,922	190,830	197,069						
Employees on 12/31 (excluding temporary staff)					144,717	137,527	139,411	137,094	129,631	124,500
Production in France (only light vehicles since 2012)	Thousands		3,348	3,628	2,048	2,229	2,295	1,968	1,740	1,821
Production per employee			**17.5**	**18.4**	**14.1**	**16.2**	**16.5**	**14.4**	**13.4**	**14.6**
Financial data										
Net sales	€ millions	19,251	73,684	80,549	69,854	78,969	83,317	77,536	77,195	77,000
Export sales	€ millions	7,511	42,290	44,998	36,790	45,526	48,719	46,415	45,482	46,000
Exports as a % of total sales	%	39.0%	57.4%	55.9%	52.7%	57.6%	58.5%	59.9%	58.9%	60%
Value added (VA) before tax	€ millions	5,883	13,282	13,246	7,423	10,112	9,541	7,573	8,243	8,500
Value added / sales	**%**	**30.6%**	**18.0%**	**16.4%**	**10.6%**	**12.8%**	**11.5%**	**9.8%**	**10.7%**	**11.0%**
Value added per employee	€ thousands	18	70	67	51	74	68	55	64	68
Social security costs	€ millions	1,452	2,153	2,169	2,015	2,302	2,443	2,363	2,162	
Social security costs per employee	€ thousands	4.5	11.3	11.0	13.9	16.7	17.5	17.2	16.7	
Wages and salaries	€ millions	3,254	5,093	5,359	5,808	5,696	5,632	5,643	5,668	
Wages and salaries per employee	€ thousands	10.1	26.7	27.2	40.1	41.4	40.4	41.2	43.7	
Personnel costs	€ millions	4,706	7,246	7,528	7,823	7,999	8,075	8,006	7,830	
Personnel costs per employee	€ thousands	14.7	38.0	38.2	54.1	58.2	57.9	58.4	60.4	
Personnel costs / VA	%	80.0%	54.6%	56.8%	105.4%	79.1%	84.6%	105.7%	95.0%	
Gross operating surplus	€ millions	928	5,201	4,822	-1,174	1,340	710	-1,129	-375	
Gross operating surplus / VA	**%**	**15.8%**	**39.2%**	**36.4%**	**-15.8%**	**13.3%**	**7.4%**	**-14.9%**	**-4.5%**	
Interest expense	€ millions	484	1,178	1,816	4,038	2,862	1,134	1,278	2,058	
Interest expense / VA	%	8.2%	8.9%	13.7%	54.4%	28.3%	11.9%	16.9%	25.0%	
Interest income	€ millions	207	2,508	2,766	3,444	2,191	2,049	2,150	2,251	
Interest income / VA	%	3.5%	18.9%	20.9%	46.4%	21.7%	21.5%	28.4%	27.3%	
Net interest income (expense)	€ millions	-276	1,330	951	-594	-671	915	872	193	
Net interest income (expense) / VA	%	-4.7%	10.0%	7.2%	-8.0%	-6.6%	9.6%	11.5%	2.3%	
Cash flow	€ millions	638	5,499	4,685	-2,218	1,078	1,537	- 322	- 306	
Cash flow / VA	%	10.8%	41.4%	35.4%	-29.9%	10.7%	16.1%	-4.3%	-3.7%	
Net income (loss)	**€ millions**	**-26**	**2,851**	**1,294**	**-4,900**	**293**	**-521**	**n/a**	**n/a**	
Net income / sales	%	-0.1%	3.9%	1.6%	-7.0%	0.4%	-0.6%	n/a	n/a	
Capital expenditure	€ millions	1,018	3,807	4,024						
Gross fixed investments exclusive of contributions	€ millions				1,983	2,078	2,230	2,315	1,850	1,950
Capital expenditure / sales	**%**	**5.3%**	**5.2%**	**5.0%**	**2.8%**	**2.6%**	**2.7%**	**3.0%**	**2.4%**	**2.5%**
Capital expenditure / VA	**%**	**17.3%**	**28.7%**	**30.4%**	**26.7%**	**20.6%**	**23.4%**	**30.6%**	**22.4%**	**22.9%**

(1) CCFA estimates for 2014 (and 2013 for capital expenditure).
(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	1990	2000	2009	2010	2011	2012	2013	2014[1]
Physical data									
No. of companies (> 20 employees up to 2007)	Units	320	243	565	639	616	703	628	
Employees[2]	Units	112,963	94,171						
Employees on 12/31 (excluding temporary staff)				64,881	61,759	59,579	82,413	80,416	77,500
Financial data									
Net sales	€ millions	14,452	17,766	14,898	16,056	16,542	20,023	19,848	20,700
Export sales	€ millions	4,018	7,512	7,056	7,865	8,513	9,481	8,786	
Exports as a % of total sales	**%**	**27.8%**	**42.3%**	**47.4%**	**49.0%**	**51.5%**	**47.3%**	**44.3%**	
Percentage of production exported (source: FIEV)				**54%**	**51%**	**53%**	**54%**	**55%**	**54%**
Value added (VA) before tax	€ millions	4,530	4,643	3,479	3,885	3,761	4,771	4,768	
Value added/Revenue before tax	**%**	**31.3%**	**26.1%**	**23.4%**	**24.2%**	**22.7%**	**23.8%**	**24.0%**	
Value added per employee before tax	€ thousands	40	49	54	63	63	58	59	
Social security costs	€ millions	867	902	939	937	940	1,264	1,260	
Social security costs per employee	€ thousands	7.7	9.6	14.5	15.2	15.8	15.3	15.7	
Wages and salaries	€ millions	2,060	2,213	2,300	2,302	2,173	2,928	2,954	
Wages and salaries per employee	€ thousands	18.2	23.5	35.4	37.3	36.5	35.5	36.7	
Personnel costs	€ millions	2,926	3,115	3,239	3,239	3,113	4,192	4,214	
Personnel costs per employee	€ thousands	25.9	33.1	49.9	52.4	52.2	50.9	52.4	
Personnel costs / VA	%	64.6%	67.1%	93.1%	83.4%	82.8%	87.9%	88.4%	
Gross operating surplus	€ millions	1,337	1,206	7	412	417	280	259	
Gross operating surplus / VA	**%**	**29.5%**	**26.0%**	**0.2%**	**10.6%**	**11.1%**	**5.9%**	**5.4%**	
Interest expense	€ millions	387	440	171	177	129	167	280	
Interest expense / VA	%	8.5%	9.5%	4.9%	4.6%	3.4%	3.5%	5.9%	
Interest income	€ millions	213	337	226	217	305	589	360	
Interest income / VA	%	4.7%	7.3%	6.5%	5.6%	8.1%	12.3%	7.5%	
Net interest income (expense)	€ millions	-174	-103	55	40	175	422	80	
Net interest income (expense) / VA	%	-3.8%	-2.2%	1.6%	1.0%	4.7%	8.8%	1.7%	
Cash flow	€ millions	883	889	-46	341	428	401	414	
Cash flow / VA	%	19.5%	19.2%	-1.3%	8.8%	11.4%	8.4%	8.7%	
Net income (loss)	**€ millions**	**400**	**-92**	**-427**	**-17**	**201**	**n/a**	**n/a**	
Net income / sales	%	2.8%	-0.5%	-2.9%	-0.1%	1.2%	n/a	n/a	
Capital expenditure	€ millions	899	1,024						
Gross fixed investments exclusive of contributions	€ millions			1,119	413	524	695		
Capital expenditure / sales	**%**	**6.2%**	**5.8%**	**7.5%**	**2.6%**	**3.2%**	**3.5%**		
Capital expenditure / VA	**%**	**19.8%**	**22.0%**	**32.2%**	**10.6%**	**13.9%**	**14.6%**		

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

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	2010	2011	2012	2013	2014
Citroën	270,983	266,822	261,508	301,607	277,790	216,237	194,728	199,382
DS				26,539	45,286	50,193	43,589	31,746
Peugeot[1]	414,335	498,481	397,547	400,663	369,761	305,440	289,587	305,014
Dacia				104,641	88,980	80,790	89,844	102,516
Renault	759,312	639,440	602,415	497,820	455,705	343,345	337,608	353,890
Others France	56	146	63	54	752	1,968	907	1,222
TOTAL FRANCE	**1,444,686**	**1,404,889**	**1,261,533**	**1,331,324**	**1,238,274**	**997,973**	**956,263**	**993,770**
Alfa Romeo	25,380	15,916	12,774	13,033	16,232	10,323	8,047	7,608
Audi	17,455	32,762	34,937	50,936	58,970	61,754	59,147	56,395
BMW	17,239	29,580	31,576	46,074	46,305	48,045	46,742	47,682
Chevrolet				21,247	23,708	24,739	21,518	4,185
Chrysler	16	4,084	4,827	880	184	8	0	0
Daihatsu	-	0	1,043	1,083	217	352	39	1
Dodge				857	147	7	2	0
Fiat	53,147	128,822	95,983	72,717	57,326	43,554	47,683	45,737
Ford	68,426	159,575	117,061	114,810	115,357	92,469	76,470	75,089
Honda	8,293	14,002	8,716	11,251	8,793	8,406	8,846	7,091
Hyundai	-	0	11,019	18,785	20,204	28,733	25,738	17,165
Jaguar	269	1,290	1,939	1,126	1,001	897	879	715
Jeep	-	3,824	3,001	1,177	2,637	3,228	1,327	2,783
Kia	-	0	2,631	24,056	27,961	33,018	33,503	28,186
Lada	13,069	15,758	1,867	346	405	248	59	9
Lancia	6,801	18,225	5,864	3,368	4,000	5,248	4,812	6,105
Land Rover	237	3,611	7,570	2,735	4,317	7,770	6,716	6,794
Mazda	13,021	18,563	6,366	10,232	6,509	5,107	6,272	6,062
Mercedes	14,430	28,605	43,389	45,612	43,545	47,567	46,966	49,148
Mini	-	-	-	18,007	21,702	21,483	19,099	18,277
Mitsubishi	2,788	4,298	5,575	3,514	4,386	3,639	3,448	3,496
Nissan-Infiniti	17,700	25,707	31,330	54,351	72,212	70,133	63,180	68,741
Opel	32,709	113,490	133,576	94,877	94,102	71,666	59,620	61,246
Porsche	1,060	1,297	825	2,073	2,734	3,336	2,813	3,449
Rover	20,690	41,147	13,474	0	0	0	0	0
Saab	179	2,459	3,265	574	377	40	7	0
Santana	-	1,746	4,231	27	3	0	0	0
Seat	306	48,052	40,562	30,645	33,268	24,180	22,039	21,090
Skoda	1,636	1,825	11,570	18,533	21,185	22,464	19,341	20,412
Smart	-	-	6,645	6,408	6,810	5,441	5,267	4,149
Ssangyong	-	0	19	451	560	290	209	344
Subaru	-	0	2,312	1,146	831	971	928	731
Suzuki	-	0	11,355	22,070	19,233	16,026	15,485	15,835
Toyota-Lexus	13,095	15,839	43,698	67,311	70,192	70,463	74,653	70,260
Volkswagen	75,727	155,971	152,868	146,538	163,584	154,434	141,427	139,554
Volvo	8,207	12,415	6,777	11,841	15,192	13,396	11,024	12,459
TOTAL FOREIGN[2]	**428,516**	**904,241**	**872,351**	**920,345**	**965,955**	**900,787**	**834,193**	**802,115**
TOTAL ALL CATEGORIES	**1,873,202**	**2,309,130**	**2,133,884**	**2,251,669**	**2,204,229**	**1,898,760**	**1,790,456**	**1,795,885**
of which Temporary Transit	-	-	-	*39,011*	*38,421*	*38,247*	*34,205*	*30,648*
TOTAL FRANCE (as a %)	77.1%	60.8%	59.1%	59.1%	56.2%	52.6%	53.4%	55.3%
TOTAL FOREIGN (as a %)	22.9%	39.2%	40.9%	40.9%	43.8%	47.4%	46.6%	44.7%

(1) Including Talbot up to 1985.

USED PASSENGER CAR REGISTRATIONS

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
TOTAL ALL CATEGORIES	**4,441,423**	**4,758,750**	**5,082,122**	**5,386,007**	**5,440,856**	**5,371,599**	**5,317,717**	**5,446,131**
Used/new ratio	2.4	2.1	2.4	2.4	2.5	2.8	3.0	3.0

USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
TOTAL ALL CATEGORIES		**644,925**	**651,033**	**806,398**	**799,058**	**778,270**	**750,371**	**772,710**
Used/new ratio		1.6	1.6	1.9	1.9	2.0	2.0	2.0

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	2010[3]	2011	2012	2013	2014
Citroën	24,158	111,881	138,628	228,977	208,060	166,894	144,873	134,756
DS				14,864	29,950	36,972	29,082	21,190
Peugeot[1]	65,199	189,322	206,153	307,518	288,634	242,860	203,291	214,419
Dacia				53,737	73,642	65,204	58,334	64,895
Renault	45,862	205,374	257,909	352,530	316,841	253,796	236,972	224,489
TOTAL FRANCE[2]	**135,219**	**506,577**	**602,711**	**957,626**	**917,127**	**765,726**	**672,552**	**659,749**
Alfa Romeo	-	2,524	7,444	8,432	11,187	6,660	5,145	4,273
Audi	19,591	13,495	25,901	45,201	49,615	52,449	48,513	45,192
BMW-Mini	-	8,271	21,065	50,906	54,738	56,503	54,094	53,289
Chrysler-Dodge-Jeep	-	-	4,161	2,863	2,876	3,145	1,203	2,462
Fiat-Lancia	10,352	33,913	38,337	28,240	19,441	15,056	15,686	13,199
Ford	1,833	56,331	58,896	89,334	88,850	65,176	44,174	40,861
Honda			413	5,029	3,360	3,992	5,051	4,111
Hyundai	-	-	5,510	13,174	14,536	20,706	18,472	10,592
Kia			1,200	15,428	18,996	20,704	19,948	17,327
Land Rover	-	2,980	5,656	2,637	4,095	7,388	6,524	6,473
Mazda	-	5,200	3,204	6,768	4,671	3,386	5,221	4,792
Mercedes	10,635	15,676	30,007	41,460	39,645	43,537	41,355	43,542
Mitsubishi	-	1,623	3,227	3,102	4,249	3,539	2,828	1,953
Nissan-Infiniti	694	4,982	15,533	35,092	50,108	51,675	47,899	48,843
Opel	6,178	28,218	63,726	63,751	64,617	45,363	32,343	31,738
Rover	-	4,419	7,480	0	0	0	0	0
Seat	-	14,367	27,861	25,462	28,922	18,718	14,467	11,696
Skoda	-	-	7,741	14,781	16,531	15,889	12,601	13,870
Suzuki	-	-	3,165	9,263	9,044	5,682	4,649	3,947
Toyota-Lexus	-	3,594	12,282	35,744	38,576	32,082	23,546	20,332
Volkswagen	-	50,975	89,487	118,702	129,026	117,017	99,149	91,387
Volvo	1,198	4,097	4,786	11,614	14,937	13,087	10,332	11,545
TOTAL FOREIGN[2]	**50,815**	**255,477**	**443,774**	**635,547**	**679,028**	**618,818**	**527,177**	**486,909**
TOTAL ALL CATEGORIES	**186,034**	**762,054**	**1,046,485**	**1,593,173**	**1,595,803**	**1,384,544**	**1,199,729**	**1,146,658**
of which Temporary Transit	-	-	-	*34,432*	*33,788*	*35,962*	*31,988*	*27,127*
% diesel	9.9%	33.0%	49.0%	70.8%	72.4%	72.9%	67.0%	63.8%
TOTAL FRANCE as a %	72.7%	66.5%	57.6%	60.1%	57.5%	55.3%	56.1%	57.5%
TOTAL FOREIGN as a %	27.3%	33.5%	42.4%	39.9%	42.5%	44.7%	43.9%	42.5%

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

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

(In units)

	1980	1990	2000	2010[3]	2011	2012	2013	2014
Citroën	53,245	80,958	77,048	70,579	75,136	64,259	61,601	63,233
DS				259	740	1,087	730	625
Peugeot[1]	58,986	60,813	74,950	72,228	72,071	63,671	60,469	59,197
Dacia				5,434	5,298	3,732	3,959	3,377
Renault	116,602	162,549	139,752	135,591	137,360	123,447	116,282	117,823
Others France	256	415	40	528	486	523	807	953
TOTAL FRANCE	**229,089**	**304,735**	**291,790**	**284,619**	**291,091**	**256,719**	**243,848**	**245,208**
Fiat	8,326	10,139	25,253	34,659	37,152	34,036	33,021	30,757
Ford	9,099	16,080	18,110	20,437	20,473	18,478	16,929	20,273
Hyundai	-	-	588	237	182	276	299	194
Isuzu			108	1,961	1,904	1,788	2,167	1,960
Iveco	2,941	11,543	16,534	11,610	12,954	11,385	10,837	11,555
Land Rover	645	2,718	1,857	1,550	1,489	1,478	1,516	1,796
Mazda	579	1,067	916	482	424	160	60	63
Mercedes	5,495	11,156	23,139	19,051	20,073	18,275	18,024	17,710
Mitsubishi	-	-	3,392	2,639	2,776	1,716	1,625	1,341
Nissan	861	5,063	5,197	7,307	9,616	9,076	8,761	8,617
Opel	664	2,408	7,561	7,195	7,560	7,257	5,404	5,545
Toyota	7,112	6,099	1,771	4,013	4,115	4,505	3,932	4,669
Volkswagen	8,091	9,673	13,819	13,249	14,895	14,815	15,563	17,552
TOTAL FOREIGN[2]	**48,798**	**89,060**	**123,176**	**132,993**	**138,163**	**127,330**	**123,483**	**126,866**
TOTAL ALL CATEGORIES	**277,887**	**393,795**	**414,966**	**417,612**	**429,254**	**384,049**	**367,331**	**372,074**
TOTAL FRANCE as a %	82.4%	77.4%	70.3%	68.2%	67.8%	66.8%	66.4%	65.9%
TOTAL FOREIGN as a %	17.6%	22.6%	29.7%	31.8%	32.2%	33.2%	33.6%	34.1%

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

NEW PASSENGER CAR 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	2010[1]	2011	2012	2013	2014
Citroën	324,228	347,780	338,556	372,186	352,926	280,496	256,329	262,615
DS				26,798	46,026	51,280	44,319	32,371
Peugeot	473,321	559,294	472,497	472,891	441,832	369,111	350,056	364,211
Dacia				110,075	94,278	84,522	93,803	105,893
Renault	875,914	801,989	742,167	633,411	593,065	466,792	453,890	471,713
TOTAL FRANCE	**1,673,775**	**1,709,624**	**1,553,323**	**1,615,943**	**1,529,365**	**1,254,692**	**1,200,111**	**1,238,978**
Fiat	61,473	138,961	121,236	107,376	94,478	77,590	80,704	76,494
Ford	77,525	175,655	135,171	135,247	135,830	110,947	93,399	95,362
Land Rover	882	6,329	9,427	4,285	5,806	9,248	8,232	8,590
Mercedes	19,925	39,761	66,528	64,663	63,618	65,842	64,990	66,858
Nissan-Infiniti	18,561	30,770	36,527	61,658	81,828	79,209	71,941	77,358
Opel	33,373	115,898	141,137	102,072	101,662	78,923	65,024	66,791
Rover	20,812	41,343	13,564	0	0	0	0	0
Seat	306	51,999	42,230	31,080	33,966	24,180	22,039	21,090
Toyota-Lexus	20,207	21,938	45,469	71,324	74,307	74,968	74,968	74,929
Volkswagen	83,818	165,644	166,687	159,787	178,479	169,249	156,990	157,106
TOTAL FOREIGN	**477,314**	**993,301**	**995,527**	**1,053,338**	**1,104,118**	**1,028,117**	**957,676**	**928,981**
TOTAL ALL CATEGORIES	**2,151,089**	**2,702,925**	**2,548,850**	**2,669,281**	**2,633,483**	**2,282,809**	**2,157,787**	**2,167,959**
TOTAL FRANCE as a %	77.8%	63.3%	60.9%	60.5%	58.1%	55.0%	55.6%	57.1%
TOTAL FOREIGN as a %	22.2%	36.7%	39.1%	39.5%	41.9%	45.0%	44.4%	42.9%

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

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

(In units)

	1980	1990	2000	2010 [1]	2011	2012	2013	2014
Renault Trucks	17,984	20,453	20,818	10,908	14,343	12,929	12,069	10,367
TOTAL FRANCE	**18,312**	**20,738**	**20,992**	**10,964**	**14,399**	**12,965**	**12,105**	**10,423**
DAF	1,881	3,460	4,365	4,464	6,240	5,545	5,388	4,193
Iveco	6,578	7,204	6,998	4,003	4,980	4,488	4,449	4,354
MAN	327	1,433	3,498	2,729	4,765	4,540	4,145	3,811
Mercedes	8,014	9,500	9,976	5,229	7,087	7,100	7,766	5,911
Scania	1,389	2,711	4,963	2,553	3,670	2,823	3,499	3,626
Volvo	3,724	4,647	6,739	3,938	5,825	5,564	5,507	4,912
TOTAL FOREIGN	**23,534**	**29,290**	**36,924**	**23,257**	**32,964**	**30,413**	**31,160**	**27,136**
TOTAL ALL CATEGORIES	**41,846**	**50,028**	**57,916**	**34,221**	**47,363**	**43,378**	**43,265**	**37,559**
TOTAL FRANCE as a %	43.8%	41.5%	36.2%	32.0%	30.4%	29.9%	28.0%	27.8%
TOTAL FOREIGN as a %	56.2%	58.5%	63.8%	68.0%	69.6%	70.1%	72.0%	72.2%

USED HEAVY TRUCK (OVER 5 METRIC TONS) REGISTRATIONS

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
TOTAL	**-**	**-**	**59,056**	**55,591**	**57,152**	**52,154**	**51,418**	**46,478**
Used/new ratio	-	-	1.0	1.6	1.2	1.2	1.2	1.2

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

(In units)

	1980	1990	2000	2010	2011	2012	2013	2014
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]	-	-	-	2,412	2,843	2,603	2,902	2,483
Evobus Group[2]	-	-	-	1,433	1,681	1,846	1,933	1,964
Neoman Bus Group[3]	-	-	-	559	515	187	294	208
Bova	-	-	-	116	86	34	28	1
Temsa	-	-	-	309	272	174	229	121
Van Hool	57	250	230	169	175	98	138	93
Others	-	-	-	384	634	602	797	539
TOTAL ALL CATEGORIES	**-**	**-**	**-**	**5,382**	**6,206**	**5,544**	**6,321**	**5,409**

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

Vehicle ownership

MOTORISATION RATE (INTERNATIONAL COMPARISONS)

Number of cars and commercial vehicles per 1,000 inhabitants on December 31

	1985	1995	2005	2013
European Union 28 countries	-	-	529	564
European Union 15 countries[1]	380	473	580	590
13 new EU member states	-	-	344	465
Germany	450	529	587	568
Belgium	363	463	527	562
Spain	276	430	580	579
France	**446**	**520**	**591**	**594**
Italy	412	541	666	686
The United Kingdom	379	474	570	578
Sweden	400	445	513	530
Poland	117	229	388	599
Turkey	27	65	124	182
Canada	559	562	586	635
USA	708	759	797	790
South Korea	25	177	327	394
Japan	375	527	596	603
Argentina	173	167	181	301
Brazil	86	89	124	198
China	3	8	24	91
India	3	6	9	20

(1) As of 1995, the EU includes 15 countries.
Sources: CCFA estimates, then OICA from 2005 onward.

TOTAL VEHICLES IN USE (ON JANUARY 1, 2015)

(In thousands)

	All fuels	Diesel[1]
Passenger cars		
Up to 5 HP	14,210	8,024
6 to 10 HP	15,990	11,001
11 HP and over	1,600	812
Total passenger cars	**31,800**	**19,836**
Light commercial vehicles (LCV)		
Up to 2.5 t	3,634	3,318
From 2.5 t to 3.5 t	2,331	2,319
From 3.6 t to 5 t	15	15
TOTAL LCVs up to 5 t	**5,980**	**5,652**
Total passenger cars and LCVs	**37,780**	**25,488**
Heavy trucks over 5 metric tons		
Trucks		
From 5 t to 12 t	74	74
From 12 t to 16 t	46	46
From 16 t to 20 t	113	113
20 t and over	106	106
Total trucks	**339**	**339**
Road tractors	**200**	**200**
Total heavy trucks	**539**	**539**
Coaches and buses	**89**	**89**
Total commercial vehicles over 5 t	**628**	**628**
Total commercial vehicles all sizes	**6,608**	**6,280**
TOTAL ALL VEHICLES	**38,408**	**26,116**

(1) Including diesel hybrid. Source: CCFA estimates.

VEHICLE OWNERSHIP

	Unit	1980	1990	2000	2010	2011	2012	2013	2014[1]
Households without a vehicle	%	29.2%	23.2%	19.7%	16.5%	16.5%	16.7%	16.9%	17.2%
Households with a vehicle	%	70.8%	76.8%	80.3%	83.5%	83.5%	83.3%	83.1%	82.8%
Households with one vehicle	%	54.3%	50.5%	50.7%	47.6%	48.2%	48.1%	48.3%	48.8%
Households with two vehicles	%	14.8%	23.0%	25.4%	30.7%	30.5%	30.4%	29.9%	28.9%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.2%	4.8%	4.8%	5.0%	5.1%
Average age of the vehicle	Years		5.90	7.25	8.0	8.1	8.3	8.6	8.7
Average ownership period	Years		3.66	4.43	5.0	5.1	5.2	5.3	5.4
Used passenger cars	%		50.0	56.1	58.9	57.8	57.9	59.0	58.5
Total average kilometers	km	12,200	13,041	13,560	11,755	11,515	11,639	11,282	11,083
Gasoline average kilometers	km	11,600	11,651	10,780	8,108	7,897	8,022	7,551	7,618
Diesel average kilometers	km	26,200	20,950	18,140	14,542	14,265	14,256	13,959	13,574
Domestic passenger road transportation									
By passenger car	Billion passenger-km	482.3	617.3	754.4	810.8	812.7	815.1	819.4	829.6
By coach—bus	Billion passenger-km	37.4	40.6	42.1	49.9	51.1	51.6	52.3	54.2
Total traffic	Billion passenger-km	588.0	743.6	892.5	974.0	981.2	985.0	989.6	1000.6
Road transport as a % of total traffic	%	88.4	88.5	89.2	88.4	88.0	88.0	88.1	88.3
Annual change									
By passenger car	%	-	+2.6	+0.6	1.0	0.2	0.3	0.5	1.2
By coach—bus	%	-	+2.7	+3.0	2.2	2.4	1.0	1.4	3.6

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

TOTAL VEHICLES IN USE ON JANUARY 1, 2013

(In thousands)

	1980	1990	2000	2010	2012	2013	2014	2015
Passenger cars								
Up to 5 HP	5,090	8,312	10,572	12,946	13,628	13,761	13,948	14,210
6 to 10 HP	11,460	13,385	15,723	16,583	16,375	16,266	16,115	15,990
Over 10 HP	1,890	1,313	1,186	1,521	1,547	1,573	1,588	1,600
TOTAL PASSENGER CARS	**18,440**	**23,010**	**27,480**	**31,050**	**31,550**	**31,600**	**31,650**	**31,800**
of which diesel[1]	*730*	*3,265*	*9,261*	*17,458*	*18,865*	*19,377*	*19,645*	*19,836*
Commercial vehicles								
Up to 3.5 t	1,985	4,125	4,974	5,750	5,867	5,896	5,915	5,965
From 3.5 t to 5 t	103	20	12	10	13	14	15	15
From 5 t to 20 t	250	334	287	250	247	242	235	233
20 t and over	26	41	46	91	98	100	102	106
Road tractors	129	160	210	202	206	199	195	200
TOTAL COMMERCIAL VEHICLES	**2,493**	**4,680**	**5,529**	**6,303**	**6,431**	**6,451**	**6,462**	**6,608**
of which diesel[1]	***976***	***2,342***	***4,202***	***5,632***	***5,941***	***6,033***	***6,091***	**6,280**
Coaches and buses	**57**	**68**	**80**	**85**	**86**	**87**	**88**	**89**
OVERALL TOTAL	**20,990**	**27,758**	**33,090**	**37,438**	**38,067**	**38,138**	**38,200**	**38,408**
of which diesel[1]	***1,763***	***5,675***	***13,543***	***23,172***	***24,889***	***25,494***	***25,821***	***26,116***

(1) Including diesel hybrid. Source: CCFA estimates.

Fuel and taxation, emissions and CO_2

ROAD FUEL CONSUMPTION, PRICES AND TAXES

	Units	1980	1990	2000	2010	2011	2012	2013	2014
Fuel consumption									
Regular gasoline	Millions of liters	4,216	959						
Premium leaded - AVSR	Millions of liters	20,007	19,911	3,924					
Premium unleaded	Millions of liters		3,406	14,329	9,501	8,582	7,335	6,650	6,397
Premium unleaded 95-E10	Millions of liters				1,379	1,754	2,331	2,714	2,971
% of total gasoline	%				12.7%	17.0%	24.1%	29.0%	31.7%
Total gasoline	**Millions of liters**	**24,223**	**24,276**	**18,253**	**10,880**	**10,337**	**9,666**	**9,363**	**9,368**
Diesel	**Millions of liters**	**11,415**	**20,664**	**32,373**	**39,749**	**40,327**	**40,382**	**40,559**	**40,718**
TOTAL ROAD FUEL	**Millions of liters**	**35,638**	**44,940**	**50,627**	**50,629**	**50,664**	**50,047**	**49,922**	**50,086**

Source: CPDP.

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**	**1.38**	**1.54**	**1.62**	**1.59**	**1.54**
Tax as a %	%	-	71	69	60	56	54	55	56
Gasoline	**€/liter**	**0.52**	**0.81**	**1.12**	**1.35**	**1.51**	**1.58**	**1.54**	**1.48**
Tax as a %	%	57	74	69	61	57	55	56	58
Diesel	**€/liter**	**0.37**	**0.54**	**0.85**	**1.15**	**1.34**	**1.40**	**1.35**	**1.29**
Tax as a %	%	46	61	62	54	49	47	49	51

Source: SOeS.

TOTAL AUTOMOBILE EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2014

	1990	1995	2000	2005	2010	2013	2014(1)	Changes 2014/1990	Changes 2014/2013
									(In thousands of metric tons)
Regulated pollutants									
SO_2	143	116	23	4	1	1	1	-99%	-
CO	6,109	4,282	2,555	1,452	756	507	427	-93%	-22%
NOx	1,183	1,080	927	763	599	530	508	-57%	-8%
NMVOC	974	731	504	293	151	106	94	-90%	-18%
Lead (in metric tons)	**4,200**	**1,495**	**65**	**62**	**64**	**66**	**67**	**-98%**	**-**
PM10: particles	72	81	66	52	44	37	34	-52%	-12%
									(In millions of metric tons)
Other emissions									
CO_2	111	120	127	129	122	120	119	7%	- 1%

(1) 2014 estimates.
Source: CITEPA / Secten data, updated May 2015.

CO_2 EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

(In millions of metric tons of CO_2)

	1990	1995	2000	2005	2010	2012	2013	2014(1)
Energy processing	69	58	63	67	59	51	51	37
Manufacturing industry	114	110	109	103	89	83	83	79
Residential/Commercial	84	87	88	98	91	82	85	70
Transport	117	126	134	135	128	127	126	125
of which road	**110**	**119**	**126**	**128**	**122**	**120**	**120**	**119**
of which other transportation	6.9	7.1	8.0	6.9	6.2	6.7	6.7	6.7
Agriculture/silviculture	9.5	9.9	10.2	10.7	10.3	9.9	10.4	10.4
TOTAL EXCLUDING LULUCF(2)	393	392	406	414	378	353	355	321
LULUCF(2)	-40	-43	-37	-52	-43	-52	-50	-49
TOTAL WITH LULUCF(2)	**353**	**349**	**368**	**362**	**335**	**301**	**306**	**272**

(1) 2014 estimates. (2) LULUCF Land Use, Land Use Change and Forestry
Source: CITEPA/ CORALIE/ Secten format, June 2015.

AVERAGE CO_2 EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE

(In grams of CO_2 per km)

	1995	2000	2005	2010	2012	2013	2014	2014-2000
France								
Gasoline	177	168	159	130	127	122	119	-49
Diesel	175	155	149	130	123	117	114	-41
TOTAL	**176**	**162**	**152**	**130**	**124**	**117**	**114**	**-48**
European Union 15 countries								
TOTAL	**186**	**171**	**161**	**141**	**132**	**127**	**122**	**-49**

Source: Ademe (July 2015).

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)														
1990	10,818	6%	846	-6%	988	7%	9,919	10%	22,571	7%	490	67%	23,060	8%
2000	19,828	12%	2,146	32%	2,328	34%	18,213	11%	42,515	14%	1,125	-6%	43,640	13%
2005	26,187	-5%	2,630	-8%	2,669	-5%	19,543	1%	51,031	-3%	1,571	0%	52,602	-3%
2010	15,241	11%	1,684	20%	2,330	29%	20,361	22%	39,616	18%	1,051	8%	40,667	18%
2013	13,222	-12%	2,443	16%	2,270	-4%	20,834	1%	38,769	-3%	1,233	8%	40,002	-3%
2014	13,651	3%	2,988	22%	2,557	13%	20,261	-3%	39,457	2%	1,222	-1%	40,679	2%
Imports (CIF)														
1990	9,813	7%	1,467	3%	1,564	-9%	5,596	1%	18,439	3%	638	21%	19,077	3%
2000	16,961	14%	1,997	9%	2,695	26%	11,024	11%	32,678	14%	959	-8%	33,637	13%
2005	20,671	4%	2,969	12%	3,285	6%	15,897	6%	42,822	5%	765	18%	43,587	6%
2010	22,380	7%	2,901	38%	2,440	6%	15,254	19%	42,975	13%	1,196	-1%	44,171	13%
2013	21,212	-3%	2,882	19%	3,386	25%	15,668	-1%	43,147	0%	1,148	2%	44,295	1%
2014	22,263	5%	2,999	4%	2,961	-13%	15,819	1%	44,043	2%	1,118	-3%	45,161	2%
Balance (exports-imports)														
1990	+1,005		-621		-576		+4,323		+4,131		-148		+3,983	
2000	+2,867		+149		-367		+7,189		+9,837		+166		+10,003	
2005	+5,517		-338		-616		+3,646		+8,208		+807		+9,015	
2010	-7,139		-1,217		-110		+5,107		-3,359		-144		-3,504	
2013	-7,990		-439		-1,116		+5,166		-4,379		+85		-4,293	
2014	-8,612		-12		-404		+4,442		-4,586		+104		-4,482	
Coverage rate (exports/imports x 100)														
1990	110		58		63		177		122		77		121	
2000	117		107		86		165		130		117		130	
2005	127		89		81		123		119		205		121	
2010	68		58		95		133		92		88		92	
2013	62		85		67		133		90		107		90	
2014	61		100		86		128		90		109		90	

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

AUTOMOTIVE TAXES AND DUTIES

(In € millions)

	1980	1990	2000	2010	2011	2012	2013	2014
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	32,324	35,360	35,608	35,891	37,103
Automotive insurance tax	478	2,780	3,429	4,126	4,263	4,378	4,470	4,590
Tax on vehicle registration certificates	157	846	1,373	1,917	2,080	2,117	2,039	2,071
Road tax	866	1,901	539	0	0	0	0	0
Tax on company cars	199	345	644	992	927	985	876	827
Tax based on number of axles	59	75	223	168	172	172	171	170
Fixed rate police and traffic fines, sentence fines	154	317	720	1,255	1,572	1,624	1,666	1,605
Driver's license tax	88	86	4	-	-	-	-	-
Regional development tax	0	0	442	539	542	535	538	571
Government royalty	-	30	132	186	193	198	300	314
TOTAL	**11,079**	**27,716**	**38,136**	**41,507**	**45,110**	**45,616**	**45,951**	**47,251**
VAT on spending to acquire and use vehicles	-	-	15,300[1]	-	-	-	-	-
Freeway tolls (including VAT)	610	2,592	5,330	9,700	10,106	10,190	10,609	11,027
Total Transportation Expense by the APUs[2]	-	-	-	-	-	41,400	-	-
of which road-related expenses	-	-	-	-	-	17,800	-	-
Resources generated by the road for everyday expenditure in favor of the APUs[2]	-	-	-	-	-	58,100	-	-

(1) For 1998.
(2) APU: Public agencies: the entire transportation expenditure (all modes) is equal to the everyday expenditure and the capital expenditure; the figure shown may include dual accounts and it is thus a plus.
Sources: Internal Revenue, CCFA, URF, Transport Satellite Account (SESP), French National Transport Accounting Commission.

FRENCH AUTOMOTIVE MANUFACTURERS

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

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

Renault
13-15, quai Le Gallo - 92153 Boulogne-Billancourt cedex
Tel.: 01 76 84 50 50
www.renault.com

Renault Trucks
99, route de Lyon
69800 Saint-Priest
Tel.: 04 72 96 51 11
Department of International Relations
14, rue Hoche - KUPKA C - 92039 La Défense Cedex
www.renault-trucks.com

Alpine-Renault
Avenue de Bréauté - 76885 Dieppe cedex
Tel.: 01 76 86 31 50 - Fax: 01 76 86 34 00

AUTOMOTIVE ORGANIZATIONS IN FRANCE

Association Française du Gaz Naturel pour Véhicules (AFGNV)
10, rue Saint-Florentin - 75001 Paris
Tel.: 01 42 97 97 99 - Fax: 01 42 97 40 60
www.afgnv.com

FFC- Constructeurs
Immeuble Le Cardinet
8, rue Bernard-Buffet - 75017 PARIS
Tel.: 01 44 29 71 00 - Fax: 01 42 67 48 21
http://www.ffcarrosserie.org/

Chambre Syndicale Internationale de l'Automobile et du Motocycle (CSIAM)
5, square de l'Avenue-du-Bois
BP 2116 - 75771 Paris cedex 16
Tel.: 01 53 64 50 30 - Fax: 01 40 67 95 94
www.csiam-fr.org

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

Conseil National des Professions de l'Automobile (CNPA)
50, rue Rouget-de-Lisle - 92158 Suresnes cedex
Tel.: 01 40 99 55 00 - Fax: 01 47 28 44 15
www.cnpa.fr

Fédération des Industries d'Équipements pour Véhicules (FIEV)
77-81, rue Jean-Jacques-Rousseau
92158 Suresnes cedex
Tel.: 01 46 25 02 30 - Fax: 01 46 97 00 80
www.fiev.fr

Groupement pour l'Amélioration des Liaisons dans l'Automobile (GALIA)
20, rue Danjou
92100 Boulogne-Billancourt
Tel.: 01 41 31 68 68 - Fax: 01 41 31 68 60
www.galia.com

Plateforme de la Filière Automobile (PFA)
2, rue de Presbourg
75008 Paris
Tel.: 01 49 52 63 98
www.pfa-auto.fr

Syndicat National des Loueurs de Véhicules en Longue Durée (SNLVLD)
Immeuble DIAPASON
218, avenue Jean-Jaurès - 75934 Paris cedex 19
Tel.: 01 53 68 40 40 - Fax: 01 53 68 40 99
www.snlvld.com

Syndicat des Véhicules de Loisirs (UNIVDL)
3, rue des Cordelières - 75013 Paris
Tel.: 01 43 37 86 61
Fax: 01 45 35 07 39
www.univdl.org

Union des Industries et Métiers de la Métallurgie (UIMM)
56, avenue de Wagram - 75017 Paris
Tel.: 01 40 54 20 20 - Fax: 01 47 66 22 74
www.uimm.fr

Union Routière de France (URF)
9, rue de Berri
75008 Paris
Tel.: 01 44 13 37 17- Fax: 01 44 13 32 98
www.unionroutiere.fr

Union Technique de l'Automobile, du Motocycle et du Cycle (UTAC)
BP 212 - 91311 Montlhéry cedex
Tel.: 01 69 80 17 00 - Fax: 01 69 80 17 17
www.utac.com

INTERNATIONAL AUTOMOTIVE ORGANIZATIONS

European Automobile Manufacturer's Association (ACEA)
85, avenue des Nerviens - 1040 Brussels (Belgium)
Tel.: 00 32 2 732 55 50 - Fax: 00 32 2 738 73 10
www.acea.be

International Organization of Motor Vehicle Manufacturers (OICA)
4, rue de Berri - 75008 Paris
Tel.: 01 43 59 00 13 - Fax: 01 45 63 84 41
www.oica.net

AUTOMOTIVE ASSOCIATIONS IN FRANCE

40 millions d'automobilistes
118, bd Haussmann – 75008 Paris
Tel.: 02 43 50 06 30 – Fax: 02 43 50 06 31
www.40millionsdautomobilistes.com

L'Automobile Club – Association Française des Automobilistes
Head office: 5, avenue de la Paix – 67000 Strasbourg
Paris office: 14, avenue de la Grande-Armée - 75017 Paris
Tel.: 0821 74 11 11
www.automobileclub.org

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

La Prévention Routière
4, rue Ventadour - 75001 Paris
Tel.: 01 44 15 27 00 - Fax: 01 42 27 98 03
www.preventionroutiere.asso.fr

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

AUTOMOTIVE INDUSTRY RESEARCH ORGANIZATIONS IN FRANCE

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

Fondation sécurité routière
2, rue de Presbourg
75008 Paris
www.fondationsecuriteroutiere.org

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

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

Institut Français du Pétrole Énergies Nouvelles (IFPEN)
1 & 4, avenue de Bois-Préau
92852 Rueil-Malmaison Cedex
Tel.: 01 47 52 60 00 – Fax: 01 47 52 70 00
www.ifpenergiesnouvelles.fr

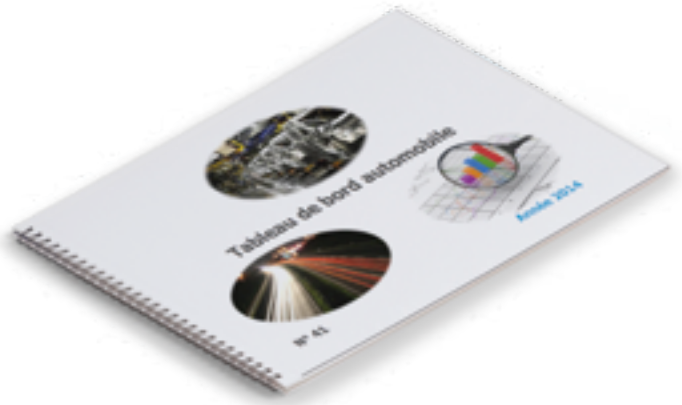
Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
IFSTTAR Head office
Département Économie et Sociologie des Transports (DEST)
14-20, Boulevard Newton
Cité Descartes, Champs sur Marne
F77447 Marne-la-Vallée Cedex 2
Tel.: 01 81 66 80 00
www.ifsttar.fr

LUTB Transport & Mobility Systems
c/o CCI de Lyon
Place de la Bourse
69289 Lyon Cedex 02
Tel.: 04 72 40 57 00 – Fax: 04 72 40 58 60
www.lutb.fr

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

Pôle Véhicule du Futur (Vehicle of the Future Cluster)
Head office: Étupes
Centre d'affaires Technoland
15, rue Armand-Japy - 25461 Étupes Cedex
General Secretariat: Mulhouse
Technopole de Mulhouse
BP 2118 – 40, rue Marc-Seguin
68060 Mulhouse Cedex
Tel.: 03 89 32 76 44 – Fax: 03 89 32 76 45
www.vehiculedufutur.com

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



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