

6

MILLION VEHICLES

.....

WERE PRODUCED
BY FRENCH MANUFACTURERS
WORLDWIDE

78%

OF VEHICLES

.....

PRODUCED
BY FRENCH MANUFACTURERS
ARE SOLD ABROAD

€5,2

BILLION

.....

FRENCH AUTOMOTIVE
INDUSTRY
RESEARCH AND DEVELOPMENT
BUDGET IN 2013

€43

BILLION

.....

OF AUTOMOTIVE
PRODUCTS
ARE SOLD ABROAD

80%

.....

SHARE OF
DOMESTIC TRAVEL
IN FRANCE USING
PASSENGER CARS

84%

.....

THE SHARE OF
DOMESTIC FREIGHT
TRANSPORT
IN FRANCE BY ROAD



Comité des Constructeurs Français d'Automobiles

THE FRENCH AUTOMOTIVE INDUSTRY

.....

ANALYSIS & STATISTICS 2016

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INTERVIEW WITH CHRISTIAN PEUGEOT



In 2015, the global economy was less dynamic, so what does that mean for the automotive industry?

In 2015, the global market grew 1% but the global automotive industry has grown 3% on average per year since 2010. The dynamism of the automotive market in the global scheme of things is still a feature.

With countries like Brazil and Russia facing sharp declines, and developed countries like the US and Europe in recovery, are local situations very variable?

After the crisis, growth came from emerging countries and then, when some started to lose impetus, western countries started to boost sales. Cars are durable goods and market fluctuations are extensive, sometimes lasting several years. These large variations have always existed and it is up to car manufacturers to know how to tackle them.

And so, how have French manufacturers gone about it?

Global production of French manufacturers increased 6% in 2015; they have been able to rely on their base market – Europe – to compensate for sharp declines in Brazil and Russia, whilst business with China and India continued to develop. For our manufacturers, the strategy is of course global and implies more balanced presence between the major areas, so as to reduce exposure to risk during the European market's negative cycle. In 2015, French manufacturers used their European, and particularly French, production apparatus more (+10%).

In several emerging countries, they continued their development by signing agreements which in the future will see new industrial facilities emerge. In the case of countries in recession, they adapt by reducing capacity while stimulating the use of local

suppliers, which allows them to better follow the spending capacity trends of local consumers.

In France, production grew 8%. How is this possible when the French economy has for many years been known to be less competitive?

During the 2000s, a major competitiveness gap opened up with Germany; the same applied to other automotive production countries in Europe. The government's measures (CICE) are very useful but need to be supplemented by company agreements. These actions have helped narrow the gap in salary cost growth compared to our main rivals and, in particular, Germany. Over recent years, numerous agreements have been signed which mean that future production schedules on French sites will veer towards higher added value production (light commercial vehicles, electric vehicles, higher-range vehicles, etc.). Such products serve the domestic market, but also French automotive exports, which progressed 9% in 2015 to more than 40 billion euros.

Does this mean things are improving for the automotive sector?

Of course, the French economy's recovery has benefitted the automotive sector, as did the global improvement in the European market which drives European production as a whole. The automotive industry has a structuring effect on suppliers and the increase in production rhythms draws along with it numerous sectors such as plastics, industrial rubber, foundries and industrial metal services, whilst other sectors are still having a tough time of it.

The French automotive industry invests a lot in R&D. How is it doing post-crisis?

In a highly competitive industry, competitiveness and innovation are the keys to the future. In spite of the crisis, the French automotive sector continues to invest, with over 5 billion euros of R&D spending on average since 2009. French manufacturers' investment effort is important for skilled jobs in France because it focuses primarily on domestic production.

Projects such as the '2-litre per 100 km vehicle', the autonomous vehicle, and others, symbolise this orientation of the automotive sector in line with current and future issues. Half of French manufacturers' R&D focuses on reducing the environmental footprint of cars, in particular by reducing fuel consumption and CO₂ emissions by developing electric vehicles (hybrid, hybrid rechargeable or 100% electric). Electrification of vehicles is a key technology in which the global automotive industry is investing to reduce CO₂ emissions.

Since 1990, the improved energy efficiency per kilometre driven by one person in a car (14%) and the transportation of one tonne of merchandise per kilometre (28%) illustrate our industry's forward-looking approach. Two major regulatory developments on emissions will also mark a significant chapter in European automobile production. The new WLTP lab test cycle and RDE tests adopted by European bodies will apply as of 2017, meaning that a high level of real driving

performance can be certified when vehicle authorisations go through.

All these efforts deliver the mobility that is essential to so many households and companies at the best possible cost.

Finally, French auto makers' R&D is now highly trained on the development of autonomous connected vehicles. This nascent revolution, using technologies allowing the vehicle to guide itself, will require traffic rules to be reviewed in depth at international level. Through a resolutely new experience for users, the challenges are many: improving road safety, making traffic more fluid, promoting economic driving and making mobility accessible to all. Also, the autonomous car will allow the user to convert driving time into a pleasant, productive experience, by using it for professional or leisure purposes.

On the subject of mobility, is the car playing a lesser role in urban areas?

In 2015, French households continued to be equipped as much as before (83% of households) with one car (48%), two cars (29%), or even more (5%)! These levels are much higher in peri-urban and rural areas, where the car is more necessary. Nevertheless, the car continues to play a substantial role in conurbations. The car also has new uses, enabled by technological developments, with cost and the environmental efficiency gains through mutualisation. Manufacturers are also looking to produce new models which are more suited to consumers' or companies' mobility needs in light commercial vehicles. This is encouraging them to prioritise connected and autonomous car projects with a capacity of synthesis that new market entrants will have difficulty challenging. This thrilling future is a project in progress.

I hope you will enjoy your read!
Christian Peugeot

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.

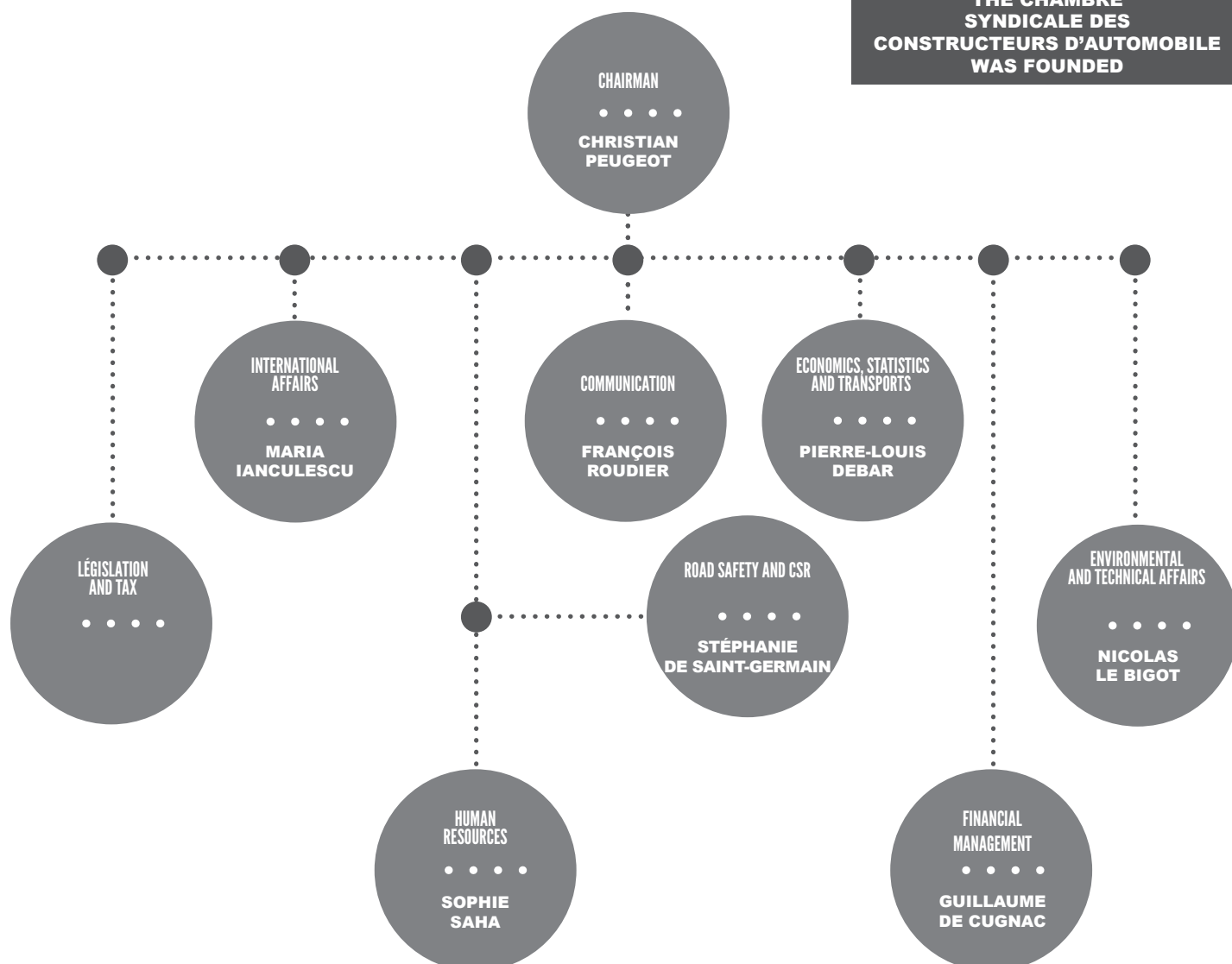
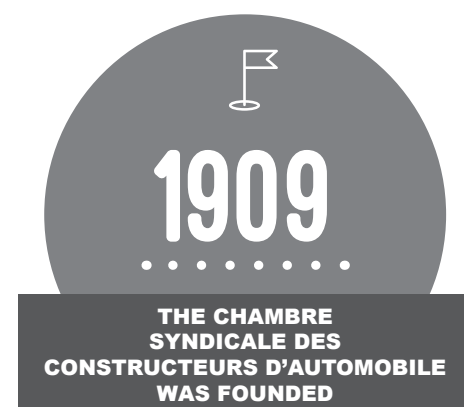
Other sectors of the automotive industry (parts and equipment manufacturers, dealers, body manufacturers) have their own trade associations (FIEV, Fédération des Industries des Équipements pour Véhicules – French Automotive Equipment Industries Association, CNPA, Conseil National des Professions de l'Automobile – National Council of Automotive Professions, FFC, Fédération Française de Carrosserie - French Bodybuilding

Federation, FIEEC, Fédération des Industries Electriques, Electroniques et Communication - Electrical, Electronic and Communications Industry Federation, FIM, Fédération des Industries Mécaniques - Mechanical Industry Federation, FFF, Fédération Forge Fonderie - Forging Foundry Federation, GPA, Groupement Plasturgie Automobile - Automotive Plastics Group, SNCP, 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 – Filière Automobile et Mobilités), 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 Conseil de Standardisation Technique Automobile (CSTA – Automotive Technical Standardisation Council) and the Conseil de Recherche Automobile (CRA – Automotive

Research Council), their role being to guide research and development.

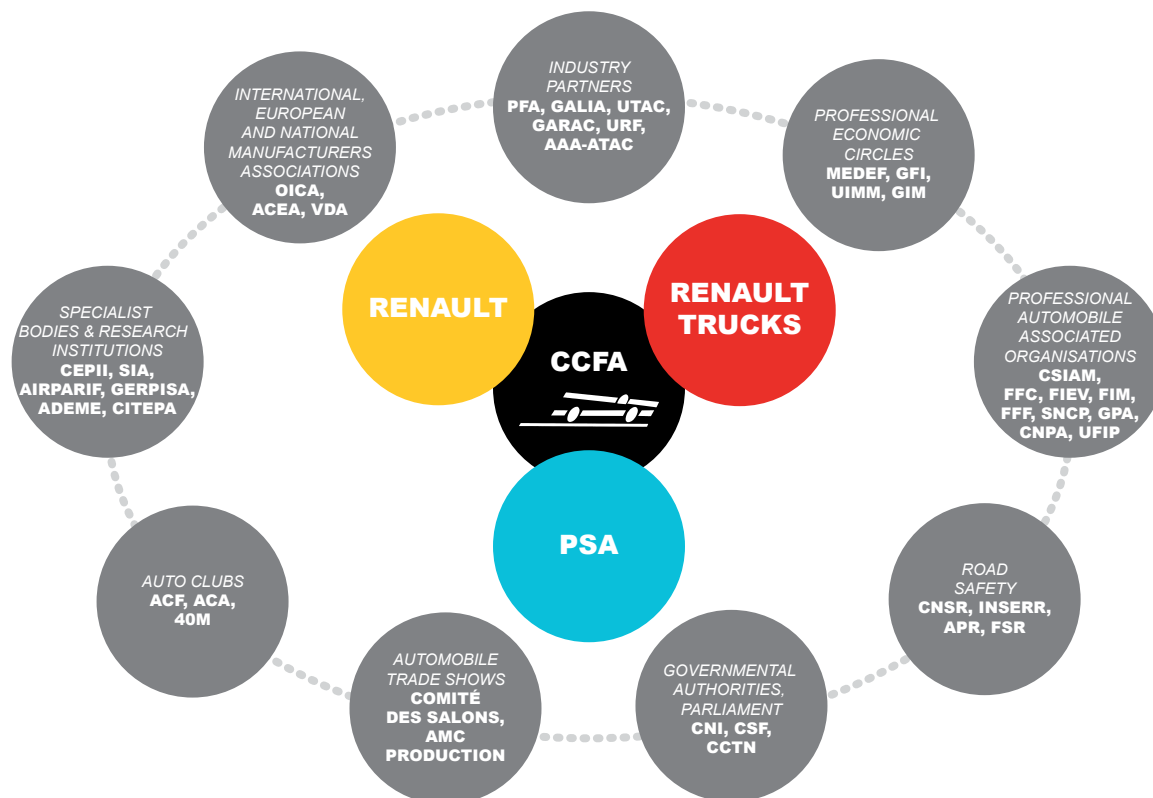
Foreign brands are represented by the Chambre Syndicale Internationale de l'Automobile et du Motorcycle (CSIAM – International Association of the Automobile and the Motorcycle). CCFA is associated with Brussels-based ACEA, the European Automobile Manufacturers' Association.

It is also a member of the OICA, Organisation Internationale des constructeurs de l'automobile (OICA - International Organisation of Motor Vehicle Manufacturers, which brings together national associations representing the industry from around the world.



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THE CCFA AND ITS PARTNERS



► INTERNATIONAL, EUROPEAN AND NATIONAL MANUFACTURERS ASSOCIATIONS:

OICA: International Organisation of Motor Vehicle Manufacturers

ACEA: European Automobile Manufacturers' Association

VDA: Verband der Automobilindustrie

► INDUSTRY PARTNERS:

PFA: Filière Automobile et Mobilités

GALIA: Groupement pour l'Amélioration des Liaisons dans l'Automobile

UTAC: Union Technique de l'Automobile, du Motorcycle et du Cycle

GARAC: Ecole Nationale des Professions de l'Automobile

URF: Union Routière de France

AUTF: Association des Utilisateurs de Transport de Fret

► SPECIALIST BODIES & RESEARCH INSTITUTIONS:

CEPII: Centre d'Etudes 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'Etudes et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile

UNIFAB: Union des Fabricants pour la protection internationale de la propriété intellectuelle

ADEME: Agence de l'Environnement et de la Maîtrise de l'Energie

CITEPA: Centre Interprofessionnel Technique d'Etudes 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

► 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 (Metallurgy employers' association)

GIM: Groupe des Industries Métallurgiques de la Région Parisienne (Paris region metallurgical industries group)

► PROFESSIONAL AUTOMOBILE ASSOCIATED ORGANISATION:

CSIAM: Chambre Syndicale Internationale de l'Automobile et du Motorcycle

FFC: Fédération Française de la Carrosserie

FIEV: Fédération des Industries d'Equipements 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)

► ROAD SAFETY:

CNSR: National Road Safety Council

INSERR: National Institute of Road Safety and Research

APR: Association Prévention Routière

FSR: Road Safety Foundation

A GLOBAL AUTOMOBILE MARKET GROWING LESS ENERGETICALLY AND WITH HIGHLY CONTRASTING LOCAL DEVELOPMENTS

European markets, which had fallen to and remained at very low levels post-2009, have continued a recovery that has seen French manufacturers returning to substantial additional volumes. The main opportunities outside Europe for French groups are in emerging countries which have suffered decline since the end of 2013, with the notable exceptions of China and India.

► KEY DATA

In thousands	1997	2007	2014	2015	Change 2015/2014	Change 2015/2007
World production of French manufacturers	4,046	6,188	N/A	N/A	N/A	N/A
Passenger cars	3,472	5,301	4,920	5,182	5.3%	-2.2%
Light commercial vehicles	507	830	759	832	9.7%	0.3%
All light vehicles	3,979	6,131	5,679	6,014	5.9%	-1.9%
Heavy trucks (at constant scope)	36	58	N/A	N/A	N/A	N/A
Production of French manufacturers in France	2,525	2,573	1,503	1,656	10.2%	-35.6%
Passenger cars	2,235	2,165	1,180	1,242	5.2%	-42.7%
Light commercial vehicles	258	352	322	415	28.6%	17.7%
All light vehicles	2,493	2,518	1,503	1,656	10.2%	-34.2%
Heavy trucks	30	55	N/A	N/A	N/A	N/A
Vehicle exports outside France	2,822	4,697	4,534	4,722	4.2%	0.5%
Passenger cars	2,526	4,110	3,962	4,159	5.0%	1.2%
Light commercial vehicles	276	549	554	542	-2.1%	-1.2%
All light vehicles	2,802	4,659	4,516	4,702	4.1%	0.9%
Heavy trucks	20	38	17	21	17.9%	-45.3%
Automotive exports outside Europe (17 countries)	659	2,110	2,761	2,747	-0.5%	30.2%
Passenger cars	563	1,914	2,495	2,548	2.1%	33.1%
Light commercial vehicles	88	178	255	188	-26.3%	5.6%
All light vehicles	651	2,092	2,750	2,736	-0.5%	30.8%
Heavy trucks	8	18	10	11	11.4%	-37.6%
Vehicle registrations in France	2,068	2,629	2,211	2,345	6.1%	-10.8%
Passenger cars	1,713	2,110	1,796	1,917	6.8%	-9.1%
Light commercial vehicles	313	461	372	379	2.0%	-17.8%
All light vehicles	2,026	2,571	2,168	2,297	5.9%	-10.7%
Heavy trucks	39.3	52.5	37.6	41.7	11.1%	-20.6%
Coaches and buses	3.1	5.5	5.4	6.7	24.3%	22.5%
Registrations in Europe (17 countries) of vehicles from French groups	3,300	3,906	3,022	3,274	8.3%	-16.2%
Passenger cars	2,841	3,181	2,461	2,651	7.7%	-16.7%
Light commercial vehicles	432	690	544	602	10.6%	-12.8%
All light vehicles	3,273	3,871	3,005	3,253	8.3%	-16.0%
Heavy trucks	27	35	18	21	17.7%	-40.1%

Compared to levels prior to the 2008 financial and economic crisis, global production of French manufacturers was only 3% lower in 2015 in a global economic context marked by sustained, high-level growth in emerging countries until 2013, and the recovery of European markets since 2014. The US has substantially exceeded its pre-crisis levels, whilst in developed countries and the euro zone this is not yet the case. Trends in emerging countries are contrasted with China continuing to grow, and decline in Brazil and Russia since 2013. Sales outside Western Europe have increased by more than 640,000 units since 2007, to 2.7 million vehicles in 2015. These areas, where the levels of car ownership are substantially lower than in Western Europe (22 and 102 vehicles per 1000 inhabitants in India and China respectively, compared to 569 in the European Union), represent vast potential markets, and investment must continue and expand in spite of

troughs and peaks. Sales in Western Europe, a mature automotive area, continued to provide a base market for French manufacturers. Sales fell by more than 1 million vehicles over the period 2007-2013 to 2.8 million, further, in particular, to retracting French and Southern European markets. Since, registrations in Western Europe have recovered to 3.3 million units, i.e. an increase of 470,000 units. To face up to growing foreign competition, French manufacturers continue to invest in France, both in R&D and in production facilities, seeing it as a guarantee for the future.



A GLOBAL AUTOMOBILE MARKET GROWING LESS ENERGETICALLY AND WITH HIGHLY CONTRASTING LOCAL DEVELOPMENTS

	Units	2014	2015	Change 2015/2014
Market share of French groups (new light vehicles)				
In France	(%)	57.0%	56.0%	-1.1 point
In Europe (17 countries) excluding France	(%)	15.5%	15.7%	0.2 point
In Europe (17 countries)	(%)	22.1%	21.9%	-0.2 point
Market share of French brands (new heavy trucks)				
In Europe (17 countries)	(%)	7.6%	7.8%	0.2 point
French manufacturers' position in world production (PSA and Renault Groups)				
Passenger cars	(%)	7.3%	7.6%	0.3 point
Commercial vehicles	(%)	3.4%	3.7%	0.3 point
Total	(%)	6.3%	6.6%	0.3 point
French automobile international trade				
Exports	(€ billions)	40.7	44.4	+9.1%
Imports	(€ billions)	45.2	50.6	+12.1%
Balance	(€ billions)	-4.5	-6.2	+39.1%
Automotive industry contribution to foreign trade goods balance				
Exports	(%)	9.5%	9.5%	0.0 point
Imports	(%)	9.0%	9.9%	0.9 point
World key figures for french manufacturers (PSA and Renault Groups)				
Sales	(€ billions)	94.7	100.0	-1.8%
Capital expenditure	(€ billions)	2.8	3.5	-21.5%
No. of employees	(thousands of people)	307	302	-3.8%
Jobs related to the automotive industry in France				
Automotive industry	(thousands of people)	226	224	
As a share of industry (including food industries, etc.)	(%)	7%	ND	
Total jobs (directly and indirectly related)	(thousands of people)	2,253	2,273	
As a % of the employed working population	(%)	9%	9%	

In France, road traffic has grown apace since 2012 (+1% on average), with a sharp acceleration in 2015 (+2%). More dynamic economic growth and the fall in fuel prices are major contributing factors. Consumers are deciding between different consumption items. Spending on cars now represents less than 9% of household expenditure compared to almost 11% in 1990. The vehicle purchase item now comes second behind vehicle use costs (excluding fuel) and the lesser expenditure has impacted the new vehicle market. Manufacturers must, however, continue to take societal demands on board (environment, safety, etc.), meaning major research and development expenditure. They are therefore offering an increasingly environmentally virtuous range of products. In France, average CO₂ emissions per kilometre for new passenger cars have fallen by 38 grams since the introduction of the bonus-malus scheme. The quantity of CO₂ required to move one tonne of merchandise over one kilometre using heavy-duty vehicles is also down (-28% since 1990).

In 2015, in Western Europe, markets for new vehicles once again progressed, in particular thanks to the buoyancy of the UK economy and the recovery of the Italian and Spanish markets. This latter point has led to a recovery in French manufacturers' penetration in

an increasingly competitive environment. The share of European sales in French groups' overall sales will not last, because of the differences in automotive density between this mature zone and the emerging countries. In 2015, they produced around 60% of their output in their zone of origin, compared to 80% in 2006.

In Eastern Europe, sales grew in the member states of the European Union, but fell in Russia. The resilience of sales growth in China, which became the leading automotive market in the world in 2009, explains the overall growth in the Asian market.

Variations in the other countries were disparate: net shrinkage in Indonesia (-14%) and Thailand (-10%), a recovery in India (+8%) and stability in Malaysia. The Iranian market, where French manufacturers have a good footing, has grown 50% since the low point of 2013, in a context of economic recovery and newfound openness to the outside world. French groups' product sales progressed substantially in Asia (+7%), with 1.1 million units in 2015.

In Latin America, the markets once again fell and the impact is reflected in French manufacturers' fortunes.

Variations are nevertheless in evidence, with -27% for Brazil and -1% for Argentina, which continues to report strong growth on the passenger vehicle segment.

Finally, French manufacturers' sales are practically stable in Africa at 270,000 vehicles, in a market in heavy decline. In the Maghreb, where French manufacturers are present commercially and industrially, Algeria suffered a severe reversal (-6%), which was quite the reverse of Morocco (+8%).

In the emerging countries, where opportunities should improve in the longer term, French manufacturers continued to develop both commercially and industrially, with or without partnerships, to satisfy demand for car ownership. They decided on further investments and to renew and adjust vehicle ranges. They are continuing their efforts in Asia (PSA, with its two partners in China, and Renault in India and China).

WORLD MOTOR VEHICLE PRODUCTION

In 2015, global production of vehicles progressed 1.1% to 90.8 million, continuing uninterrupted growth since the 2009 collapse. This increase represented 950,000 vehicles in volume. Most of the production areas have reported substantial increases, contrasting with declines in Japan, ASEAN countries, Russia and South America.

Global production of vehicles was around 50 million units in 1990, and nearly 60 million in 2000. The 70 million thresholds were crossed in 2007

before the 2009 collapse. Since 2000, the annual average growth rate has been 3%.

In developed zones, production trends compared to 2007 levels are divergent; decline in Western Europe (-14%) and Japan (-20%), but 16% growth in NAFTA (Canada, US, Mexico) and 11% in South Korea.

In emerging zones and countries – today's automotive expansion segment – production is far higher than before the crisis. In 2015, it was

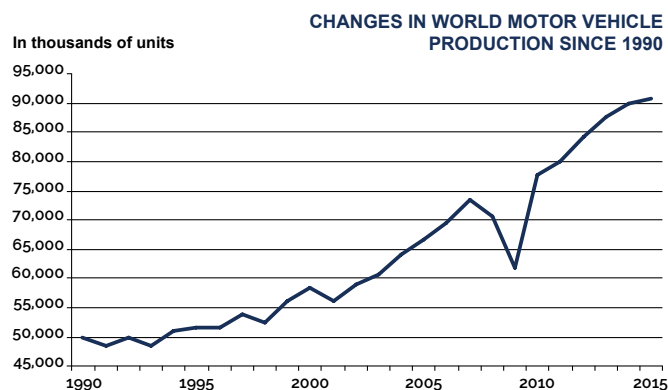
128% higher than in 2007 in Asia-Oceania (and more than doubled in China: +176%), but fell 18% in Latin America and increased 27% in the new member states of the European Union.

In thousands	2014	2015	Change %
Europe	20,473	21,184	3.5
Western Europe	13,527	14,414	6.6
Germany	5,908	6,033	2.1
Belgium	517	409	-20.9
Spain	2,403	2,733	13.7
France	1,821	1,970	8.2
Italy	698	1,014	45.3
The Netherlands	31	44	41.9
The United Kingdom	1,599	1,682	5.2
Sweden	198	189	-4.5
Central and Eastern Europe	5,775	5,411	-6.3
Turkey	1,170	1,359	16.1
North and South America	21,222	20,965	-1.2
NAFTA	17,422	17,949	3.0
South America	3,800	3,016	-20.6
Asia-Pacific	47,405	47,782	0.8
ASEAN	3,930	3,788	-3.6
China	23,732	24,503	3.2
South Korea	4,525	4,556	0.7
India	3,845	4,126	7.3
Japan	9,775	9,278	-5.1
Africa	720	836	16.2
TOTAL	89,820	90,767	1.1

1) NAFTA: Canada, USA, Mexico

(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.

Source: OICA, CCFA estimates for July 2016.

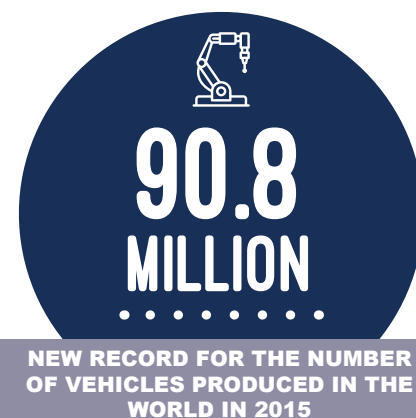


In Western Europe, production progressed 7% in 2015 compared to the previous year with still highly contrasted results. Countries like Spain (+14%), Italy (+45%) and France (+8%) started to benefit from Europe's return to growth, whilst others, more focussed on exports outside the EU, consolidated their positions (Germany: +2%, UK: +5%). In Eastern Europe, Russia's decline has been particularly striking (-27%).

In America, production continued to increase in the NAFTA zone (+3%) but collapsed in South America (-21%), falling to its lowest level for a decade (that of 2006).

As was the case in Asia-Oceania, which represents more

than half of global production, production progressed in India (+7%), Philippines (+5%), China (+3%), Malaysia (+3%) and Thailand (+2%). Growth was lower in South Korea which is a mature market (+1%). It fell in Iran (-10%) and Japan (-5%)



WORLD MOTOR VEHICLE PRODUCTION

Between 2010 and 2015, global production of vehicles (90.8 million) increased 17% i.e. by 13 million units. Since 2010, the global automotive industry has remained dynamic overall, across almost all areas.

In developed zones and countries, production increased by almost 6.3 million vehicles to 46.2 million units (+16%). They represented half of global production in 2015, the same proportion as in 2010. Within those zones, production in North America increased by 5.8 million units (+47%) thanks to Mexico, in particular, whilst in Western Europe, it increased by 588,000 (+4%). Production in Japan fell by around 350,000 units in 2015 (i.e. 4% down on 2010). However, South

Korea, having benefitted in particular from more favourable exchange rate movements, added 284,000 units (+7%).

In emerging countries and zones, production increased by 6.9 million vehicles, based on the five following areas:

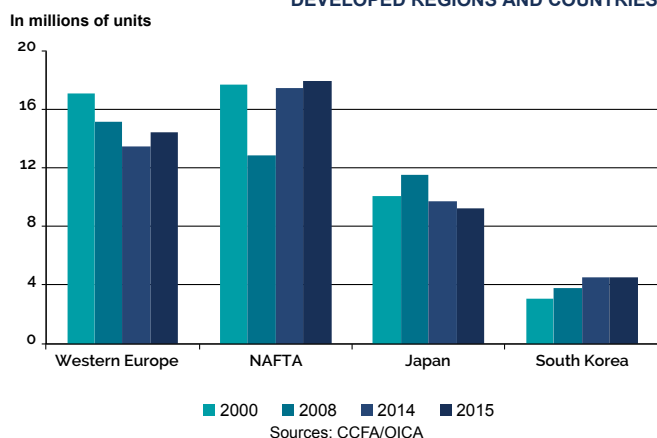
- China (+6.2 million), which represented 27% of global production in 2015, compared to 24% in 2010
- Central and Eastern Europe and Turkey (+707,000 units and a share of 7%, i.e. the same level as in 2010)
- Indonesia, Iran, Malaysia and Thailand (+1.1 million units and a share of 5%, down from 6%)
- South America (-1.2 million and a share of 3%,

compared to 6%)

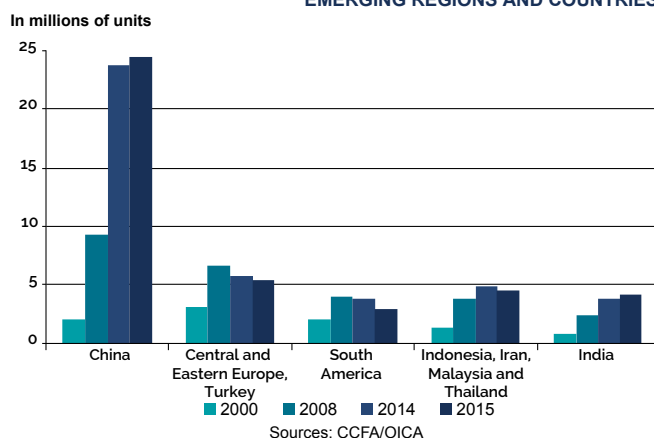
• India (+570,000 and a share of 5%, i.e. the same level as 2010).

In Central and Eastern Europe, the vigour demonstrated by the new member states of the European Union contrasts with the severe decline in production in Russia, with 1.4 million vehicles in 2015 (-27% compared to the previous year).

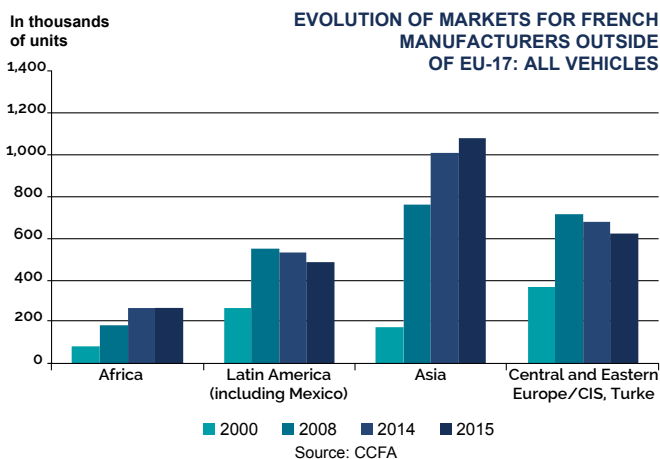
DEVELOPED REGIONS AND COUNTRIES



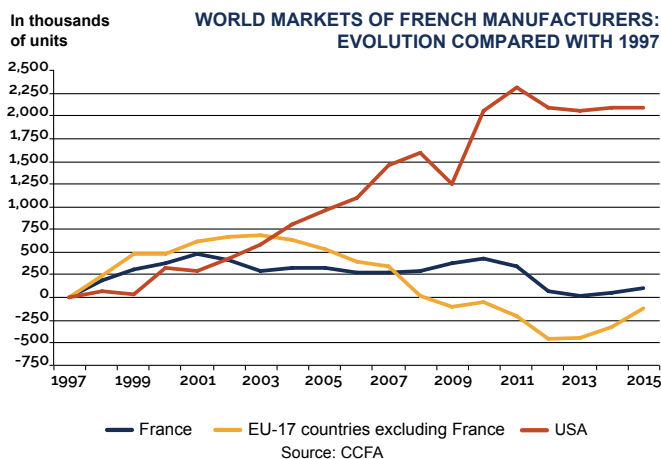
EMERGING REGIONS AND COUNTRIES



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



WORLD MARKETS OF FRENCH MANUFACTURERS: EVOLUTION COMPARED WITH 1997



1/2

RESPECTIVE SHARE OF DEVELOPED/EMERGING ZONES AND COUNTRIES IN GLOBAL VEHICLE PRODUCTION

In this context of dynamic growth of global production, French auto makers have substantially bolstered their deliveries to emerging areas: up 1.3 million units between 2000 and 2008, outside the 17 countries of the European Union, to 2.3 million vehicles. In 2009, deliveries had dipped and then recovered substantially over the following years. In 2015, further to a decline in some of the emerging markets, they fell compared to 2010, except in two regions. Hence, deliveries were up in Africa (+69,000 units) and the countries of Central and Eastern Europe and Turkey (+5000 units). But they fell in Latin America, including Mexico (-157,000 units) and in Asia (-127,000 units). In Europe, deliveries to Italy and Spain continued to recover after downturn caused by the global crisis; they approached 2010 levels to Italy and increased by 18,000 units to Spain.



WORLD RANKINGS OF AUTOMOBILE MANUFACTURERS

The 14 biggest manufacturers, including French groups PSA and Renault, represented around 80% of global production. Each produced over two million vehicles.

In 2015, French manufacturers benefitted in volume terms from the recovery in Europe; they occupied the tenth and eleventh global ranking

respectively. French auto makers accounted for 6.6% of global production, substantially lower than the 2001 record of 9.8%.

Car manufacturers have become substantially internationalised since 2000 and continue to develop industrial facilities outside their home countries. European, America, Japanese and

Korean manufacturers produce between 60 and 70% of their vehicles in their own areas in 2000, compared to 30-60% in 2015. Japanese manufacturers were the most internationalised (they only made 33% of their vehicles in Japan), followed by the Koreans (45% in Korea). Even one emerging country manufacturer, Tata, only made 50% of its vehicles at home.

(IN THOUSANDS)

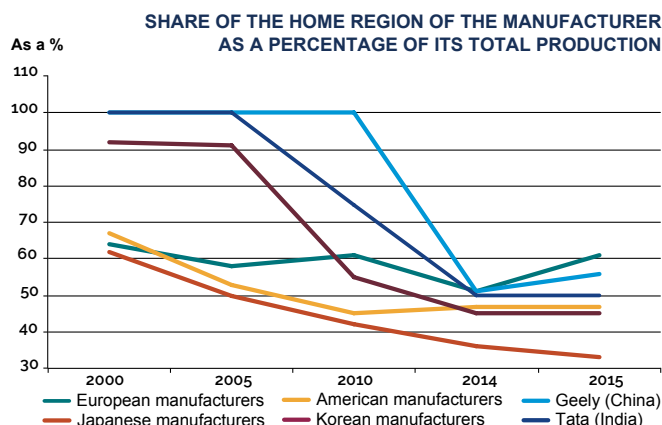
Rank	GROUPS	Year 2014	Year 2015	Change (%)
1	TOYOTA	10,475	10,270	-2.0
2	VOLKSWAGEN	10,093	10,053	-0.4
3	G.M.	9,611	9,476	-1.4
4	HYUNDAI	8,003	7,988	-0.2
5	FORD	5,998	6,396	6.6
6	NISSAN	5,098	5,070	-0.6
7	FIAT	4,866	4,865	0.0
8	HONDA	4,514	4,526	0.3
9	SUZUKI	3,017	3,047	1.0
10	RENAULT	2,762	3,033	9.8
11	PSA	2,917	2,982	2.2
12	DAIMLER AG	2,502	2,670	6.7
13	B.M.W.	2,166	2,280	5.3
14	SAIC	2,088	2,261	8.3
15	MAZDA	1,328	1,688	27.1
16	CHANGAN	1,447	1,540	6.4
17	MITSUBISHI	1,262	1,241	-1.7
18	DONGFENG MOTOR	1,302	1,209	-7.1
19	BAIC	1,116	1,170	4.8
20	TATA	962	1,009	5.0
21	GEELY	849	1,000	17.8
22	FUJI	889	942	5.9
23	GREAT WALL	731	870	19.0
24	ISUZU	538	694	29.1
25	ANHUI JAC AUTOMOTIVE	468	584	24.9
26	BRILLIANCE	520	562	8.1
27	CHERY	468	526	12.3
28	IRAN KHODRO	587	509	-13.2
29	FAW	624	497	-20.4
30	BYD	434	447	3.0
31	MAHINDRA	413	422	2.3
32	SAIPA	402	369	-8.3
33	AVTOVAZ	393	308	-21.6
36	VOLVO - MACK-RENAULT TRUCKS - UD TRUCKS	233	237	1.7

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



In a context of less dynamic growth, global production however did increase by 1.1% with contrasting results from one group to another.

Toyota group, a chart-topper since 2006, saw its production fall (-2%). GM also fell slightly (-0.2%) whilst Ford progressed (+6.6%). Volkswagen group (-0.4%), which is very present in emerging countries, held on to second place in 2015.

Amongst the Asian manufacturers, situations differ somewhat, but Hyundai-Kia (-1.4%/4th rank), Nissan (-0.6%/6th rank), Honda (+0.3%/8th rank) and Suzuki-Maruti (+1.0%/9th rank), maintained their positions.

European groups increased their production: the generalists PSA (+2.2%), Renault (+9.8%), and German

specialists of higher-end vehicles, BMW (+6.7%) and Daimler (+8.3%), with Fiat's production stable.

Manufacturers from emerging countries (China, India, Russia) also report highly contrasted growth patterns. The number of vehicles coming off SAIC's production lines, the biggest Chinese group, increased (+5.3%), similar to Tata (+5%), whilst production of the Dongfeng Motor group fell sharply (-7.1%) as did AvtoVAZ (-22%).



MARKET SHARE OF FRENCH MANUFACTURERS IN WORLD AUTOMOBILE PRODUCTION IN 2015

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

The European Union (now 28 countries) became the world's leading production area thanks to the net growth in the domestic market and buoyant exports (34% of production).

In North America, including Mexico, production continued to increase, at around 250,000 vehicles above the record level of 2000. Production is

primarily for the local market, with exports only accounting for 10%.

In Japan, exports represent 49% of production, with imports accounting for around 5% of total vehicle registrations.

Outside these three historic auto maker zones,

China, which became the number one production zone in the world in 2010, manufactures primarily for its domestic market: imports (1 million vehicles) and exports (0.7 million), down sharply in 2015 (-20%), each represent less than 5% of total production.

	European Union (1)		USA, Canada and Mexico (3)		Japan	
PASSENGER CARS						
PRODUCTION	In thousands	Index (100=2000)	In thousands	Index (100=2000)	In thousands	Index (100=2000)
1980	10,166	69	7,196	101	7,038	84
1990	12,726	86	7,150	101	9,753	117
2000	14,779	100	7,092	100	8,359	100
2010	15,260	103	5,084	72	8,310	99
2015	16,342	111	7,020	99	7,831	94
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%
2015	2,511	15%	2,488	35%	285	4%
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%
2015	5,641	35%	1,415	20%	3,970	51%
COMMERCIAL VEHICLES						
PRODUCTION	In thousands	Index (100=2000)	In thousands	Index (100=2000)	In thousands	Index (100=2000)
1980	1,600	69	2,138	25	4,005	225
1990	1,598	69	4,553	53	3,539	199
2000	2,327	100	8,669	100	1,782	100
2010	1,819	78	7,089	82	1,319	74
2015	1,929	83	10,929	126	1,448	81
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%
2015	366	19%	2,162	20%	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%
2015	481	25%	283	3%	608	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.

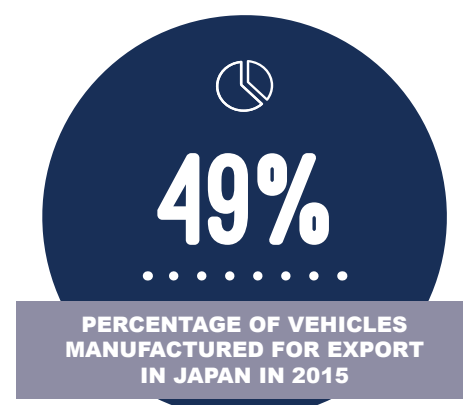
Since 2000, the trends in the three major automotive industry zones have been contrasted.

In the European Union (now 28 countries), growth of vehicle production was 11% (compared to +16% in 2007) and trade – already buoyant – more than doubled.

In North America, including Mexico, since 2009, production exceeded 2000 output by 14%. Imports, already very high in 2000, and sustained since, exceeded 2000 levels by 48%. Exports only represented 10% of production (29% for the EU and 46% for Japan).

Finally in Japan, vehicle output increased only 4% because of the decline in the domestic market and slow

export growth, initially boosted in line with the depreciation of the yen, to a level 51% above 2000 figures by 2008. In 2015, exports were only 3% higher, primarily because Japanese manufacturers are manufacturing outside Japan.



WORLD VEHICLE MARKETS



In 2015, the global automotive market continued its growth (+1.4% to 89.6 million vehicles), thus establishing a new record for the sixth consecutive year. All markets progressed except for those of Central and Eastern Europe, South America and the Association of South East Asia Nations (ASEAN) and Africa.

The world's five leading markets (China, US, Japan, Germany, India) accounted for 61% of global sales. In 2005, China and India ranked third and twelfth respectively. In 2015, sales in China were almost equivalent to the American continent and higher than Europe and Asia (excluding China).

The share of the global market of the main industrialised zones, where car ownership rates have arrived at maturity, was 48% in 2015, compared to 69% in 2005.

In emerging areas, market trends have generally been downward compared to previously higher levels. Since 2012, sales in Russia and Brazil have fallen respectively by 53% and 32%. The Algerian market lost almost 30% compared to its high point in 2013.

	Passenger cars				Commercial vehicles				Total		Change
	2014		2015		2014		2015		2014	2015	2015/2014
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
Europe	16,154	24.7	16,412	24.9	2,433	10.6	2,621	11.0	18,588	19,033	+2.4
Europe 17 countries	12,139	18.6	13,247	20.1	1,763	7.7	1,960	8.2	13,903	15,208	+9.4
Central and Eastern Europe	4,006	6.1	3,151	4.8	669	2.9	658	2.8	4,674	3,809	-18.5
North and South America	13,465	20.6	12,617	19.2	12,011	52.2	13,026	54.7	25,476	25,643	+0.7
NAFTA (1)	9,195	14.1	9,130	13.9	10,715	46.5	12,039	50.5	19,910	21,169	+6.3
USA	7,689	11.8	7,525	11.4	9,154	39.8	10,310	43.3	16,843	17,836	+5.9
South America	4,270	6.5	3,487	5.3	1,296	5.6	987	4.1	5,565	4,474	-19.6
Asia-Pacific	34,449	52.7	35,596	54.1	8,108	35.2	7,750	32.5	42,557	43,346	+1.9
China	19,708	30.2	21,146	32.1	3,791	16.5	3,451	14.5	23,499	24,598	+4.7
South Korea	1,360	2.1	1,534	2.3	302	1.3	300	1.3	1,662	1,834	+10.3
Japan	4,700	7.2	4,216	6.4	863	3.7	831	3.5	5,563	5,047	-9.3
ASEAN (2)	2,056	3.1	1,968	3.0	1,147	5.0	1,141	4.8	3,202	3,110	-2.9
Other Asia-Pacific	6,626	10.1	6,731	10.2	2,004	8.7	2,026	8.5	8,631	8,758	+1.5
Africa	1.9	1,159	1.8	1.8	476	2.1	425	1.8	1,749	1,584	-9.4
TOTAL	100.0	65,784	100.0	100.0	23,028	100.0	23,821	100.0	88,369	89,606	+1.4
Change 2015/2014	0.7%				3.4%				1.4%		

(1) NAFTA: Canada, USA, Mexico.

(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.

Source: OICA.

In the US, the market continued to progress after a low point in 2010, at around 18 million vehicles, breaking a new sales record. Also within NAFTA, the Mexican market progressed 18% to 1.4 million vehicles.

Western Europe continues its recovery begun in 2014, after six consecutive years of decline, to settle at 15.2 million vehicles, i.e. the same level as 2009, compared to 17.3 million in 2007. Variations per country were disparate, from -5% in Luxembourg to +48% in Iceland and +31% in Ireland, and +5% in Germany and +8% in the UK. The Spanish and Italian markets – severely hit by the economic and financial crisis – have grown 55% and 21% respectively since 2013.

In Central and Eastern Europe, confirmation has come of the end of the rapid growth observed since 2012 (-19%).

Developments are however contrasted. The markets in the new member states of the European Union are progressing (+14%), whilst the Russian (-45%) and Ukrainian (-51%) markets have collapsed.

In China, in spite of the limitations on the number of new vehicles in major cities, the market grew by 5% to 24.6 million vehicles. After becoming the leading market in 2009, China continues to be the engine room of global growth.

In Japan, after three years of growth, sales fell 9%. Since 2012, new registrations in South Korea have continued their progress (+10% to 1.8 million vehicles).

In the Asia-Oceania (excluding China) / Japan / South Korea zone, the market stagnated at 11.9 million vehicles.

Trends were highly contrasted: up 56% in Pakistan but down 14% in Indonesia and 10% in Thailand.

In South America, the market accelerated its decline (-20%), typified by the continent's leading market, Brazil (-27%).

In Africa, Algeria (-26%) was not helped by solid growth in Morocco (+8%).

THE WORLD'S VEHICLE FLEET

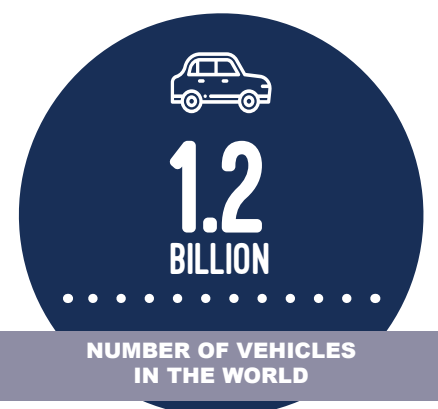
In 2014, the global vehicle stock (passenger and commercial vehicles) was 1.2 billion units (of which over 70% passenger cars), i.e. a growth of 4% compared to the previous year. The average rate of growth since 2011 is 4%, i.e. a faster pace of growth than before the crisis.

Stocks were practically stable in the mature markets of developed countries (increases generally between 0 and 1%) and showed strong growth in emerging countries.

The US stock is the biggest in the world with almost 260 million vehicles, ahead of China and Japan (142 and 77 million units respectively). France is in eighth position worldwide (38 million vehicles), behind Brazil.

Automobile density across the world was on average 178 vehicles per 1000 inhabitants (+24% compared to 2005). However, the gap is large between 41 vehicles in Africa and 661 in the NAFTA zone (US, Canada, Mexico) via 79 in Asia (excluding Japan and South Korea), 176 in South America and over 500 for the EU and Japan/South Korea. Density in Europe overall is slightly above 460.

North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has shown strong vehicle stock growth with an average rate of 6% per year since 2005, from 10.5 to 17.7 million units.



	Total		Change
	2013	2014	2014/2013
	thousands	thousands	%
Europe	374,943	382,183	+1.9
Western Europe	245,329	247,457	+0.9
Central and Eastern Europe	129,613	134,727	+3.9
North and South America	392,482	403,742	+2.9
NAFTA	309,919	316,630	+2.2
USA	252,715	258,027	+2.1
South America (1)	82,563	87,112	+5.5
Asia-Pacific	379,984	407,886	+7.3
China	126,701	142,430	+12.4
South Korea	19,401	20,118	+3.7
Japan	76,619	77,188	+0.7
ASEAN (1)	157,263	168,149	+6.9
Other Asia-Pacific	8,631	8,758	+1.5
Africa	40,653	42,508	+4.6
Total	1,188,062	1,236,319	+4.1

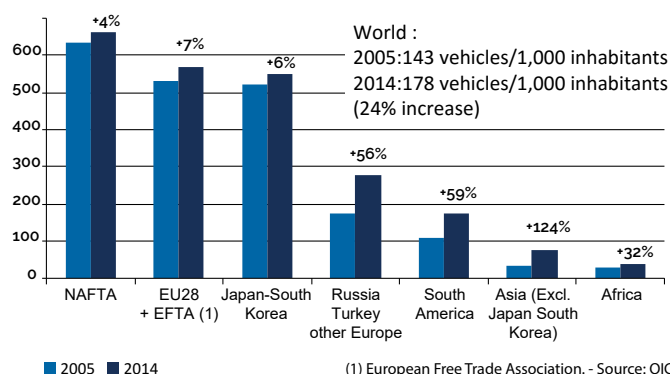
(1) NAFTA: Canada, USA and Mexico

(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam

Source: OICA



VEHICLE DENSITY BY REGION
(NUMBER OF CARS AND COMMERCIAL VEHICLES
PER 1,000 INHABITANTS)



In 2014, the mature zones represented more than 50% of the global vehicle stock and 15% of global production. They have lost around 15 percentage points to the emerging areas since 2005.

At the heart of the European zone, accounting for almost one third of the global stock, the increase was quicker in the east than in the west (cf. page 19). The rate of car ownership is also contrasted, ranging from 157 in Albania to 860 in Iceland, via 264 in Romania, and 550-600 in the main countries of Western Europe. The number of vehicles in the zone has grown by almost 60 million units since 2005, of which 75% outside Western Europe (+19 million additional units in Russia).

In the Americas, NAFTA, with 26% of the global stock, is a mature market with a high level of car ownership, especially in the US (808). However, the emerging South American market had 7% of the global vehicle stock in 2014 (176). The number of vehicles in America has swelled by 76 million units since 2005, almost at the same pace as NAFTA and South America. The three countries with the highest progression in terms of number of vehicles are the US, Brazil and Mexico with 20, 19 and 14 million units respectively.

In Asia, the mature markets of Japan and Korea (8% of the global stock) have car ownership levels of 607 and 406 respectively. However, emerging countries with

bigger populations have lower automobile density: 22 in India, 83 in Indonesia and 102 in China. Since 2005, almost all of the vehicle stock growth has come from Asia – excluding Japan and South Korea. China (111 million additional units) is way ahead of India (+18 million) and Indonesia (+12 million).

WORLD TRADE IN AUTOMOTIVE PRODUCTS

According to the WTO, in 2014, global trading in automotive industry products increased by 4%, to \$1395 billion, 13% above the 2008 level.

Between 2005 and 2014, the trading balances of automotive industry products were very different between countries and zones. South Korea's surplus increased from \$34 to \$62 billion, Japan's from \$110 to \$124 billion, and the European Union from \$80 to \$188 billion. In spite of the automotive market not yet reaching 2005 levels, the US deficit got wider (-\$136 billion).

Conversely, Canada's +\$9 billion balance in 2005 has been reversed (-\$10 billion), due to the role taken by Mexico in trade relations within NAFTA. Mexico reported an excess of \$48 billion compared

to \$2 in 2007. Brazil's excess of \$7 billion has turned into a \$10 billion deficit. China, which in the meantime has become the leading global automotive market, grew from \$4 to \$43 billion.

India's balance of trade surplus increased from \$1 to over \$6 billion further to a sharp increase in export from \$3 to almost \$12 billion.

Taking intra-zone trade into account, European Union imports have for the second time exceeded those of China (\$67 versus \$93 billion in 2014), still well below NAFTA, whose imports exceeded \$170 billion for the second time. The other major importers automotive products in 2014 were Russia (\$33 billion), Australia (\$25 billion) and Saudi Arabia (\$23 billion).



► EXPORTS (FOB)/IMPORTS (CIF) TO/FROM THE MAJOR REGIONS (IN US\$ BILLIONS)

Areas	World			USA and Canada, later North America (1)			Eur. Union (2)			Japan			Other countries (4)		
Countries	exp.	imp.	balance	exp.	imp.	balance	exp.	imp.	balance	exp.	imp.	balance	exp.	imp.	balance
USA															
2010	99.7	189.8	-90.0	60.2	91.7	-31.5	9.7	33.6	-23.9	1.2	42.9	-41.7	28.6	21.5	7.1
2013	134.7	260.1	-125.3	77.8	n/a	n/a	11.6	n/a	n/a	1.4	n/a	n/a	43.9	n/a	n/a
2014	138.1	274.4	-136.4	78.3	n/a	n/a	13.3	n/a	n/a	1.4	n/a	n/a	45.1	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
2013	59.9	71.6	-11.7	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2014	61.0	70.6	-9.5	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Eur. 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
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
2014	695.3	506.9	188.4	67.9	n/a	n/a	440.3	n/a	n/a	10.9	n/a	n/a	176.1	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
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
2014	145.1	21.3	123.8	53.2	n/a	n/a	15.0	n/a	n/a				77.0	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
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
2014	75.4	13.3	62.1	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
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
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
2014	50.9	93.5	-42.6	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
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
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
2014	10.0	20.3	-10.3	1.2	n/a	n/a	0.3	n/a	n/a	0.0	n/a	n/a	8.5	n/a	n/a

► TRADE OF THE MAIN EUROPEAN UNION COUNTRIES (3)

	Germany			France			Spain			Italy			United Kingdom		
2010	195.7	79.3	116.4	54.1	58.7	-4.7	47.5	31.4	16.1	29.1	39.7	-10.6	30.9	45.5	-14.6
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
2014	256.2	104.7	151.5	54.0	60.7	-6.7	56.9	40.5	16.4	36.1	33.7	2.4	45.0	64.9	-19.9

(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.

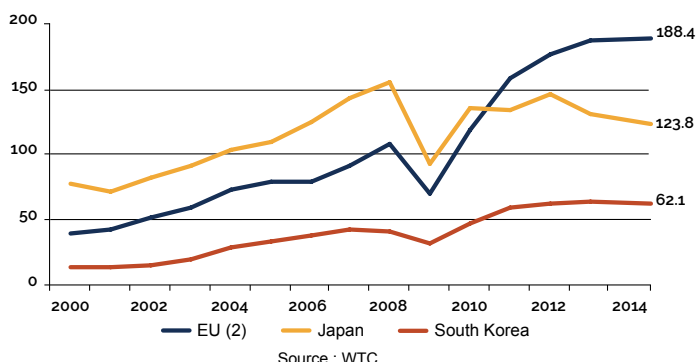
(3) Since 2001, CCFA has based its estimates of imports and exports for European Union countries on local customs statistics.

(4) The "other countries" total contains countries not included in the three major divisions.

Source: WTO.

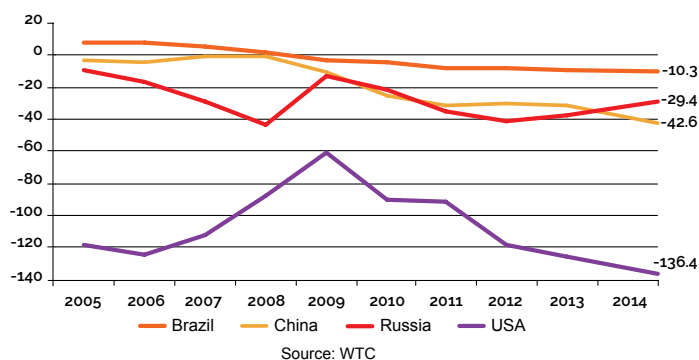
In US\$ billions

SURPLUSES IN AUTOMOTIVE PRODUCTS



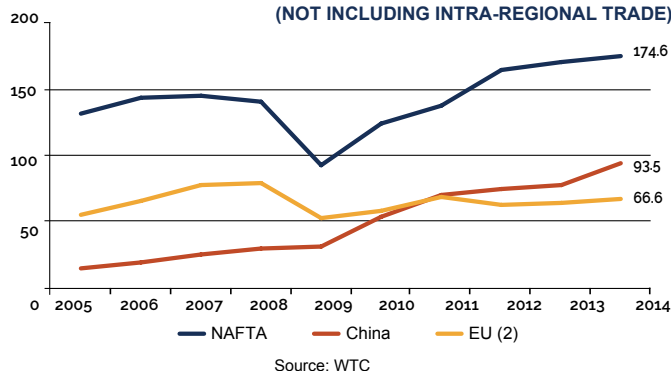
In US\$ billions

DEFICITS IN AUTOMOTIVE PRODUCTS



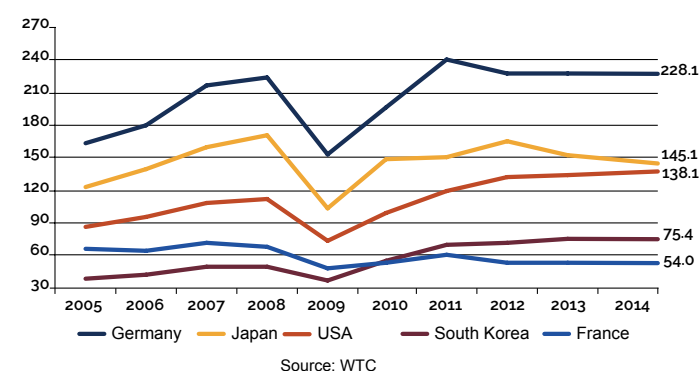
In US\$ billions

IMPORTS FROM THE MAIN REGIONS FOR AUTOMOTIVE PRODUCTS (NOT INCLUDING INTRA-REGIONAL TRADE)



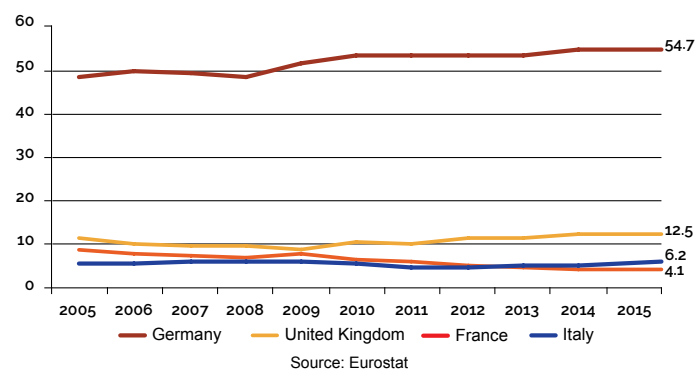
In US\$ billions

MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



As a %

SHARE IN EXPORTS FROM THE EU TO THE NON EU - ROAD VEHICLES (SITC 78)



4%

FRANCE'S SHARE OF GLOBAL AUTOMOTIVE INDUSTRY PRODUCT TRADING

In 2014, global trade in automotive industry products represented 7% of global exports of merchandise and 11% of manufactured products.

2014 was marked by stability of the euro against the dollar, whilst the exchange rate between the yen and the dollar fell 8%.

With increasing market levels in NAFTA and the European Union, the share of inter-regional trade in global trade stabilised at 60% in 2014 after a number of years' decline (64% in 2007). Whilst in NAFTA and Europe (excluding CIS) this share increases to around 70%, and even >80% in South America, it is only 29% in Asia-Oceania.

In 2014, Germany continued to be the biggest exporter of automotive industry products with a share of 18% (\$256 billion).

Japan, second in the world rankings, exported \$145 billion worth of product, of which \$53 billion to North America (i.e. 30% of its total exports compared to over 50% at the beginning of the 2000s). Over the period 2011-2014 its exports to China fell to \$13.7 billion on account of the geopolitical context. It is useful to compare this to Japan's

\$15 billion of exports to EU-28.

Exports from the EU's 28 countries reached \$695 billion dollars, 63% of which in intracommunity trade (73% in 2009). Exports from the EU totalled \$47 billion to China, \$16 billion to Russia, \$20 billion to Africa and \$15 billion to the Middle East.

According to Eurostat data, more than half of the EU's exports outside the EU are from Germany (55% in 2015), ahead of the UK (12%), Italy, Spain and France (around 5% each). The share of the five new entrants (Hungary, Poland, Romania, Slovakia and Slovenia) was 7%.

France accounted for 4% of global exports (\$54 billion), including intra-EU trade, compared to almost 8% in 2004.

The US continued to be the world's leading importer of automotive products with \$274 billion; further to strong growth on the domestic market, its deficit in automotive products achieved a record level of \$136 billion, i.e. higher than the \$120 observed between 2004 and 2006.

Chinese imports progressed sharply in 2014 (+20% to \$93

billion). Since 2005, they have increased 23% per year. In 2012, those imports came from EU-28 (56% compared to 42% in 2009), Japan (22% compared to 36% in 2009), NAFTA (13%) and South Korea (7%).

Reflecting oil resource trends, imports have grown sharply in Russia, Saudi Arabia and the United Arab Emirates since 2005. Respectively in annual averages, they progressed 13%, 10% and 9%.

The depressed domestic market in Italy caused a fall in imports, meaning that the automotive trading balance is once again in surplus.

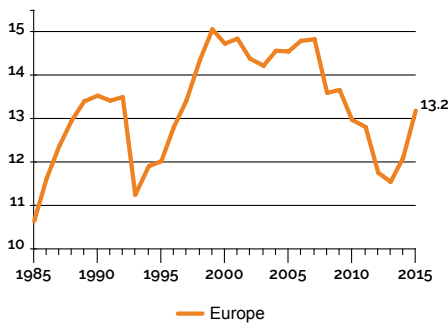
NEW PASSENGER CAR REGISTRATIONS PER COUNTRY

The West European market (12.1 million new cars, i.e. 90% of the European market) accelerated in 2015 (+8.9% compared to +4.8% in 2014). Over two years, the market grew by 1.4 million units. This increase partially made up for the decline during the years of the crisis (-3.3 million cars between 2007 and 2013). The current level is 11% down on 2007.

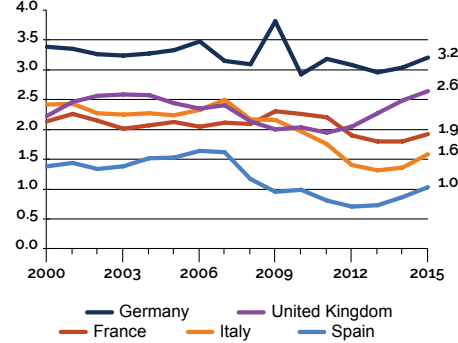
All West European countries saw market growth in 2015. The difference in the scale of that growth was however considerable from one zone to another. The UK was very high and Denmark and Sweden reached record levels. The German and French market increased but still shy of their long-term trends.

The countries of Southern Europe (Spain, Italy, Portugal and Greece) showed strong recovery in 2015 (+18%) after a period of growth (+11%) the previous year, but still 38% down on 2007.

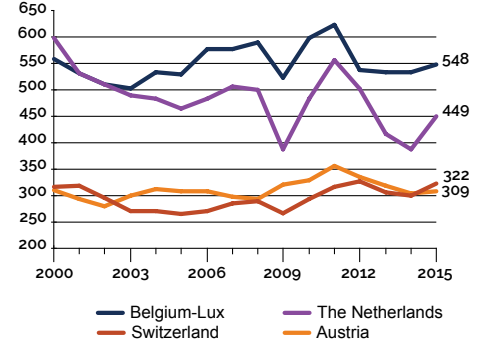
In millions of units



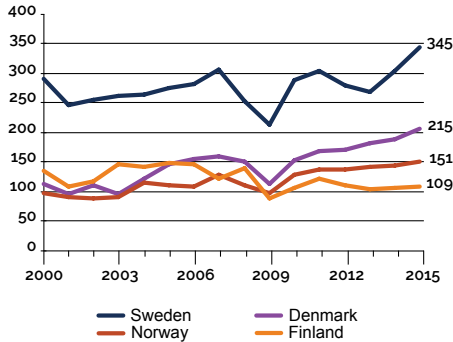
In millions of units



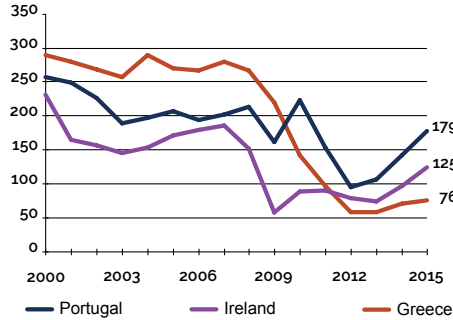
In thousands of units



In thousands of units

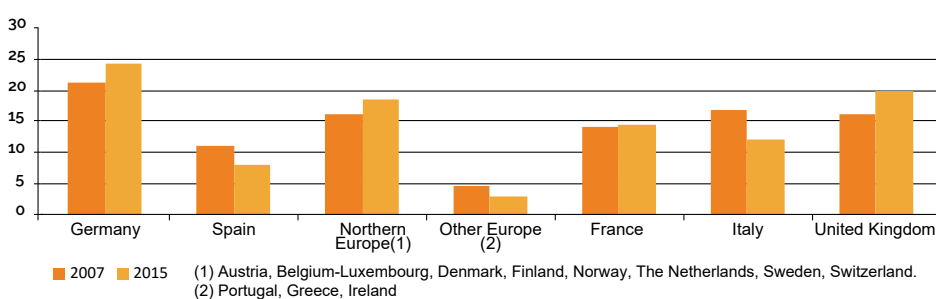


In thousands of units



MARKET SHARES OF COUNTRIES ON THE NEW PASSENGER CAR MARKET

As a %



The West European market comprises 17 countries (15 pre-2004 EU members, plus Switzerland and Norway). These countries have similar environments and obey similar economic rules. Since 1990, reunified Germany is taken into account in these figures.

The market went through two major crises: in 1993, i.e. -16% to 2.2 million units, and from the end of 2008. The latter resulted in a decline of 22% between 2007 and

2013, i.e. 3.3 million units with considerable variations from one geographical zone to another. Northern Europe (cf. definition of the graph above, plus Germany and the UK) suffered a fall of 5% during the crisis compared to >50% for Southern Europe (Spain, Italy, Portugal and Greece).



**+9
POINTS**

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

NEW PASSENGER CAR REGISTRATIONS PER GROUP

In 2015, the penetration of French groups on the West European market fell 0.2 percentage points, after the recovery of the previous year, to settle at 20%. In a highly competitive context, the situation remains precarious in France and the Southern European markets (Spain, Italy, Portugal, Greece), where they are well represented. Those Mediterranean countries, which now account for only one fifth of the market compared to one

third before the crisis, continued to dent France's figures.

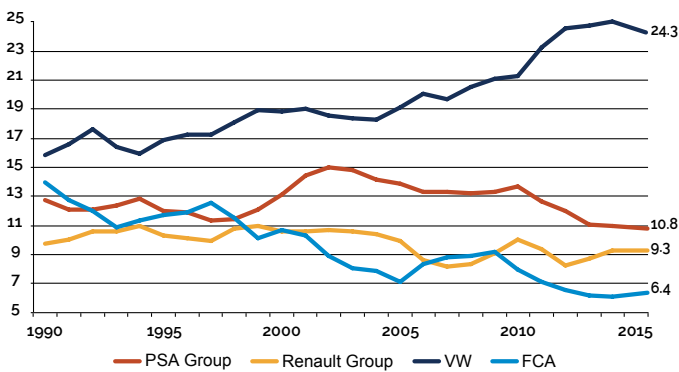
French auto makers rely on the complementary nature of their brand ranges. The Renault group have Renault (7% of market share) and Dacia (2%); the latter accounted for only 0.5% of the market in 2007. The PSA group now has three brands: Peugeot (6%), Citroen (4%) and, since 2009, DS (1%).

Six major 'generalist' European groups, producing a complete range of vehicles, each held around 6% of the market or more.

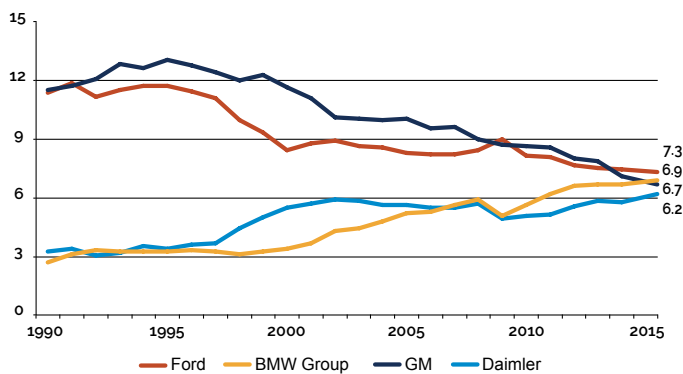
Volkswagen's market share is in decline for the first time since 2007.

► MARKET SHARES OF GROUPS IN EUROPE (1)

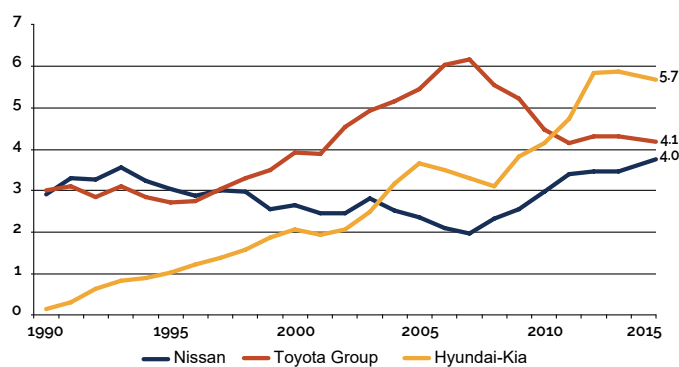
As a % of the total market



As a % of the total market



As a % of the total market



(1) Based on the scope of consolidation as of 1/1/2016.
See page 70 for group definitions.



Since 1999, the Volkswagen group (VW), with its four main brands, had consolidated its position well above 20%. But, in 2015, it lost 0.8 percentage points and fell back to 24%.

Penetration of the French groups Renault and PSA (20% in total) fell slightly, below 2007 levels. They exceeded 25% between 2001 and 2003, a more favourable period where the French and Southern European markets accounted for 45% of the West European markets, compared to 35% in 2015. Dacia's share progressed and DS's share is emerging.

The penetration of the General Motors (GM) group, now without the Chevrolet brand which is no longer distributed in Europe, was 6.7%, i.e. a decline of 0.5 percentage points. In 2015, Ford's market share was 7.3%. In the middle of the 1990s, the two American groups each enjoyed a market share of around 12%.

The Fiat group now includes Chrysler group brands. Its penetration was up at 6.4% compared to almost 13%

in 1997 and 15% in 1989. In 2015, Fiat's market share was 4.8%.

The German groups Daimler and BMW, specialists of high-end vehicles and sales to companies and in the throes of implementing a strategy to broaden their ranges, achieved record market shares in 2015. Daimler (Mercedes and Smart) consolidated the growth begun in 1997 with the effect of the diversification of its vehicle range, to 6.2%. BMW, which also includes Mini, also continued its consolidation (6.9%).

Toyota group's share, with sustained impetus from 1995 (3%) to 2007 (6%), then fell back one third over a period of four years, before stabilising at around 4%.

The penetration of Hyundai-Kia, from being almost non-existent in 1990, and 2.1% in 2000, enjoyed strong progression during the crisis (+3 percentage points). Its share was 5.7% in 2015.



20%

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

RANGE ANALYSIS IN 2015



47 & 81

MODELS AND BODY
STYLES OFFERED
BY FRENCH
MANUFACTURERS

The French manufacturers enhanced their vehicle ranges, offering 50 or so models compared to 27 in 2000. Over recent years, they have developed their ranges with an SUV offering (C4-Cactus, 2008, Captur, Kadjar). They also revamped their low range (C1, 108, 208, Clio, Sandero) and high range (Trafic, Espace, Talisman), whilst restyling existing models (C4, DS4, 208).



Groups	Brands	Economy and low ranges	Low-mid range	High-mid range	Premium range
PSA GROUP	CITROËN	C-Zéro, C1, C3, C4-Cactus, Nemo, Berlingo, E-Mehari	C4, C4 Air Cross, Jumpy, SpaceTourer, Jumper	C5	
	DS	DS3	DS4	DS5	
	PEUGEOT	iOn, 108, 208, 2008, Bipper, Partner	308, RCZ, 3008, 4008, 5008, Expert, Traveller, Boxer	508	
RENAULT GROUP	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE	Mégane, Fluence, Master	Laguna, Trafic, Kadjar, Koleos	Espace, Talisman
	DACIA	Logan, Sandero, Duster, Dokker	Lodgy		
BMW	BMW	i3	1, 2 series	4, X1 series	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, GL, SL, CLS, CLK, SLK, GLC, GLK, ML classes
	SMART	Fortwo, Forfour			
	ALFA ROMEO	Mito	Guilietta		4C
FIAT	FIAT	Panda, 500, Punto, Sedici, Fiorino, Doblo	Bravo, Scudo, Ducato	Freemont	
	JEEP	Renegade		Wrangler, Compass, Cherokee	Grand Cherokee
	LANCIA	BMW	Delta		Thema, 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	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, HR-V, Insight	Accord, CR-V	
HYUNDAI	HYUNDAI	I10, I20, IX20	I30, Veloster	IX 35, I40, Santa Fe, Tucson	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	Lancer, Spacestar, ASX	Outlander	Pajero
NISSAN	NISSAN	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, Celrio, Splash, Swift, SX4, Jimny, Vitara		Grand Vitara	
GROUPE TATA	JAGUAR				XE, XF, XJ, XK, F-TYPE
	LAND ROVER			Freelander, RR Evoque	Discovery, Range Rover
TOYOTA	LEXUS		CT 200 H		GS, IS, LS, RX, NX
	TOYOTA	VOLVO	Verso, Auris, Corolla	Avensis, Prius, RAV4	GT86, Land Cruiser
VOLKSWAGEN GROUP	AUDI	A1, S1	A3, S3	A4, A5, TT, Q3	A6, A7, A8, Q5, Q7
	PORSCHE	HONDA			911, Boxster, Cayman, Macan, Cayenne, Panamera
	SEAT	Mii, Ibiza	Leon, Altea	Toledo, Exeo	Alhambra
	SKODA	HYUNDAI	Fabia, Rapid	Octavia	Superb
	VOLKSWAGEN	Up!, Polo, Caddy	Golf, Jetta, New Beetle, Touran, Eos, Crafter	Passat, Scirocco, Tiguan, Transporter	Sharan, Phaeton, Touareg

Source: CCFA

BREAKDOWN AND RANK BY MODEL

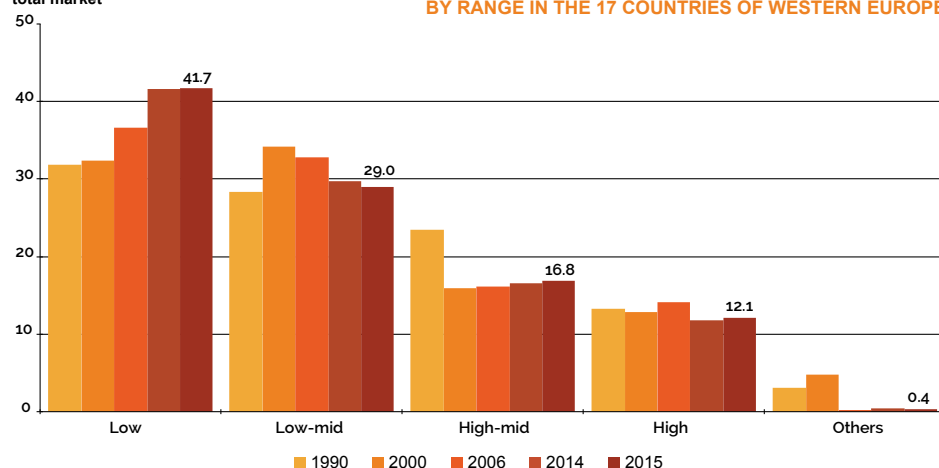
Of the 15 best-selling models in Europe in 2014, six are made by Renault, Peugeot or Citroën.

► RANGES AND BODY STYLES (AS A % OF NEW REGISTRATIONS BY COUNTRY)

	Small	Lower medium	Upper medium	Executive	Others	Sedans	Station wagon	Coupés	Convertibles	MPVs	Others
Germany	29	34	19	17	1	40	19	1	2	14	24
Austria	35	33	20	13	0	38	16	1	1	18	27
Belgium	37	30	18	14	0	43	15	1	1	17	24
Denmark	54	27	12	7	0	63	16	0	0	7	13
Spain	39	36	18	7	0	55	6	1	0	11	27
Finland	23	32	30	15	1	44	28	0	0	7	22
France	54	28	12	5	0	51	7	1	0	15	26
Greece	61	23	13	3	0	78	2	0	0	4	16
Ireland	29	33	29	9	0	64	5	1	0	7	24
Italy	65	18	11	6	0	55	7	0	0	12	26
Luxembourg	30	30	19	21	0	41	12	3	2	13	29
The Netherlands	45	29	15	10	0	53	22	0	0	7	17
Portugal	45	33	13	9	0	54	22	1	0	6	17
United Kingdom	42	26	17	14	0	58	6	2	2	7	25
Sweden	18	27	25	30	1	33	34	0	0	6	26
EUR. UNION 15 COUNTRIES	42	29	17	12	0	50	12	1	1	11	25
Norway	22	34	28	17	0	41	21	0	0	6	31
Switzerland	32	27	21	19	2	39	15	2	2	11	32
ALL 17 COUNTRIES	42	29	17	12	0	49	12	1	1	11	25

Source: CCFA

As a % of the total market



In 2015, they maintained a high level of diversity; the market share of the 15 best selling vehicles sold in Europe totalled 30% compared to 40% in 2000. French manufacturers, who previously offered eight low range models, now have more than 40.

In Europe, 71% of new cars registered are low and low-mid range vehicles. The introduction of environmentally-friendly tax breaks at the time of purchase plus a wider choice has steered the market towards lower ranges. After the scrap incentive scheme ended, this share fell by more than 2 percentage points in 2011 before stabilising at around 70% in the following years.

During the 1990s and the beginning of the 2000s, there was a transfer from the mid to high range towards the low-mid range, which by then had more MPV versions. Today, they include SUV versions.

The share of sedans, which remain dominant, has regressed over recent years in favour of station wagons, MPVs, convertibles, light vans and SUVs. However, after 2006, a dynamic offering in the lower ranges, with more

sedans, had changed this trend through to 2009. In 2015, the 'Other' category continued to benefit from the expansion of SUVs in the lower ranges (Peugeot 2008, Renault Captur, etc.): it grew by more than 2 percentage points and now accounts for 25% of the market (compared to 13% in 2010).

Each European country retained its own characteristics until 2008 when Southern Europe preferred low and low-mid range vehicles, whilst premium cars and station wagons continued to prosper in Northern Europe. But in 2009, the successes of the lower ranges and in particular sedans in Germany and the UK reduced the contrast between the different regions. This trend has continued since 2010, with the exception of Germany where upper ranges have returned to percentages more in line with long-term patterns (36%).

8 OUT OF 15

BEST-SELLING MODELS IN EUROPE IN 2015 WERE IN THE LOW RANGE

► RANKING OF THE SIXTEEN LEADING MODELS IN 2015

Models	Rank	Market share
Volkswagen Golf	1	4.6%
Fiat 500	2	2.4%
Ford Fiesta	3	2.3%
Ford Focus	4	2.2%
Volkswagen Polo	5	2.2%
Renault Clio	6	2.2%
Opel Corsa	7	1.9%
Peugeot 208	8	1.7%
Renault Mégane	9	1.7%
Volkswagen Passat	10	1.6%
Nissan Qashqai	11	1.6%
Peugeot 308	12	1.6%
Audi A3	13	1.5%
Renault Captur	14	1.4%
Mini Mini	15	1.4%
Citroën C3		1.2%
Citroën C4		1.2%
Peugeot 2008		1.1%
Dacia Sandero		1.0%
Dacia Duster		0.8%
Twingo		0.7%
C4 Cactus		0.6%
Peugeot 108		0.5%
Peugeot 3008		0.5%
Citroën C1		0.5%
Renault Kadjar		0.4%
DS DS3		0.3%

Source: CCFA

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS

Having grown significantly from 1997 to 2007, the share of new cars equipped with diesel engines in Western Europe as a proportion of total registrations is still around 50%. In 2015, it fell by one percentage point to 51.6%, 4 points adrift of the 2011 record. In Western Europe, outside France, it was 51%, 1.6 percentage points down compared to the same reference year.

On this market of 6.8 million units, French manufacturers had a market share of 22% in 2015 (28% in 2010), i.e. around 1.5 million new diesel cars, compared to around 18% for all other fuel types. Diesel cars represented 56% of total

sales of new passenger cars made by French manufacturers in Europe's 17 countries.

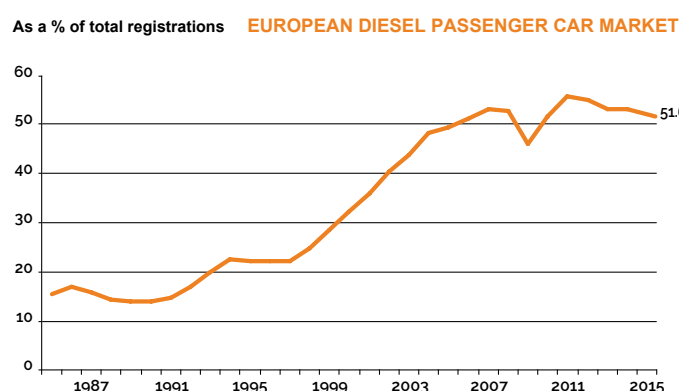
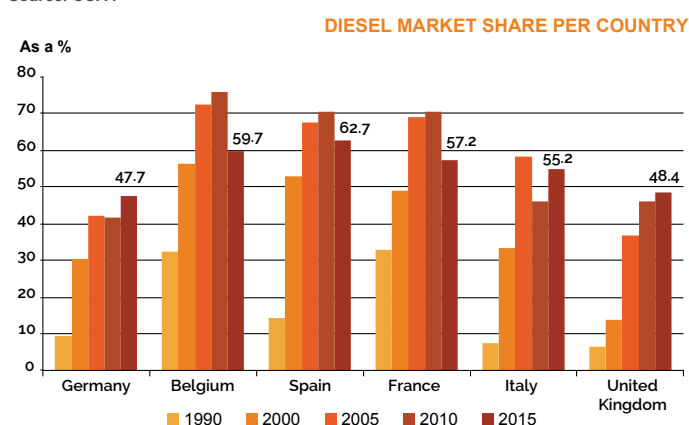
Like France, the four other main Western European countries (Germany, Spain, Italy, UK) saw companies purchasing more diesel cars (around 60% of their purchases) than households (around 40% of their purchases).



► TECHNICAL CHARACTERISTICS FOR NEW PASSENGER CARS IN EUROPE IN 2015

	Average cylinder capacity	Average power	4WD	Diesel
	cc	kW	%	%
Germany	1,714	105	17.1	47.7
Austria	1,625	91	21.6	58.3
Belgium	1,583	88	7.6	59.7
Denmark	1,376	77	4.0	31.0
Spain	1,566	85	7.1	62.7
Finland	1,594	97	16.8	35.7
France	1,495	83	7.0	57.2
Greece	1,385	0	2.9	63.2
Ireland	1,571	82	4.3	71.0
Italy	1,476	77	10.4	55.2
Luxembourg	1,865	116	24.6	70.4
The Netherlands	1,453	86	6.5	28.9
Portugal	1,485	81	2.2	68.2
United Kingdom	1,642	98	12.6	48.4
Sweden	1,797	110	30.5	57.7
EUR. UNION 15 COUNTRIES	1,598	93	12.1	52.1
Norway	1,742	100	34.8	40.8
Switzerland	1,797	118	39.0	38.7
ALL 17 COUNTRIES	1,604	93	13.0	51.6

Source: CCFA



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 in 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, before taking off again in 2010. Engine capacity stopped increasing in 2006 because of engine downsizing, delivering identical power with less displacement. After further increases between 2010 and 2012, it has now fallen by 43 cc.

The share of FWDs progressed for the sixth year running (+0.7 percentage points); at 13% of the European market, i.e. 17 million units, compared to 8% in 2009. Vehicle type

varies substantially depending on national characteristics. In Switzerland, Norway and Austria, market share for these vehicles is higher where mountainous terrain has fuelled sales. In Germany, it was 17%, i.e. 6 percentage points up on 2007.

The share of diesel is largely dependent on local regulations and tax rules.

In Europe's buoyant market in 2015, the share of diesel cars fell slightly to 51.6%; overall, the volume increase amounted to >360,000 units. In Spain, Greece, Ireland, Luxembourg and Portugal, more than two thirds of new cars registered are still diesel. The share of diesel increased slightly in Italy (+0.2 percentage points to 55%).

Further to a change in taxation rules, the Scandinavian countries, traditionally not particularly favourable to diesel, started buying and reached very high levels in 2012 (around two thirds of the market for Norway and Sweden). However, this figure has since fallen by around 15 percentage points.

PASSENGER CARS IN USE IN EUROPE

In Western Europe, a high density area (486 in Ireland to 695 in Finland), the number of vehicles increased by +0.8% as at January 1, 2015. This reflects a highly differentiated situation between the countries of Southern Europe (from decline to slight growth) and those of Northern Europe, with increases above the European average. France stands just below that latter group.

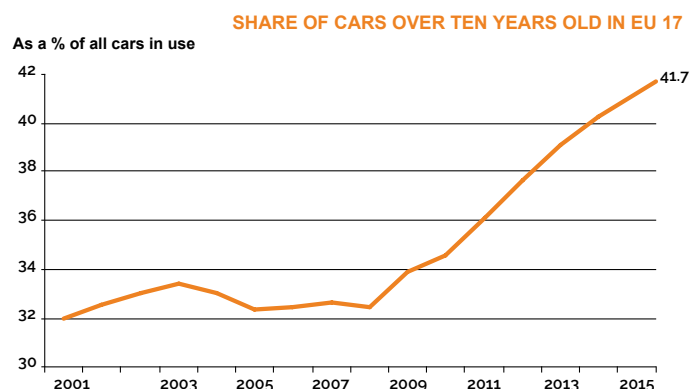
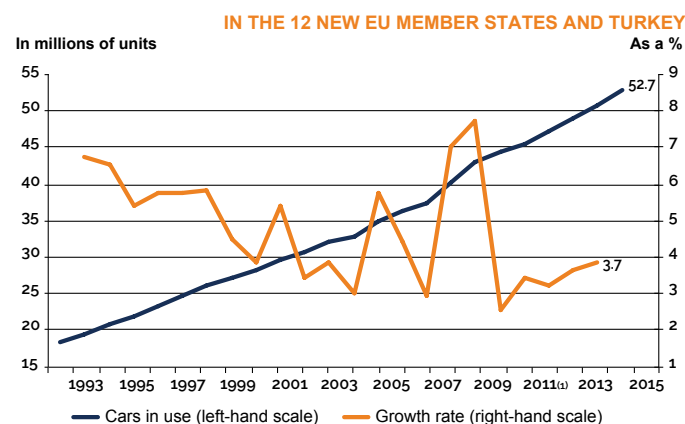
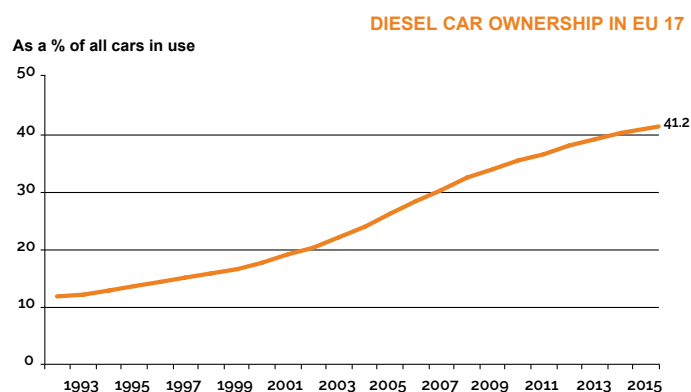
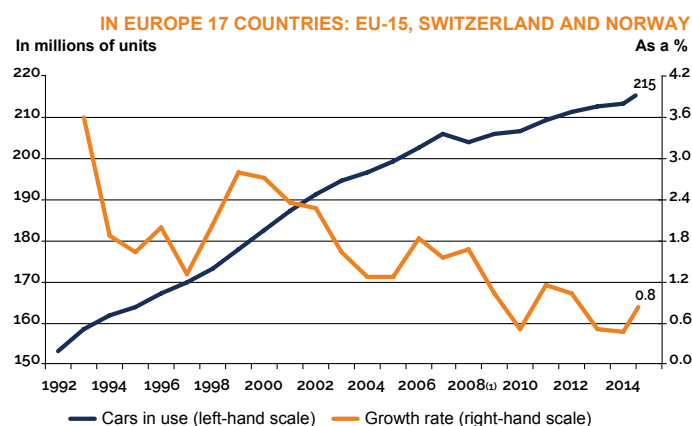
In the new EU member states and Turkey, where car ownership is lower (189 for Turkey and 697

for Lithuania), the economic and financial crisis sharply slowed the pace of growth of the vehicle stock: almost 4% as opposed to 5-7% between 2005 and 2009. Demand for lower-cost vehicles is primarily satisfied by second-hand imports. In 2014, this zone accounted for 20% of the number of vehicles in Europe, compared to 15% in 2005.

Having wavered between 32% and 34% between 2000 and 2009, the share of cars over 10 years old in Western Europe increased to 42% in 2014.

Fewer registrations of new passenger cars, in particular in Southern Europe, are part of the reason for this high percentage. Western Europe has become a replacement market. Within the new EU member states and Turkey, this share can be estimated a little over 60%.

► PASSENGER CARS IN USE ON JANUARY 1 EACH YEAR



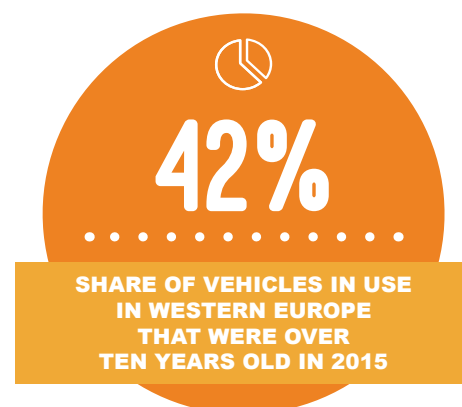
(1) The change was calculated on a like-for-like basis.

National sources: statistics organisations, French Transport and Interior Ministries, professional sources.

On January 1, 2015, the number of passenger cars in use in Western Europe (EU-15, Switzerland and Norway) was 215 million cars. High levels of ownership and the 2008 crisis affected growth, and the pace is now more in line with population growth. Per country, the number of passenger cars fell in some of the Southern European countries: Greece (-0.3%) and Portugal (-0.5%), was stable in Spain and slightly up in Italy (+0.3%). In France (+0.5%) growth was moderate, and higher in the UK (+1.6%) and in Germany (+1.3%).

Having increased 2 percentage points per year between 2002 and 2009, the share of diesel cars in Western Europe increased by more than 1 percentage point per year since, and stood at 42% on January 1, 2016. In five countries, this engine type is in the majority: Austria, Belgium, Spain, France and Luxembourg. However, although in progress, the share is lower in Germany (31%) and in the UK (37%), and almost equivalent to the overall average in Italy (41%).

In the new EU member states and Turkey, the numbers of cars on the road is contrasted. Since 2010, Latvia has lost one quarter of its vehicle stock. Slovenia and Hungary increased 1% and 3% respectively over the same period. Lithuania and Czech Republic grew more sharply (+10%) but fell short of the very high levels of Estonia (+20%), Bulgaria and Poland (+21%) and Slovakia (+23%). Romania sits between the two (+16%). The growth in the number of vehicles in Turkey was extremely high (+39%). Within these EU member states and Turkey, the share of diesel is 30%, around one and a half percentage points up per year over recent years.



NEW LIGHT COMMERCIAL VEHICLES IN EUROPE



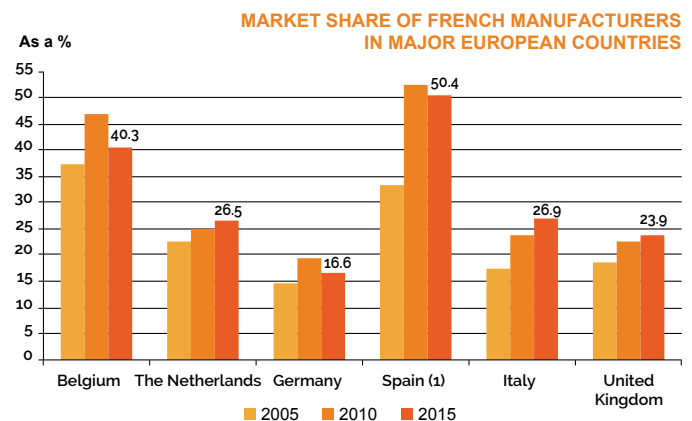
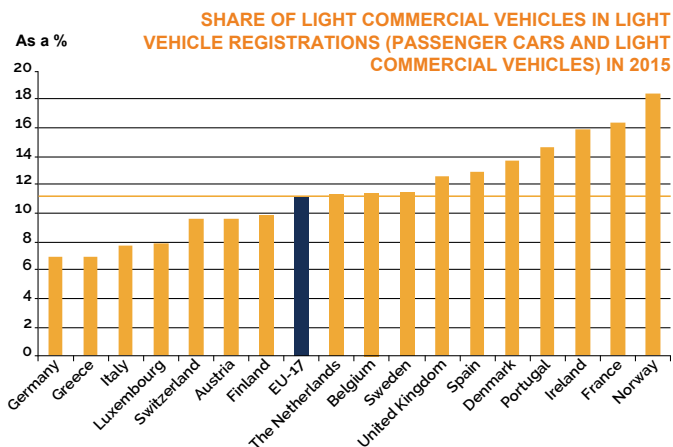
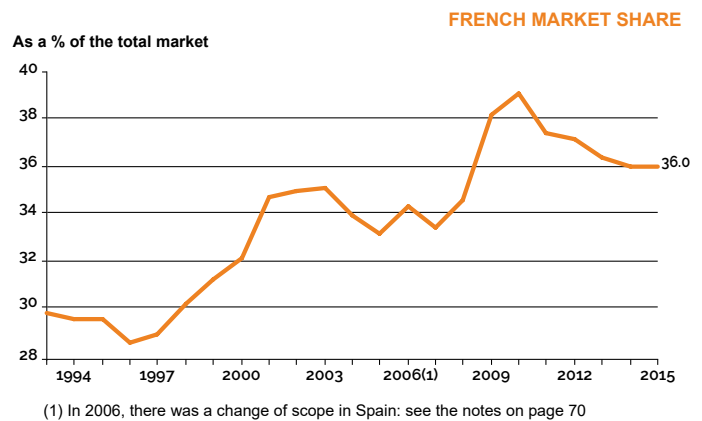
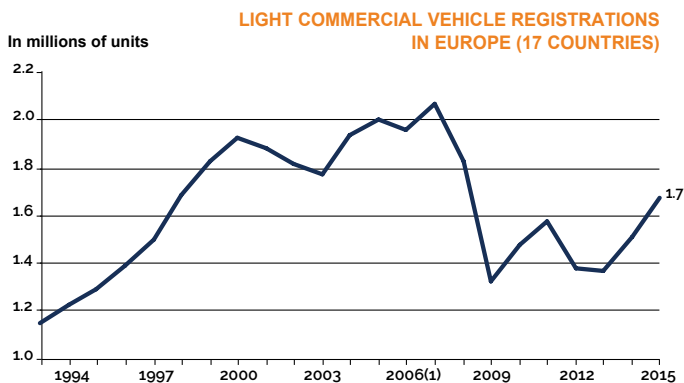
36%

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

The Western Europe market for light commercial vehicles, badly affected by the 2009 crisis, then hovered at around 1.5 million units, before a sharp increase to 1.7 million units in 2015, but still 400,000 units down on 2007 record levels.

Between 2007 and 2014, the UK and German markets were slightly up, +32,000 and +15,000 vehicles respectively. In the other three major markets, volumes fell from between -82,000 in France to -121,000 for Spain, with Italy in between, at -103,000. Southern Europe, including France, accounted for 42% of the European market, compared to 52% in 2007.

In 2015, French auto makers saw sales up 11% to 602,000 units and 36% of the market. Present on every segment and with improved market share in some countries (+2 percentage points in Italy), they were able to maintain their market share at a high level, more than 3 percentage points up on 2007.



Light commercial vehicles are defined here as vehicles with a GVW under 5 tonnes, used to transport merchandise. In numerous sectors (agriculture, building, services, etc.), they are also used for ferrying people to and from worksites, transferring between sites and transporting equipment. They are broken down into different categories: light commercial vehicles derived from passenger cars, light vans, light trucks, large vans, pick-ups and FWDs. Since tax rules are not the same in all European countries, the number of light commercial vehicles as a percentage of all light vehicles ranges from 7% in Germany to 19% in Norway. Overall, the 2015 average was 11%.

For many years, model renewals and the transportation, service and mobility needs they serviced in the economy have improved sales of these vehicles. The 2009 crisis

had a substantial impact on the market, which had returned to its 1996 levels.

In the van segment, French manufacturers' market shares were protected by the success of Renault Master, Peugeot Boxer and Citroën Jumper. In the small van segment, competition is cut-throat, but French manufacturers can rely on a wide range (Citroën Berlingo and Nemo, Peugeot Partner and Bipper and Renault Kangoo). In 2015, five of the ten highest-selling models were French (Berlingo, Kangoo, Partner, Master, Trafic).

In Spain and Belgium, French auto makers' market share easily exceeded 40% in 2015. In Germany and in Italy, who have their own domestic manufacturers, their market share was 17% and 27% respectively, higher than in 2005.

France is now the second biggest European market (379,000 units), just behind the UK (381,000 units), but ahead of Germany (243,000 units), Italy (135,000 units) and Spain (155,000 units).

HEAVY TRUCK MARKET AND PRODUCTION IN EUROPE

The European market for commercial vehicles over 5 tonnes was up 14% in 2015 at 265,000 units, but 25% down on 2008, i.e. 86,000 units fewer. Contrary to the 1993 crisis, where the market recovered its high sales levels five years later, the 2009 crisis is proving much more durable and seems to be settling at a new, lower level.

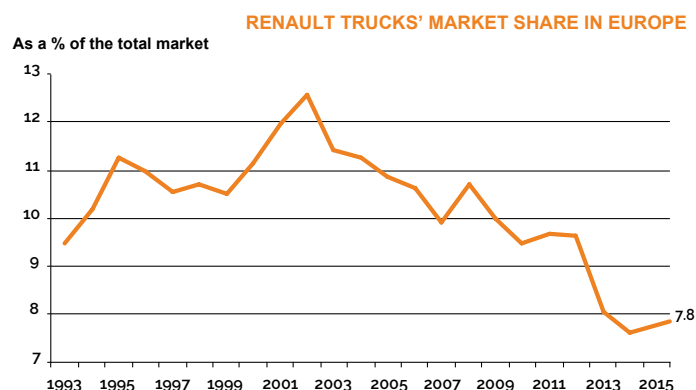
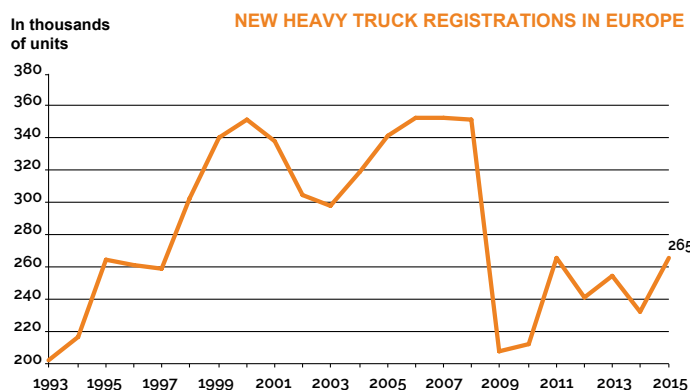
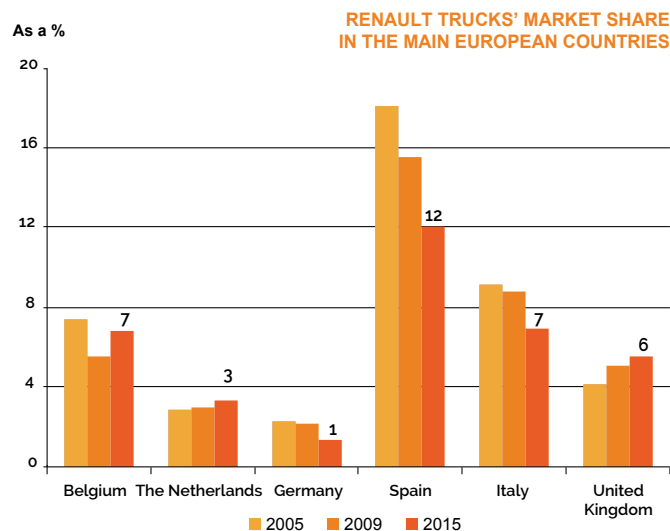
European production increased substantially to 420,000 units, up 11% on the previous year. The 2009 crisis came on the back of five years of stability at a high domestic market level and sustained growth of commercial vehicle exports outside EU-15, and in particular to Eastern Europe and Asia. Since, major peaks and troughs have

featured each year. Production is now twice what it was during the 2009 dip, emphasising the scale of fluctuations due to the economic context in the sector.

► HEAVY TRUCK MARKET AND PRODUCTION IN WESTERN EUROPE (IN THOUSANDS OF UNITS)

	2005	2013	2014	2015	Change 2015/2014
New heavy truck registrations					
5.1t to 15.9t	87	55	45	48	6.0%
16t and over	254	199	187	217	16.2%
TOTAL	342	255	232	265	14.2%
Heavy trucks production					
5.1t to 15.9t	113	-	-	-	-
16t and over	339	-	-	-	-
TOTAL	453	390	380	420	11%

Source: CCFA



+14%

**INCREASE OF
NEW HEAVY TRUCK
REGISTRATIONS
IN WESTERN EUROPE IN 2015**

In Europe, the commercial vehicle market reached a record level in 2008; the return to investment and the recovery of world trade since the second half of 2003 had boosted that recovery, before the 2009 financial and economic crisis really took its toll.

Heavy truck investment cycles are very long: the high points of 2000, 2006-2008 represent 75% more than the lowest point in 1993, or nearly 150,000 additional vehicles. Compared to the two dark years for commercial vehicles (1993 and 2009), the market is finding it more difficult to recover after the most recent crisis than in the nineties. In 2015 – six years on – the market is 28% up compared to 69% up in 1999.

Demand is very much orientated towards vehicle of 16

tonnes and more (82% of total registrations), whether for rigid trucks or road tractors.

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 Trucks' 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 15% between 2007 and 2015. Renault Trucks' European penetration outside France (4%) is also down compared to 2008 (6%). Overall, registrations have fallen, but with a recovery in 2015, and its market share in Europe stands at 8%.

FRENCH MANUFACTURERS IN THE NEW EU MEMBER STATES



1 IN 5

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

In 2015, vehicle production increased (+6% to 3.8 million vehicles), settling at a record level, beating the previous records of the three previous years. The sale of new vehicles increased 13% to 1.2 million units. The difference between production and sales of new vehicles was therefore 2.7 million vehicles. The local market for new vehicles is way below 2007 levels (-24%), in spite of those three years of growth.

French manufacturers are commercially present in this zone and have been for a number of years,

but also have industrial sites: PSA in Slovakia and Czech Republic (with Toyota in Czech Republic); Renault in Slovenia, and in Romania with its acquisition of Dacia. All these sites made around 900,000 units in 2015. This presence promotes local sales which should increase given the low ownership levels in those countries (number of vehicles per 1,000 inhabitants) when compared to France or Germany.

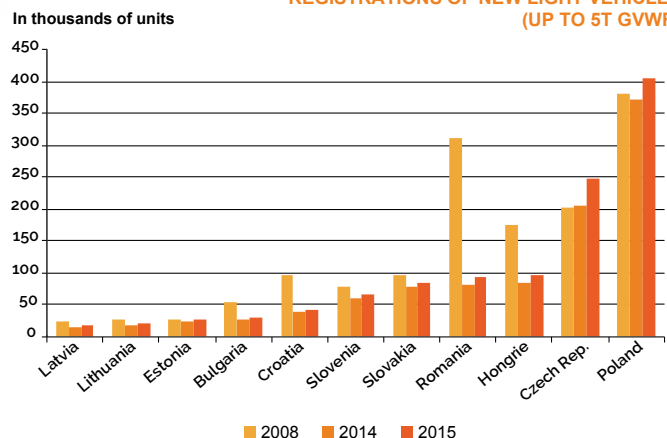


► THE MARKET AND VEHICLE PRODUCTION IN THE MAIN COUNTRIES OF CENTRAL AND EASTERN EUROPE – NEW EUROPEAN UNION MEMBER STATES (1) AND CROATIA

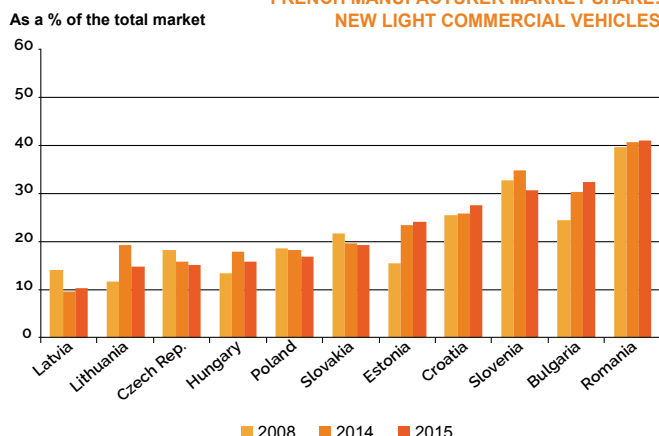
In thousands units	2014	2015	Change
Vehicle production			
Passenger cars	3,515	3,722	5.9%
Light commercial vehicles	120	125	4.3%
Heavy trucks			
New vehicle registrations			
Passenger cars	885	991	12.0%
Light commercial vehicles	118	139	17.4%
Heavy trucks	46.6	56.0	20.2%

(1) excl. Malta et Cypria
Sources: CCFA, OICA

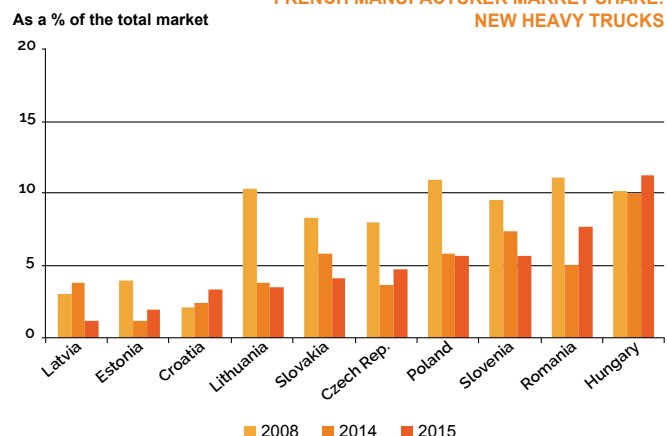
REGISTRATIONS OF NEW LIGHT VEHICLES (UP TO 5T GVWR)



FRENCH MANUFACTURER MARKET SHARE: NEW LIGHT COMMERCIAL VEHICLES



FRENCH MANUFACTURER MARKET SHARE: NEW HEAVY TRUCKS



Whilst the EU-15 automotive market is now dominated by replacement demand, the same does not apply to new and future member states of an extended European Union and neighbouring countries, where the potential for access to vehicle ownership is much higher.

Central and Eastern European Countries (CEEC) produced 3.8 million vehicles in 2015. Their activity

progressed just like that of Western Europe after the recovery of the European market.

In 2015, production was higher for the second year running thanks to domestic demand in the region, when new vehicle registrations and second hand vehicle imports are taken into account. This imbalance has been in evidence since the 2009 crisis.

In 2015, new vehicle sales progressed sharply for the second consecutive year. Sales increased in all countries and more markedly in Czech Republic (+21%), Romania (+18%) and Hungary (+14%).

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2013, the European automotive industry employed 2.3 million people, 45% of whom in vehicle manufacture. Since 2005, on a comparable business scope, employment levels have changed in divergent ways, with a fall of around 270,000 people in Western Europe (tending more towards stability than the previous year), compared to an increase of more than 110,000 in the new member states. Western European countries have been able to create jobs over recent years (UK: +14,000 people since 2011).

Value added per employee ranges from €32,000 in the six new member countries to €96,000 in

Germany. In France, the figure is €56,000, below the European average of €65,000 because of low production levels, although the gap is narrower than the previous year.

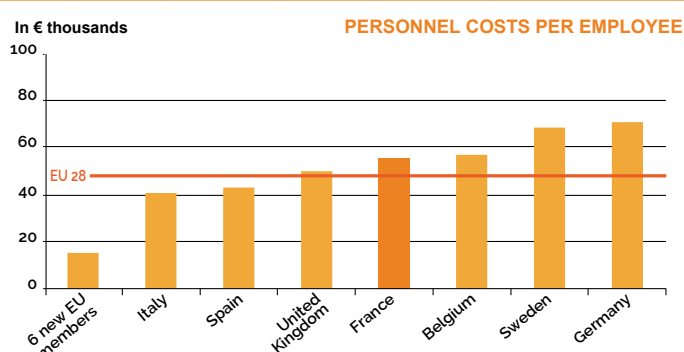
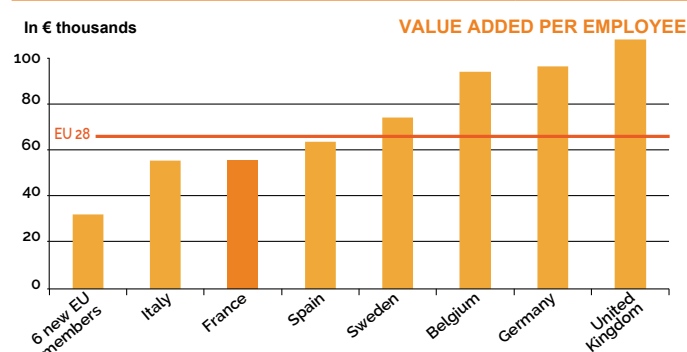
Costs per employee fluctuate between €15,000 in the six new member countries to €71,000 in Germany, i.e. a multiplier of around five; in France, it was €56,000, which is above the European average (€48,000). The difference between Western and Eastern Europe has decreased since 2004, falling from 7 and 5.3 times higher in Germany and France than the 6 new member states, to 4.6 and 3.6 times higher respectively in 2013


-270,000
PEOPLE

THE FALL IN STAFF NUMBERS
IN THE AUTOMOTIVE INDUSTRY
IN WESTERN EUROPE
FROM 2005 TO 2013

► THE AUTOMOTIVE INDUSTRY IN THE EU 28 IN 2013 (1)

	Units	Eur. union (28 countries)	Germany	France	6 new EU members (2)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	thousands	2,299	815	234	591	143	131	161	66	37
of which automobile assembly	thousands	1,042	504	130	138	73	60	65	44	20
of which body and trailer manufacturers	thousands	154	41	24	-	19	8	11	4	5
Of which automotive equipment manufacturing	thousands	1,104	270	81	453	51	63	85	19	12
Sales	€ millions	867,016	389,525	100,823	115,170	71,306	52,048	54,218	33,376	18,154
Production	€ millions	713,904	317,180	55,539	110,203	64,759	48,884	45,784	24,018	17,391
Production/Sales	%	82.3	81.4	55.1	95.7	90.8	93.9	84.4	72.0	95.8
Value added (to factor costs)	€ millions	150,213	78,339	13,014	19,013	15,432	8,349	8,917	4,884	3,463
Value added (to factor costs)	%	21.0	24.7	23.4	17.3	23.8	17.1	19.5	20.3	19.9
Value added/production	€ thousands	65.3	96.1	55.5	32.2	108.3	63.5	55.3	73.6	93.7
	base 100: 6 new EU members states	203	299	173	100	337	197	172	229	291
Value added per employee	€ millions	712,115	310,327	86,840	97,965	55,808	45,063	47,229	28,319	14,647
Personnel costs	€ millions	110,297	57,893	13,040	9,088	7,100	5,648	6,579	4,523	2,094
Goods and services purchased	€ thousands	48.0	71.0	55.6	15.4	49.8	43.0	40.8	68.1	56.6
Purchases as a % of output	base 100: 6 new EU members states	312	462	362	100	324	279	265	443	369
Personnel costs per employee	€ millions	47,784	20,446	-25	9,980	8,332	2,701	2,338	361	1,368
	%	31.8	26.1	-0.2	52.5	54.0	32.3	26.2	7.4	39.5



(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 CCA estimates

The automotive industry, one of the essential sectors of the European economy, comprises:

- vehicle manufacture;
- body and trailer manufacture;
- automotive equipment manufacture.

The data collated in this table come from national company surveys, harmonised by Eurostat. The difficulties encountered, nationally and Europe-wide, both for the collection and homogenisation of data explains the lack of reliable figures post-2013.

Germany accounted for 35% of all employees in the automotive industry. France had 10%, compared to an average of around 6% for Spain, Italy and the UK. The six new EU member states' share (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) was 26%. The automotive industry continued vary greatly from one country to another in terms of structure and salary costs.

In Germany and Sweden, more than 60% of employees of the automotive industry were employed in vehicle production, compared to 55% in France, around 23% in

the six new member states and 40-51% in Italy, Spain and the UK.

The share of employers' social charges in employee expenditure was 29% in France compared to 17% in Germany, with a European average of 21%.

FRENCH AUTOMOBILE MANUFACTURERS IN 2015

PSA Group: www.psa.fr

In 2015, in a growing global market and strong recovery on the base market from a low footing, PSA group sales increased 1.2%. Growth was higher in Europe (+6%) where the group still ranks second (passenger cars and light commercial vehicles). Outside this zone, the automaker's sales are practically stable in China, at a high level, and in South East Asia (736,000 units).

The group's international development strategy is primarily based on long-term, targeted hook-ups with other manufacturers. In China, the group is working on developing strategic partnerships with Dongfeng Motor and has started building a fourth factory, and China Changan Automobile Group. PSA and General Motors continue their cooperation in Europe to develop two vehicles on shared platforms and a new light commercial vehicle model using the French group's platform.

PSA group has a headcount of around 182,000 people throughout the world, 78,000 of whom are in France on some twenty sites (assembly, engine production and mechanics; R&D centres, head office, etc.). Apart from assembly factories (cf. adjoining page), the group has a number of large sites in France, such as Vélizy (R&D), Douvrin and Trémery (engines), Vesoul (spare parts warehouse) and Valenciennes (gear boxes), employing several thousand people.

In the technology area, the group has three key objectives: developing technologies to reduce fuel consumption and polluting emissions (the 2L to 100km car, hybridation), the connected autonomous vehicle (introduction of delegated driving) and to serve the brand's appeal. The automaker initiated a reorganisation plan in 2013, with implementation from 2014, as part of the company's recovery and its aim to keep the group's industrial and technological bases in France. In 2014, it launched the 'Back in the race' plan with four objectives: 3 globally recognised brands, Peugeot, Citroën and DS, a concentrated global product plan, profitable growth internationally and modernisation to serve competitiveness, in particular in Europe. At the beginning of 2016, the company went further by implementing a performance and profitable organic growth plan entitled 'Push to pass' for the 2016-2021 period. It focuses particularly on working with the customer to provide mobility services.

Renault Group: www.renault.com

Renault's global sales increased 3.3% thanks to sturdy European market sales growth. The Renault brand ranks third on the market for light vehicles in Europe. Sales outside Europe accounted for 42% of overall sales compared to 46% the previous year, following the sustained slowdown on emerging markets.

The venture with Nissan begun in 1999 as part of "Alliance" has been optimised over time and new synergies (industrially, electric vehicles, etc.) are coming on stream. In 2014, Alliance initiated four convergent projects in key functions: engineering (products and technology), manufacturing and logistics, purchasing and human resources.

In 2010, the group broadened the scope of its alliance strategy by signing an agreement with Daimler AG for small cars, light commercial vehicles and engines (including energy efficient engines from 2012 onwards). 13 shared projects are now under way. The strategic partnership with AvtoVAZ, extended to Nissan with increased participation in 2014, aims to accelerate growth and strengthen its presence in Russia.

Renault has four development themes for the vehicle of the future: safety, onboard wellbeing (delegated driving), reduced environmental impact (2L to 100 km car, autonomous car, the zero emissions range) and mobility available for all.

Renault group employs 117,000 people throughout the world, 46,000 of whom are in France on 15 sites: assembly, manufacturing of engines and mechanics (Cleon, Ruitz); R&D centres (Guyancourt); head office, etc. Large numbers of people do work for the company outside the assembly plants.

In 2011, Renault launched a new strategic plan entitled 'Renault 2016 – Drive the change' to meet two objectives: growth for the group and generation of free cash-flow by 2016. In 2013, the group also reorganised to keep its sites in France and develop their workloads. The main actions over the period 2014-2016 concerned model renewals, international expansion, a renewed ambition for Europe, greater competitiveness, greater synergies with Alliance and controlling investments.

Renault Trucks: www.renault-trucks.com

2015, Renault Trucks benefited from the European market recovery (+14%), whilst suffering from slovenly business levels in Southern Europe where it is well represented. Its West European market share is 8%.

Renault Trucks assembles its trucks in France at its Bourg-en-Bresse (Ain) and Blainville-sur-Orne (Calvados) plants. The truck maker relies on partners for local assembly outside Western Europe, in Morocco and in Iraq. Its subsidiary, Renault Trucks Defense, the protected mobility vehicle specialist for defence and safety makes and assembles its vehicles in France (cf. adjoining page). As a member of Volvo Group which employs almost 100,000 people throughout the world, Renault Trucks has over 8,000 employees in France. Apart from the complete assembly of vehicles, Renault Trucks has engine assembly and die-stamping operations in Venissieux, design and research in Saint-Priest, in the suburbs of Lyon, and parts reconditioning in Limoges. In 2013, Renault Trucks entirely renewed its truck range (T, C, K, D and D Wide), designed for sturdiness and lower operating costs, in particular through better energy efficiency. The truck maker is developing a range of alternative energy vehicles (gas, biodiesel) and a range of services (fleet management, repair and maintenance, financing and insurance, etc.) including even greater fuel-saving solutions (Optifuel Solutions), one of the main cost items for hauliers.

	Units	PSA Group	Renault Group
Sales	€ millions	54,676	45,327
Capital expenditures	€ millionss	1,623	1,845
Net income	€ millions	1,202	2,960
Employees worldwide	no. of people	182,157	120,136
of which France	no. of people	78,274	45,579



	Units	PSA Group					Renault Group			
		Units	Auto-motive activity: Peugeot and Citroën	Auto-motive equipment: Faurecia	Financing: PSA Finance	Others	Eliminations	Auto-motive sector	Financial sector	Eliminations
Sales	€ millions	37,514	18,770	635	110	-2,323	42,744	2,631		-48
Operating income	€ millions	1,871	830	4	28	-	1,485	824		11
Capital expenditure (2)	€ millions	1,622		1			1,840	5		
Employees worldwide (1)	no. of people	95,669	85,218				117,159	2,977		

(1) On December 31.

(2) The capital expenditure given for automotive activities are those for all industrial and commercial activities, excluding financing.
Sources: PSA and Renault Groups annual reports

FRENCH AUTOMOBILE MANUFACTURERS IN 2015

EUROPE

France

01 Batilly
02 Blainville
03 Bourg-en-Bresse
04 Dieppe
05 Douai
06 Flins
07 Hordain
08 Limoges
09 Marolles-en-Hurepoix
10 Maubeuge
11 Mulhouse
12 Poissy
13 Rennes
14 Saint-Nazaire
15 Sandouville
16 Sochaux

Spain

17 Palencia
18 Valladolid
19 Vigo
20 Villaverde

Italy

21 Val di Sangro

Portugal

22 Mangualde

Czech Republic

23 Kolín (Toyota)

Romania

24 Pitesti (Dacia)

Russia

25 Kalouga (PSA-Mitsubishi)
25 Kalouga (Volvo Trucks)
26 Moscou
27 Togliatti (AvtoVAZ)

Slovakia

28 Trnava

Slovenia

29 Novo Mesto

Turkey

30 Bursa (Tofas)
30 Bursa

PSA GROUP

RENAULT GROUP

RENAULT TRUCKS

SEVELSUD



62

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

AMERICA

Argentina

31 Buenos Aires
32 Santa Isabel

Brazil

33 Curitiba
34 Porto Real
35 Sete Lagoas (Fiat)

Colombia

36 Medellín

AFRICA

South Africa

37 Rosslyn (Nissan)

Algeria

38 Oued Tlelat (Nissan)

Morocco

39 Ameer Sefia (project)
40 Casablanca
41 Tanger

Nigeria

42 Kaduna (PAN Nigéria Ltd)
(project)

ASIA

China

43 Chengdu (project)
44 Shenzhen
45 Wuhan

South Korea

46 Busan (Renault Samsung
Motors)

India

47 Chennai (Renault-
Nissan)

Iran

48 Téhéran (Iran Khodro) (project)
48 Téhéran (Iran Khodro)
48 Téhéran (Pars Khodro)

Japan

49 Mizushima (Mitsubishi)
50 Okazaki (Mitsubishi)

Kazakhstan

51 Koustanaï (project)

Malaysia

52 Gurun
53 Tan Chong Motors
(project)

Vietnam

54 (project)

WORLD PRODUCTION OF FRENCH MANUFACTURERS



222
MILLION

**VEHICLES PRODUCED
BY FRENCH AUTOMOBILE
MANUFACTURERS WORLDWIDE
SINCE 1898**

In 2015, French manufacturers' global production once again increased (+6%) to 6 million vehicles. Since 2007, in spite of two record years in 2010 and 2011, it has fallen by 3%, but the gap has narrowed. Since 1996 however, production has increased 59%, i.e. an annual average rise of over 2%, thanks primarily to increased sales in Europe outside France, and subsequently outside Europe.

The production of passenger cars reached 5.2 million units compared to 5.6 million in the record years of 2010 and 2011; the production of light commercial vehicles reached 832,000 vehicles (up 10% in 2015), against a record output of 847,000

units in 2008. Compared to 2007, production has fallen 2% for passenger cars (i.e. -18,000 units), and remained more or less stable for light commercial vehicles (i.e. +2,000 units).

► PRODUCTION OR ASSEMBLY SITES/TOTAL PRODUCTION PER MODEL

Group/Brand	Model	Launch date	Production or assembly sites in 2015	Production (In units) Total at the end of 2015
PSA GROUP				
Peugeot, Citroën	iOn, C-ZERO	2010	Japan (Mitsubishi)	8,484 / 7,905
Peugeot, Citroën	108, C1	2014/2005	Kolin (Czech Rep.)	113,151 / 889,339
Peugeot	208	2012	Poissy, Trnava (Slovakia), Porto Real (Br)	1,201,806
Citroën, DS	C3, DS3	2002/2008/2009	Poissy, Porto Real (Br), Trnava (Slovakia)	4,130,373 / 388,255
Citroën	C3-XR	2014	China	68,044
Peugeot, Citroën	301 / C-Elysée	2012	Vigo (E), China	293,852 / 306,956
Peugeot	308	2007	Sochaux, China, Argentina	2,222,456
Peugeot	RCZ	2010	Austria (Magna Steyr)	67,916
Peugeot	2008	2013	Mulhouse, China	517,794
Peugeot	3008	2009	Sochaux, China	873,351
Peugeot	5008	2009	Sochaux	327,060
Citroën, DS	C4, DS4	2004/2010/2011	Mulhouse, Vigo (E), China, Russia,	3,918,585 / 134,573
Citroën	C4 Cactus	2014	Argentina	133,594
Peugeot, Citroën	4008 / C4 Air Cross	2012	Madrid	32,809 / 60,436
Citroën, DS	C5, DS5	2008/2011	Japon (Mitsubishi)	1,346,823 / 110,468
DS	DS6	2014	Rennes-la-Janais, Sochaux, China	22,105
Peugeot	408	2010	China	475,338
Peugeot	508	2010	Russia, China, Argentina	483,023
Peugeot, Citroën	Bipper, Nemo	2008	Turquie (Tofas)	225,514 / 236,711
Peugeot, Citroën	Partner, Berlingo	1996/2008	Vigo (E), Mangualde (P), Argentina	2,524,769 / 3,010,849
Peugeot, Citroën	Expert, Jumpy	2007	Hordain	596,714 / 548,743
Peugeot, Citroën	Boxer, Jumper	1994/2006	Val di Sangro (I)	1,000,748 / 868,686
RENAULT GROUP				
Renault	Twingo	2014	Novo Mesto (SI)	141,555
Renault	Pulse	2011	India	14,444
Renault	Clio	1998/2012	Flins, Turkey, Novo Mesto (SI), Dieppe,	5,815,570 / 1,227,718
Renault	ZOE	2012	Argentina, Colombia	42,266
Renault	Captur	2013	Flins	535,759
Renault	Logan	2005 / 2013	Valladolid	1,467,993 / 283,395
Renault	Latitude	2010	Russia, Brazil, Morocco, Algeria, Colombia,	42,835
Renault	Sandero	2007 / 2012	Iran	1,007,429 / 283,395
Renault	Duster	2010	South Korea	874,572
Renault	Fluence	2009	Brazil, Morocco, Colombia, South Africa	535,986
Renault	Mégane	2008/2009/2015	(Rosslyn), Russia	2,423,157 / 124,918 / 8,030
Renault	Scala	2012	Russia, Brazil, Colombia, India	13,596
Renault	Laguna	2007	Turkey, Argentina, Russia	351,080
Renault	Espace	2002	Douai, Palencia (E), Turkey, Russia	33,726
Renault	Kangoo / Kangoo ZE	1997/2007/2011	India	2,696,545 / 1,008,375 / 22,277
Renault	Master	2010	Sandouville	553,387
Renault	Trafic	2014	Sandouville	119,698
Dacia	Logan	2012	Maubeuge, Argentina	264,338
Dacia	Sandero	2012	Batilly, Brazil	511,946
Dacia	Duster	2010	Sandouville	789,963
Dacia	Lodgy	2012	Pitesti (Romania)	132,370
Dacia	Dokker	2012	Pitesti (Romania)	185,164
RSM	SM3 / Fluence	2009/2013	Pitesti (Romania)	206,391 / 1,755
RSM	SM 5 / Latitude	2010	Tanger (Morocco)	230,446
RSM	QM5 / Koleos	2007	Tanger (Morocco)	62,398
RSM	SM7 / Talisman	2011	Busan (South Korea)	30,973
RSM	Rogue	2014	Busan (South Korea)	144,036

Sources: CCFA, PSA, Renault.

MARKETS FOR NEW FRENCH VEHICLES

In 2015, the portion of French manufacturers' domestic sales and sales outside France once again grew (+4% each).

Domestic sales as a percentage of French manufacturers' sales rose to 22%: 20% for passenger cars, 35% for light commercial vehicles and 35% for commercial vehicles. These ratios are up for light commercial vehicles because of the sharp fall in deliveries to Maghreb and South America.

Foreign markets accounted for 78% of French automakers' sales compared to 66% around the

year 2000 and less than 60% in 1990.

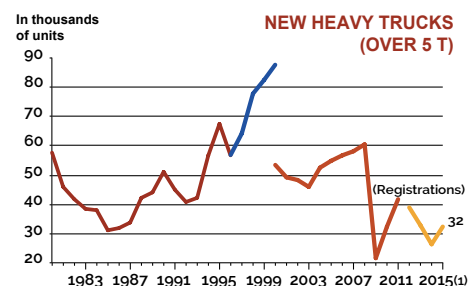
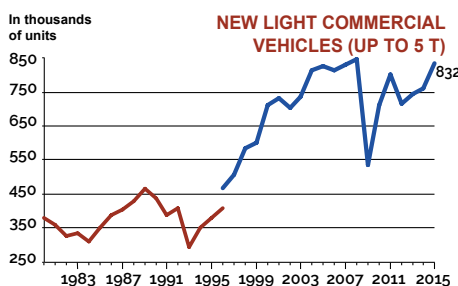
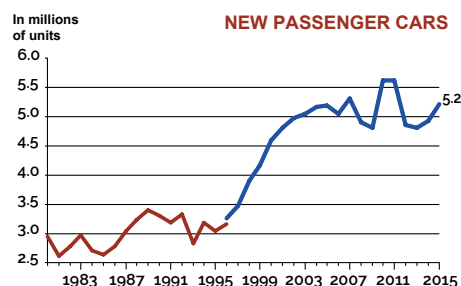
Deliveries outside the European Union in 2015 accounted for around 51% of French manufacturers' total sales, continuing the lower trend since 2010. The partial recovery of the markets of the South of Europe and a decline in some emerging countries led to a 3 point fall of this ratio, which in 2000 was less than 30%.



22%

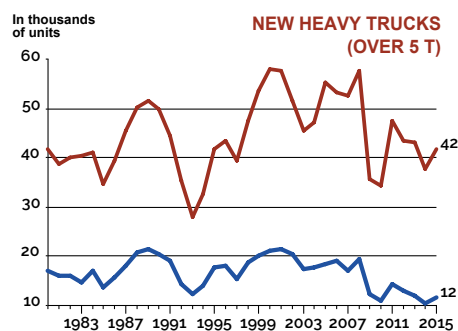
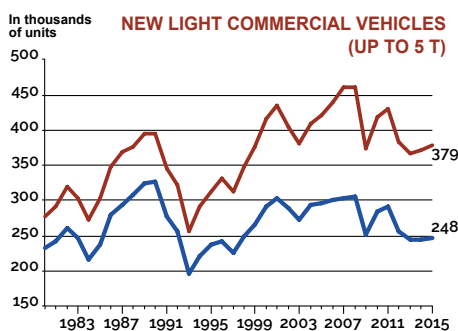
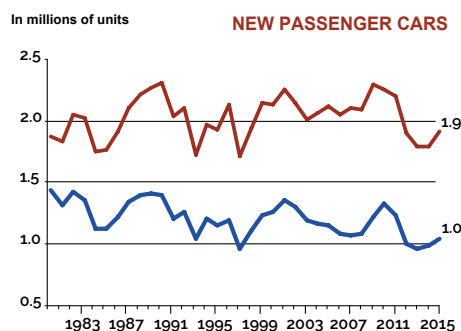
**SHARE OF THE FRENCH MARKET
IN MARKETS FOR FRENCH
MANUFACTURERS**

► WORLD PRODUCTION OF FRENCH MANUFACTURERS



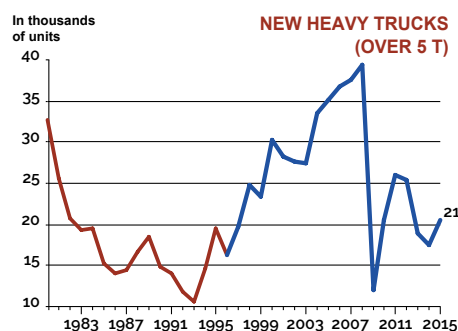
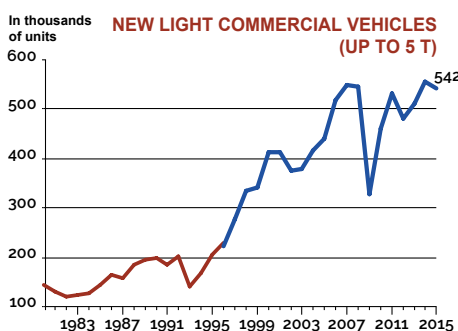
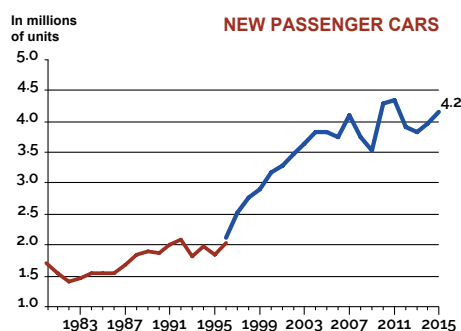
(1) Starting in 2012, the scope of heavy trucks includes invoices for 7 tons and greater (see note page 77)

► VEHICLE REGISTRATIONS IN FRANCE



— Total registrations — French brands registrations

► FRENCH EXPORTS



Between 1997 and 2001, registrations of French automakers' vehicles in France progressed thanks to large numbers of new models, high performance and attractive prices. The cycle reversed for the period 2002-2007. More vigorous competition and subsequently a selective sales policy led by French manufacturers meant that these gains could not be consolidated. In 2008, the increase in volumes sold can be explained by the healthy market for light commercial vehicles and the large number of French manufacturers' low CO₂-emission models, in

line with the bonus/malus scheme. In 2009 and 2010, the coupling of this environment-friendly scheme and the scrap incentive scheme boosted global sales of cars and, more particularly, those made by French groups whose product ranges were in line with those tax breaks. From 2011 to 2013, before the slight recovery in 2014, the end of this support system resulted in a drop in sales, in particular for French manufacturers.

During previous years, the impact of the crisis in countries

where French manufacturers are strongly present had impacted deliveries of passenger cars outside France. In 2015, sales stood at 4.2 million units, up 5%. Deliveries of light commercial vehicles fell 2% to 542,000 units, whilst sales of commercial vehicles jumped 18% to 21,000 units.

ECONOMIC RATIOS OF THE AUTOMOTIVE INDUSTRY IN FRANCE

At the crossroads of numerous techniques, auto-manufacturing requires major investments: since the 2009 crisis, almost 3% of turnover. In a newly-defined perimeter (now including extraction industries, agro-foods and industrial companies of less than 20 employees), the automotive industry accounted for 5% of tangible investments in 2011 (7% in 2009).

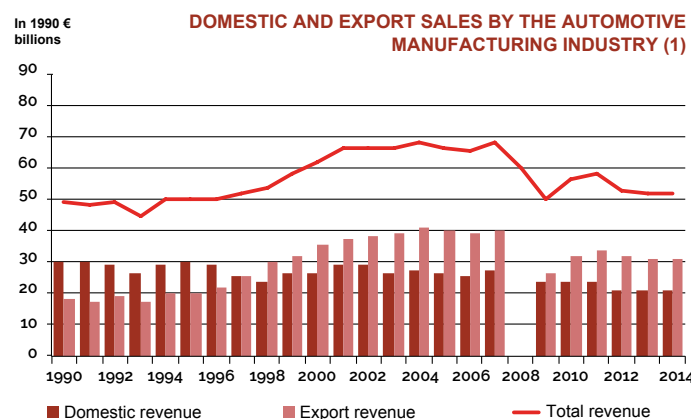
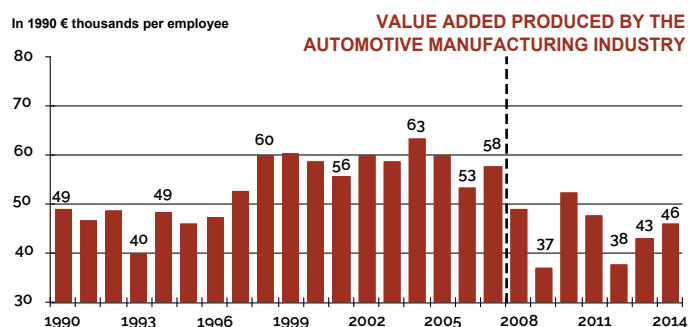
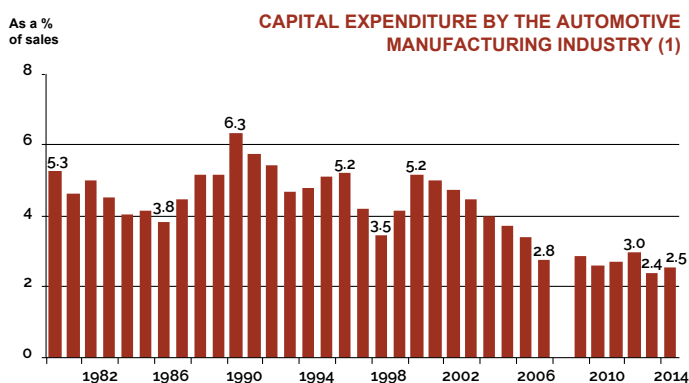
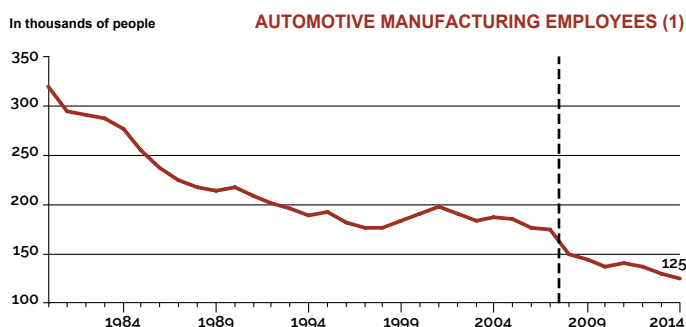
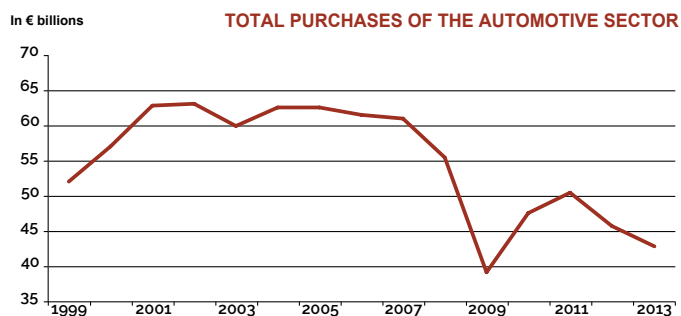
Given growing societal demands (environment, road safety, etc.), the automotive industry is investing more in intangible elements and R&D (cf. following pages), to which the automotive competitiveness clusters are particularly well suited.



2.7%

.....

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



(1) CCFA estimates for 2014 (and 2013 for capital expenditure) : see also pages 84 et 85 (in particular for concept changes). Source: INSEE, National accounts base 2010 (see also page 58)

Each year, INSEE produces annual company surveys, one of the main aids to reading French industry trends. The report was previously compiled by SESSI. A major revamp of these surveys has been undertaken with the new ESANE information system. Also, a new economic activity nomenclature was introduced at the beginning of 2008 (cf. pages 80 and 81).

The automotive industry includes the construction of automobiles, bodywork, caravans and leisure vehicles, but also upstream, the manufacture of automotive equipment. However, the statistics do not cover the whole scope of suppliers to the automotive industry, since certain

products like tyres, plastics, equipment supplies and glass feature in other business nomenclature categories (cf. also page 63).

Automobile construction

Having shown substantial progress between 1996 and 2004 (+30%), in line with booming vehicle production, the value added (ex VAT) in automotive construction, at constant value and per employee, fell under the impact of different factors: costs linked to new environmental standards, stagnation and decline of the West European market for new vehicles, made worse by the crisis, and

rising raw material costs. In 2014, the increase took it €17 above its 2009 levels. So as to develop new models and optimise production capacities, automobile manufacturing has dedicated almost 3% of its turnover to investment, i.e. almost €2 billion. Research and development costs (cf. page 34) are not included in these figures. The share of turnover made from exports has increased uninterrupted since 1990, when it reached 38%, and is now around the 60% mark, compared to around 35% for the manufacturing industry as a whole.

THE AUTOMOTIVE INDUSTRY IN FRANCE'S REGIONS

All told, including direct jobs (automakers' production and research sites), indirect jobs (suppliers' sites) and trickle-down jobs (generated by suppliers' workload), the automotive industry often represents an essential pillar of local economies.

4.1

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

► AUTOMOBILE CONNECTED JOBS IN THE REGIONS

Regions	Direct jobs	Indirect jobs	Induced jobs	Reference year	Sources
Haute-Normandie	8,070	18,900	nd	2010	Insee Haute-Normandie, Aval no 122, September 2012
Nord-Pas-de-Calais	18,928	17,692	nd	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, mars 2009
Nord Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	Insee Franche-Comté - L'essentiel no 113 - mai 2009
Lorraine	almost 20,000 people			2006	Insee Lorraine, Economie 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 - A la page no 291 - January "
Val d'Oise and Yvelines	75,000	75,000	Between 50,000 and 100,000	2006-2007	RAVY (Réseau automobile Val-d'Oise Yvelines) – Press kit – 2008 Edition

► 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



INSEE's March 2012 economic report shows that one unit of added value in the automotive sector generates 4.1 units of added value in the national economy. The automotive industry boasts the biggest added value multiplier after the aeronautic industry. Also, an industrial site creates local business beyond its direct employees. INSEE's regional divisions have produced surveys which describe some of the indirect jobs generated by suppliers, sub-contractors and service providers, plus trickle-down jobs, i.e. those needed to satisfy employees' and their families' consumption (direct and indirect). The Direction Générale des Entreprises (DGE) has produced a study on the automotive industry (cf. page 58) which describes the sector in terms of a 'core' and its 'periphery'. The core activities (manufacturers, equipment manufacturers and body builders) depend on the manufacture of industrial products and services, hence the multiplier effect described by INSEE.

The 2012 INSEE Haute-Normandie survey showed that the automotive sector employed 27,000 people in the region in 2010, 8,000 of whom in vehicle production and 19,000 in the rest of the segment, 48% with equipment manufacturers, 30% in intermediary goods and 9% in

design and analysis. The February 2014 INSEE Nord-Pas-de-Calais survey indicated that the automobile industry in 2011 employed 36,000 people, 19,000 of whom in vehicle production. Also, in this region, over 40% of employees in the plastics sector and almost 25% of those in metallurgy were working for the automotive industry. The 2009 study on the South of Alsace and the North of Franche-Comté found that in 2008, 45,000 people in all (spouses and children) were dependent on the jobs of the 13,000 people directly or indirectly employed by the automotive industry. And 2008 studies on the Seine-Aval region showed that one job out of six was dependent on the activity of the local PSA and Renault factories, the Poissy and Flins sites respectively. There was a ratio of 5:1 between employees and temps on those sites.

The automotive industry's regional associations (ARIA), a regional relay point for PFA, Filière Automobile et Mobilités, includes companies (manufacturers, equipment manufacturers and other suppliers) from the automotive sector in the regions, with the public authorities and training and research establishments. The 13 members have a wide range of remits: increasing competitiveness, improving industrial performance, access to new

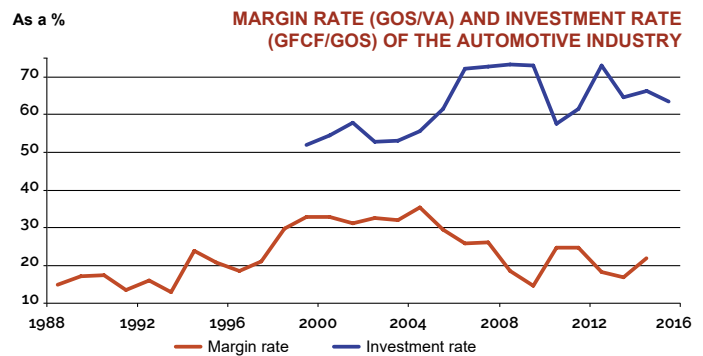
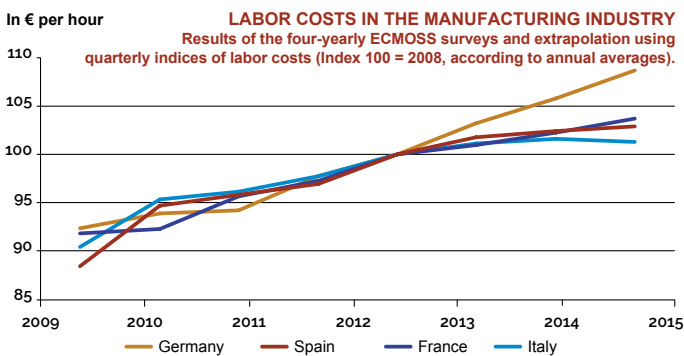
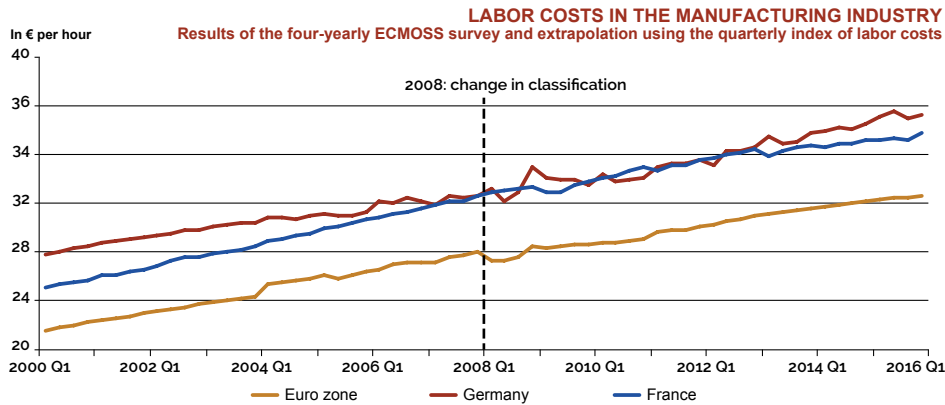
opportunities (customers and markets), emergence of new projects, promotion of the sector's image in the region. They also cooperate with automotive competitiveness clusters. Also, each ARIA runs the regional automotive operational committee (Comité opérationnel régional automobile) which brings together the public authorities (DIRECCTE and the automobile reference agent, the credit mediator, OSEO and the Caisse des Dépôts et Consignations - The government bank), the UIMM and other professional organisations, and competitiveness clusters.

COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

In a highly competitive global market, French automakers must be competitive whilst addressing factors affecting the whole industry. The latter include the scale of compulsory charges on the factors of production, exchange rates, and other, more automotive-sector-specific elements like the opening up of the base market to competition. All these factors affect profit margins (difference between gross operating profit and added value), which in turn have a bearing on how investments are financed and competitiveness improved. On the back of different reports, including the 'Pact for the competitiveness of French industry' (2012), showing the chronic

weakness of profit margins in French industry in relation to other countries of the euro zone, the government in the same year drew up a 'National pact for growth, competitiveness and employment'. One of its key tools was the Competitiveness and Employment Tax Credit (CICE), costing €20 billion, based on the value of the wage bill and excluding salaries over 2.5 times the minimum wage (SMIC). But average salaries in the industry, given the international competition it faces, are higher than the CICE baseline (even more so in the automobile industry), meaning they only benefit to a level of 20%. The introduction from 2015 onwards of the Responsibility Pact, which

includes a reduction in employers' contributions and corporation tax, should also help partially reduce France's handicap. Automakers are also organised internally to develop their activities and maintain industrial and research sites in France. Since 2012, the increase in the cost of employment is five points lower to that observed for Germany, compared to 15 points higher between 2000 and 2010.



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).

Competitiveness reflects the industry's ability to cope with competition and develop its sales. It is a relative notion, in this sense that reflects their position in respect of other actors on their markets.

On a European market that lost 4.6 million light vehicles (passenger cars and light commercial vehicles) between 2007 and 2013, European generalist automakers were not very profitable. Some of them had even recorded losses before recovering from 2014 onwards further to a jump of 2.1 million additional units registered since that low point. And so to continue to develop, the French automotive industry must deliver performance levels comparable to those of its European, American, Japanese, Korean – and in future Chinese or even Indian – competitors. Operating margin (operating income/turnover) is one of the tools used to measure automotive groups' performance. Between 2009 and 2013, it stood at 1% on average for French automakers, compared to somewhere between 5-8% for German groups (Volkswagen, BMW and Daimler). In 2015, it was 5% for Renault and PSA, and up on previous years, whilst operating margins of German groups are traditionally above 5% for Volkswagen (-1.5% in 2015 given the very particular situation of VW), 10.4% for BMW and 8.8% for Daimler. Beyond the problems of global competitiveness

of the economy and the industry (salaries, social charges and tax burden) some competitiveness factors are specific to the French automotive industry, which result both from the characteristics of the automobile as a product, and those of the global automobile industry.

Of the competitiveness factors affecting French industry, social charges weighs heavily on the employment factor. France has one of the highest in the European Union, including the euro zone. It is higher than in the UK, Italy and Spain, and much higher than in the countries of Eastern Europe. And of course, compulsory charges on production impact automobile manufacturing directly and indirectly right through the supply chain.

Furthermore, exchange rate fluctuations can have a non-negligible impact on terms of trade because of the substantial and growing share of production outside the euro zone.

Since the beginning of 2002, the recovery of the euro has affected the competitiveness of French exports and companies have had to multiply their efforts industrially and commercially to continue to develop opportunities outside the euro zone (69% of total sales in 2015, compared to

47% in 2002). In 2015, the euro has nevertheless lost ground compared to the leading currencies.

There are also factors linked to the opening up of the market, domestically and abroad. In general, domestic sales, referred to as the 'base market', are a solid pillar to feed growth on external markets via international development and innovation. For the French automotive industry, the French market and particularly the European market can be considered their base market. It is open to competition and non-European automakers enjoy a significant and constantly growing share. In other automaking countries like Japan, access to the market is more difficult and local manufacturers therefore have a broader base market upon which they can build their international development.

COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

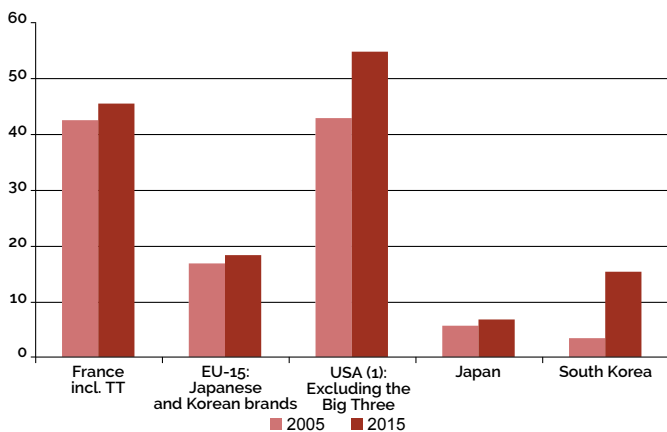
69%

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

The price of raw materials expressed in euros increased substantially between 2001 and 2010. Passing on these increases in final vehicle prices to the customer proved too difficult in an intensely competitive environment. It was no easier in the so-called developed countries because of multiple arbitrations by consumers.

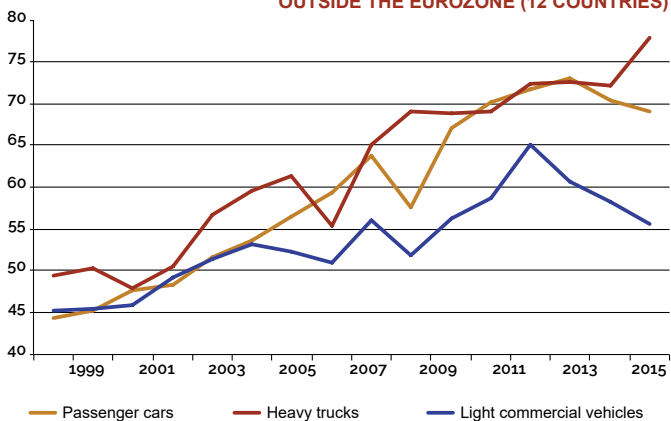
Raw material prices have nevertheless fallen compared to 2010. In January 2016, oil had fallen 51%, rubber 40% and steel 26%. They have returned to the average prices of the early 2000s to the end of 2007.

As a % **SHARE OF FOREIGN MAKES IN PASSENGER CAR MARKETS**



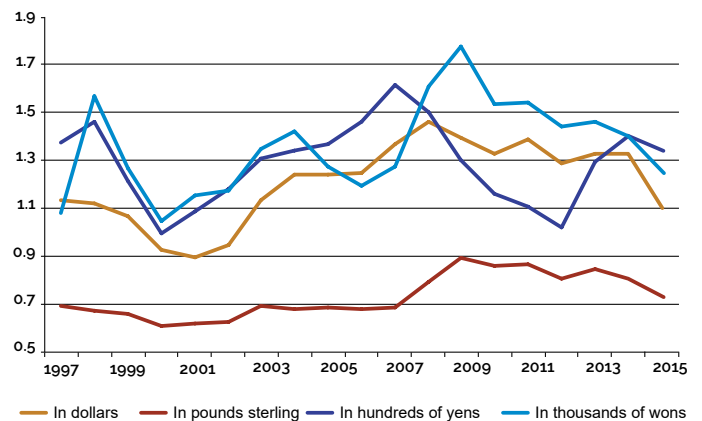
Source: CCFA

As a % **SHARE OF EXPORTS BY FRENCH MANUFACTURERS OUTSIDE THE EUROZONE (12 COUNTRIES)**



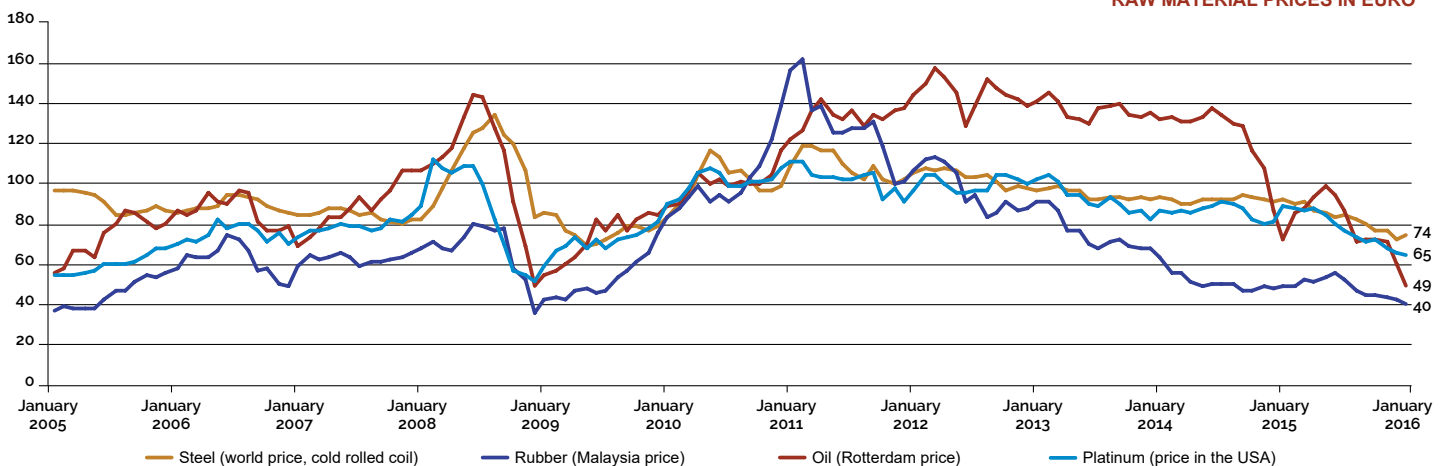
Source: CCFA

EURO EXCHANGE RATE VARIATION



Source: ECB

In € - Base 100 in 2010



RAW MATERIAL PRICES IN EURO

CONSOLIDATION OF THE AUTOMOTIVE INDUSTRY

2009

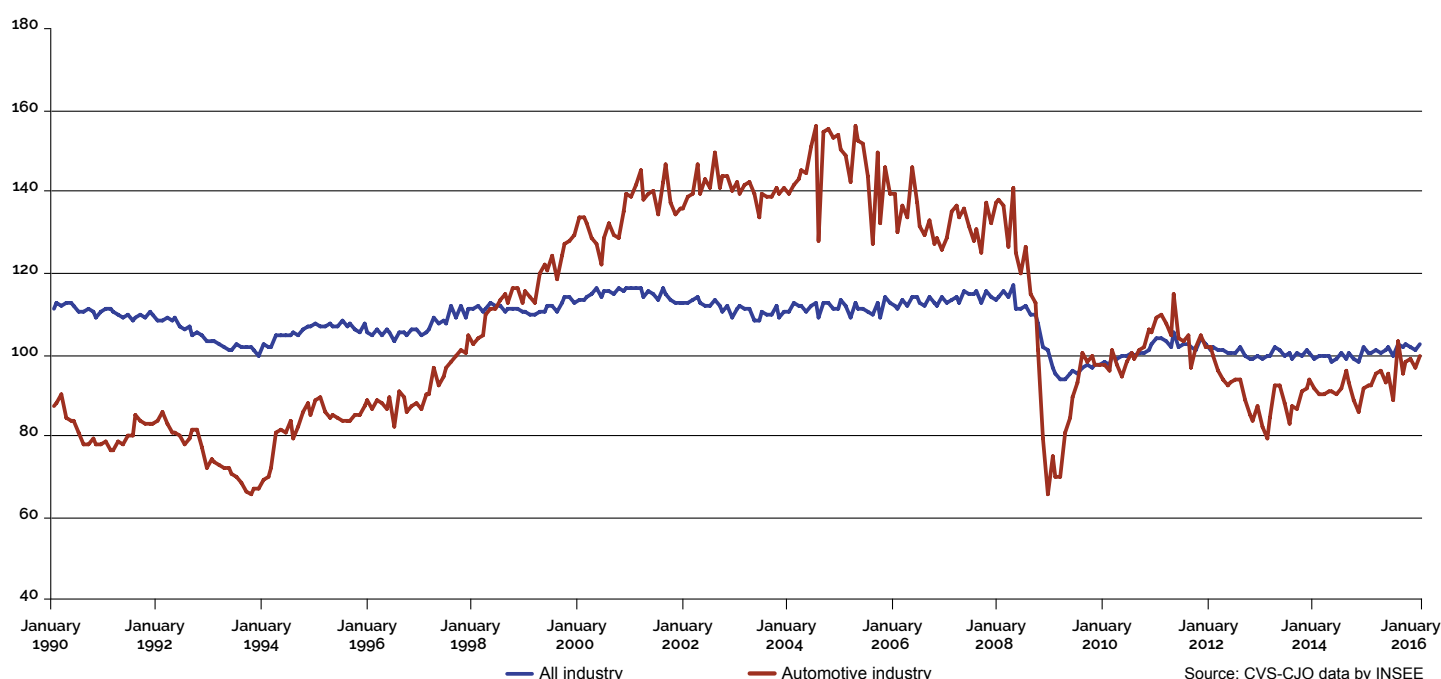
**YEAR IN WHICH THE PFA,
FILIERE AUTOMOBILE
ET MOBILITES
WAS CREATED**

With major fluctuations on the European automotive market, the automotive industrial production index in France measured by INSEE (base 100 in 2010) has gone through two distinct phases. The first started at the beginning of the crisis, when the index fell sharply from almost 140 at the beginning of 2008 to 66 at the end of that same year. And then it climbed again, in particular thanks to systems introduced to boost demand, at a level between 80 and 115, the high point in the spring of 2011. The second phase then began, and the index fell to 79 at the beginning of 2013, before progressing towards a new point of equilibrium, at somewhere between 83 and 2013 (against an average of 130 before the crisis).

To address a crisis on such a scale, the automotive sector had to structure itself. Thus, the Plateforme de la Filière Automobile (PFA - Automotive Branch Platform) was introduced in 2009 by French automakers and their suppliers within the automobile suppliers' liaison committee (CLIFA) to improve the efficiency of their sector. It is now called PFA, Filière Automobile et Mobilités. As part of the industry's national council (formerly the national industry conference – CNI), the automotive sector strategic committee (CSFA) was set up. The CSFA includes all members of the segment, upstream and downstream, including trade unions.

Base 100 in 2010

INDUSTRIAL PRODUCTION INDEX



The financial and economic crisis had major repercussions for the automotive sector, upstream with suppliers and downstream through to vehicle sales/maintenance, via transport and merchandise, equipment manufacture and service to companies, including research and development. Because of reduced business levels, degraded competitiveness and cut-throat competition, the fabric fragmented and the PFA had to fix new priorities to address the situation: lean manufacturing, skills and professions of the future, better management of communication, and medium- and long-term competitiveness strategies for automakers and their suppliers.

Since 2013, this has relied at a regional level on the regional automotive industry associations (ARIA). After an initial phase of activity, it consolidated in 2012, in particular around the automotive technical committee (CTA) and its two councils, the automotive technical standardisation council (CSTA) and the automotive research council (CRA). Five programmes were defined: the car consuming 2L per 100km, the ecosystem of the autonomous vehicle, VALdriv PLM (structuring and federating the digital transformation of the segment), FORCE (lightening and reducing the carbon footprint by accompanying development of low-cost carbon fibre) and Factory of the

Future. The first two programmes were integrated into the 'ecological mobility' solution of the second phase of the 'New Industrial France' project launched in 2015. The first stage began in 2013 with industrial recovery plans and the PFA worked in partnership with competitiveness clusters. It is also a stakeholder in CSFA.

The purpose of the PFA is to build a clear vision of the major challenges faced by the segment. Over the period 2016-2018, the priorities are as follows: initiate impetus in innovation by piloting priority programmes and facilitating collaboration between different actors; being active in the fields of regulations and standards to give companies the best possible opportunities to develop; supporting and developing SMEs and mid-tier firms by accompanying them on strategy and operational choices; building lasting, trusting relationships and improving the quality of customer/supplier relationships so as to make each actor more efficient and therefore profitable; promoting the appeal of the segment and anticipating the skills that will be required for the jobs of today and the future; improving the match between needs and training and thereby giving real opportunities to the men and women working in the sector now and in the future.

The CSFA was created in 2010 within the existing CNI,

further to the industry conference (EGI) signed up the same year, which now includes 13 other committees. It includes automakers and commercial vehicle manufacturers present in France, 'first tier' equipment manufacturers and a large number of SMEs and mid-tier firms who supply the automotive industry and come from different sectors (mechanical, plastics, die-stamping, foundry, etc.). Body builders and the downstream activities of the segment (distribution and repairs) are also present, as are R&D companies, in particular competitiveness clusters and the major public research organisations (IFPEN, IFSTTAR). The trade unions of the industrial branch are also represented. In October 2012, a sector contract was signed defining four major working themes in a shared vision for the segment: anticipating economic change, innovation and R&D, solidarity of the segment and internationalisation of actors. In 2015, different CSF initiatives were implemented or at advanced stages. The transformation of the fund for the modernisation of automotive equipment suppliers (FMEA) and the automotive future fund (FAA) were, for example, also enacted (cf. adjoining page).

INTERVENTION FUNDS, RESEARCH TAX CREDITS, FUTURE INVESTMENTS

2015

THE FIRST YEAR OF EXISTENCE OF
THE AUTOMOTIVE FUTURE FUND

The automotive industry requires major physical investment (production site, etc.) that are written down over very long periods. Furthermore, during design and before sale, vehicles require several years' work in research centres, onboarding continuous improvements, so as to be able in particular to meet societal demands, whether they are linked to safety or the environment. The automotive industry is a capitalistic industry that relies on substantial financing.

During the financial crisis, this was particularly debilitating for the automotive industry and the public authorities introduced structural instruments to finance them over the long term. Created in

2009 under the banner 'fund for the modernisation of automotive equipment suppliers', which became the 'automotive future fund' (FAA) in 2015, its mission is to contribute to the development and consolidation of equipment manufacturers that are strategic to the automotive sector, so as to foster larger, more profitable equipment manufacturers able to sign up to long-term partnerships with the automakers. The organisation continues to be based on two levels of funding: first and second tier (cf. table below).

► INVESTMENT FUNDS

FSI and FMEA	Objectives and attributions
The strategic investment fund (FSI) (created in November 2008) became 'Bpifrance Participations' in 2013 when Bpifrance was created.	Originally a sovereign fund initiated by the public authorities to meet the funding requirements of companies with potential for growth and competitiveness to help the economy. Capital exceeded €15 billion at the end of 2014.
Fund for the modernisation of automotive equipment manufacturers (FMEA) (created in January 2009 and which in January 2015 became the 'automotive future fund').	Taking minority shareholdings in companies from the automotive sector with value-creating industrial projects and bringing competitiveness to the economy. The scale of investment is €5-€60 m.' 'Initial allocation of €600 m equally shared between PSA, Renault SA and FSI (now Bpifrance Participations).

Automotive future fund (FAA) (since January 2015)	Objectives and attributions
Fonds Avenir Automobile (FAA) Tier 1	€600 m distributed equally between three subscribers (Bpifrance, Renault, PSA) to accompany Tier 1 supplier projects, investing amounts between €5 m and €60 m.
Fonds Avenir Automobile (FAA) Tier 2	€50 m comprising five reference automotive equipment manufacturers (Bosch, Faurecia, Valeo, Hutchinson and Plastic Omnium) and FAA Tier 1, specifically dedicated to Tier 2 automotive suppliers, investing amounts between €1 m and €5 m.

Source: Bpifrance

As part of the long-term financing, the strategic investment fund (FSI), which subsequently became Bpifrance Participations with the creation of the public investment bank Bpifrance, had, when it was set, up invested in three automotive companies. The fund for the modernisation of automotive equipment manufacturers Tier 1 (FMEA Tier 1), into which French automakers had injected €400 m and the FSI over €200 m, invested €330 m in 19 equipment manufacturers. The fund for the modernisation of automotive equipment manufacturers Tier 2 (FMEA Tier 2) provided €23 m to 11 companies.

'Investments for the future' was launched at the end of 2009, further to the Juppé-Rocard report recommending the relaunch of innovation in France. The remit of this €47 billion investment programme (€35 billion in 2010, plus an additional €12 billion in 2013) is to bolster French companies' productivity and competitiveness. A budget of €1.1 billion is dedicated to the 'vehicle of the future' programme aimed at developing a more economical, more environmentally efficient vehicle; €620 m had already been committed by the end of 2015.

The automotive industry also has access to other 'investment for the future' programmes, including a

worldwide project to create an 'institute of excellence in decarbonated energies' called 'the communicating decarbonated vehicle and its mobility' (VeDeCoM). VeDeCoM is based on three Paris area sites and will become the reference of the new eco-mobility sector. It supports three research themes: the electric vehicle, delegated driving and connectivity, mobility and shared energy. It includes over 40 members: major industrial groups, including PSA and Renault, SMEs, research centres and laboratories, schools and training centres, and local authorities. The 10-year budget is around €300 m, one third of which is financed by the industrialists themselves. VeDeCoM is also working with PFA on the autonomous vehicle.

French automakers are also stakeholders in the Jules Verne Technological Research Institute (IRT), on a single site in Nantes. The budget commitment to the end of 2015 was €107 m divided between 63 projects, of which 20 new ones. It specialises in advanced production technologies for composite, metal and hybrid structures. It focuses on the transport equipment sectors, including automotive, and energies.

The public authorities are also supporting R&D

development of companies via the 'research tax credit' (CIR), a tax measure created in 1983, amended and improved in 2004 but more importantly simplified and amplified by the 2008 Finance law. Manufacturing industry in 2013 benefited from 61% of all CIR relief, i.e. €3.4 billion. The automotive industry was the third biggest beneficiary of CIR with 6%, i.e. €332 m.

European Investment Bank loans (EIB) and the European Union's Framework Programme for Research and Technological Development also provide an effective stimulant to R&D financing. Nonetheless, at European Union level, the automotive industry represents one quarter of private R&D, i.e. twice that dedicated to aircraft construction, whilst benefiting from five times less aid. Furthermore, the major traditional automotive countries and BRIC countries also strongly support the automotive sector, in particular in the R&D field.

RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

13%

**SHARE OF
THE AUTOMOTIVE INDUSTRY
IN THE TOTAL RESEARCH
AND DEVELOPMENT BUDGET OF
COMPANIES IN 2013**

In 2013, the automotive industry was the second branch in terms of budget for Research and Development (R&D) within companies in France. Their expenditure totalled €5.2 billion, i.e. 13% of all companies' R&D expenditure.

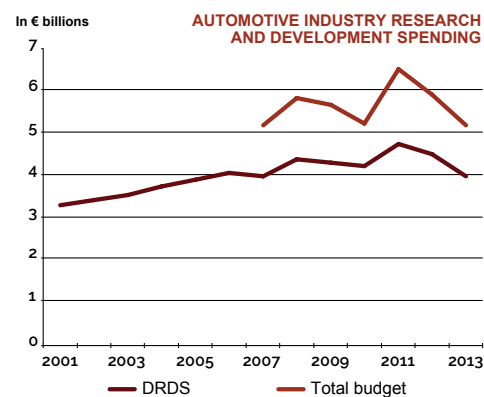
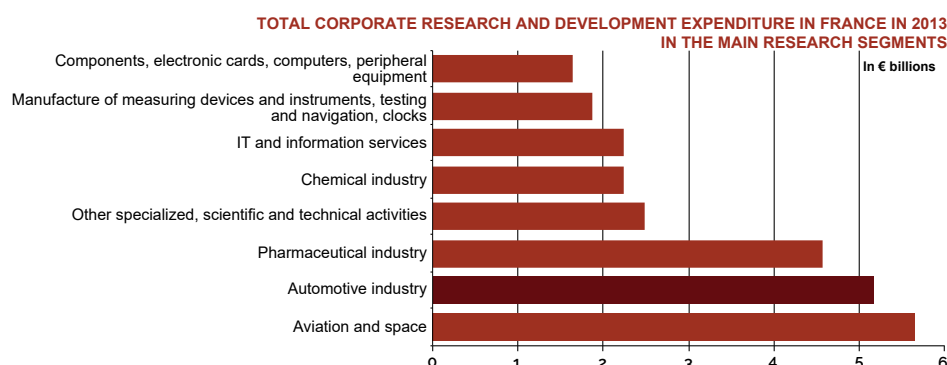
The crisis substantially reduced financial resources but spending fell only 2% in 2009 and 2010, emphasising the vital importance of the long-term view. It recovered markedly (+11%) in 2011 and reached a new record level before dropping to 16% (€4 billion) over the following two years. It represents 42% of the gross added value of the branch.

At the crossroads of numerous different techniques, the automotive industry requires major research to ensure life-long reliability for its products, as well as user safety and environmental protection, in particular with the switch from Euro 5 to Euro 6 and CO₂ emission reductions, to name but a few.

Cumulative over the past 5 financial years, the sector has invested almost €29 billion. Spending has a pull effect on suppliers, such as those from the plastics and electronics industries, for example. In investment terms, the automotive industry ranks higher than both pharmaceuticals and aircraft construction.

► **GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2013**

	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
Aviation and space	3,509	2,141	5,649	14.1%	850	31.2%
Automotive industry	3,959	1,207	5,166	12.9%	37	1.4%
Pharmaceutical industry	3,113	1,452	4,564	11.4%	40	1.5%
Other specialized, scientific and technical activities	2,053	440	2,493	6.2%	231	8.5%
Chemical industry	1,774	464	2,237	5.6%	110	4.1%
IT and information services	2,027	210	2,237	5.6%	105	3.9%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,553	322	1,875	4.7%	246	9.0%
Components, electronic cards, computers, peripheral equipment	1,450	189	1,640	4.1%	157	5.8%
Manufacture of electrical equipment	1,020	549	1,569	3.9%	37	1.4%
Publishing, audiovisual, and broadcasting	1,057	242	1,299	3.2%	52	1.9%
Manufacture of machinery and equipment not included elsewhere	1,107	176	1,283	3.2%	35	1.3%
Manufacture of communication equipment	996	200	1,196	3.0%	s	s
Other branches	7,093	1,837	8,929	22.2%	822	30.2%
Total	30,708	9,429	40,137	100.0%	2,725	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).

The research statistics study office (Ministry of Higher Education and Research) performs surveys on R&D expenditure by companies and the wider public sphere. Since 2008, data has been disseminated under a new nomenclature of economic activity. The total R&D spend can be broken down into domestic expenditure (DRDS), for work carried out in France, whatever the origin of the funds, and foreign expenditure (ERDS), for R&D work entrusted to other companies or public research bodies; some of the latter expenditures can be performed abroad. ERDS are much more volatile than DRDS.

In 2013, 22% of domestic expenditure in the automotive sector was triggered by subsidiaries of companies under foreign control (owning over 50% of their capital).

In 2013, 31,000 people EFT (equivalent full-time), of whom 17,000 researchers, were included in the R&D headcount of the automotive sector. These numbers were down 5% compared to 2003 (in spite of an increase in 25% for researchers). According to the national industrial property institute (INPI), in 2015 the PSA (including Faurecia) and Renault groups occupied the top positions

as major filers of patents; it is important to emphasise that three major automotive suppliers were also amongst the top 20. The automotive sector continues to be the biggest sector for filing patents.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

Initiated by the State and the territorial authorities in 2005, competitiveness clusters federate companies (major groups and SMEs/SMIs), research units and training centres in collaborative project mode. They also offer a number of services: economic intelligence, aid to the filing of patents, networking, etc. Their role is to provide a competitiveness springboard to the French economy by putting the emphasis on its capacities for innovation and encouraging the anchoring and structuring of the different regions of the country.

The 'national pact for growth, competitiveness and employment' drawn up by the government in November 2012 was intended to focus the action

of the competitiveness clusters on products and services that could be industrialised, for greater economic impact in terms of the growth of companies and job creation. This new phase was implemented with 'performance contracts' for the period 2013-2018.

The automotive competitiveness clusters are associate members of the automotive sector body, the PFA, Automotive Industry & Mobilities.



► 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 2015, the automotive industry continued its research and development efforts through those clusters. Through them, the automotive industry is mobilised to meet the challenges of industrial excellence and durable mobility. Their action is transversal and includes automakers, equipment manufacturers, innovative SMEs/SMIs, research laboratories and training organisations, including universities.

The global Mov'eo cluster (www.pole-moveo.org) covers the Ile-de-France, Basse-Normandie and Haute-Normandie regions. Its remit is to federate mobility optimisation projects. The themes addressed are: consumption, environment, road safety, mobility and services, and mechatronics. The measures planned for the new 'performance contract' are being put in place at the moment. The cluster is also involved in one of the nine solutions of the second New Industrial France project launched by the government in May 2015, as an extension to that launched in September 2013. Mov'eo is therefore involved in the ecological mobility solution, with cars consuming less than 2 litres per 100 kilometres driven, for example, and the connected vehicle. The cluster also stepped up its cooperation with the PFA, Automotive Industry & Mobilities, in 2015 on 'jobs and skills'.

The 'vehicle of the Future' cluster (www.vehiculedufutur.com) mobilises historical automotive areas such as Alsace and Franche-Comte, interacting with Germany and Switzerland. Its mission revolves around two themes: innovation and industrial excellence serving companies (piloted by the PerfoEST cluster Association, which is the ARIA of Alsace and Franche-Comte). The cluster focuses on the urban vehicle (eco-design, fuel consumption, recycling, industry of the future, etc.) and the organisation of mobility (services to users, etc.). In 2015, 13 new projects were approved and financed for a total budget of €28 m.

The ambition of the LUTB, Transport and Mobility Systems cluster (www.lutb.fr) is to provide solutions to the challenges raised by the increasing needs for mobility of individuals and merchandise in towns. It coordinates structuring activities for the region by automakers, transport operators and research centres. Research projects revolve around five key themes: urban transport and the vehicle of the future, engines and the powertrain, security and safety, vehicle architecture and intelligent transport systems. In 2015, 13 new projects – a new record – were approved. The cluster is also associated with the Rhône-Alpes Automotive Cluster, the region's

ARIA, whose development themes include 'industrial performance'.

The iDforCAR cluster (www.id4car.org) set up in the West of France (Brittany, Loire, Poitou-Charentes) focuses on special vehicles and sustainable mobility. The four strategic activity areas are: intelligence of onboard systems, vehicle materials and architecture, innovative vehicles and uses, and information and communication technologies driving sustainable mobility.

Other clusters, not specifically dedicated to the automotive industry, have applications which are of interest to the sector. Elastopôle, a national cluster, including the regions of Centre, Ile-de-France, Auvergne and Pays de Loire, is dedicated to rubber and polymers, and three quarters of its applications apply to the automotive sector. It also works in collaboration with the automotive clusters. I-Trans, a global cluster in Nord-Pas-de-Calais and Picardie which specialises in sustainable terrestrial transport solutions, operates on the principles of transversality between road and rail.

THE AUTONOMOUS CAR

The autonomous car denotes a car equipped with intelligent onboard systems which allow it to limit driving tasks under certain conditions and, in terms of development, able to use public highways in an automatic mode without the driver being involved.

The development of electronics and IT has led to the increased integration of multiple driving aid functionalities (assisted braking, speed controller, parking aids), an initial stage towards the automation of vehicles.

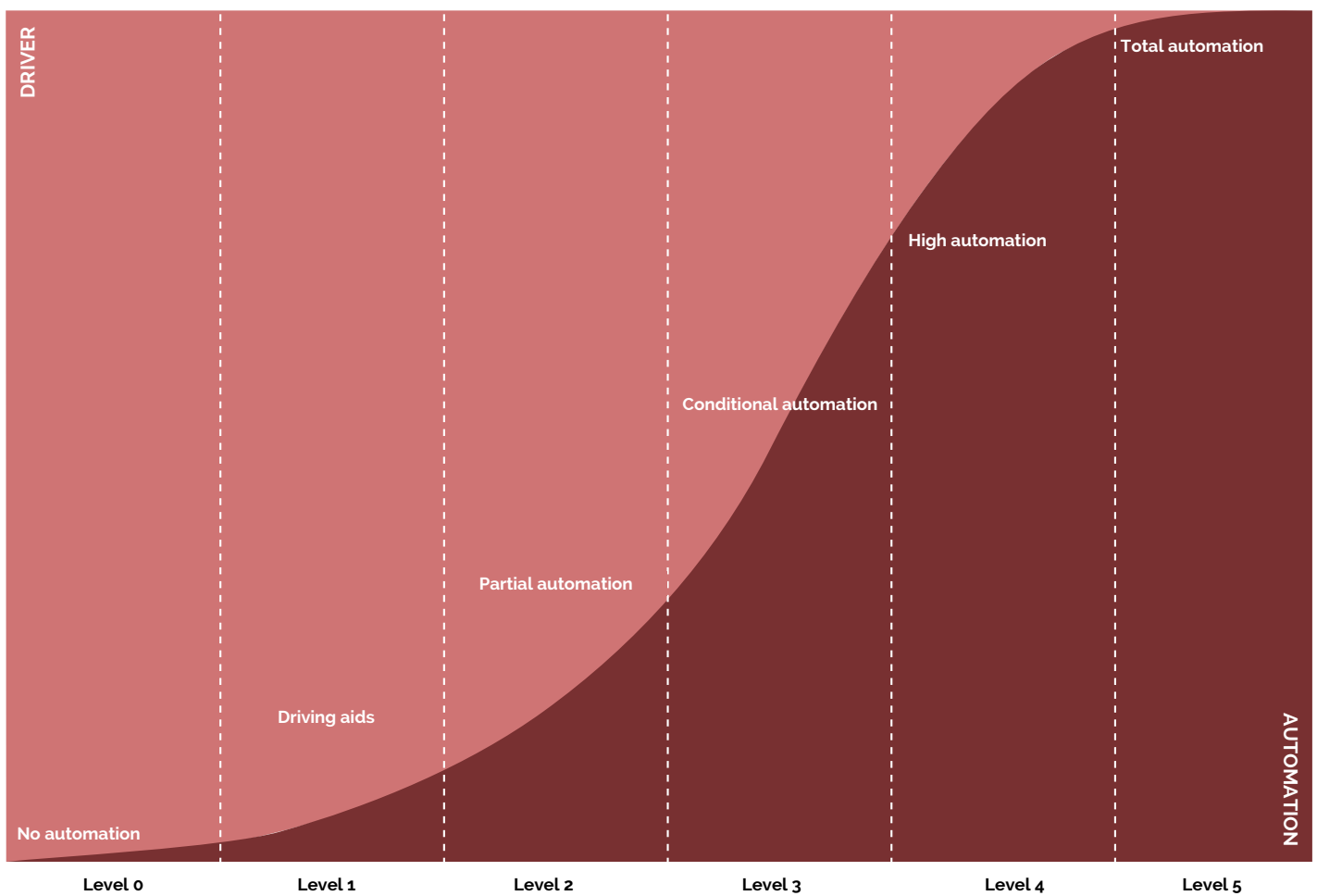
Today, experiments are coming thick and fast to promote driverless vehicles in increasingly complex environments, ranging from dedicated roads to the public open road. Nevertheless,

numerous issues remain to be resolved both technically and legislatively.

The reasons for developing these vehicles are many: improving road safety, making traffic more fluid, promoting economic driving and making mobility accessible to all. Also, the autonomous car will allow its user to convert driving time into pleasant, productive time, for professional or leisure purposes.



ILLUSTRATION OF LEVELS OF DRIVING AUTOMATION



Automation levels were defined by SAE J3016

LEVEL 0 : The driver performs all driving tasks (steering, acceleration/braking, monitoring the driving environment).

LEVEL 1 : The driver maintains overall control of the vehicle but a driving aid system takes charge of vehicle steering or acceleration/braking.

LEVEL 2 : The driver must permanently monitor the vehicle's behaviour and the driving environment. Driving aids take charge of vehicle steering and acceleration/braking under predefined conditions.

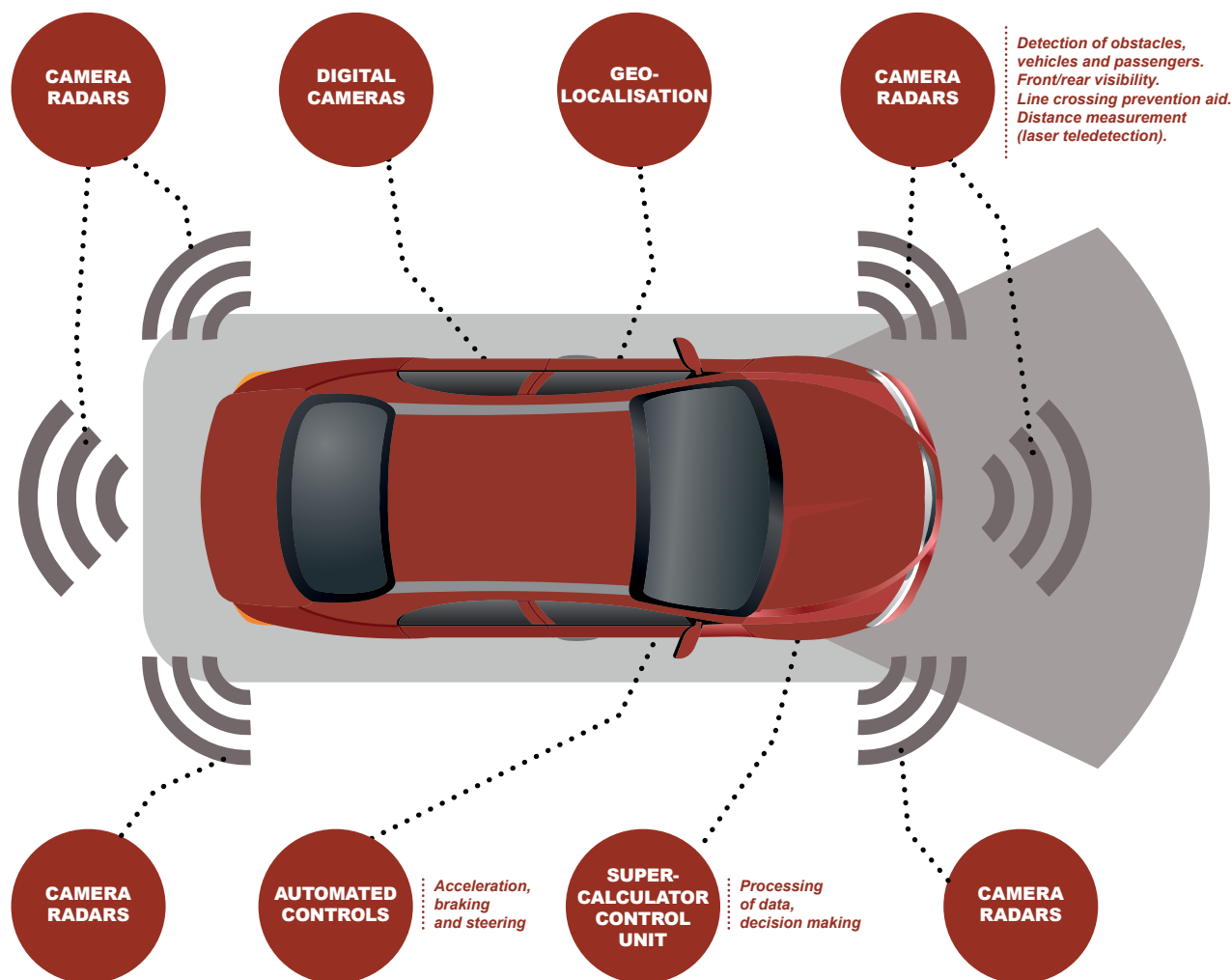
LEVEL 3 : The driver doesn't need to permanently monitor the behaviour of vehicle and the driving environment, but it must be able to quickly take over control of the vehicle if the system requires it.

LEVEL 4 : Under predefined conditions, the driver is no longer irreplaceable. The system in this case can fulfil all the driving functions of the vehicle.

LEVEL 5 : The system performs all driving functions in all situations encountered on a journey. Driver involvement is no longer required.

THE AUTONOMOUS CAR

► EXAMPLES OF ONBOARD INTELLIGENCE SYSTEMS FOR AUTOMATED DRIVING



The automatic car denotes cars equipped with intelligent onboard systems which reduce driving tasks under certain conditions and which may, at the end of its development, allow cars to travel on the open road automatically, without any intervention of its users. The notion of autonomous vehicles therefore covers different degrees of automation. Five levels have been defined by SAE International (an American standards association in the automotive and aerospace fields), ranging from assisted driving, when the driver retains control of the vehicle whilst receiving various types of assistance (speed controller and limiter, guiding, geolocalisation, etc.) to total automation, when the vehicle can drive without a driver on board. When all or some of these driving tasks are transferred from the driver to the system, the term 'delegated driving' is used. Prospects for the use of autonomous vehicles will depend on degree of automation. The possible cases of use are, for example, driving on unencumbered motorways, low-speed driving in congested traffic, automatic valet services, small public transport vehicles, flow management vehicles in logistics centres or areas, groupings of urban shuttles (balancing of car sharing stations).

For road transport of merchandise, heavy goods vehicles driving in convoy will allow driverless trucks to follow a lead vehicle driven by a driver guiding the vehicles of the convoy.

The development challenges opened up by the autonomous vehicle are many. Connected to the infrastructure and other vehicles, it will optimise travel time, fuel consumption and anticipate road-related events

that may present a risk. Freeing up the user from driving tasks will allow users to dedicate time to more pleasant, more productive tasks, such as work or entertainment. Nevertheless, numerous issues remain unresolved, both technically and legislatively.

The autonomous vehicle will need to manage new levels of technical complexity. The development of electronics and IT has led to the increasing integration of multiple driving aid functionalities such as assisted braking, speed controller and parking aids, which are initial stages towards the automation of vehicles. The autonomous vehicle must be fitted with sensors to collect information about the environment, data processing systems to decide on the appropriate manoeuvre, and communications tools to execute the manoeuvre itself. The autonomous vehicle will communicate with the environment via the road infrastructure, but also with users and other vehicles.

Today, many experiments are underway to help vehicles use the roads without drivers in increasingly complex environments, ranging from dedicated roads to the public highway. In June 2015, the first authorisations for autonomous vehicle experiments on open roads were issued. Since, over 40,000 km have been covered on French and European motorways with different autonomous car prototypes (C4 Picasso, Renault Espace). The Institute for Energy Transition, VeDeCoM, has also covered 1,000 km in urban and peri-urban zones with an electrical demo vehicle using delegated driving.

Legally, autonomous vehicles will lead to changes to the

share of responsibilities between drivers, automakers and infrastructure managers. The 1968 Vienna convention on road traffic, signed in particular by France, stipulates that 'any driver must constantly have control of the vehicle and avoid any activity other than driving'. But since March 23, 2016, amendments have opened the way to autonomous driving by explicitly authorising automatic driving systems on public roads, on condition that they comply with United Nations vehicle regulations, and that they are able to be controlled or even deactivated by the driver. Other changes are being investigated to delegate unsupervised driving under certain conditions by 2020.

FRENCH AUTOMOTIVE FOREIGN TRADE



€43
BILLION

EXPORTS OF AUTOMOTIVE
PRODUCTS FROM
FRANCE IN 2015

2015 was marked by growth in global trade (+3%), but also a more dynamic European market. In this better environment, exports of automotive products from French sites totalled €43 bn, i.e. €4 bn more compared to 2013. The automotive industry remains one of the biggest export sectors next to aircraft manufacturing, agrofoods, etc. It accounts for 10% of total exports. In 2014, in customs rankings, two of the sector's companies were among the five biggest exporters.

Renewed growth on the European market resulted in a strong increase in exports (+9%) and imports progressed 12% with an ever greater proportion of flows of new vehicles from Germany (€9.4 bn). The balance of the automotive industry branch was €-6.4 bn.

The positive balance of the 'parts and engines' item fell to €3.4 bn, but exports grew 4% to €21 bn. The surplus can be explained in particular by the production of non-French sites of French manufacturers, which source from France, for example for drivetrain units (more than €3 bn in exports).

► 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)									
2014	13.7	3.0	2.6	20.3	39.5	1.2	40.7	427.9	9.5%
2015	15.0	4.2	2.9	21.0	43.0	1.4	44.4	446.1	9.9%
Change 2015/2014 in %	+9.6	+39.3	+12.7	+3.7	+9.0	+11.7	+9.1	+4.3	
IMPORTS (CIF)									
2014	22.3	3.0	3.0	15.8	44.0	1.1	45.2	503.4	9.0%
2015	25.1	3.2	3.5	17.6	49.4	1.2	50.6	509.4	9.9%
Change 2015/2014 in %	+12.9	+5.2	+16.7	+11.5	+12.2	+9.4	+12.1	+1.2	
BALANCES									
2014	-8.6	-0.0	-0.4	+4.4	-4.6	+0.1	-4.5	-75.5	
2015	-10.2	+1.0	-0.6	+3.4	-6.4	+0.1	-6.2	-63.3	
COVERAGE RATE (2)									
2014	61	100	86	128	90	109	90	85	
2015	60	132	83	119	87	112	88	88	

(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.

► EXPORTER RANKINGS - YEAR 2014

Rank	Company (1)
3	Peugeot Citroën Automobile SA
4	Renault SAS
21	Automobiles Peugeot
24	Renault Trucks

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



In 2015, the share of exports (imports) from the automotive branch as a proportion of all exports (imports) of goods represented 10%. This ratio was 12% and 9% respectively in 1997, the year of the crisis in the French market for new vehicles.

Exports from the automotive industry totalled more than €50 bn in the mid-2000s, before falling back to €34 bn in 2009 with the crisis. Since, they have fluctuated between €39 bn and 43 bn.

Exports of passenger cars valued more than €25 bn

in 2004-2005 before a very sharp drop to €13.7 in 2009. Subsequently, they fluctuated between €13 bn and 16 bn further in particular to the weak Southern European markets where French manufacturers are well represented.

After a sharp decline in 2009, exports of light commercial vehicles and heavy commercial vehicles had recovered strongly the two following years, and continued to progress to reach €4.2 bn in 2015. Commercial vehicles saw two consecutive years of decline before once again recovering to €2.9 bn. Imports of light commercial vehicles

and commercial vehicles increased. The balance of light commercial vehicles, which had been structurally in deficit, went into surplus (€+1 bn), with the cover rate at 132 in 2015 compared to 58 in 2010.

Exports of parts and engines increased 4% whilst imports increased 12%. The balance therefore worsened for the second consecutive year (€3.4 bn).

FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automotive industry are generally in Europe but do include emerging from Eastern Europe and North Africa.

The top five destinations for new passenger cars from France are primarily in Europe, with three of the four other main markets of the European Union. In 2015, Belgium (€2.7 bn) came top, ahead of Germany and Italy (€2 bn each). Algeria ranked twelfth with €248 m turnover.

Germany was the biggest importer of light commercial vehicles with €847 m, ahead of the UK with €706 m. From 2005 to 2010, the value of exports to the top five importing countries tripled to €2.7 bn. In 2015, the total value of light commercial vehicle sales reached a record level of €4.2 bn.

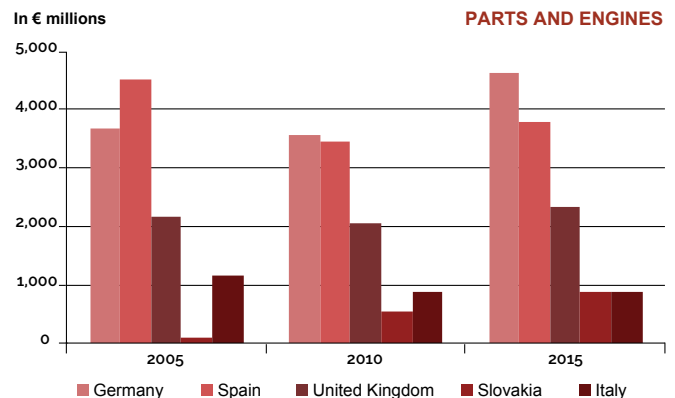
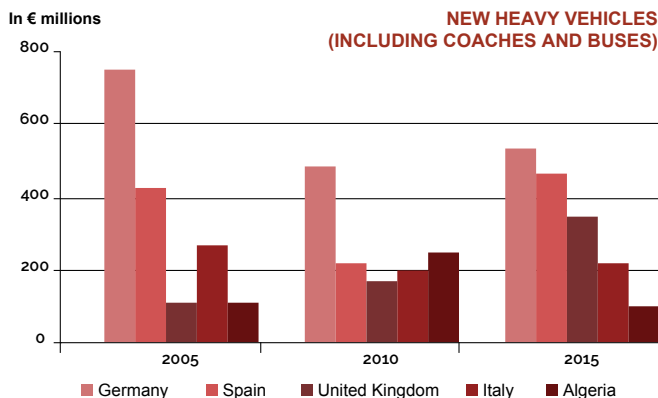
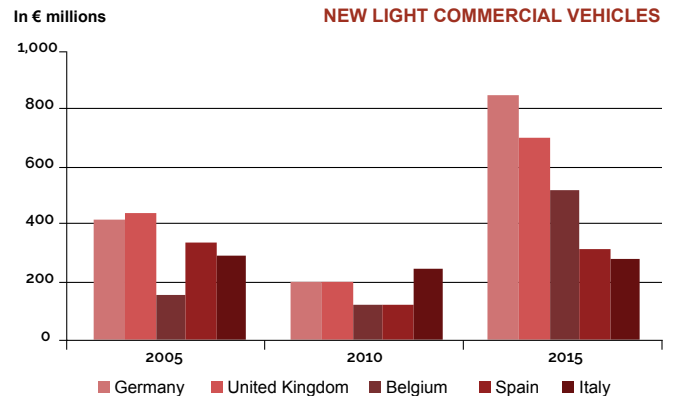
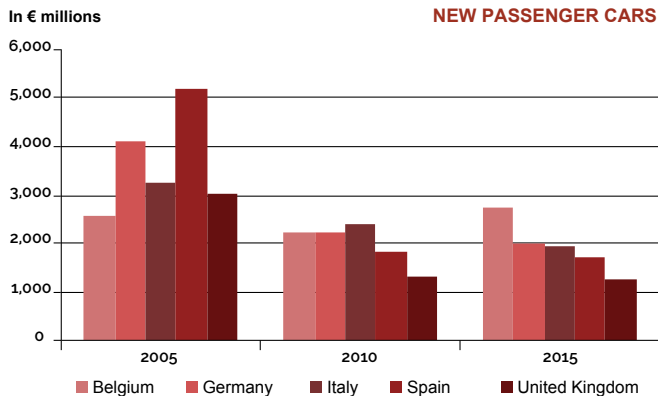
The recovery of the South European markets and growth in Germany and the UK led to further strong growth in the export of commercial vehicles over 5 tonnes, thus reaching a level close to that of the 2000s. Since 2010, exports to Germany have

progressed 25% compared to 32% for the four other countries.

Exports of parts and engines recovered compared to 2010. The top five destinations were in Europe, with Slovakia replacing Belgium when compared to 2014. Germany ranked first (€4.6 bn). China (€563 m) and Brazil (€306 m) were respectively ninth and fourteenth. Brazil's total was in sharp decline. Imports of new passenger cars from Germany (€7.4 bn), UK (€2.2 bn) and Japan (€1.2 bn) rose. For commercial vehicles, imports from Germany totalled €1.5 bn.



► LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE



Sources: customs data processed by CCFA

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

-16 POINTS

**THE REDUCTION IN THE
PERCENTAGE OF NEW DIESEL
POWERED PASSENGER
CARS REGISTERED IN FRANCE
COMPARED WITH 2012**

Since 2001, registrations of new passenger cars equipped with diesel engines in France were higher than for other engine types. In 2015, they represented 57% of total registrations, and we have seen a net acceleration of the decrease (-7% in 2015 compared to the previous year) since the record level in 2012 (73%). This trend can be explained by unfavourable changes in taxation for diesel and more stringent standards, making the depollution of diesel vehicles more costly, and development of petrol car ranges with the advent of three-cylinder engines.

In Western Europe outside France, the high point for diesel cars' market share (52%) was 2011, which has since fluctuated at around 51%. Hybrid and electric engines are emerging in France

with respective market shares of 3.2% and 0.9%. In Western Europe, development is slower, with only 2.5% and 0.7% of the market respectively. Registrations of hybrid and electric cars in France, boosted by a bonus system, accounted for one fifth of the European market for such vehicles, whilst France's market share overall was 15%.



► DIESEL PASSENGER CARS

	1990	2000	2005	2010	2013	2014	2015	% change 2015/2014
PRODUCTION								
In units	804,007	1,648,448	2,328,108	2,178,408	1,848,122	1,835,289	2,066,449	+12.6
As a % of total production	24.4%	35.8%	45.0%	38.8%	38.6%	37.3%	40.8%	
EXPORTS								
In units	292,061	975,038	1,500,989	1,346,022	1,256,429	1,278,930	1,447,512	+13.2
As a % of total exports	15.5%	33.7%	39.1%	31.3%	32.7%	31.1%	35.2%	
REGISTRATIONS								
In units	762,054	1,046,485	1,466,296	1,593,173	1,199,729	1,146,658	1,097,124	-4.3
As a % of total registrations	33.0%	49.0%	69.2%	70.8%	67.0%	63.8%	57.2%	
CARS IN USE								
In units	3,775,000	9,980,000	14,348,000	18,165,000	19,645,000	19,836,000	19,900,000	+0.3
As a % of all cars in use	16.0%	35.6%	47.7%	58.0%	62.1%	62.4%	62.2%	

► ELECTRIC AND HYBRID PASSENGER CAR REGISTRATIONS

	1990		2000		2005		2010		2013		2014		2015	
	Units	Market share	Units	Market share	Units	Market share	Units	Market share	Units	Market share	Units	Market share	Units	Market share
Electric	12	0.0%	184	0.0%	2,630	0.1%	5,663	0.3%	8,779	0.5%	10,561	0.6%	17,268	0.9%
Hybrids	9,876	0.4%	9,655	0.4%	13,641	0.6%	27,889	1.5%	46,745	2.6%	43,143	2.4%	61,619	3.2%

Source: CCFA

► MAIN NEW DIESEL PASSENGER CAR RANKINGS IN 2015 (WITH TEMPORARY TRANSIT)

Rank	Brands	Models	% market
1	RENAULT	Mégane	6.8
2	RENAULT	Clio	5.9
3	CITROEN	C4	4.8
4	PEUGEOT	308	4.7
5	PEUGEOT	Captur	3.9
6	CITROEN	208	3.6
7	PEUGEOT	2008	3.2
8	RENAULT	C3	2.7
9	DACIA	Duster	2.7
10	PEUGEOT	3008	2.5

Source: CCFA

In 2015, for the second year running, France was third on the European market for diesel engines for new passenger cars with 1.1 million registrations, behind Germany and the UK, 1.5 and 1.3 m units respectively for that engine type.

In terms of the number of cars on the road in France, 62% of cars on the road on January 1, 2016 were equipped with a diesel engine. This ratio has been stable over the past three years.

In Western Europe, diesel's market share in new cars fell (-1.6 percentage points to 52%) i.e. 6.8 m units. On this market, the share of French auto makers was 22%. Outside Europe, the market share of diesel cars is higher than 40% in India, and it increased by twenty percentage points in South Korea to over 40% between 2011 and 2015.

In 2015, 2.1 m diesel cars were produced by French auto makers, i.e. a drop back of 15% compared to the record

levels of 2004, but 13% up on 2014. The share of diesel cars in their total production (41%) increased compared to levels achieved since the crisis. However, there was a significant drop compared to 2004 (47%). French groups also supplied diesel engines to other makes according through cooperation agreements.

In 2015, registrations of new passenger cars (including micro hybrids) totalled 61,600 units. That of new electric passenger cars increased 64% to 17,300 units. The sharp increase in the sales is boosted by the government's Automobile Plan started in July 2012. The French market is the biggest Western European market for electric cars. French auto makers have developed a range of products (Renault Zoé, Citroën C-Zéro, Peugeot iOn).

NEW PASSENGER CAR REGISTRATIONS BY MODEL, RANGE AND BODY STYLE

The economy and low range, which dominates in France, peaked in 2010 thanks to the bonus/malus system and the scrap incentive scheme. Subsequently, there was a slight drop back but in 2013-2014, the renewal of cars from the economy range (108, C1, Twingo), the success of models from the existing low range (208, C3, Clio Sandero) and the development of the SUV range (C4-Cactus, 2008, Captur, Duster) stimulated the sector, which enjoyed a 54% share in 2015.

Sedans (down 10 percentage points to 51% and MPVs (-5 percentage points to 14%) started to lose their appeal in 2010 but SUVs have made up this difference (+17 percentage points to 26%). As for station wagons, demand fluctuates around 7% market share.

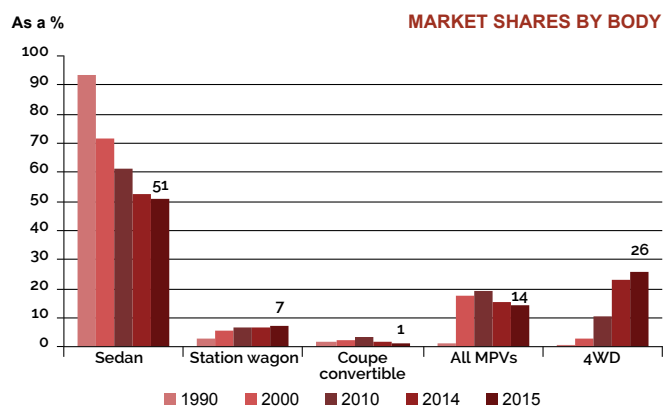
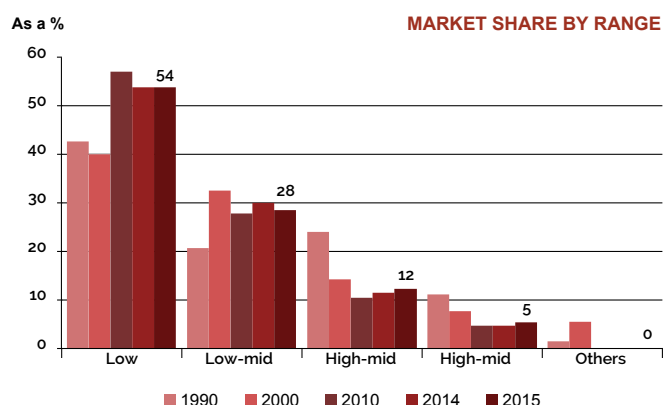
High ranges benefited from demand from companies and French auto makers were able to rely on tried and tested models (508) and new launches (Kadjar, Espace).

26%

**SHARE OF
NEW PASSENGER
CARS REGISTERED
IN 2015
IN THE 4WD BODY SEGMENT**

▶ RANKINGS OF MAIN NEW PASSENGER MODELS IN 2015

Rank	Brand	Model	% market
1	Renault	Clio	5.7
2	Peugeot	208	4.7
3	Renault	Megane	4.6
4	Peugeot	308	4.0
5	Citroën	C3	3.8
6	Renault	Captur	3.8
7	Citroën	C4	3.6
8	Peugeot	2008	3.3
9	Renault	Twingo	2.4
10	Dacia	Sandero	2.4
11	Volkswagen	Golf	2.3
12	Volkswagen	Polo	2.2
13	Fiat	500	2.2
14	Dacia	Duster	1.8
15	Peugeot	3008	1.8
16	Toyota	Yaris	1.5
17	Nissan	Qashqai	1.5
18	Ford	Fiesta	1.3
19	Mini	Mini	1.2
20	Peugeot	508	1.1
21	Renault	Kadjar	1.1
22	Opel	Corsa	1.1
23	Citroën	C4 Cactus	1.1
24	Ford	Focus	1.0
25	Opel	Mokka	1.0
26	DS	DS3	0.9
27	Nissan	Juke	0.8
28	Peugeot	108	0.8
29	Audi	A3	0.8
30	Volkswagen	Tiguan	0.8



▶ NEW PASSENGER CAR REGISTRATIONS BY RANGE

Range	1990		2000		2010		2014		2015	
	units	%	units	%	units	%	units	%	units	%
Low	986,532	42.7	855,161	40.1	1,283,902	57.0	967,138	53.9	1,031,441	53.8
Low-mid	477,631	20.7	695,146	32.6	627,694	27.9	538,578	30.0	545,819	28.5
High-mid	555,053	24.0	303,028	14.2	234,664	10.4	205,487	11.4	235,633	12.3
Premium	256,381	11.1	163,293	7.7	105,313	4.7	84,682	4.7	104,333	5.4
Others	33,533	1.5	117,256	5.5	96	0.0	0	0.0	0	0.0
Total	2,309,130	100.0	2,133,884	100.0	2,251,669	100.0	1,795,885	100.0	1,917,226	100.0

▶ NEW PASSENGER CAR REGISTRATIONS BY BODIES

Bodies	1990		2000		2010		2014		2015	
	units	%	units	%	units	%	units	%	units	%
Sedan	2,155,724	93.4	1,527,676	71.6	1,377,498	61.2	947,136	52.7	979,415	51.1
Station wagon	61,418	2.7	119,739	5.6	153,476	6.8	119,523	6.7	134,934	7.0
Coupe-convertible	36,269	1.6	50,527	2.4	70,353	3.1	29,046	1.6	24,836	1.3
All MPVs	28,682	1.2	369,434	17.3	430,857	19.1	273,105	15.2	269,015	14.0
of which compact MPVs	-	-	241,190	11.3	233,363	10.4	167,079	9.3	163,826	8.5
4WD	17,129	0.7	57,116	2.7	205,106	9.1	415,662	23.1	494,728	25.8
Others	9,908	0.4	9,392	0.4	14,379	0.6	11,413	0.6	509,026	26.6
TOTAL	2,309,130	100.0	2,133,884	100.0	2,251,669	100.0	1,795,885	100.0	1,917,226	100.0

USED PASSENGER CARS

In 2015, registration of second-hand passenger cars returned to growth (+2.1%) after two consecutive years of decline and reached 5,562,000 units. Sales have surpassed the 5 m threshold since 2000.

Each year, two or three second-hand cars are sold for every new car sold (closer to 3 since 2012): as a percentage of all cars on the road, around 17% of vehicles change hands each year. Households keep their vehicles almost five and a half years on average (compared to five in 2020 and four in 1995).

The second-hand/new car ratio is practically stable at a very high level of 2.9, well beyond levels observed during previous periods of contraction of the new car market in 1993 and 1997 (2.5).

58% of cars owned or available to households were bought second-hand compared to 51% in 1991. For cars bought in 2015, this share was 64%. At the time of purchase, average mileage was around 69,000 kilometres and more than one quarter of second-hand vehicles purchased by households had more than 100,000 kilometres on the clock.

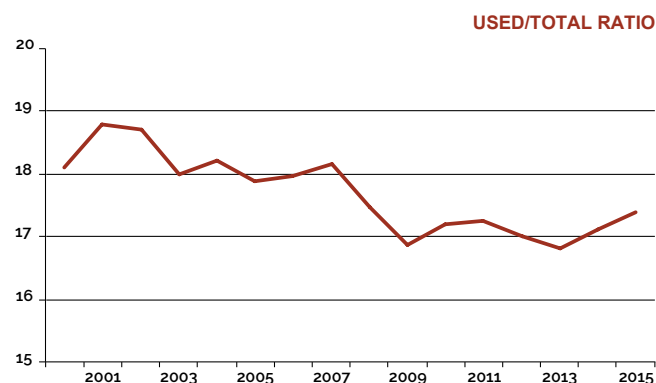
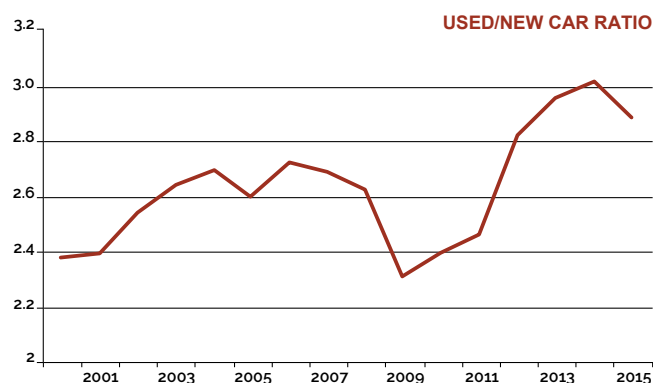


58%

PERCENTAGE OF CARS OWNED BY HOUSEHOLDS THAT HAVE BEEN BOUGHT USED

► USED PASSENGER CARS

	Units	1990	2000	2005	2010	2014	2015
REGISTRATIONS							
New cars	thousands	2,309	2,134	2,118	2,252	1,796	1,917
Used cars	thousands	4,759	5,082	5,383	5,386	5,446	5,562
Used/new ratio		2.1	2.4	2.5	2.4	3.0	2.9
Cars less than 5 years old	% used	52	40	40	37	34	33
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	24	23
Cars more than 5 years old	% used			25	26	25	24
Cars more than 10 years old	% used			22	21	24	24
Cars more than 15 years old	% used			13	15	18	19
USED DIESEL-POWERED CARS							
Thousands	thousands			2,996	3,558	3,720	3,745
% used	%			55.7	66.1	68.3	67.3
Cars in use (on 12/31)		23,550	28,060	30,100	31,300	31,800	32,000
Used/total ratio		20.2%	18.1%	17.9%	17.2%	17.1%	17.4%



The passenger car is a long-term purchase that households buy, use, maintain and possibly re-sell on the second-hand market.

Second-hand cars can be sold via car dealers or directly between private individuals. Professionals generally concentrate on 'newer' second-hand cars, i.e. under 5 years of age, around 60% of the total market.

Between 5 and 6 m second-hand cars are traded per year. This market is subject to longer cycles than the new car market. In 2015, demand for new cars increased slightly by 6.8% to 1.9 m units, and for second-hand cars +2.15% to 5.6 m units. The second-hand/new ratio is therefore practically stable at 3. Demand for second-hand cars is generally closer to the trends on the overall number of cars on the road, and is less influenced by economic factors than the demand for new cars. It is, however,

sensitive to measures introduced to stimulate the new car market (bonus/malus system, scrap incentive scheme, etc.).

The ageing of the vehicle stock and the growth of multi-car households has resulted in an increase in the share of cars aged 5 years and older in second-hand transactions: from 48% in 1990 to 67% in 2015. Furthermore, the share of cars over 15 years old has more than doubled since the beginning of the 2000s and increased 4 percentage points compared to the pre-crisis period to level, at 19% in 2015.

Second-hand cars less than one year old can be considered part of the new car market. Indeed, they are often initially been registered by a dealer (demonstration car or rental car), and then sold on to private individuals. They accounted for 445,000 registrations, i.e. 23% of the new car market, and that level has been practically stable

since 2012 but more importantly, higher than during the years when the scrap incentive scheme was in progress, where new car prices were more competitive.

Since 2001, the share of cars under one year old as a proportion of all registrations of second-hand passenger cars has reduced constantly and in 2015 represented only 8% (12% in 2001).

The share of diesel in second-hand cars was 67% in 2015, one percentage point up compared to 2010 and 12 percentage points up compared to 2005.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS (DOM)

In a more recent market environment than in France, annual trading in new cars in the five overseas territories (Guadeloupe, Guyana, Martinique, Mayotte and Reunion Island) resulted in between 60,000 and 75,000 registrations from 1998 to 2012. In 2013 and 2014, the market fluctuated at around 60,000 units, i.e. a fall-back of 20% compared to 2007. In 2015, it progressed 8% to 66,000 vehicles.

The share of commercial vehicles over 5 tonnes as a proportion of all registrations was lower in those territories (1.2%) than in Metropolitan France (2.1%), given the geographical context. However, the share of light commercial vehicles was practically the same (16.4% compared to 16.2% in Metropolitan France).

French auto makers have to deal with intense competition on the market for passenger cars in those territories. Their market share was below 50% between 2006 and 2013, but since 2014 has risen 3 percentage points to 51%. They occupy 57% of the light commercial vehicle market (3 points up compared to 2014), which is much lower than in Metropolitan France (around two thirds of the market). On the narrow market of heavy commercial vehicles, Renault Trucks' market share is stable at 29%.

The registration of second-hand passenger cars totalled 125,000 units in 2015, 30% up on 2009 (96,000 units). The second-hand/new ratio was under 2 during the 2000s, before growing during the 2010-2012 period. Since 2013, it has settled around an upper limit of 2.4%.



66,000

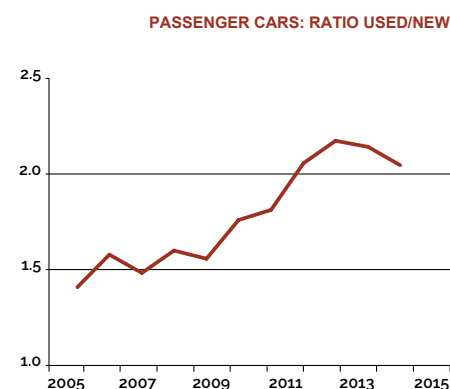
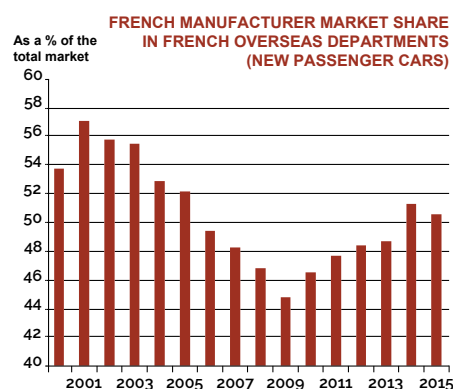
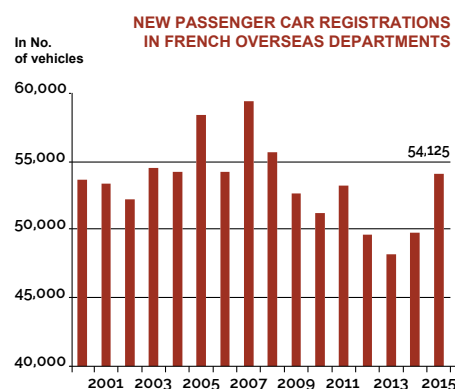
**NUMBER OF NEW VEHICLES
REGISTERED
OVERSEAS IN 2015**

New passenger cars	2000	2005	2010	2014	2015	Change 2015/2000	Change 2015/2014
Guadeloupe	13,691	14,359	13,438	12,599	13,409	-2.1%	6.4%
French Guiana	4,031	4,085	4,382	4,248	4,414	9.5%	3.9%
Martinique	14,424	14,749	13,147	11,325	12,931	-10.4%	14.2%
Mayotte (1)				1,055	1,083		2.7%
Reunion Island	21,463	25,142	20,295	20,605	22,288	3.8%	8.2%
Total French overseas departments (DOM)	53,609	58,335	51,262	49,832	54,125	1.0%	8.6%
Total DOM used passenger cars	ND	98,024	104,381	120,204	125,457	ND	4.4%

Light commercial vehicles (up to 5 t)	2000	2005	2010	2014	2015	Change 2015/2000	Change 2015/2014
Guadeloupe	2,685	2,772	2,394	2,023	2,214	-17.5%	9.4%
French Guiana	1,143	1,169	1,239	1,210	1,159	1.4%	-4.2%
Martinique	2,368	2,732	2,016	1,909	2,156	-9.0%	12.9%
Mayotte (1)				213	230		8.0%
Reunion Island	5,200	6,021	4,166	4,760	4,975	-4.3%	4.5%
Total French overseas departments (DOM)	11,396	12,694	9,815	10,115	10,734	-5.8%	6.1%

Commercial vehicles including coaches and buses (over 5 t)	2000	2005	2010	2014	2015	Change 2015/2000	Change 2015/2014
Guadeloupe	146	196	135	151	97	-33.6%	-35.8%
French Guiana	66	99	85	76	50	-24.2%	-34.2%
Martinique	187	183	84	117	128	-31.6%	9.4%
Mayotte (1)				46	48		4.3%
Reunion Island	362	464	293	392	434	19.9%	10.7%
Total French overseas departments (DOM)	761	942	597	782	757	-0.5%	-3.2%

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



HOUSEHOLD CAR OWNERSHIP

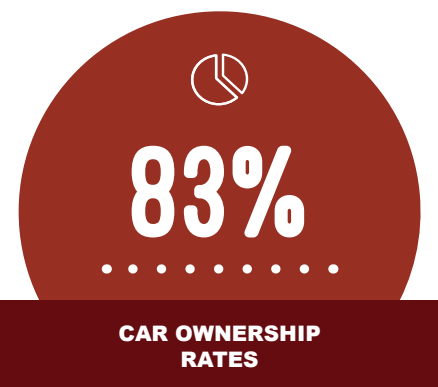
In 2015, multi-car households represented 35% of all households compared to 26% in 1990 and 16% in 1980; this share has been practically stable since 2010.

93% of households in rural or peri-urban areas (rural areas near to cities) have a vehicle.

60% of households in the Paris area have cars (i.e. equivalent to the year 2000). In other French conurbations, the rate is closer to 80%.

60% of modest households (less than €15,000 income per year) are equipped with at least one year.

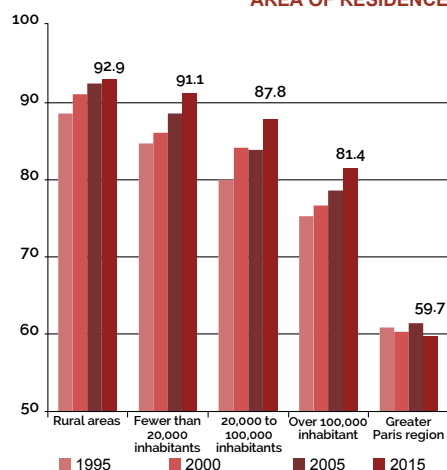
79% of more elderly households have cars, compared to 69% in 2000. Possession of a driving licence and the proportion of drivers in this age category continues to grow.



► CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR)

As a %	1990	1995	2000	2005	2010	2015
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%	90.9%
Self-employed professionals, executives	94.4%	85.5%	84.6%	83.7%	84.1%	83.2%
Middle management	93.3%	88.7%	90.8%	87.6%	89.8%	88.0%
White collar workers	78.3%	75.9%	77.5%	80.9%	82.5%	80.1%
Blue collar workers	87.2%	89.7%	88.7%	89.1%	91.2%	90.9%
Non-working population	54.6%	65.8%	70.9%	72.8%	77.1%	77.6%
of which retired persons	59.4%	70.9%	76.0%	76.2%	80.1%	80.6%
BY AREA OF RESIDENCE						
Rural areas	82.1%	88.6%	91.1%	92.4%	92.7%	92.9%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	88.4%	90.2%	91.1%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	83.7%	87.1%	87.8%
Towns with over 100,000 inhabitants	74.2%	75.1%	76.6%	78.5%	80.8%	81.4%
Greater Paris	77.0%	60.8%	60.4%	61.5%	63.6%	59.7%
Inner Paris	47.3%					
BY LOCATION OF RESIDENCE						
Town center	-	67.6%	69.4%	69.2%	73.0%	71.6%
Suburb	-	79.3%	80.5%	80.9%	83.2%	82.1%
Peri-urban area	-	88.5%	89.8%	91.2%	91.6%	92.5%
Rural area	-	85.3%	90.4%	92.6%	94.8%	94.4%
BY AGE OF HEAD OF HOUSEHOLD						
Under 25	-	51.2%	49.3%	63.3%	64.9%	74.0%
25 to 34	-	85.1%	82.4%	82.3%	83.9%	82.5%
35 to 44	-	86.7%	86.3%	87.5%	88.0%	87.3%
45 to 54	-	87.5%	87.4%	86.1%	88.1%	84.7%
55 to 64	-	84.9%	87.0%	86.7%	86.9%	85.1%
Over 65	-	61.9%	69.0%	70.8%	76.2%	78.6%
ALL	76.5%	78.4%	80.3%	81.2%	83.5%	82.9%
Vehicles with a woman as their main driver	-	-	40.4%	40.7%	41.5%	41.9%

As a % **CAR OWNERSHIP BASED ON AREA OF RESIDENCE**



The rate of car ownership can be measured by the percentage of households having at least one car.

It is largely linked to income, the age of the head of the household, socio-professional category, geographical area and the number of people in the household.

- Whilst 20% of the highest-income households had a car ownership rate above 90% in 2015, the 20%, only 60% of the most modest households had at least one car.
- The rate of car ownership in cities with over 100,000 inhabitants remains firm: 81% had cars in 2015 compared to 75% in 1995. This ratio has grown since 2007 in the Marseille (85%) and Lyon areas (79%); but has fallen slightly in the Paris (60%) and Lille (76%) areas.

- Rural households, large families and workers are those recording the highest levels of car ownership.

- The category of office workers and non-workers (including retired) are relatively less well equipped, but since 2000 their rate of ownership has grown substantially (+2.6 and +6.7 percentage points respectively).

Each year, 2-3% of households divest. A change in family situation (death, divorce, etc.), the cost of maintenance, health problems, the option of public transport and parking problems are the main reasons. Amongst households with no cars, 13% are considering buying again in the next two years.

HOUSEHOLD VEHICLES IN USE

Daily use of the car has fallen regularly over recent years: the share of vehicles on the road used daily or almost daily was 72% in 2015 compared to 79% in 2000.

The share of vehicles used for the home-to-work run continues to exceed 50%. In 2015, business travel other than the home-to-work run stood at 16%.

For travel linked to the school and baby-minding run, the share was 23%.

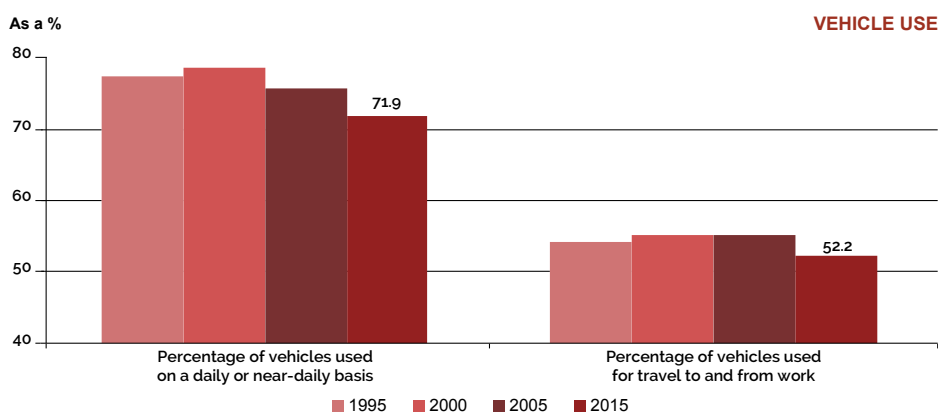
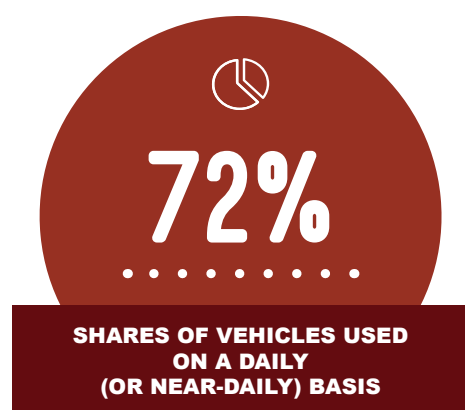
Cars on the road are ageing slowly and regularly, except during periods when market levels are high, like at the beginning of the 2000s or when the scrap incentive scheme was introduced. Households keep their vehicles longer and longer; the average period of ownership was 5.5 years in 2015 compared to 5 years in 2004 and 4 years in 1995.

The average mileage per car on the road was around 106,000 km, i.e. 13,000 km more than in 2000 and 37,000 km more than in 1990. Average mileage for diesel cars, which are used more and more each year, has increased to 118,800 km; petrol cars are used less intensely and are down to 84,700 km.

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

	Units	1980	1990	1995	2000	2005	2010	2015
Total	millions	16.7	23.0	25.1	27.4	31.0	33.6	34.1
Average age	years	5.8	5.8	6.6	7.3	7.7	8.0	8.9
Average ownership period	years		3.7	4.1	4.4	4.7	5.0	5.5
Breakdown by automotive group								
Renault (including Dacia)	%	36.2	33.3	33.3	33.3	30.2	28.6	27.7
PSA (including Talbot)	%	47.1	38.3	36.2	35.2	36.4	38.2	36.5
Foreign brands	%	16.7	28.4	30.5	31.4	33.2	33.2	35.8
Breakdown by power category for tax purposes								
2 and 3 HP	%	12.3	3.4	1.6	0.7	43.3	44.4	49.2
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	11.8
Breakdown by vehicle range								
Low range	%		39.4	43.4	45.1	44.5	46.8	49.3
Low-mid	%		20.8	24.3	27.3	32.2	30.9	29.2
High-mid	%		26.0	22.2	19.9	16.2	11.5	7.9
Premium range	%		8.7	7.0	7.0	5.7	5.0	3.0
Others	%		5.1	3.2	0.8	1.4	5.7	10.6
Percentage of vehicles purchased new	%	55.7	50.4	45.2	43.9	40.1	41.1	41.5
Breakdown by type of fuel used								
Premium unleaded – Gasoline	%		16.2	38.4	49.1	51.1	40.1	38.8
Premium leaded - AVSR	%		65.6	28.8	11.9			
Diesel	%		18.2	30.9	38.1	48.9	59.9	61.2
Average kilometres on odometer	km		69,500	84,080	93,140	99,460	103,470	105,590
Percentage of vehicles used on daily or near daily basis	%		75.1	77.4	78.7	75.7	71.8	71.9
Percentage of vehicles used for travel to and from work	%		55.4	54.3	55.1	55.2	53.7	52.2

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.



A SOFRES survey every year provides a detailed description of vehicles on the road, which are owned or available to households.

The total number of vehicles on the road is made up primarily of passenger cars, but also light commercial vehicles which represent around 5% of the total number.

The share of vehicles over 5 years of age was 68% in 2015 and over a period of 10 years has stabilised at a record level (31%). The average age of the vehicle stock according to energy type is 10 years for petrol and 8 years for diesel.

The share of multi-car households equipped exclusively with cars aged 5 years and over was 49% in 2015 compared to 43% in 2010.

The most popular fiscal power ratings are between 2 and 5 HP. Cars from the low and mid-low range categories have been in favour for several years and their share of the total stock has remained high compared to high-end vehicles: they represented 49% and 29% respectively of the vehicle stock as against 8% for cars from the mid-high range in 2015.

Comfort features are increasingly present; in 2015, 75% of cars had an air-conditioning system. For safety equipment, rates have also increased; 48% have a speed limiter and 38% a central balancing system (ESP) compared to 18% each in 2008. Onboard connectivity and 'Stop&Start' equipment is emerging and represented 23% and 14% of the vehicle stock respectively. The rate for all these elements is much higher for the main cars of multi-car households.

DOMESTIC PASSENGER TRANSPORT

Personal mobility is a social and economic necessity which allows exchanges between individuals, as is a source of wealth and job creation.

Expressed in passenger-kilometres and limited to domestic transport, the road is the primary means of transport of individuals: 80% for the passenger car and 8.8% for buses, coaches and trams in 2015.

The private car but also the light commercial vehicle, is used for door-to-door mobility. They cater to a large number of individual constraints (the elderly, children, disabled, transport of heavy or bulky objects) and provide a suitable solution in low-density housing areas or where flows are not sufficient (shift work) for public transport to

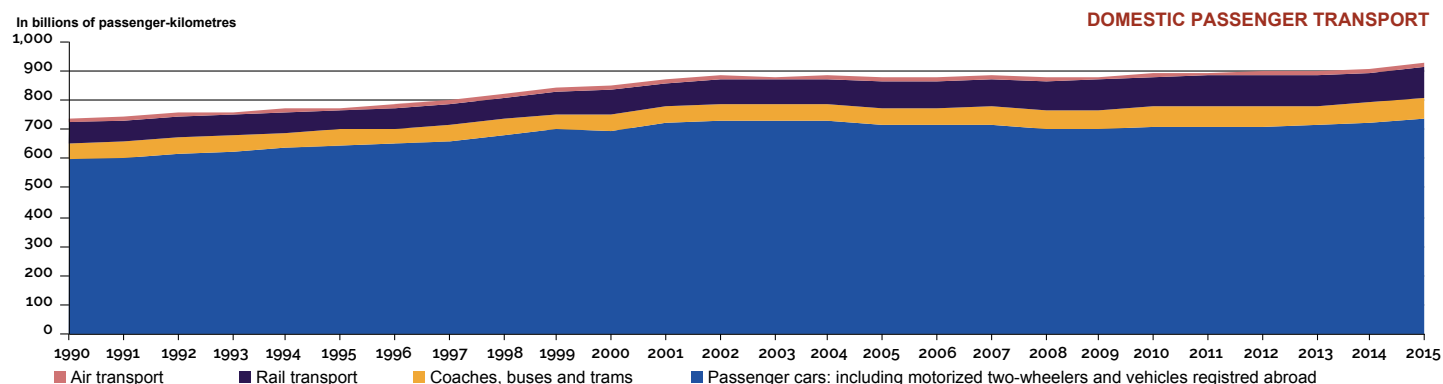
be a good solution from an economic or societal point of view.

In 2015, domestic passenger transport grew 2.1%, i.e. at a rhythm higher than the annual average observed since 2010 (+0.8%). This sharp growth in mobility is linked primarily to the increase in passenger car traffic, which accelerated compared to the two previous years (+2.4% compared to +0.8% between 2008 and 2015).

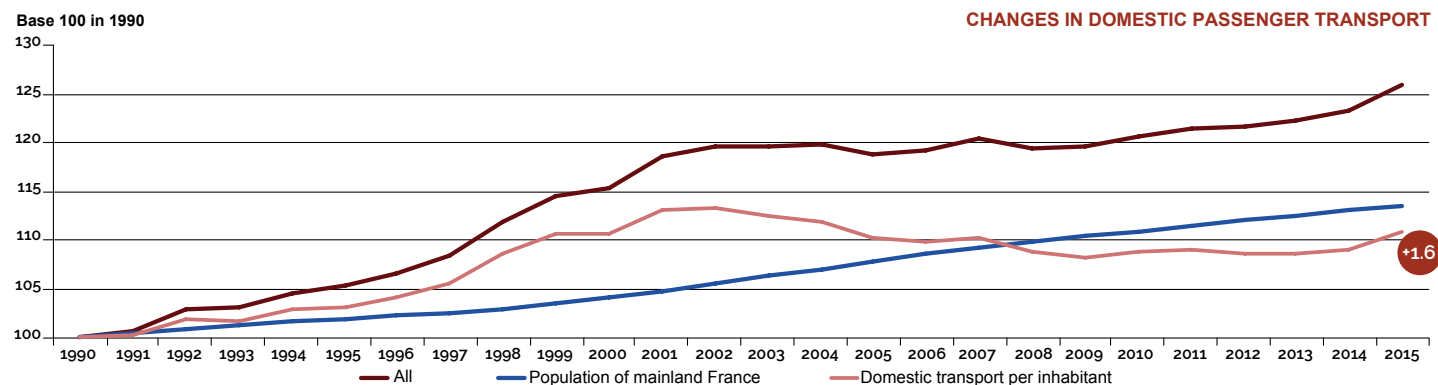
Public transport (road, rail and air) has also risen at the same rhythm as the annual growth for the period 2010-2015, i.e. +0.9%.

+2.1%

**INCREASE IN 2015
IN DOMESTIC PASSENGER
TRANSPORT IN ALL MODE,
EXPRESSED
IN PASSENGER
KILOMETRES**



Sources: MEDDE/SOeS, INSEE



Sources: MEDDE/SOeS, INSEE

Individual mobility is of course linked to the economy, as is freight transport, but also comprises a social dimension, i.e. bringing people together, which remains a crucial element.

Whilst freight transport is more of a productive industrial, artisanal or agricultural function, individual mobility clearly covers a much broader economic scope.

Whilst home-to-work travel is the foundation of it, the development of the economy – including the tertiary sector – relies on individual mobility. This situation is accentuated in the case of services to individuals in the areas of health, tourism, etc.

The determinants of choice of modes of transport are, in

the same way as for merchandise transport, to do with origin-destination, distance, time and quantity/volume of business transported.

Individual transport for each mode of transport requires major investments which are generally written down over a long period for the construction and maintenance of infrastructures.

When mobility is expressed in passenger-kilometres, light vehicles come out dominant in domestic passenger transport.

When expressed in terms of the number of daily trips, and in particular in dense urban areas, where public transport and other modes of transport (bicycles, motorcycles, etc.)

may play a major role, or in passenger-kilometres for long-distance international travel, the range of pertinence of each mode of transport is clearly illustrated.

Domestic passenger transport expressed in passenger-kilometres, related to the number of inhabitants, progressed steadily between 1990 and 2002 (+1.1% per year). Subsequently, primarily because of the increase in the price of fuel, a ceiling seems to have been reached and an average dip of -0.4% per year was recorded between 2002 and 2013. In 2015, for the second year running, the use of domestic passenger transport per inhabitant increased (+1.6%), primarily linked to the increase in individual mobility.

DOMESTIC FREIGHT TRANSPORT

Freight transport is the drive-belt of the economy: it physically links together merchandise production sites, and those sites to the point of consumption, and then those points of consumption to reprocessing and recycling sites. As well as these geographical dimensions linked to territorial planning, there is also the notion of time.

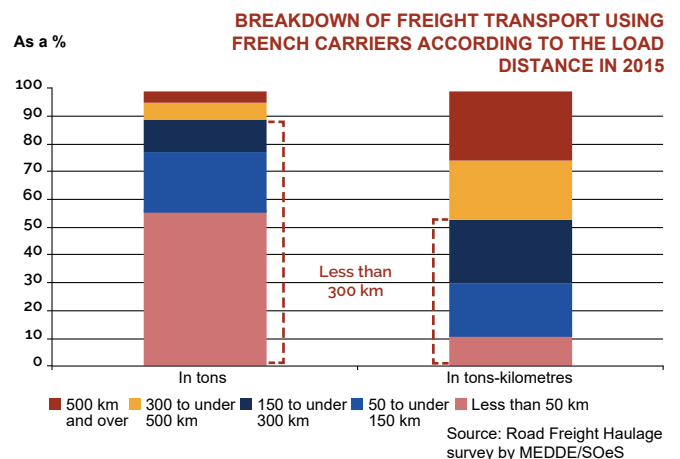
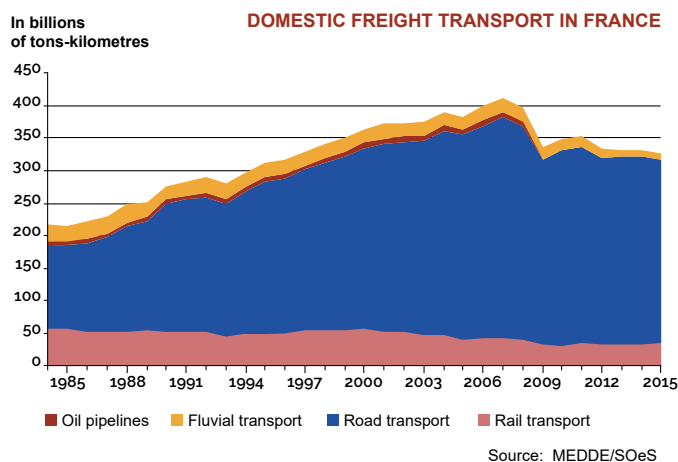
Each mode of transport, whether it be road, rail or river, requires infrastructure which means major investment, generally written down over long periods.

Road freight transport ticks a number of boxes in favour of modal transport. Its share in the freight transport remains stable (around 84% of tonnes per kilometre covered) and distances under 300 kilometres stand out, making the transfer to modal

transport more difficult: 57% of tonnes loaded under the French flag are delivered fewer than 50 kilometres away.

Since 2010, freight transport of merchandise has declined -1.3% on average per year, linked to the drop in activity under the French flag (-2.6% per year), whilst foreign transport has grown 0.8% each year.

Having fallen back sharply between 2000 and 2010, rail transport has returned to growth since 2013 (+3.5% on an average yearly basis) with the arrival of new actors, but remains at low levels (10% of market share). Conversely, river transport dropped over the same period by -3% per year.



Demand for freight transport is closely linked to the country's economy and its interactions with other nations; on the one hand it corresponds to domestic demand from the different economic actors involved and on the other, exports of companies producing in the country. Also, some countries, like Germany and France, because of their geographical position, are key areas for the transit of freight. In road freight transport, this translates into a phenomenon of cabotage but also, over recent years, the arrival of foreign players who are taking increasing market share from the French.

Physical transfer of freight and goods exported by a country is one of the routes to competitiveness of an economy. Amongst other things, the cost must not be too high, compared to other countries, so as to facilitate export activities. The destination and type of freight or goods exchanged are criteria which are often decisive in the choice of modes of transport. Liquids can be transported by road, thus avoiding unloading and reloading, and ports are used, amongst other things, for trade with distant lands.

Domestic demand from the different economic actors concerns a wide variety of freight and goods. It is satisfied by national (auto) production or by imports, and transport allows the production sites to be linked up physically between them, and then with sites of consumption, and finally with reprocessing and recycling sites: in France

in particular, spatial planning policies play a major role.

Because of the great variety of freight and goods, numerous factors come into play and shape the choice of modes of transport. Such is the case for:

- the weight of freight: auto makers transport their spools of steel by rail or river;
- the value of freight and goods transported;
- delivery time: perishable goods such as fresh products must be transported quickly, and are therefore primarily transported by road;
- the departure and arrival point of freight; as much during the production phase linked with spatial planning as during the consumption phase. The latter is primarily in urban areas, because that is where people mostly live.

Also, different modes of transport require the efficient use of infrastructure, which means substantial investment, generally written off over long periods. Intensive use, i.e. massification of flows, becomes all the more pertinent in this respect. The same applies if, during the transport chain, several modes of transport are used because in particular of unloading and reloading between different modes of transport.

Because of its ability to use the convenient routing facilities of the road network, its flexibility, its capacity for adaption and quality of service, road freight transport meets all these criteria, which show that transport is not

a homogenous ensemble but a multitude of sub-markets, which in most cases is difficult to replace. Thus, modal transfer is not possible for most freight flows, in particular over the final miles, or because it extends transport distances too much. Good inter-modality is based on an acceptable economic cost and efficient transfers between the different modes of transport.

Apart from the geographical position of the departure and arrival points, two main factors are used to measure the freight transport: per ton at the time of loading and ton-kilometres. The road remains dominant in freight transport with an 84% share of ton-kilometres completed. The road freight transport survey carried out by the Transport Ministry shows the predominance of distances under 300 kilometres: 57% of tonnes are transported by French hauliers over distances under 50 kilometres and 54% of ton-kilometres under 300 kilometres.

ROAD TRAFFIC

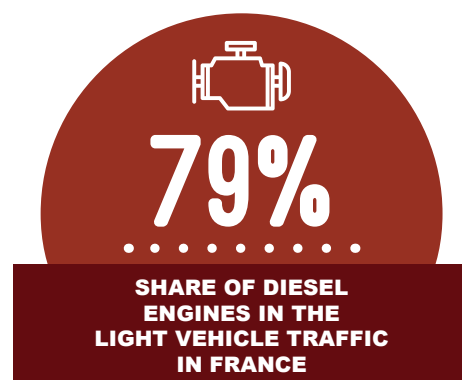
Having increased by 2% on average between 1990 and 2004, traffic remained practically stable until 2012 (+0.2% per year). Since then, however, it has grown sharply (+1.2% on average), with a big jump in 2015 (+2.2%).

The continued fall in the price of fuel and the development of new mobility services (car-sharing) have undoubtedly led to greater use of passenger cars, up 2.4% in 2015. Bus and coach traffic also increased in 2015 by 1.5%.

For merchandise transport, heavy truck traffic declined 0.9% in 2015, primarily because of

the decline in the traffic of heavy goods vehicles registered in France (-4%) to the benefit of foreign HGVs which continued to grow (+5%).

At the end of 2015, over 30% of the passenger cars on the road met Euro 5 or Euro 6 standards. For heavy goods vehicles, the percentage of trucks respecting Euro 5 and Euro 6 standards was already 43%. Their presence in traffic is all the more virtuous as these newer vehicles are used more than older ones.



► OVERVIEW OF ROAD TRAFFIC

	Units	1990	2000	2014	2015	Average annual change as a %		
						05/90	15/05	15/14
TOTAL VEHICLES (ANNUAL AVERAGES)	thousands of vehicles	28,106	33,464	38,340	38,562	+1.7	+0.6	+0.6
New passenger cars		23,280	27,770	31,726	31,900	+1.7	+0.6	+0.5
Gasoline (and others)		19,760	18,150	11,985	12,032	-1.4	-2.8	+0.4
Diesel		3,520	9,621	19,741	19,868	+9.6	+3.6	+0.6
Light commercial vehicles (LCV)		4,223	5,062	5,971	6,019	+1.8	+0.8	+0.8
Gasoline		2,279	1,302	352	312	-5.3	-11.0	-11.4
Diesel		1,944	3,761	5,619	5,707	+5.8	+2.3	+1.6
Heavy trucks (> 5t)		535	551	551	550	+0.4	-0.4	-0.2
Coaches and buses		68	81	92	93	+1.5	+0.9	+1.1
KILOMETRES (ANNUAL AVERAGES)	thousands of km							
New passenger cars		13.4	13.5	12.8	13.0	-0.1	-0.1	+1.9
Gasoline (and others)		11.9	10.7	8.3	8.5	-1.3	-1.5	+1.5
Diesel		21.3	18.8	15.4	15.7	-1.5	-0.7	+2.0
Light commercial vehicles (LCV)		14.6	15.5	16.0	16.2	+0.5	+0.3	+1.4
Gasoline		9.9	8.3	7.4	7.6	-1.4	-0.6	+1.5
Diesel		20.2	18.0	16.5	16.7	-1.0	-0.4	+1.0
Heavy trucks (> 5t)		36.1	41.2	32.0	30.8	+0.8	-2.7	-3.9
Coaches and buses		31.0	30.2	36.6	36.8	+0.2	+1.5	+0.5
CONSUMPTION PER VEHICLE	litres/100 km							
Passenger cars: gasoline		8.68	8.12	7.50	7.42	-0.7	-0.5	-1.1
Passenger cars: diesel		6.73	6.74	6.20	6.16	-0.1	-0.7	-0.6
LCV: gasoline		9.39	9.29	8.00	8.03	-0.6	-0.7	+0.4
LCV: diesel		9.77	9.67	9.00	8.93	-0.3	-0.5	-0.8
Heavy trucks: diesel		36.23	36.62	34.10	33.90	-0.0	-0.6	-0.6
Buses and coaches: diesel		32.00	32.99	30.50	30.20	+0.1	-0.8	-1.0
FUEL CONSUMPTION (ALL ROAD TRANSPORTATION)	millions of litres							
Gasoline		24,110	18,729	9,626	9,773	-3.1	-4.2	+1.5
Diesel		17,977	30,779	38,157	38,622	+4.7	+0.7	+1.2
Total		42,086	49,508	47,783	48,395	+1.3	-0.5	+1.3
TOTAL TRAFFIC	billions of vehicle-km	420	518	572	585	+1.9	+0.5	+2.2
Light vehicles		389	476	528	541	+1.8	+0.7	+2.4
Heavy goods trucks		22.4	29.5	26.7	26.5	+2.4	-1.9	-0.9
ROAD TRAFFIC								
Passengers in passenger cars (1)	billions of passenger-km	598.7	697.6	720.9	738.0	+1.2	+0.3	+2.4
Passengers in coaches and buses	billions of passenger-km	52.3	55.9	70.0	71.2	+0.5	+2.3	+1.7
Freight	billions of ton-km	197.0	276.9	288.5	281.4	+3.2	-1.1	-2.5

(1) Including vehicles registered abroad and motorized two-wheelers.

Sources: The accounts of the Nation's transportation, MEDDE/SOeS, INSEE.

Road traffic is estimated by cross referencing information from vehicle accounting on the different road networks (national, county, local and urban) with annual average kilometre distances covered by vehicles on the road and fuel consumption data, including vehicles registered abroad.

In 2015, the number of cars registered in France grew 0.6%, i.e. almost the same as previous years, but a lot lower than that observed during the 1990s.

The dieselisation of light vehicles continued (67.4% in 2015 compared to 66.7% in 2013), but at a slower rhythm

again this year (+0.3%). The share of diesel was 79% of light vehicle traffic registered in France, compared to 55% in 2000. For petrol cars, four out of five are now compatible with lead-free 95-E10 which represents 33% of total petrol supplies.

Average unitary consumption of passenger cars has continued to decline with improved technical performance. Over the past ten years, average unitary consumption of diesel cars fell 7% and petrol cars, 5%.

The heavy truck sector grew 0.9% per year between 1990 and 2002 but has declined since -0.7% per year

on average. The recovery of registrations in 2015 meant that the Euro 6 standard became more prevalent in the market and now applies to 15% of trucks on the road.

ROAD TRAFFIC AND CO₂ EMISSIONS

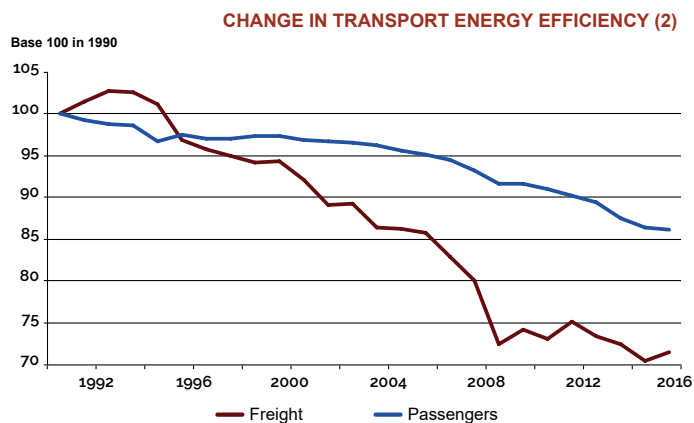
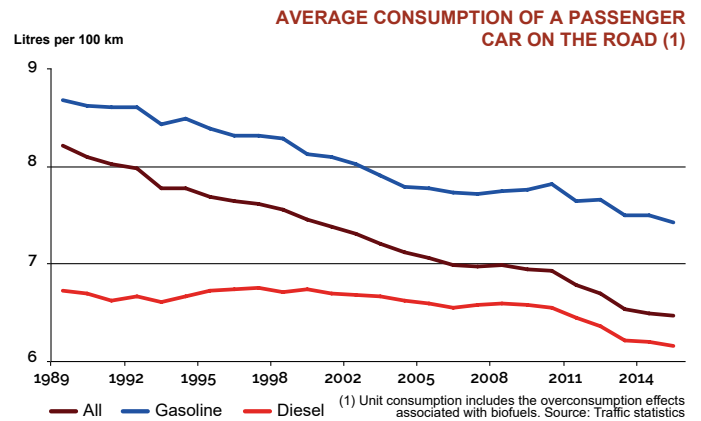
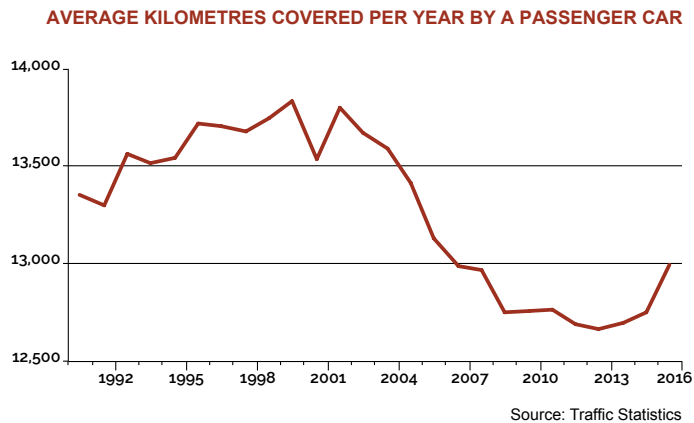
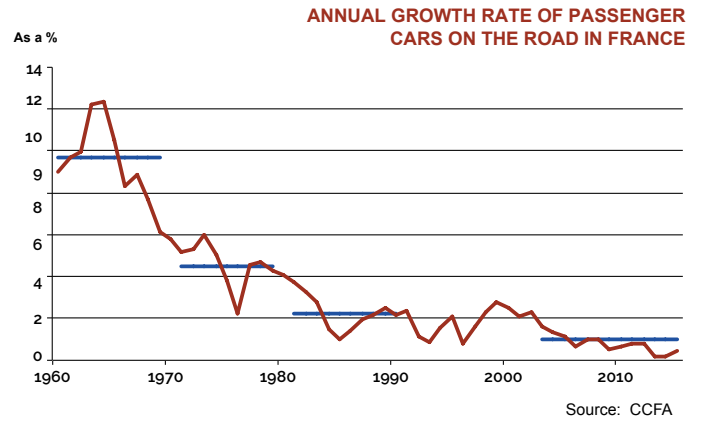
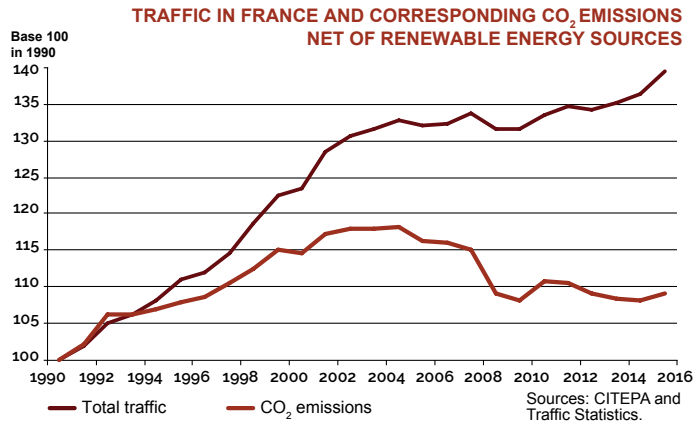
Since 1990, traffic of French and foreign vehicles in France has increased by 39%; the associated CO₂ emissions, net of renewable energies, have only increased by 9%.

Different factors explain this improved energy efficiency. The drop in unitary average consumption of passenger cars registered and in use in France

(including the effects of over-consumption linked to biofuels) was more than 20% over the period 1990 to 2015 (dieselisation of cars on the road, auto makers and drivers' efforts and the impact of the bonus/malus scheme introduced in 2008).

Also, the quantity of CO₂ emitted net of renewable energies required to move one tonne of merchandise

over one kilometre by a commercial vehicle in France fell 28% between 1990 and 2015, in spite of the impact of the economic and financial crisis.



(2) Energy efficiency relates to the change in the amount of CO₂ emitted in order to transport one ton of goods (or a passenger) one kilometre by heavy truck (or passenger car) driving on French roads. The reduction of CO₂ emissions due to the use of biofuels is not considered. Sources: MEDDE/SÔeS, CCFA calculations

Passenger car use statistics take two components into consideration: the number of cars on the road and their annual average mileage. Over a long period, the growth rate of the vehicle stock has slowed down substantially after the access-to-mobility phase, now closer to the demographic growth of the population. The growth of multi-car households and substantial increases in fuel prices are the main factors behind the decline in average annual mileage of passenger cars.

In 2015, new estimates provided by the cross-professional centre on atmospheric pollution studies (CITEPA) for road transport report CO₂ emissions net of renewable energies of 121 million tonnes. After the stabilisation observed at the beginning of the 2000s, at around 130 million tonnes, a net decline was recorded from 2004 onwards linked, amongst other things, to the effects of the economic crisis, a bigger share of biofuels as a proportion of fuels overall, and dieselisation.

For 2014, CO₂ emissions net of renewable energies for road transport, according to CITEPA estimates, were 56% for cars, 20% for light commercial vehicles and 23% for heavy trucks, including coaches and buses (26% in 2007).

DROP IN AVERAGE UNITARY CONSUMPTION OF PASSENGER CARS ON THE ROAD SINCE 1990

-21%

NEW USES FOR THE AUTOMOBILE

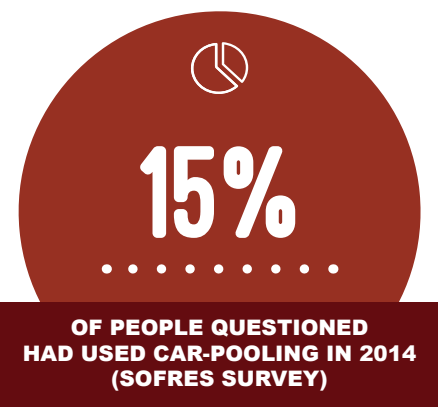
Changing technologies, economic constraints and peoples' understanding of environmental challenges have, in several sectors, promoted the development of new consumption trends and lifestyles which privilege the use, to the detriment of ownership, of goods.

In transport, this trend has materialised in the development of new uses for the car, promoting sharing and mutualisation leveraging information and communication technologies. These new practices include car-sharing, car-pooling, as well as rental between private individuals.

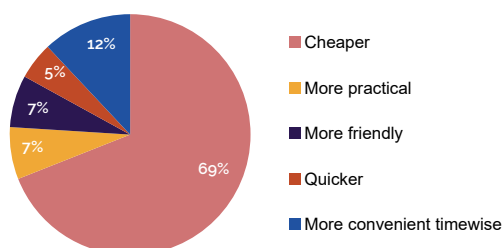
As surveys show, the main motivation for sharing car is cost. Sharing a personal vehicle reduces usage and maintenance costs and meets the demands of household buying power.

A shared car in a densely populated area is also a useful complement to public transport (for transporting heavy or bulky loads, or for shift-workers), whilst improving the fill rate of cars, with inherent positive effects on the environment and fuel consumption.

In rural and peri-urban areas, car-sharing and car-pooling also increase transport possibilities at a lesser cost to the authorities because it requires almost no new infrastructure.

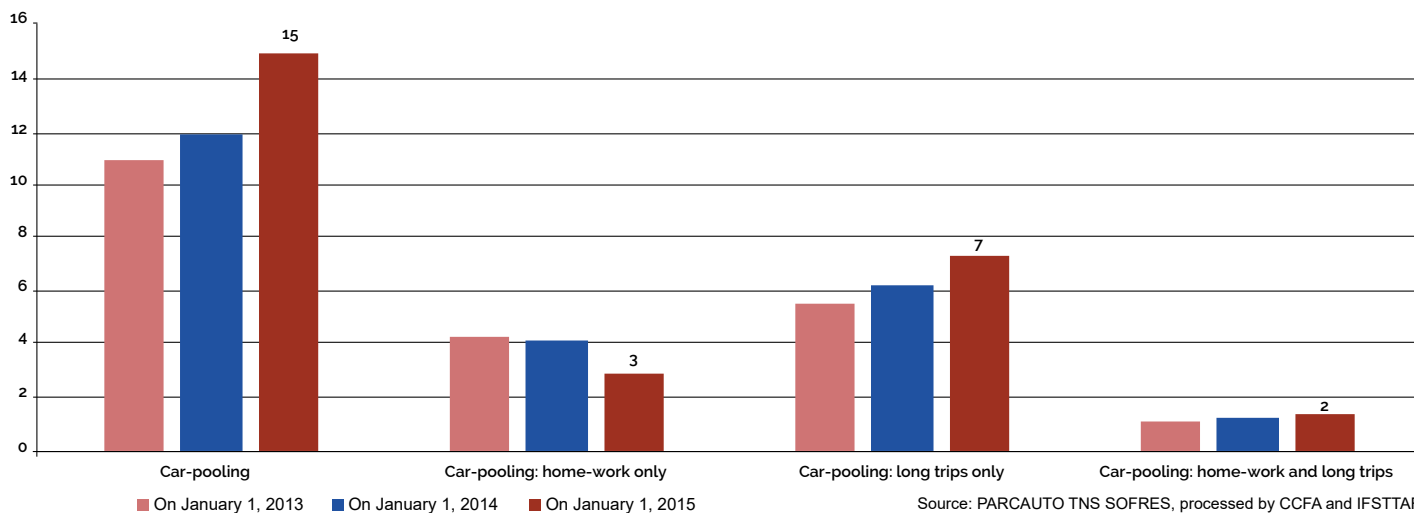


MAIN REASONS FOR CAR-POOLING



Source: 6t survey, 2015

% of people questioned



Car-pooling

Car-pooling is defined in the energy transition law for green growth as 'the shared use of a terrestrial motorised vehicle by a driver and one or more passengers, without a fee but on a cost-sharing basis, on a journey the driver would have made anyway. Connecting these people up, to this end, can be a service for which there may be a fee.' (Art. L. 3132-1).

There are several car-pooling practices, differentiated by the way people get in touch, the frequency of journeys or the distances covered. Car-pooling crews can gather informally or via a third party using a website or telephone service. Car-pooling is called 'dynamic' when it is done in real time using information and communication technologies.

The dissemination and development of car-pooling is difficult to measure. According to different surveys, 5-10% of the French population car-shares regularly, but the figure is rising rapidly. The 2015 SOFRES Parc Auto survey indicates that 4.5% of people questioned had already used car-pooling for home-to-work trips over the past 12 months, 8.7% for long journeys (>150 km) and 8% for short journeys. In all, 15% of people questioned had used car-pooling during 2014.

The last survey performed for the ADEME in 2015 shows that car-pooling is progressively becoming a transport solution in its own right, with the average age of the car sharer (33 years) increasing, and no longer exclusively used by young urban-dwellers, but also in rural areas and by older people. For 69% of carpoolers, the main motivation is still cost.

Occasional car-pooling, generally for longer distances (364 km on average), is the most structured. Applications such as Blablacar link up drivers and passengers. Regular car-pooling, more popular for short distances and home-to-work trips in particular, is more difficult to organise. However, companies are increasingly involved through their company travel plans (PDE), helping employees to network. Transport operators and local authorities are also involved via the provision of information or the availability of car-pooling car-parks.

NEW USES FOR THE AUTOMOBILE

► CATEGORISATION OF ADJECTIVES RELATING TO CAR-SHARING PER TYPE OF URBAN AREA

	Île-de-France	> 500 000 inhabitants with dedicated-lane public transport	> 300 000 inhabitants with dedicated-lane public transport	Other urban areas with or without dedicated-lane public transport
1	Economical	Practical	Economical	Economical
2	Practical	Economical	Practical	Practical
3	Ecological	Ecological	Ecological	Ecological
4	Clean	Easy	Clean	Easy
5	Easy	Clean	Easy	Clean
6	Expensive	Available	Flexible	Available
7	Sensible	Expensive	Expensive	Flexible
8	Flexible	Flexible	Restrictive	Restrictive
9	Difficult parking	Restrictive	Freedom	Sensible
10	Insufficient	Freedom	Available	Expensive

Source: National Survey on car-sharing, Bureau 6t, 2012



SHARE OF RENTALS BETWEEN PRIVATE INDIVIDUALS IN THE RENTAL MARKET IN 2015

Car-sharing

Car-sharing is defined in the Grenelle II law (article 54) as 'the sharing of a vehicle or a fleet of vehicles for terrestrial motorised transport for users subscribed to or accredited by an organisation fleet manager. Each subscriber or accredited user can access a vehicle without driver for a trip of his choice and for a limited period of time.

In the case of commercial car-sharing, the vehicles belong to the company providing the service. Each subscriber can have access to a fleet vehicle by reserving it via an app on the internet or by telephone. The vehicle rented is equipped with an onboard computer and a satnav system, and the doors are opened using an RFID card or the user's smartphone.

'Looped' services where having reserved, the customer takes the vehicle from a station and then returns it to the same place afterwards, are differentiated from 'direct route' systems where the customer drops the vehicle

off at the place of his choice. The two systems cater to different periods of use and different needs.

So-called 'free-floating' services also exist, whereby vehicles are made available within a limited area of a conurbation, more generally in a dense urban area, without the pick-up and drop-off points being limited to specific stations.

In France, a growing number of cities are installing free-floating services. The Autolib service developed in Paris and in over 80 communes of the Paris area is the biggest to date. In January 2016, it had 100,422 active subscribers (one-year subscription), 3,732 electric vehicles in service in 1,060 stations.

Car-sharing between private individuals refers to the sharing of one or more vehicles used by friends, neighbours or family. The vehicle belongs to one of the joint owners or is jointly-owned by all.

Rental between private individuals

More recently, sharing vehicles outside the private sphere has also developed via a car rental service between private individuals. Rental is secured on specialised websites which connect up people who do not know each other. It allows private individuals to pool their vehicle against payment and thereby optimise vehicle ownership and maintenance when it is not being used.

According to an annual CNPA report, this activity represented 3% of total rentals in 2015, compared to 1% the year before, and 5% of licence holders have already used it. Users tend to be young (44% are under 35 years of age), and less often in work than customers of traditional agencies (70% compared to 83%), and less well-off: 47% are from the upper socio-professional categories, i.e. 10 percentage points fewer than those using more conventional rentals.

PASSENGER TRANSPORT PRICE INDICES

For the second consecutive year, the price index for passenger cars (purchased and used) fell, with a bigger fall in 2015 (-2.2%), because of a major dip in fuel prices. Conversely, the increase in the price index for rail transport was higher in 2015 (+3.1%), and over the past two years has been higher than the average for the past decade (+2.6%). The passenger road transport index (excluding taxis) has increased steadily over two years (+2.2% in 2015), after several years' decline. More road passenger transport

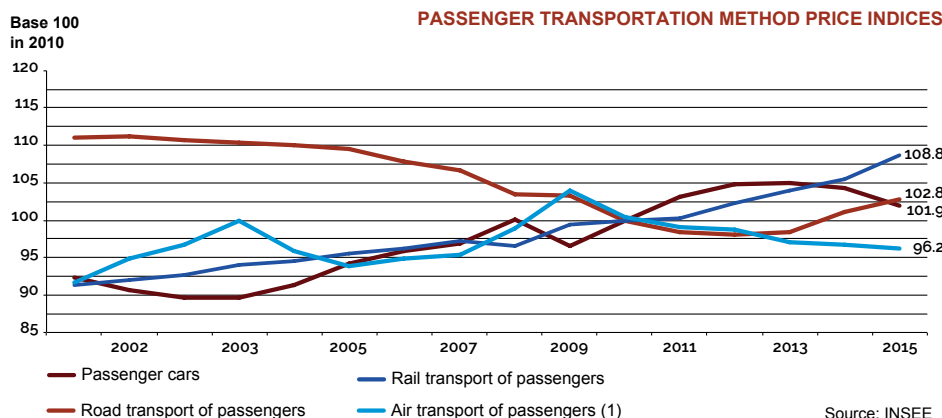
options (VTC, regular coach services thanks to the Macron law) could, in time, have an impact on the associated price indices (road transport of passengers including taxis).

Since 2009, real price indices of the different forms of passenger transport have developed in very contrasting ways: from -4% for road passenger transport (excluding taxis) to +6% for private vehicles via a drop of 8% for air transport and an increase of 9% for rail transport.

-2.2%

+3.1%

RESPECTIVE
PRICE INDEX VARIATIONS
IN 2015 FOR PASSENGER CARS
AND RAIL PASSENGER
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%
2015	-2.2%	2.2%	3.1%	1.8%	1.0%	-0.6%

(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



The price indices of the different forms of passenger transport reflect price trends including VAT. Thus, for air travel, they include airport taxes; the same applies to other means of transport, taking account of infrastructure charges up to a level that can be incorporated in the sale price. Also, only the part directly paid by the household is monitored. For example, if a region or local authority decides to subsidise some of the cost linked to transport as part of a spatial planning exercise or social policy, a drop will be recorded in household expenditures. Surcharges for fuel are incorporated into the monitoring of the index for air passenger transport.

Rail and road passenger transport indices primarily concern inter-urban connections. The index for personal vehicles was created taking into account both the cost of purchase, but also their use. To identify actual price changes in these main means of transport, the different indices are corrected using the general consumer price index as illustrated in the graph above.

Having stayed close to the 1995 level, the real price indices of the different forms of passenger transport have seen a variety of trends since 2003: between 2003 and 2015, the real index for personal vehicles (purchase and

use) increased 14%, exceeding by far its 2000 level. That of rail transport increased 15%, continuing its progression begun in 2000, whilst passenger transport by road (excluding taxis) fell 15%; it is important to remember that only the portion that is paid directly by households is taken into account.

FREIGHT TRANSPORT PRICE INDICES

In 2015, the road freight price index fell back for the first time since 2010 (-1%), thanks to the drop in the oil price. Freight transport price indices, for means of transport other than by road, also fell, except for air freight which increased slightly (+0.7%). The biggest drop was in maritime freight (-9.8%), after an increase the previous year. Prices also continued to fall in river freight (-3.9%) and rail freight (-3.5%).

Since 2006, the road transport freight price index has risen on average +1.3% per year, ranging from +1.75% for local transport to 1.2% for interurban transport. Over the same period, the river transport

price index rose more timidly (+0.4% per year), ranging from -0.3% for international to +1.2% for domestic. For rail transport, the price index has only been available since 2014 using data going back to the first quarter of 2012. Over the period, there has been a drop of -1.9%, primarily due to sharp decreases in 2014 and 2015.

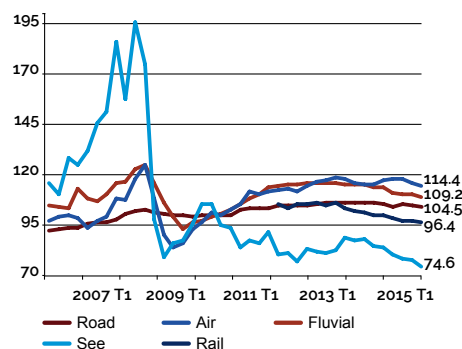


-1.1%

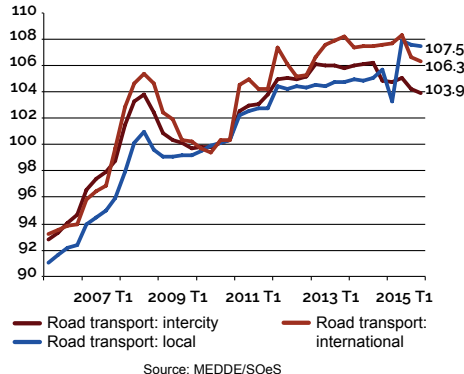
-3.5%

RESPECTIVE
PRICE INDEX DROPS IN 2015
FOR ROAD AND RAIL
FREIGHT

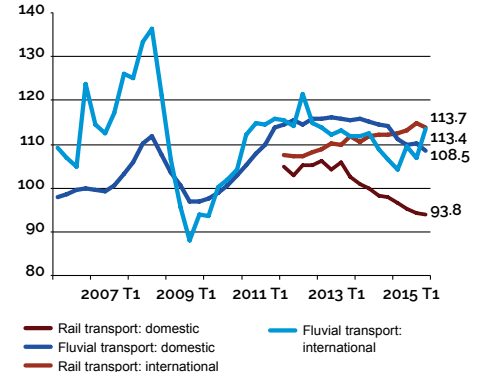
Base 100 in 2010
FREIGHT TRANSPORT PRICE INDICES IN FRANCE



Base 100 in 2010
FREIGHT TRANSPORT PRICE INDICES: ROAD



Base 100 in 2010
FREIGHT TRANSPORT PRICE INDICES IN FRANCE: RAIL AND FLUVIAL



Freight transport price indices are calculated by the transport ministry's SOeS statistics department. For road, river and rail transport, these indices are drawn up using the so-called 'representative services methodology', defined according to loading and unloading site, type of merchandise and characteristics of the contract linking the shipper to the haulier. Prices are recorded on a quarterly basis.

In road and river transport, only activities performed on behalf of third parties by companies domiciled in France, for whom freight is the main business, are monitored. For rail transport, the price index, which has been monitored since the first quarter of 2012, is calculated on the basis of representative transport services entrusted by a sample of 22 shippers to rail transport operators.

Monitored since 2006, air freight indices are calculated according to freight services departing from France by air waybill. The service is defined by the point of unloading and the airline responsible for shipment. Indices are drawn up using so-called 'unitary value methodology' which includes the excess charges for fuel and security, paid to the airline doing the shipping.

The maritime transport price index, also monitored since 2006, comprises transport services for third parties, performed by companies registered in France whose activity is maritime freight (bulk and ferry). Calculations are based on international price indices, unitary prices and tariffs.

The price index for road freight fell in 2015 (-1.1%), but with contrasting trends between local transport, which was up (+1.3%), interurban transport, which was down (-1.2%) and international haulage (-0.3%), which was slightly down. Compared to river or air, infra-annual variations are less substantial, even though fuel does represent between 20 and 30% of total road freight transport as the CNR survey shows (cf. page 51).

Because of highly volatile fuel prices, the air freight price index has undergone considerable variations since 2006. After a fall in 2014, the index grew in 2015 (+0.7%).

The maritime freight price index is very volatile, in line with bulk price trends. After two years' rise, it fell sharply in 2015.

Available since 2000, the river transport index has progressed every year with the exception of a dip in 2009. However, it fell back in 2014 and 2015 (-3.9%).

Finally, with the opening of the market up to new players, the rail freight price index continues its decline, which began during the 3rd quarter of 2013. In 2015, it fell 3.5% but with major deviations between national freight, which fell back sharply (-4.4%) and international freight, which was up (+1.7%). According to an ARAFER survey, companies not linked to the historical operator reported growth (expressed in tonne-kms) of +60.7% between 2010 and 2014, by which time they had amassed a market share of 26.3%.

HOUSEHOLD MOTORING COSTS

According to the most recent family budget survey of 2011, households dedicate on average 18% of their budget to cars (acquisition and use). The fuel item represents the largest car budget item accounting for 5.2% of the total. Cutting up income brackets by quintiles (fifths) shows that the least well-off households (Q1-Q3) dedicate a bigger portion of their budget (6%) than wealthier ones (4.3%). Conversely, new vehicle purchases seem to be the first item of expenditure for the lowest quintile (5.6% of total budget).

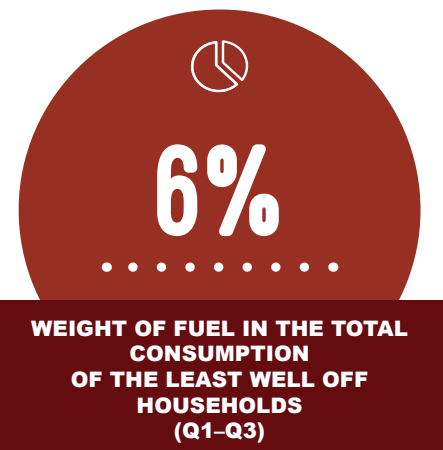
In 2015, pressure on the fuel budget was less, with the drop in the price of oil, and therefore the situation was closer to that of 2006. And yet, figures from the 2006 survey show that households from the three first quintiles already dedicated

4.4% of their budget to fuel compared to 3.2% for the last quintile. And thus, whatever the price situation, the expenditure item remains a key one for the most economically-vulnerable households.

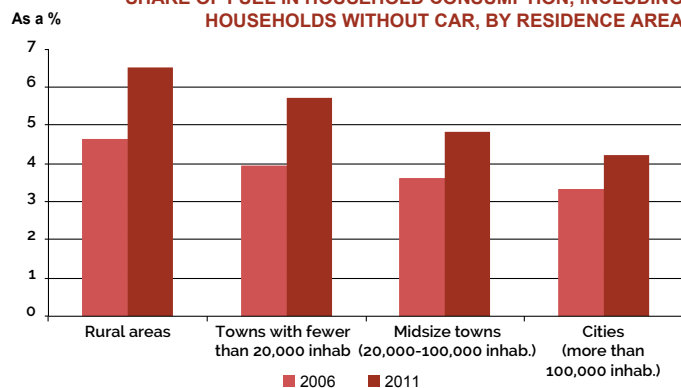
Between 2006 and 2011, there were also changes to distribution patterns concerning the purchase item for new cars (NV), which increased +0.7 percentage points, and second-hand cars, which fell by 0.2 percentage points, which could be explained in part by purchases being made under the scrap incentive scheme in 2010-2011. For Q1-Q3 households, the increase in the share of the NV item (+0.5 points) was almost balanced by the dip in the used car item (-0.4 points).

Finally, the share of the maintenance and repair, spare parts and accessories item (ER&PA)

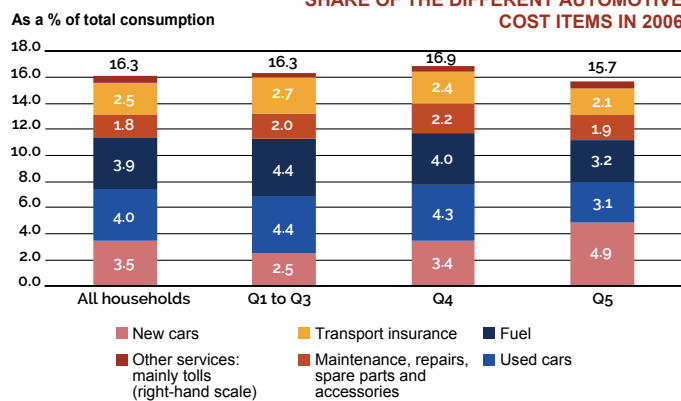
remains stable for all households, but dropped 0.5 percentage points for households in the last quintile.



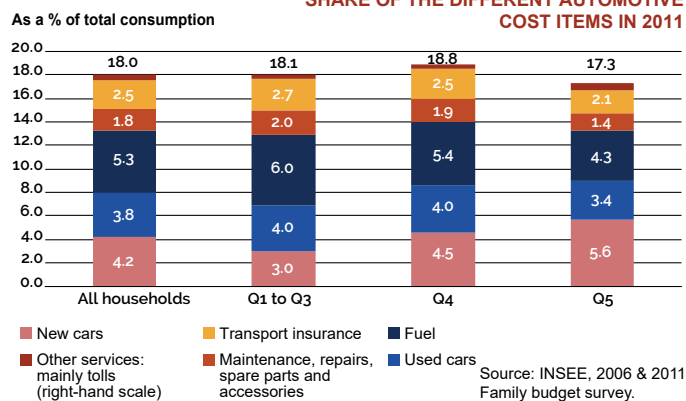
SHARE OF FUEL IN HOUSEHOLD CONSUMPTION, INCLUDING HOUSEHOLDS WITHOUT CAR, BY RESIDENCE AREA



SHARE OF THE DIFFERENT AUTOMOTIVE COST ITEMS IN 2006



SHARE OF THE DIFFERENT AUTOMOTIVE COST ITEMS IN 2011



Source: INSEE, 2006 & 2011 Family budget survey.

The 'Budget and Family' survey carried out every five years by INSEE gives an idea of the share of the major consumption items in household budgets and provides data according to their characteristics: socio-professional category, age, income, category of commune of residence, etc.

In terms of automobile-related items, there are two major differences compared to national accounting. For the processing of vehicle insurance expenses, the whole amount is taken into account in surveys, whereas only the service (spending that is the least reimbursed) is accounted for at a macroeconomic level. For second-hand car expenditure, the whole amount is accounted for in the surveys, whilst at a macroeconomic level, the amount taken is more or less the margins of professionals involved at the time of a transaction, without taking trading between private individuals into consideration.

Some graphs show the distribution of the different automobile items as a percentage of total consumption, equivalent to individual consumption excluding rents levied according to revenue, ventilated by population tranche of 20%: Q5 corresponds to the 5th quintile, i.e. 20% of households with the highest revenues, ahead of Q4 and the Q1-Q3 grouping.

In 2010-2011, the automobile budget for all households with cars represented 18% of their total consumption. The new car purchase item and second-hand car purchase item represent a little under half of that, varying from 7% for 60% of households with the lowest revenues to 9% for the 5th quintile. For Q1-Q3 households, almost 60% of purchases are second-hand cars (almost two thirds in the period 2005-2006), whilst almost two thirds are new cars for the Q5 group.

Whilst over 5% of total consumption is dedicated to fuel,

the richest quintile dedicates a much smaller proportion to this item. The same phenomenon occurs for vehicle insurance. As these two items are the most exposed to taxation, it therefore appears that households with cars belonging to the Q1-Q3 segment pay more tax for the privilege of using their vehicles, proportionate to their consumption, than households belonging to the top quintile.

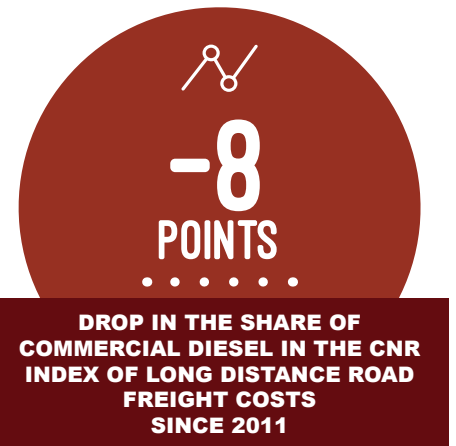
When ventilated by category of commune of residence and for all households (with or without cars), the fuel item seems to get higher as the commune gets smaller. Thus, households in the Paris conurbation dedicate almost 3% of their consumption to this, compared to more than 6% in rural communes.

ROAD FREIGHT COST PRICE

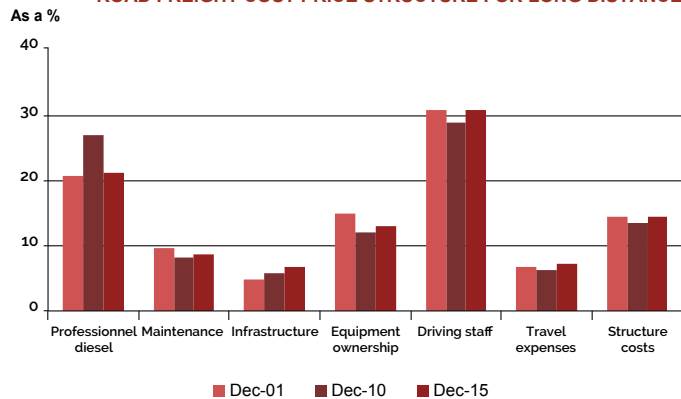
According to the national road committee (CNR), the cost price of long-distance and regional road freight transport have been relatively stable since 2010 and have returned to their pre-crisis level of 2008.

The share of professional diesel in the cost price of long-distance road freight transport fell 2 percentage points in one year and in 2015 stood at 20% compared to 28.5% in 2011.

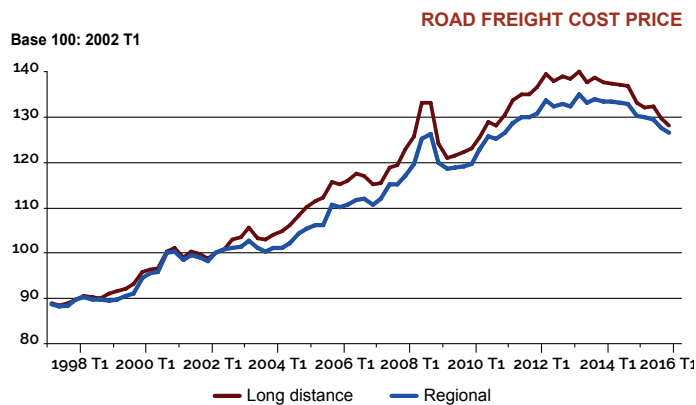
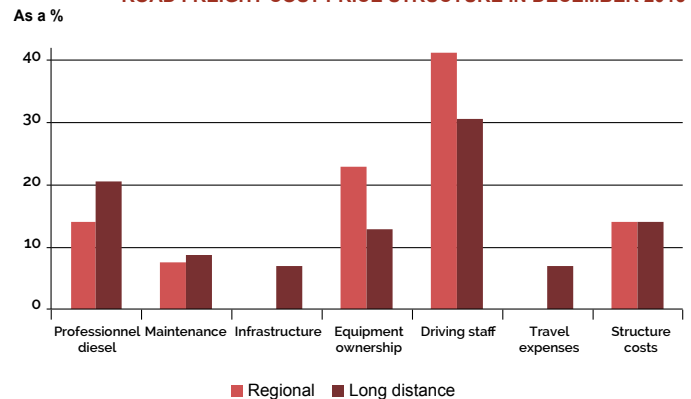
Conversely, the share of ownership of equipment (road tractor and semi-trailer) increased in 2015, representing 12.7% of the total cost of long-distance road transport of merchandise (compared to 12.3% in 2014). This increase is also explained by the introduction of the Euro 6 standard which increased the price of rolling stock.



ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2015



The national road committee (CNR) publishes, amongst other things, two indices reflecting changes to the cost of long-distance and regional road freight transport. Long-distance corresponds to national or international transport performed by a maxi-code articulated unit whose operating constraints mean that the driver's return home every night is either impossible or very difficult to plan.

Regional transport, which is performed using rigid trucks with a total weight between 3.5 and 19 tonnes, applies to transport within a region and across into neighbouring regions whereby the driver is able to return home every night.

For long-distance road freight transport, the first item of expenditure is personnel, and their share in the cost has been stable since 2001, at around 30%. The second item, professional diesel, initially accounted for a growing

portion of the cost price, in line with substantial increases in oil prices, to level out at 29% in 2011. From 2012 onwards, it fell on a regular basis to 20.7% in 2015.

Equipment ownership (road tractor and semi-trailer) represented 12.7% of the total cost in December 2015, but this share is 2 percentage points down on 2001, in line with the increase in fuel prices at the time. Over the same period, maintenance (servicing and repairs) fell 0.8 percentage points to 8.5% and the infrastructure share progressed 2 percentage points to 6.8%.

In regional transport, the share of driving personnel in the cost price of road freight transport has remained stable since 2006 at 41%. The cost of ownership of equipment is the second item of expenditure accounting for 22% of the total cost, up 2.5 percentage points since 2006 and 1 percentage point compared to last year. Finally, as for

long-distance haulage, the share of fuel has dropped since 2011, from 19.4% in December 2011 to 14.3% in December 2015.

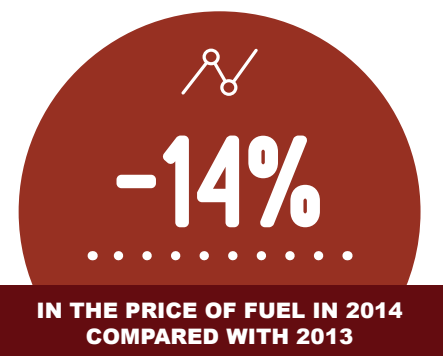
AUTOMOTIVE PRICE INDICES

In 2015, the new car price index increased 1.1%, i.e. 1.1 percentage point above inflation. Tougher ecological bonus/malus scales, the introduction of new standards making depollution devices more expensive and the introduction of new elements designed to improve road safety have contributed to this increase observed over recent years.

In 2015, the real price index of fuel fell sharply (-10%) and returned to its 2010 level. Since 2012, the real price index of fuel has fallen 17%.

The price index for vehicle spare parts, accessories and maintenance and repairs increased 1.6% in

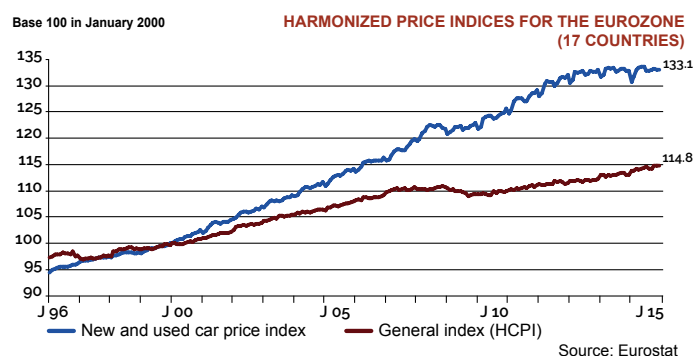
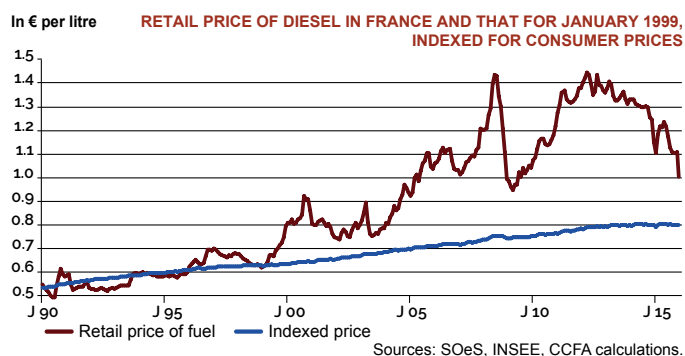
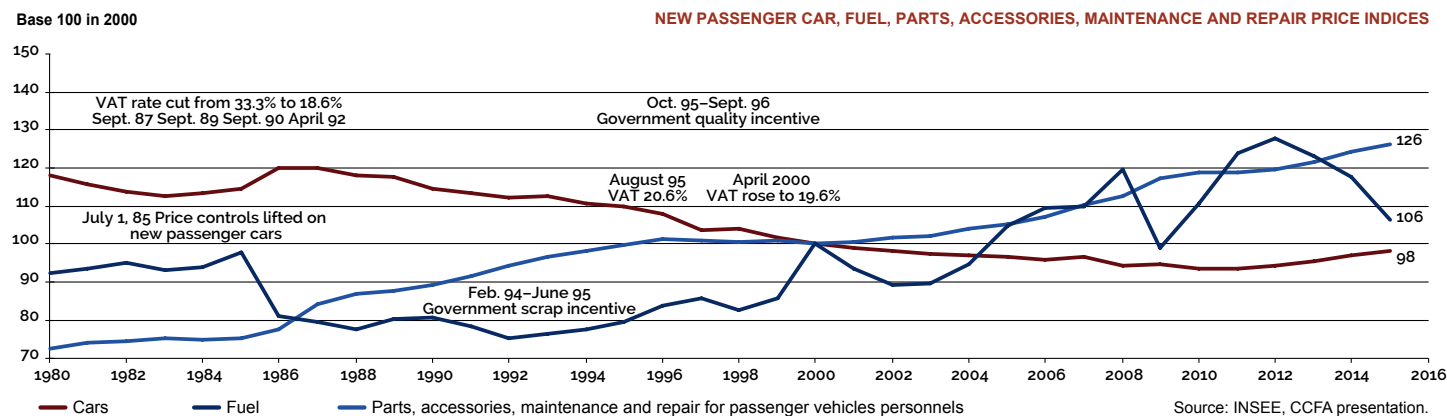
2015. In this list, the hourly cost of labour for car repairs progressed more than average (+2.3% and +2.1%), whereas the price index for vehicle maintenance only increased 0.8%.



► YEAR ON YEAR AUTOMOTIVE PRICE CHANGES

	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Fuel prices
2013	0.9%	2.2%	2.7%	-2.5%
2014	0.5%	2.1%	2.6%	-4.0%
2015	0.0%	1.1%	1.6%	-9.8%

Source: INSEE, CCFA presentation



The price index for new cars compares the price of cars with similar technical characteristics so as not to take into account price increases resulting from improved quality or equipment. It factors in promotional offers made occasionally (i.e. outside the private sales market), as well as the bonus/malus system.

To identify real price trends for the main items linked to cars, these indices have been corrected by the general consumer price index in the above graph.

Since 1992, the real price of new cars has declined on a regular basis under the continuous effect of competition and the occasional effect of measures to boost sales (bonus/malus system and scrap incentive since 2008).

Nevertheless, the increase in the ecological malus did lead to a price rise of 2.5% in January 2014 compared to December 2013. In the same way, between December 2014 and January 2015, the price increased 1.2% partly under the impact of the reduction of the number of vehicles qualifying for the bonus.

As for the real price index of repairs and maintenance, it started to climb again from 2003 onwards for various reasons linked to labour (the cost of work, development of skills, etc.) and parts (improved reparability, price of raw materials, improved service quality, greater diversity of models demanded by consumers).

In the euro zone (17 countries), Eurostat calculates a price

index for the purchase of new and second-hand cars; the data from the different countries are then collated. Since 1996, the index trend compared to that of the general price index shows a high pressure phenomenon on prices linked to intense competition and limitations on households' buying power, as is the case for France. In 2015, the general price index was up 31% compared to 2000, whilst the price index for the purchase of new and second-hand cars was only up 14%.

CONSUMER SPENDING ON PRIVATE VEHICLES

8.7%

**SHARE OF VEHICLE PURCHASES
AS A PERCENTAGE OF TOTAL
HOUSEHOLD
SPENDING FOR 2015**

In 2015, households' purchasing power accelerated (+1.6% compared to +0.7% in 2014) under the impact of an increase in gross available income and a fall in the final consumer price index (-0.2%). Household consumer spending progressed by +1.5% compared to +0.7% in 2014.

Purchases of new and second-hand cars contributed substantially to this recovery. Purchases of new vehicles increased +6% to €25.2 bn. Purchases of second-hand cars remained buoyant with 9% growth in 2015. Over the long term, however, there has been a dip in the share

of vehicle purchases as a portion of households' overall consumption, to the detriment of new car sales.

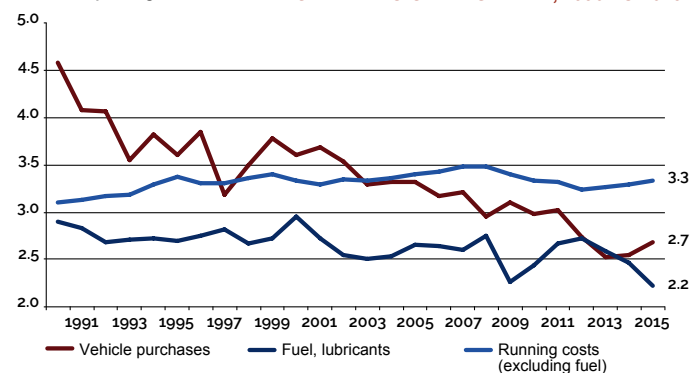
In 2015, household purchases of fuel fell again because of the drop in the price of oil. They now stand at €34 bn, i.e. a fall of more than €3 bn compared to 2014.

► **HOUSEHOLD CONSUMER SPENDING ON TRANSPORT**
(AMOUNT AND % OF TOTAL CONSUMER SPENDING FOR THE YEAR)

	Units	1990	2000	2014 (1)	2015 (1)	Change 2015/2014
VEHICLE PURCHASES	€ billions	33.0	36.4	38.6	41.2	+6.8%
New and used cars		30.4	32.6	34.0	36.4	+7.0%
of which new cars		25.6	24.5	23.8	25.2	+5.8%
Caravans, motorcycles, bicycles		2.6	3.8	4.6	4.8	+5.1%
RUNNING COSTS	€ billions	43.3	63.5	87.5	85.5	-2.2%
Maintenance, repairs, spare parts and accessories		17.3	24.3	34.9	35.7	+2.3%
of which automotive equipment manufacturing		7.2	11.1	17.7	18.1	+2.4%
of which automotive service		7.1	9.2	12.0	12.3	+1.8%
Fuel and lubricants		20.9	29.9	37.5	34.2	-8.7%
Tolls, parking fees, rental, driving lessons		5.0	9.3	15.2	15.6	+3.2%
INSURANCE	€ billions	2.9	3.9	7.8	8.0	+2.5%
TOTAL CONSUMER SPENDING ON PRIVATE VEHICLES	€ billions	79.1	103.9	133.9	134.7	+0.6%
Public transport	€ billions	10.4	15.3	27.0	27.7	+2.9%
TOTAL CONSUMER SPENDING FOR THE YEAR	€ billions	721	1,010	1,519	1,541	+1.4%
Number of households (mainland France)	Thousands	21,634	24,140	28,032	28,236	+0.7%
Spending on passenger cars per household	€	3,657	4,302	4,776	4,772	-0.1%
Spending on passenger cars per vehicle-owning household	€	4,780	5,358	5,768	5,763	-0.1%

As a % of total consumer spending

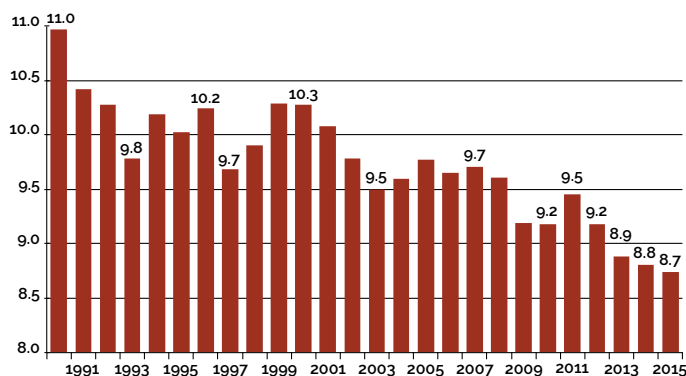
**PERCENTAGE OF HOUSEHOLD BUDGET
ALLOCATED TO OWNING A CAR, 1990 TO 2015**



(1) These are provisional data and can be readjusted for three years.
Source: INSEE - Household consumer spending, 2015 - base 2010

As a % of total consumer spending

TOTAL VEHICLE RELATED EXPENDITURE



According to national statistics – based on different fundamentals than those used for the family budget survey (cf. page 50) – households in 2015 spent €135 bn (+0.6%) on personal transport. This sum represented 83% of all household expenditure dedicated to transport (individual and public).

The share of automobile consumption as a share of real national consumption is called the 'automotive budgetary coefficient'. This coefficient varied between 9% and 11% at the beginning of the 1990s until the 2009 crisis. Since, it has vacillated around the 9% mark and was only 8.7% in 2015.

As part of this consumption group, the 'vehicle purchase item' is now in second place behind spending on vehicle upkeep (excluding fuel), whereas pre-2003 it was the biggest item of expenditure. The downward trend in vehicle purchases is affecting this budgetary coefficient, which was only 2.7% in 2015 compared to 4.6% in 1990. This drop is to the detriment of the purchase of new passenger cars, which now only represent 69% of overall vehicle purchases compared to 84% in 1990.

The budgetary coefficient linked to maintenance and repairs of private vehicles, which had increased over

the 1990s in line with the development of car ownership and the increase in the average age of vehicles on the road, has since 2008 decreased and is now stabilising at around 2.3% compared to 2% in the past.

Expenditure on tolls, parking, rental and driving schools was €15 bn, i.e. 1% of household expenditure.

AUTOMOBILE FINANCING

In 2015, with the fall in interest rates and the recovery of automobile purchasing trends, new consumer credit used by private individuals increased 15%. More than 60% of new cars purchased by households are paid for on credit. After the scrap incentive scheme period, 2003-2008 levels have once again been reached.

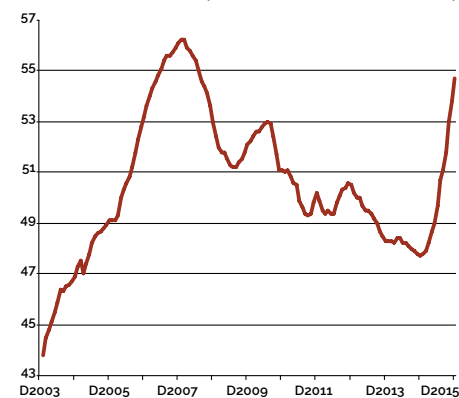
Conventional car loans are the most common form of financing (40%), but in decline compared to rental which now finances 35% of new car purchases, ahead of personal loans (25% of purchases financed). Financing by rental breaks

down into 'rental with the option of purchase' – LOA – (94%) and 'rental without the option of purchase' – LSOA – (6%). Having reached a peak in 2012, the share of conventional credit has, over the past three years, dipped sharply, whereas over the same period the share of rental with or without option of purchase has grown. In 2015, the number of loans used for new vehicle purchase fell 5% whereas LOAs increased 55%.

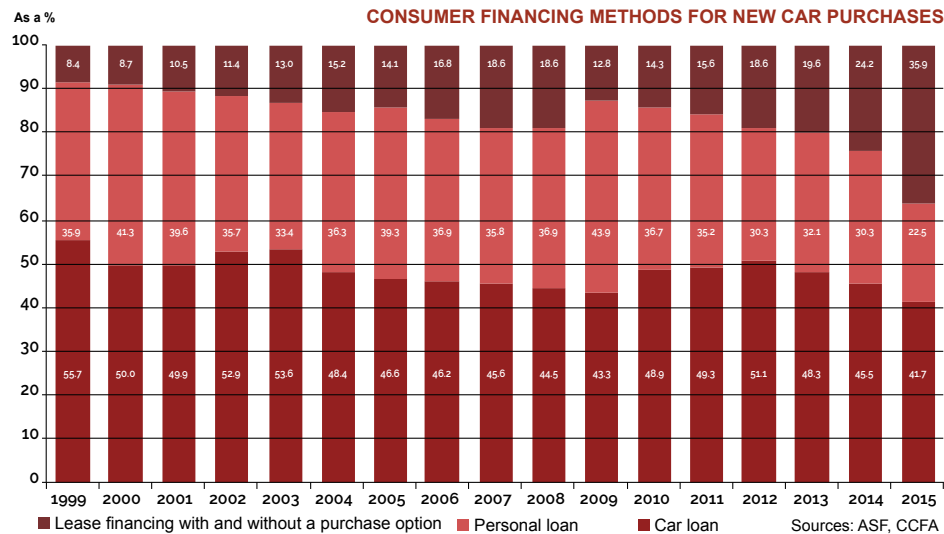
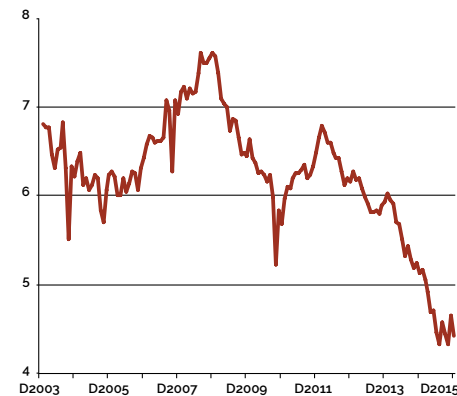
For second-hand cars purchased by households, cash is the main means of financing. The older the vehicle, and the younger the driver, the more likely a cash purchase is.

For new vehicles used by companies (both passenger cars and light commercial vehicles or trucks), the 2015 recovery has resulted in an increase in financing to the benefit of LOA contracts (+4%) and LSOA contracts (+9%).

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



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



New and second-hand car purchases use loan facilities if they cannot or do not wish to buy in cash.

There are three financing possibilities:

- conventional automobile credit: these loans are provided by financial companies, subsidiaries of automakers and importers, or by independent finance companies belonging to automakers and finance or banking subsidiaries or groups;
- rentals with or without option of purchase (LOA or LSOA): the user of this formula has a car and pays a rent during a lease period, which can be as long as eighty-four months, i.e. seven years. He or she can then choose to take up the option for purchase or not during the lease or at the end of the lease;
- personal or bank loans.

Results from various sources (professional associations,

statistics on registrations, surveys) allow calculations to be made on credit used for the purchase of new cars by households.

Between 2003 and 2007, the use of loans by households in France was particularly high (up 8% on the annual average). Over the same period, housing loans had progressed around 20% per year. This increased level of debt compensated for the smaller rises in purchasing power measured by INSEE for all households.

Having fallen by 12% between January 2008 and September 2011, as a consequence of the financial crisis and then the economic crisis, the production of consumer loans wavered at around €50 bn and fell again between December 2012 and December 2014 (-6%). Although interest rates for consumer credit did start to fall in July 2014, it was only in 2015 that the number of new

consumer loans taken out by private individuals started to record big increases (+15% in one year).

Using these forms of lending, the financing of new passenger cars by private individuals was particularly buoyant in 2015. The number of credit applications for the purchase of a new vehicle increased +15%. The increase in the number of LOA and LSOA applications accelerated still further (respectively 55% and +31% compared to 2014) to the detriment of conventional loans, which fell 5%.

CAR AND MOTORCYCLE SALES AND REPAIRS

The trade in automotive vehicles in 2015 generated turnover (TO) of €77 bn, up almost 7% compared to the previous year, and in line with the big increase in registrations of new passenger cars. This means that the sector has returned to its pre-crisis levels.

The vehicle maintenance and repair business, constantly in decline since 2009 (-2.2% per year between 2009 and 2014), recovered in 2015, reporting turnover of €21 bn, up +4.7% compared to 2014. The sector reaped the benefits of an aging automobile stock (8.7 years in 2015 compared to 8.2 years in 2010), linked to the downward trend in kilometres driven and the increasing reliability of cars.

► LIGHT VEHICLE SALES NETWORKS IN FRANCE ON JANUARY 1, 2015

Brands	Primary dealership
Renault	683
Peugeot	421
Citroën	428
French brands	1,532
Ford	291
Opel	250
Fiat	186
Volkswagen	320
BMW	153
Mercedes-Benz	170
Japanese Brands	1,133
Korean brands	457
Other brands	1,518
TOTAL	6,010

Sources: CNPA, CCFA

Retail sales of automobile equipment also benefited from this trend, growing 5.5% compared to 2014.

According to an INSEE survey, 6.5% of automotive dealerships and repair shops were controlled by a group in 2009 compared to 6.1% in 2007 (excluding franchises). They represented 50% of headcount for the sector and 49% of its added value.

This concentration of companies can be found in automobile distribution groups' new vehicle (NV) sales statistics. Between 2001 and 2012, each distribution group from the top 10 each year sold on average more than 1,000 additional NVs. The

100 biggest each saw their sales increase by 300 NV per year. This trend is linked to improved geographical coverage and the development of multi-badge retail.

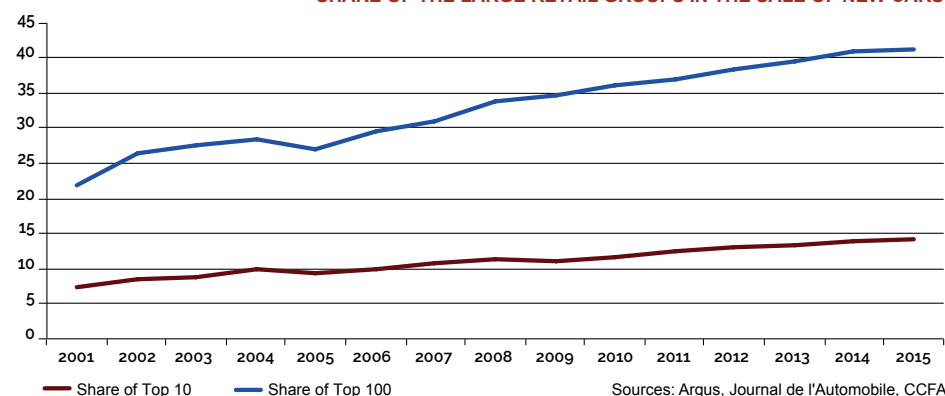
In 2015, the 10 biggest groups sold more than 320,000 NV, i.e. 17% of sales of NVs, for a turnover of €10.9 bn excluding VAT. The 100 biggest groups accounted for 49% of total sales, i.e. more than 945,000 NVs for a turnover of €31.9 bn ex-VAT.

► REVENUE FROM VEHICLE SALES AND REPAIRS (IN CURRENT € BILLIONS, INCLUDING VAT)

Activity	2009	2010	2011	2012	2013	2014	2015	Change 2015-2014
Motor vehicle sales	70.8	73.3	77.0	72.2	70.3	71.9	76.7	6.7%
Automotive maintenance and repairs	22.5	20.5	20.4	20.2	20.1	20.1	21.0	4.7%
Retail sales of automotive equipment	6.7	6.5	7.1	7.5	7.8	7.7	8.1	5.5%
Motorcycle sales and repairs	2.8	2.9	2.9	2.7	2.6	2.7	2.7	0.4%
Retail fuel sales	11.2	13.3	14.9	16.7	16.1	15.3	14.6	-4.4%
TOTAL	113.9	116.5	122.4	119.4	116.9	117.7	123.2	4.7%

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

As a % SHARE OF THE LARGE RETAIL GROUPS IN THE SALE OF NEW CARS



Cars require a very specific type of service: throughout its service life, and to maintain its initial characteristics, the vehicle requires attention at all times and in all locations to be serviced and repaired under the best possible conditions.

Cooperation between manufacturers, distributors and approved repairers is therefore very tight to provide warranty service, user safety, protection of the environment, availability of spare parts and information

on technical changes, as well as maintenance and repair.

To guarantee a high level of quality at the point of sale and through after-sales, auto-distribution networks rely on a selection procedure for distributors and repairers able to apply the exigencies of the brand and the level of customer service required.



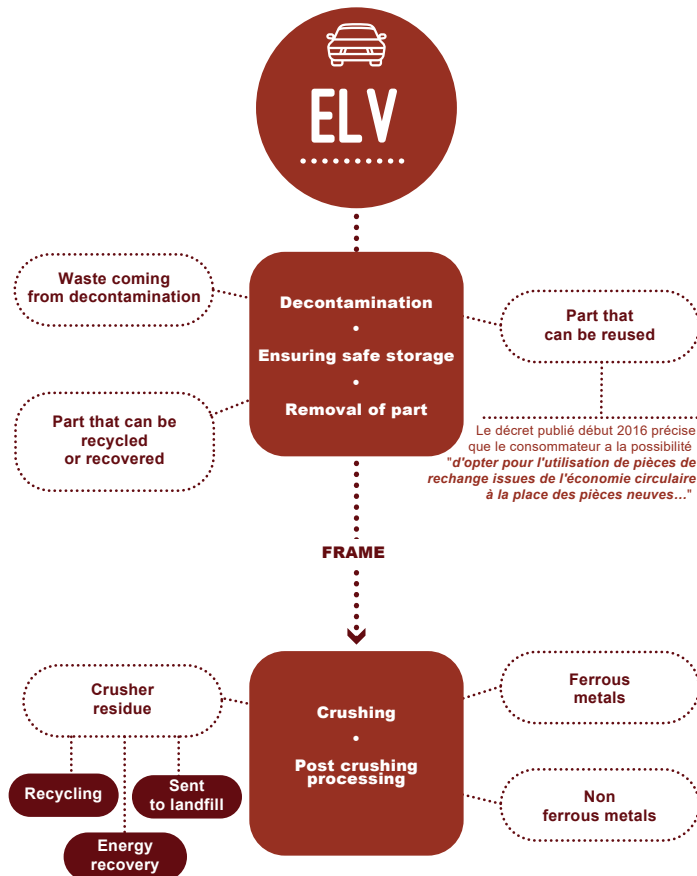
**NET TURNOVER, IN 2015,
OF CAR SALES AND REPAIRS
IN FRANCE,
ACCORDING TO INSEE**

CIRCULAR ECONOMY

The term 'circular economy' refers to the technical circuit that transforms waste after the vehicle enters the recycling chain, with the objective of reintroducing some or all of that 'waste' into the production cycle.

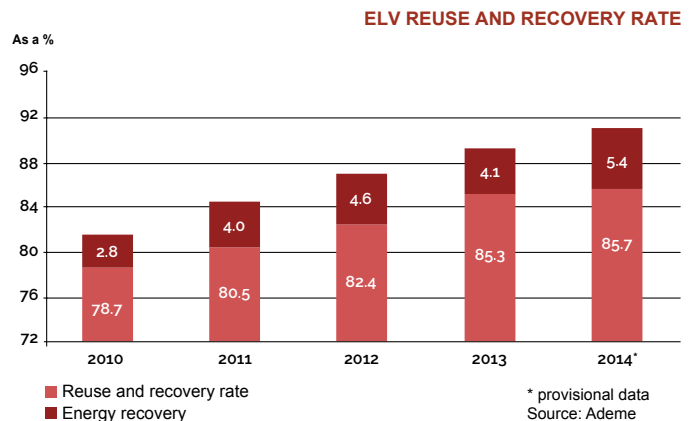
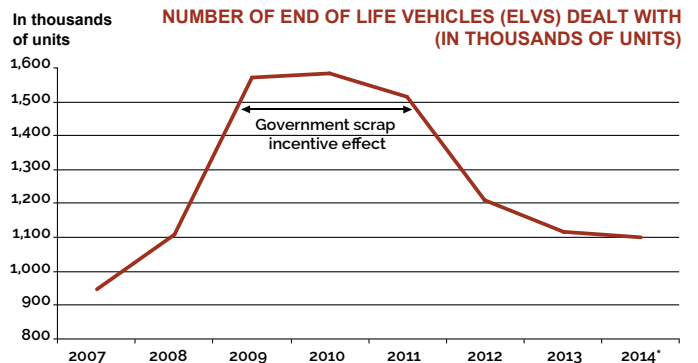
The circular economy in the auto industry focuses on the vehicle and its consumables (tyres, oils, batteries, etc.).

► SIMPLIFIED CHART OF PROCESSING OF AN ELV



1.1 MILLION

ELV PROCESSED IN 2014



In France, around 1.1 million vehicles were processed by the end-of-life vehicle channel in 2014 in around 1,600 approved centres, called 'ELV centres'. Their average age was 17.5 years in 2014.

Vehicles are first depolluted: fluids are removed (fuel, brake fluid, air conditioning fluid, etc.), batteries removed and pyrotechnic devices made safe. Some serviceable parts of the vehicle are then retrieved, sorted, and checked before being re-used (engines, doors, headlights, etc.). The vehicle is then ground up by one of 50 licenced grinders, so as to separate the different component materials. When sorted, they can then be re-used to make other products (recycling). If the components cannot be re-used or recycled, they can be used for energy (heat, cogeneration).

The resale of second-hand spare parts maintains recycling ratios and contributes to ELV centres' financial performance.

The level of collection and processing of automobile components by the ELV centres varies according to the new vehicle market, the economic context, the use of schemes to promote the withdrawal of old vehicles and technical progress that reduces the frequency of vehicle component renewal.

The processing of end-of-life vehicles must respect predefined performance levels according to European regulations: 95% re-use, of which 85% recycling and re-injection, since 2015. Some sites already exceed this objective.

In 2014, the materials breakdown of ELV centres was: 75% metal (ferrous metals: 70%; non-ferrous metals: 4%; and electrical harnesses: 1%), 12% plastics, 3% tyres and 1% batteries. The average weight of a passenger car is around one tonne.

Some vehicle consumables (oils, batteries, etc.) are also recycled during the service life of the vehicle.

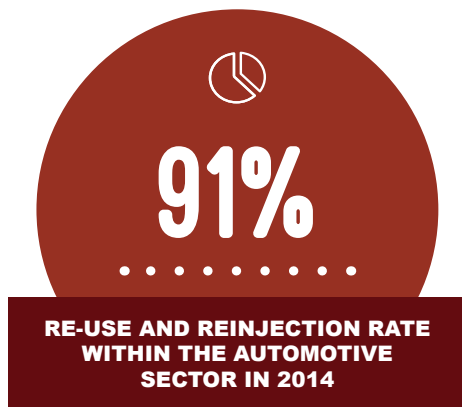
In 2014, the collection of accumulators (batteries designed to power the starter motor, lighting or the ignition system) reached the lowest level since 2009, i.e. 178,000 tonnes (-4% compared to 2013). The recyclability of lead accumulators is 84%.

Collection of car tyres (light vehicles and heavy goods vehicles) totalled 379,000 tonnes in 2014, up 4%. The collection rate increased 4 percentage points to 92%. The re-use rate of tyres is now 100%. Around 51% of tyres were used for energy in 2014, 23% for granulation

(for sports pitches, urban furniture) and 15% re-injected (12% for second hand sale and 3% for remoulding). The last 9% went to public works.

Keeping cars on the roads generates 200,000 tonnes of used engine oil each year. These used oils, which are collected free of charge by approved collectors are then recycled, only if they have never been mixed with other liquids (water, cooling liquids, solvents, etc.). The oils are then regenerated where possible (75% of volume), i.e. used for energy.

CIRCULAR ECONOMY



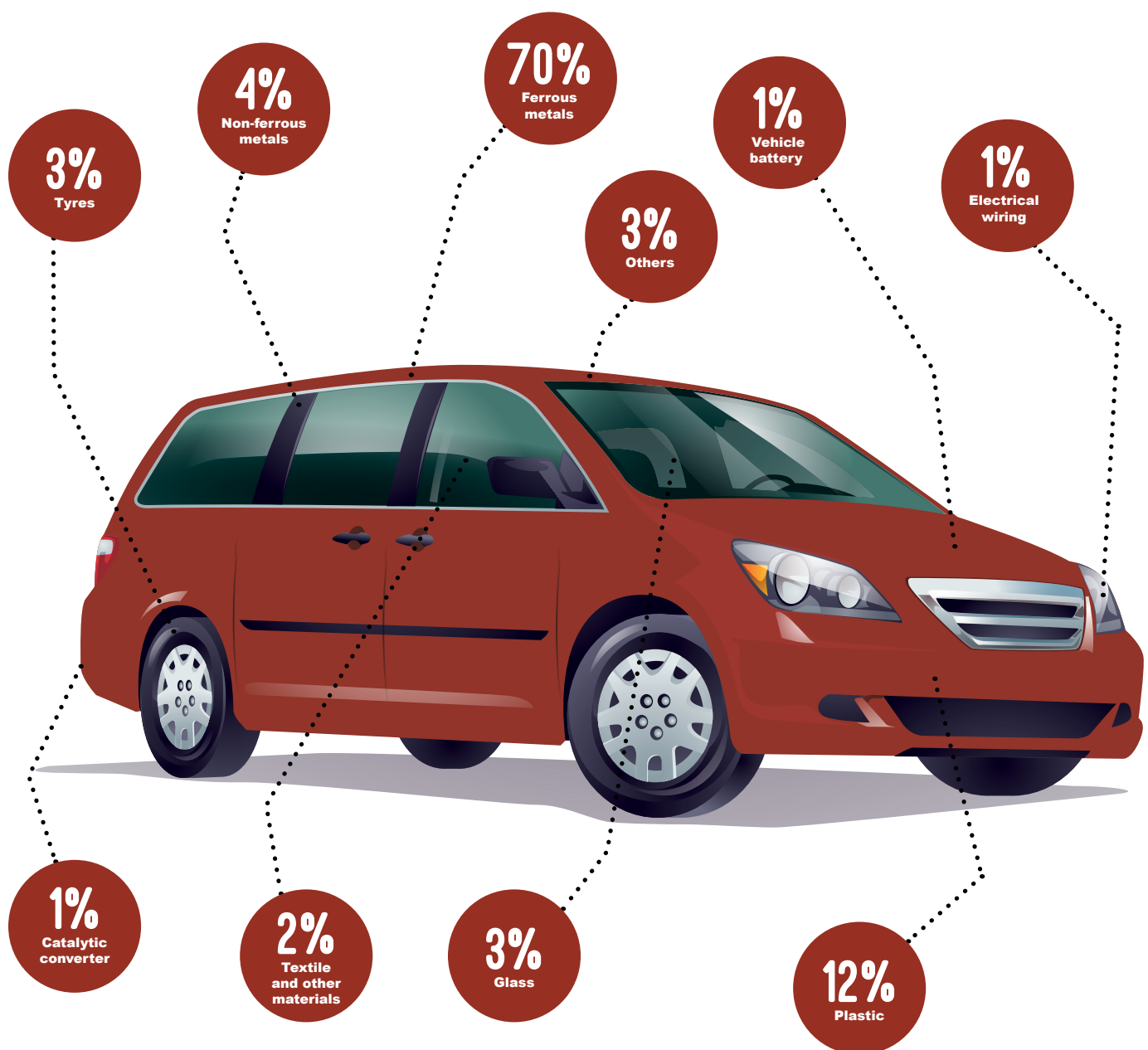
End-of-life vehicles are those sent for destruction (to ELV centres) by the last owner. Around 1.1 m ELV vehicles entered the approved recycling channel in 2014, compared to 1.5 million between 2009 and 2011 (whilst the scrap incentive scheme was in place) and under one million in 2007.

The approved ELV centres take end-of-life vehicles free of charge and have to depollute them, and recover certain spare parts and send the vehicle to an approved grinder.

France's environmental agency (ADEME) measures ELV re-use and reinjection rates, which has progressed around 10 percentage points since

2010. This ratio is the sum of re-use, recycling and energy applications.

► **Composition of an end of life vehicle in 2014** (PROVISIONAL DATA)



Source: ADEME

PRODUCTION OF THE AUTOMOTIVE INDUSTRY AND ITS ECONOMIC IMPACT

Production in the automotive field was €53 bn in 2014, i.e. a rise of 3% compared to the previous year. It is 10% above its 2009 level, which is when the financial crisis hit. It was between €70 and €77 bn between 2000 and 2007.

According to the new 2010 base, when research and development expenditure was included in the gross fixed capital amount (FBCF), total purchases (or intermediary consumption), including the branch itself, represents more than four times its added value (AV). In 2014, this was €43 bn, which benefitted numerous sectors of the economy because of its stability.

Since 2009, AV has settled at around €10 bn, at a level well below the €13 bn recorded between 2000 and 2005. In 2014, the dip observed since 2010 ended and there was a 4% upturn.

As a guarantee of future production in a highly capitalistic industry, the investment rate (the FBCF/AV ratio) has been maintained at a high level over a sustained period during which European markets have been lower than their pre-crisis level, whilst the margin rate (the ratio between the gross operating margin and AV) has remained low (cf. graph on page 28).

► ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION

As a % of total purchases	Units	2000	2005	2010	2012	2013 (1)	2014 (1)
Purchases from other industries	%	71.7	76.3	75.6	76.5	76.9	76.7
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	19.6	19.8	19.7
manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	3.7	3.7	3.6
manufacture of electrical equipment	%	3.1	3.4	3.5	3.5	3.6	3.6
manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	12.4	12.4	12.4
Other industries (including coking and refining)	%	35.8	39.8	39.7	40.5	40.4	40.0
metallurgy and metalworking	%	16.0	16.7	17.5	17.9	17.8	17.5
manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	10.4	10.1	10.1
other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.3	4.3	4.3
chemical industry	%	2.6	2.8	3.0	3.2	3.2	3.2
manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.9	1.8	1.8	1.9	1.9
wood, paper and printing industries	%	1.4	1.4	1.6	1.5	1.5	1.6
Extraction, energy and water industries	%	1.6	1.5	2.0	2.2	2.3	2.2
electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	1.3	1.4	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	1.0	1.3	1.2
Transport and storage	%	1.2	1.3	1.5	1.5	1.6	1.6
Information and communication	%	0.4	0.4	0.5	0.4	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	%	7.7	7.7	7.3	7.5	7.4	7.6
legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.2	2.3	2.3
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	2.5	2.5	2.4
administrative and support services	%	3.4	3.1	2.7	2.8	2.6	2.9
Other commercial sector industries	%	2.3	2.1	2.1	2.3	2.3	2.4
All commercial sector purchases	%	13.4	13.6	13.4	13.9	14.2	14.5
Purchases within the industry	%	28.3	23.7	24.4	23.5	23.1	23.3
Total industry production at base prices	Current € billion	70.3	75.6	58.3	55.3	51.4	53.2
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	45.7	42.0	43.4
As a % of production at base prices	%	81.2	82.7	81.5	82.7	81.7	81.6
Value added by the industry	Current € billion	13.2	13.0	10.8	9.5	9.4	9.8
As a % of production at base prices	%	18.8	17.3	18.5	17.3	18.3	18.4
Gross operating surplus (gos)	Current € billion	-	-	2.6	1.7	1.6	2.1
As a % of value added (margin rate)	%	-	-	24.6	17.9	16.7	21.6

(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)

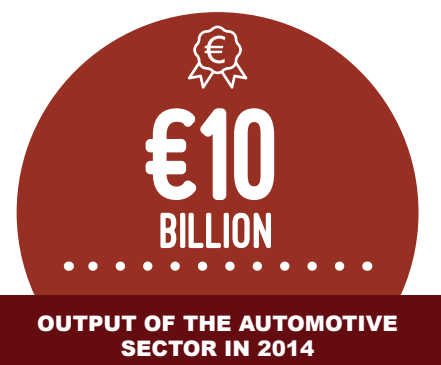
Total purchases by the automotive branch, representing more than 80% of production, can be broken down as follows: a little under 25% for the branch itself and the remaining three quarters for other branches.

'Other industries' purchases accounted for 40% of all purchases, amongst which metallurgy and metal product manufacturing, which remain the leading suppliers (17% of total purchases).

Purchases from machine and equipment manufacturers

(excluding electrical, electronic and IT products) accounted for 12% of the automotive industry's total purchases.

From a 2010 base, when research and development expenditure was first accounted for in the GFCF, the automotive industry dedicated 14.5% of its spending to the tertiary sector, compared to 13.4% in 2010. Some of these purchases were destined in particular to business support suppliers (with a relatively stable ratio at around 7.5%).



AUTOMOTIVE OEMS AND SUPPLIERS

Vehicle manufacturing is a structuring industry for its suppliers and for the French economy.

The development of French automaking has a pull effect on equipment manufacturers and other suppliers from sectors such as plastics, industrial rubber, foundry, industrial metal services. A Direction Générale des Entreprises study, published in July 2015, found that the automotive industry employed 441,000 employees in 'equivalent full time' positions, of which 211,000 in the 'core' (auto makers, equipment manufacturers and body builders) and 230,000 in the periphery.

The latter group includes eleven activities, such as glass, textile and rubber, plastic and metal products.

Equipment suppliers, grouped within CLIFA (automotive industry suppliers' liaison committee), estimate their turnover at >€40 bn in 2015, compared to >€50 bn in 2007.

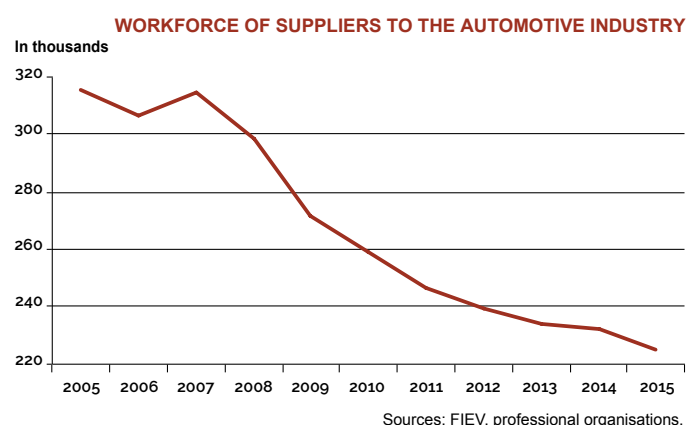
According to Eurostat, vehicle manufacturing and the French equipment manufacturing industry ranked second in Europe in terms of turnover.



► REVENUES OF SUPPLIERS TO THE AUTOMOTIVE INDUSTRY (2015) (IN € BILLIONS)

"FIEV Fédération des Industries des équipements pour Véhicules (French Automotive Equipment Industries Association)"	16.4
"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 (1) Fédération des Industries Électriques, Électroniques et de Communication (Federation of Electric, Electronic and Communication Industries)"	4.0
Fondeurs de France	2.0
Glass industry (1)	0.3

Sources: FIEV, professional organisations.
(1) 2012 data, except FIEEC: 2014



According to FIEV (vehicle equipment manufacturers' federation) and other professional bodies, headcount for 2015 linked to the industrial automotive sector, excluding automakers themselves, was around 225,000, i.e. a dip of more than 25% since 2007.

Equipment manufacturers have two types of market: initial assembly, whereby equipment is delivered to the assembly line, and secondary assembly or replacement parts. Their turnover in 2015 was 83% for the former and 17% for the latter.

Over recent years, externalisation has resulted in an increasing use of suppliers, whose services represent

a high and growing proportion of the overall cost of manufacturing a vehicle (around 80% according to FIEV).

The French automotive industry continues to rely on its French industrial base; FIEV estimates automotive suppliers' turnover at more than €40 bn. It accounts for a substantial share of plastic technical parts, industrial rubber, foundry, industrial metal services businesses, which are made up in particular by cutting, die stamping, industrial mechanics, bar turning, stamping, forging and metal surfacing. According to GIST (a group of mechanical sub-contractors), the automotive sector in 2014 represented almost 40% of its turnover. To express the total industrial value of the automotive sector, as well

► WORKFORCE (1) OF THE AUTOMOTIVE INDUSTRY BY ACTIVITY (IN THOUSANDS)

Activity	Employees (1)
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

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

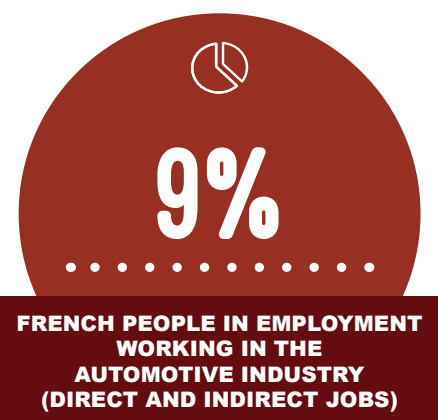


EMPLOYMENT

In broader terms, 2.3 million people worked in activities linked to the automotive industry in 2015, i.e. 9% of the working population.

In the strictest sense, the automotive industry employed 224,000 people, i.e. around 7% of salaried jobs across industry (including extractive industries, agrofoods and industrial companies employing fewer than 20 people).

The impact of the economic and financial crisis which began in 2008 was particularly damaging in industry as well as in activities linked to the use of the automobile, and now particularly in the infrastructure area. After the 2011 consolidation, jobs once again started to be shed from 2012 onwards.



► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2015 (IN THOUSANDS OF PEOPLE)

Manufacturing and energy sector*		Services		Total raw materials and services			
170		138		308			
Automotive manufacturing		Equipements, accessories*		Bodywork, trailers, caravans		Total automotive industry	
118		82*		24		224	
TOTAL PRODUCTION OPERATIONS						532	
Sales, repairs, automotive equipment sales, vehicle inspections, short-term rentals, breakers and recycling*						480	
Insurance, experts and financing						83	
Fuel retailing						30	
Driving schools, licensing						25	
Motor sport, media, publishing, other						12	
TOTAL USE AUTOMOBILES						630	
Road transport (passengers and freight, outsourced and in-house), related services						955	
Police, health, education, non-commercial administration						34	
Road building and maintenance						122	
TOTAL TRANSPORTS						1,111	
TOTAL JOBS RELATED TO THE AUTOMOTIVE INDUSTRY						2,273	

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

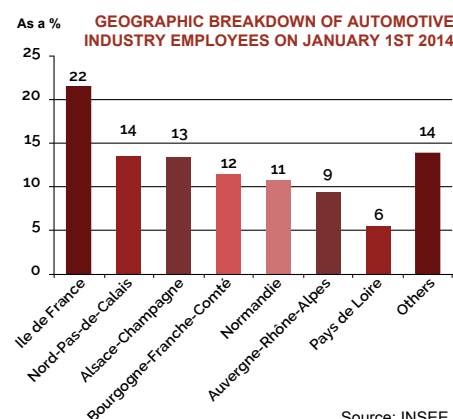
The automotive industry, one of the main contributors to industrial production in France, generated 532,000 jobs through its production and its purchases from other branches. It is important to remember that the number of jobs linked to the automotive industry now excludes temporary workers, since they are now part of 'services'.

The number of temps employed – in equivalent full time (EFT) – averaged over 19,000 people between 2010 and 2014. Also, further to the change in nomenclature (cf. pages 84 and 85), staff from automotive equipment manufacturers included those coming from manufacturers of vehicle seats and electrical materials for engines and vehicles, which previously figured in manufacturing and engine industries' purchases.

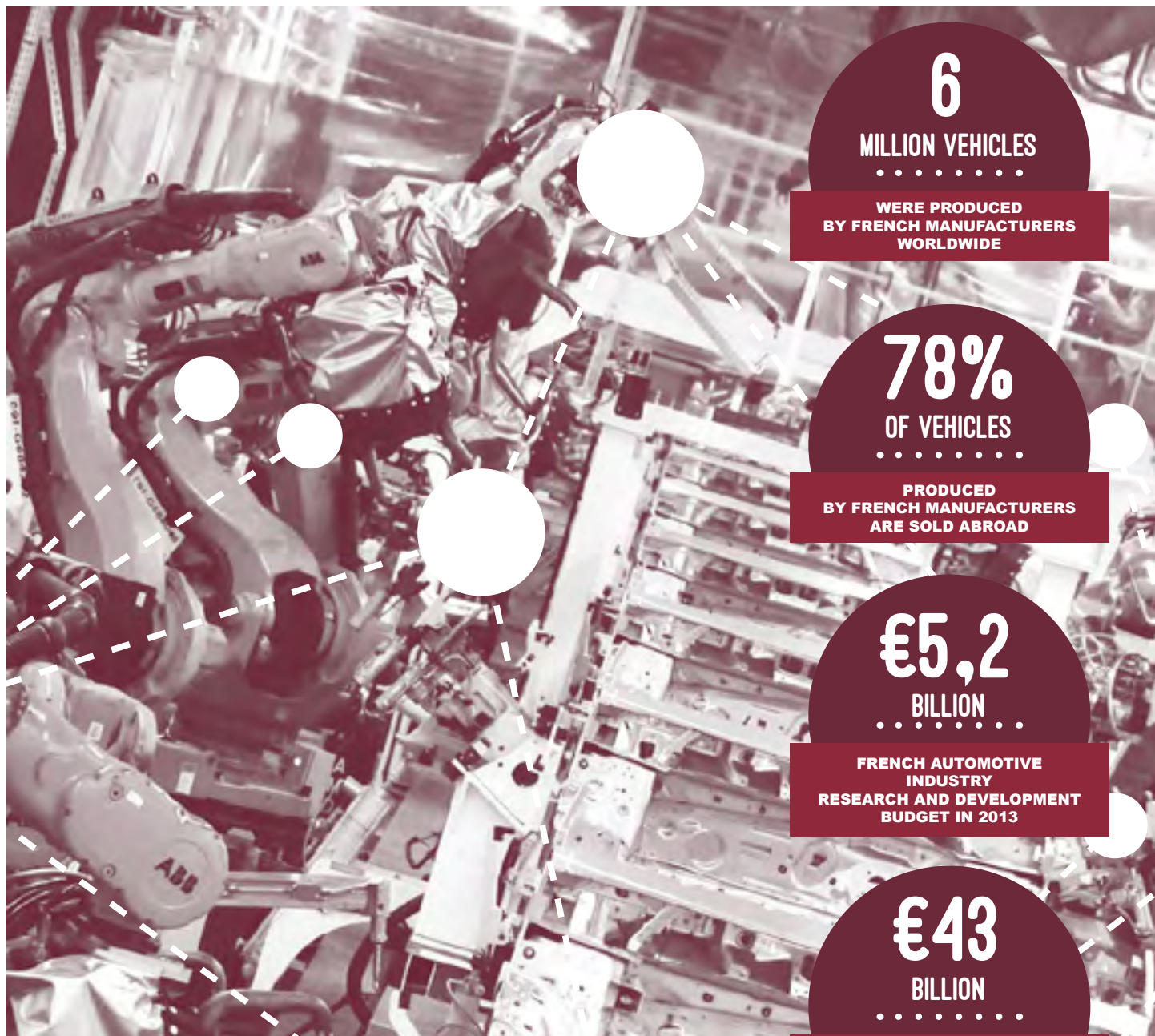
Vehicle use accounted for 630,000 jobs connected in particular to services linked to vehicles (sales, repair, automobile equipment centres, rental, etc.), fuel and recycling (oils, demolishers, etc.). These figures include employees, but also individual entrepreneurs (or non-salaried employees).

Finally, road transport (passenger and merchandise) and the associated infrastructure employed over one million people; this figure includes those working for a third party and the self-employed.

In a broader notion of goods transport and logistics (warehousing and associated services), the statistics department of the Transport Ministry (SOeS) has performed a multi-sector study that shows that there were 1.5 million jobs in this sector in 2004. According to INSEE data, on January 1, 2014, Ile de France accounted for 22% of jobs in the automotive industry (automakers, equipment manufacturers and body builders). The other leading automotive industry regions were: Nord-Pas-de-Calais-Picardie (14 %), Alsace-Champagne-Ardenne-Lorraine (13 %), Bourgogne-Franche-Comté (12 %), Auvergne-Rhône-Alpes (11 %), Normandie (9 %) and Pays de la Loire (6 % each).



Source: INSEE



6

MILLION VEHICLES

WERE PRODUCED
BY FRENCH MANUFACTURERS
WORLDWIDE

78%

OF VEHICLES

PRODUCED
BY FRENCH MANUFACTURERS
ARE SOLD ABROAD

€5,2

BILLION

FRENCH AUTOMOTIVE
INDUSTRY
RESEARCH AND DEVELOPMENT
BUDGET IN 2013

€43

BILLION

OF AUTOMOTIVE
PRODUCTS
ARE SOLD ABROAD

80%

SHARE OF
DOMESTIC TRAVEL
IN FRANCE USING
PASSENGER CARS

84%

THE SHARE OF
DOMESTIC FREIGHT
TRANSPORT
IN FRANCE BY ROAD



Comité des Constructeurs Français d'Automobiles

THE FRENCH AUTOMOTIVE INDUSTRY

.....

ANALYSIS & STATISTICS 2016

WORLD PRODUCTION

► PASSENGER CARS

In units	1980	1990	2000 (2)	2010	2012	2013	2014	2015
EUROPE	11,983,548	15,231,409	17,407,047	17,341,941	17,403,987	17,745,241	18,048,939	18,511,416
Western Europe of which:	10,401,320	13,061,853	14,778,879	12,138,971	11,324,878	11,441,467	11,895,047	12,620,031
Germany	3,520,934	4,660,657	5,131,918	5,552,409	5,388,459	5,439,904	5,604,026	5,707,938
Belgium	882,001	1,160,412	912,233	528,996	504,076	465,504	481,637	369,172
Spain	1,028,813	1,679,301	2,366,359	1,913,513	1,539,680	1,754,668	1,898,342	2,218,980
France (1)	2,938,581	3,294,815	2,879,810	1,924,171	1,682,814	1,458,220	1,499,464	1,553,800
Italy	1,445,221	1,874,672	1,422,284	573,169	396,817	388,465	401,317	663,139
The Netherlands	80,779	121,300	215,085	48,025	24,895	0	29,196	41,870
Portugal	61,000	60,221	178,509	114,563	115,735	109,698	117,744	115,468
United Kingdom	923,744	1,295,611	1,641,452	1,270,444	1,464,906	1,509,762	1,528,148	1,587,677
Sweden	235,320	335,853	259,959	177,084	162,814	161,080	154,174	188,987
Central and Eastern Europe	1,582,228	2,002,000	2,330,692	4,599,576	5,501,813	5,670,170	5,420,453	5,100,358
Turkey	31,529	167,556	297,476	603,394	577,296	633,604	733,439	791,027
AMERICA	8,663,060	8,450,862	10,022,089	8,228,067	10,124,903	10,394,353	9,986,532	9,397,047
NAFTA of which:	7,526,658	7,747,823	8,371,806	5,084,330	6,956,179	7,106,013	7,082,340	7,020,298
Canada	846,777	1,072,281	1,550,500	967,077	1,040,298	965,191	913,533	888,565
USA	6,376,825	6,077,449	5,542,217	2,731,105	4,105,874	4,368,835	4,253,098	4,163,679
Mexico	303,056	598,093	1,279,089	1,386,148	1,810,007	1,771,987	1,915,709	1,968,054
South America of which:	1,136,402	703,039	1,650,283	3,143,737	3,168,724	3,288,340	2,904,192	2,376,749
Argentina	218,516	81,107	238,921	508,401	497,376	506,539	363,711	308,756
Brazil (3)	977,697	663,097	1,351,998	2,584,690	2,589,236	2,722,979	2,502,293	2,018,954
ASIA-PACIFIC	8,796,971	11,910,333	13,573,073	32,414,823	35,159,735	37,201,988	39,263,358	40,018,742
China	-	-	605,000	13,897,083	15,523,658	18,084,169	19,928,505	21,079,427
South Korea	55,000	986,751	2,602,008	3,866,206	4,167,089	4,122,604	4,124,116	4,135,108
India	30,538	176,015	517,957	2,831,542	3,296,240	3,155,694	3,162,372	3,378,063
Japan	7,038,108	9,947,972	8,359,434	8,310,362	8,554,503	8,189,323	8,277,070	7,830,722
AFRICA	277,058	209,603	213,444	356,872	381,377	403,821	483,206	604,784
South Africa	277,058	209,603	230,577	295,394	274,873	265,257	277,491	341,025
TOTAL	29,720,637	35,802,207	41,215,653	58,341,703	63,070,002	65,745,403	67,782,035	68,531,989

► COMMERCIAL VEHICLES

In units	1980	1990	2000 (2)	2010	2012	2013	2014	2015
EUROPE	2,563,596	2,688,509	2,783,468	2,549,317	2,453,409	2,365,139	2,424,148	2,672,399
Western Europe of which:	1,663,080	1,671,915	2,326,653	1,686,875	1,497,474	1,452,221	1,632,376	1,794,175
Germany	357,619	315,895	394,697	353,576	260,801	278,318	303,522	325,226
Belgium	47,029	91,784	121,061	26,306	nd	38,000	35,194	40,168
Spain	152,846	374,049	666,515	474,387	439,499	408,670	504,636	514,221
France (1)	439,852	474,178	468,551	305,250	284,951	282,000	322,000	416,200
Italy	166,635	246,178	316,031	265,017	274,951	269,741	296,547	351,084
The Netherlands (4)	32,102	29,832	52,234	46,081	30,754	29,183	2,232	2,252
Portugal	58,000	77,466	68,215	44,166	47,831	44,318	43,765	41,158
United Kingdom	389,170	270,133	172,442	123,019	112,039	88,110	70,731	94,479
Sweden	63,080	74,415	41,384	40,000	nd	nd	nd	nd
Central and Eastern Europe	900,516	975,000	323,203	371,279	460,253	420,988	354,766	310,455
Turkey	19,352	41,594	133,471	491,163	495,682	491,930	437,006	567,769
AMERICA	2,599,948	5,032,605	9,761,798	8,139,331	9,961,555	10,687,077	11,235,931	11,567,607
NAFTA of which:	2,349,318	4,775,818	9,325,214	7,088,685	8,841,625	9,395,102	10,340,526	10,928,740
Canada	527,522	850,566	1,411,136	1,101,112	1,423,066	1,414,643	1,480,621	1,394,909
USA	1,634,846	3,702,787	7,257,640	5,031,439	6,226,752	6,697,597	7,407,604	7,936,416
Mexico	186,950	222,465	656,438	956,134	1,191,807	1,282,862	1,452,301	1,597,415
South America of which:	250,630	256,787	436,584	1,050,646	1,119,930	1,291,975	895,405	638,867
Argentina	63,153	5,337	100,711	208,139	267,119	284,468	253,618	224,927
Brazil (3)	187,477	251,450	329,519	797,038	813,272	989,401	644,093	410,509
ASIA-PACIFIC	4,344,363	4,492,406	4,497,938	8,515,432	8,549,396	8,576,545	8,141,411	7,763,738
China	-	-	1,464,000	4,367,678	3,748,150	4,032,656	3,803,095	3,423,899
South Korea	65,012	334,879	512,990	405,535	394,677	398,825	400,816	420,849
India	83,379	186,640	283,403	725,531	878,473	742,731	682,485	747,681
Japan	4,004,776	3,538,824	1,781,362	1,318,558	1,388,574	1,440,858	1,497,595	1,447,516
AFRICA	127,698	125,174	115,305	158,204	205,019	221,834	236,402	231,153
South Africa	127,698	125,174	126,787	176,655	264,551	280,656	288,592	274,633
TOTAL	9,675,970	12,399,000	17,158,509	19,362,284	21,169,379	21,850,595	22,037,892	22,234,897

(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 in 2012.

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
G.M.	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
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%		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%
G.M.	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%
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.

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	2,426,187	3,349,788	3,378,343	2,916,259	3,082,504	2,952,431	3,036,773	3,206,042
Belgium	399,240	473,506	515,204	547,340	486,737	486,065	482,939	501,066
Spain	504,051	988,270	1,381,515	982,015	699,589	722,703	890,125	1,094,077
France	1,873,202	2,309,130	2,133,884	2,251,669	1,898,760	1,790,473	1,795,885	1,917,226
Italy	1,717,432	2,307,055	2,415,600	1,961,580	1,403,010	1,304,648	1,360,578	1,575,524
The Netherlands	450,076	502,732	597,640	482,531	502,544	416,717	387,569	449,350
Poland				315,855	272,719	289,913	327,709	354,975
United Kingdom	1,513,761	2,008,934	2,221,670	2,030,846	2,044,609	2,264,737	2,476,435	2,633,503
Europe (15 countries)	9,690,146	13,125,133	14,312,087	12,559,450	11,299,363	11,097,524	11,692,983	12,772,706
Europe (17 countries)	10,065,460	13,516,933	14,725,982	12,981,443	11,765,469	11,547,560	12,139,127	13,247,175
Central and Eastern Europe	1,900,000	1,600,474	2,551,000	3,515,830	4,419,549	4,387,018	4,005,631	3,150,933
Russia				1,912,794	2,755,384	2,649,181	2,333,067	1,284,366
Turkey	31,000	215,000	456,696	509,784	556,280	664,655	587,331	725,596
Canada	948,967	886,217	849,132	694,349	748,530	755,615	760,449	713,058
USA	8,760,937	9,300,678	8,846,625	5,635,432	7,241,900	7,585,341	7,689,110	7,525,023
Mexico	286,000	353,000	603,010	503,748	649,333	698,217	745,250	892,194
Argentina	215,177	77,306	224,950	489,304	600,915	684,379	432,696	431,097
Brazil	793,028	532,791	1,188,818	2,856,540	3,115,223	3,040,783	2,794,687	2,122,956
China				13,757,794	15,495,240	17,927,730	19,707,677	21,146,320
South Korea	45,972	626,126	1,057,620	1,237,482	1,256,403	1,243,868	1,359,834	1,533,670
India				2,387,197	2,781,919	2,553,979	2,570,736	2,772,745
Indonesia				541,475	780,785	880,032	863,268	755,566
Iran				1,410,403	901,268	691,709	1,106,700	1,055,400
Japan	2,854,185	5,102,659	4,259,771	4,203,181	4,572,333	4,562,282	4,699,591	4,215,889
Malaysia				543,594	552,189	576,657	588,348	591,298
Thailand				346,644	660,214	631,225	369,826	304,872
Australia				592,122	576,955	566,454	531,596	515,683
South Africa				337,130	440,002	450,561	439,264	412,670
WORLD	28,500,000	34,825,967	38,689,767	55,602,157	60,658,943	63,090,769	65,340,736	65,784,472

► NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	175,687	203,389	314,804	282,157	311,498	305,287	319,945	333,783
Belgium	34,478	46,670	66,125	60,157	63,782	61,074	62,316	70,458
Spain	105,934	249,185	335,684	132,104	91,402	100,261	139,657	182,982
France	323,291	446,983	477,204	457,215	432,971	416,917	415,042	427,866
Italy	122,293	159,322	268,057	202,573	142,754	116,166	132,430	149,863
The Netherlands	47,926	68,791	114,354	59,781	69,349	64,399	62,777	71,818
Poland				49,356	55,813	63,284	64,767	77,464
United Kingdom	274,143	293,473	301,523	262,730	289,154	330,976	366,590	427,903
Europe (15 countries)	1,276,097	1,718,369	2,245,881	1,646,742	1,568,952	1,561,706	1,690,915	1,882,131
Europe (17 countries)	1,313,650	1,769,569	2,310,844	1,711,882	1,646,028	1,635,430	1,763,448	1,960,418
Central and Eastern Europe	850,000	874,072	579,060	595,752	826,321	764,958	668,830	658,473
Russia				194,341	386,167	349,469	259,329	153,564
Turkey	19,000	43,015	199,825	251,129	261,340	228,469	220,155	285,598
Canada	335,827	416,041	736,951	889,039	967,648	1,024,908	1,129,938	1,226,891
USA	2,476,777	4,845,360	8,965,048	6,136,787	7,544,036	8,298,102	9,154,354	10,310,482
Mexico	166,000	198,000	302,944	344,606	375,241	402,325	431,055	501,270
Argentina	59,881	17,481	81,995	163,098	231,111	279,538	181,152	174,836
Brazil	187,233	180,000	302,288	658,524	686,848	726,587	703,325	446,020
China				4,304,142	3,811,195	4,056,349	3,791,324	3,451,263
South Korea	58,502	328,151	372,840	273,891	275,684	299,696	302,034	300,116
India				653,193	813,589	687,323	606,269	652,591
Indonesia				223,235	335,445	349,779	332,141	275,856
Iran				232,440	143,162	113,041	180,900	166,600
Japan	2,161,305	2,674,834	1,703,114	752,967	797,388	813,231	863,297	830,622
Malaysia				61,562	75,564	79,136	78,139	75,376
Thailand				453,713	763,366	699,465	511,984	492,707
Australia				443,452	535,177	569,773	581,628	639,725
South Africa				155,777	183,919	200,184	205,240	205,079
WORLD	9,150,000	13,410,615	18,723,143	19,392,043	21,501,815	22,546,520	23,027,981	23,821,028

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

PRODUCTION PER ENERGY TYPE

► DIESEL PASSENGER CAR PRODUCTION BY BRAND AND COUNTRY

In units	1980	1990	2000	2010	2012	2013	2014	2015
French manufacturers								
Citroën	33,996	213,010	453,604	586,769	486,782			
Peugeot	133,332	334,469	593,349	622,644	554,931			
PSA Group (1)	167,328	547,479	1,046,953	1,209,413	1,041,713	932,595	936,425	965,047
Renault	69,335	256,528	601,495	812,306	645,955			
Dacia				132,548	172,730			
Renault Samsung Motors				24,141	22,961			
Renault Group	69,335	256,528	601,495	968,995	841,646	915,527	898,864	1,101,402
Total (2)	236,663	804,007	1,648,448	2,178,408	1,883,359	1,848,122	1,835,289	2,066,449
Total gasoline + diesel + others	2,938,581	3,294,815	4,598,617	5,610,340	4,862,707	4,794,079	4,920,471	5,070,154
Diesel share	8.1%	24.4%	35.8%	38.8%	38.7%	38.6%	37.3%	40.8%
Germany								
Mercedes	216,053	141,547	278,772	363,443	366,408	400,324	412,462	420,050
Opel	32,742	76,441	288,651	236,982	170,847	143,919	157,576	114,241
Volkswagen-Audi-Seat	211,199	325,767	847,652	1,095,790	1,165,913	1,210,951	1,289,215	1,344,161
Ford	5,344	90,117	179,130	347,553	277,704	206,654	216,980	272,502
BMW	33,520	28,135	194,794	448,604	482,369	522,549	519,080	547,713
Total diesel	465,788	662,007	1,788,999	2,502,419	2,491,390	2,514,363	2,635,285	2,744,586
Total gasoline + diesel + others	3,520,934	4,660,657	5,131,918	5,552,330	5,388,459	5,439,904	5,604,026	5,708,138
Diesel share	13.2%	14.2%	34.9%	45.1%	46.2%	46.2%	47.0%	48.1%
Spain								
Total diesel	ND	150,221	681,262	1,000,000	812,016	885,850	1,004,877	1,217,898
Total gasoline + diesel	ND	1,679,301	2,445,421	1,913,513	1,539,680	1,719,700	1,871,985	2,202,348
Diesel share	ND	8.9%	27.9%	52.3%	52.7%	51.5%	53.7%	55.3%
Italy								
Alfa Romeo	3,851	11,176	77,532	60,095	44,023	39,249	32,493	30,437
Fiat	76,513	87,985	223,889	138,598	63,350	60,206	69,632	115,418
Lancia		17,679	40,891	40,759	12,568	6,339	1,745	0
Jeep							18,593	49,767
Divers		297		1,449				5,410
Total diesel	80,364	117,137	342,312	240,901	119,941	105,794	122,463	201,032
Total gasoline + diesel + others	1,445,221	1,874,672	1,422,243	573,169	396,817	388,465	401,317	663,139
Diesel share	5.6%	6.2%	24.1%	42.0%	30.2%	27.2%	30.5%	30.3%
United Kingdom								
Honda			596	35,908	30,525	54,800	51,728	62,773
Jaguar-Land Rover		25,374	69,775	137,824	202,097	212,041	213,349	246,542
Mini				34,752	35,044	29,529	31,280	39,437
Nissan		3,200	54,396	173,050	216,048	201,379	233,884	254,800
Opel		7,695	125,880	35,206	50,704	42,908	25,205	9,008
Peugeot		50,942	37,432					
Toyota			38,931	55,599	39,702	49,468	44,879	49,624
Autres	774	34,740	57,413	1,814	955	924	1,376	1,171
Total diesel	774	121,951	384,423	474,153	575,075	591,049	601,701	663,355
Total gasoline + diesel	923,744	1,295,611	1,641,317	1,274,070	1,464,906	1,439,290	1,439,258	1,489,372
Diesel share	0.1%	9.4%	23.4%	37.2%	39.3%	41.1%	41.8%	44.5%

(1) Including Talbot up to 1985

(2) Including others.

Source: CCFA.

REGISTRATIONS

► **NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY (1)** (IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005 (2)	2009	2010	2011	2012	2013	2014	2015
PSA Group	2,111	1,892	1,849	1,689	1,471	1,345	1,395	1,479
	13.6%	13.0%	13.4%	12.4%	11.7%	10.9%	10.7%	10.4%
Renault Group	1,635	1,353	1,416	1,303	1,057	1,092	1,234	1,349
	10.5%	9.3%	10.2%	9.6%	8.4%	8.9%	9.5%	9.5%
FCA Group	1,085	1,311	1,080	950	801	741	766	871
	7.0%	9.0%	7.8%	7.0%	6.4%	6.0%	5.9%	6.1%
Ford Group	1,269	1,300	1,128	1,092	949	919	960	1,030
	8.2%	8.9%	8.2%	8.0%	7.6%	7.5%	7.4%	7.3%
General Motors	1,590	1,264	1,196	1,173	1,011	968	924	943
	10.2%	8.7%	8.6%	8.6%	8.1%	7.9%	7.1%	6.6%
Volkswagen Group	3,041	3,107	2,984	3,216	3,114	3,090	3,307	3,514
	19.5%	21.3%	21.6%	23.6%	24.8%	25.1%	25.5%	24.8%
Daimler	830	685	676	673	667	689	714	839
	5.3%	4.7%	4.9%	4.9%	5.3%	5.6%	5.5%	5.9%
BMW Group	772	709	753	812	801	795	833	936
	5.0%	4.9%	5.4%	6.0%	6.4%	6.5%	6.4%	6.6%
Nissan	361	369	407	464	436	424	481	559
	2.3%	2.5%	2.9%	3.4%	3.5%	3.4%	3.7%	3.9%
Toyota-Lexus-Daihatsu	852	770	629	572	548	543	563	601
	5.5%	5.3%	4.5%	4.2%	4.4%	4.4%	4.3%	4.2%
Other Japanese brands	911	850	718	619	537	558	603	693
	5.8%	5.8%	5.2%	4.5%	4.3%	4.5%	4.6%	4.9%
Hyundai-Kia	569	603	614	686	773	767	773	852
	3.7%	4.1%	4.4%	5.0%	6.2%	6.2%	6.0%	6.0%
Volvo	249	206	231	256	231	231	255	285
	1.6%	1.4%	1.7%	1.9%	1.8%	1.9%	2.0%	2.0%
Tata Group	128	90	100	97	128	139	146	179
	0.8%	0.6%	0.7%	0.7%	1.0%	1.1%	1.1%	1.3%
Other brands (including MG-Rover, Saab)	168	54	53	42	23	20	32	46
	1.1%	0.4%	0.4%	0.3%	0.2%	0.2%	0.2%	0.3%
Total EU + Switzerland + Norway	15,572	14,564	13,832	13,644	12,546	12,322	12,987	14,175
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-2.0%	-5.0%	-1.4%	-8.0%	-1.8%	5.4%	9.2%

► **NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY (1) BY GROUP** (IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005 (2)	2009	2010	2011	2012	2013	2014	2015
PSA Group	389	321	344	354	307	303	330	354
	18.1%	22.3%	21.9%	21.0%	20.8%	20.7%	20.3%	19.5%
Renault Group	331	223	266	279	240	233	258	299
	15.4%	15.4%	17.0%	16.5%	16.3%	15.9%	15.9%	16.5%
FCA Group	284	220	233	246	197	195	208	229
	13.2%	15.3%	14.9%	14.5%	13.4%	13.3%	12.8%	12.7%
Ford Group	235	162	171	187	164	171	213	268
	10.9%	11.2%	10.9%	11.1%	11.1%	11.7%	13.1%	14.8%
General Motors	153	74	78	93	76	75	84	104
	7.1%	5.1%	5.0%	5.5%	5.2%	5.1%	5.2%	5.7%
Volkswagen Group	212	156	185	215	213	208	225	218
	9.9%	10.8%	11.8%	12.8%	14.4%	14.2%	13.9%	12.0%
Daimler	166	130	140	147	140	148	159	172
	7.7%	9.0%	8.9%	8.7%	9.5%	10.1%	9.8%	9.5%
Nissan	103	45	43	54	48	45	46	50
	4.8%	3.1%	2.7%	3.2%	3.3%	3.1%	2.8%	2.7%
Toyota-Lexus-Daihatsu	65	39	39	42	34	31	38	41
	3.0%	2.7%	2.5%	2.5%	2.3%	2.1%	2.3%	2.3%
Other Japanese brands	81	33	38	35	25	27	30	37
	3.8%	2.3%	2.4%	2.1%	1.7%	1.9%	1.9%	2.0%
Hyundai-Kia	52	7	6	5	4	4	3	4
	2.4%	0.5%	0.4%	0.3%	0.3%	0.2%	0.2%	0.2%
Other brands (including MG-Rover, Saab)	78	33	27	31	29	27	30	35
	3.6%	2.3%	1.7%	1.8%	1.9%	1.8%	1.9%	1.9%
Total EU + Switzerland + Norway	2,149	1,442	1,569	1,688	1,476	1,467	1,624	1,811
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-29.3%	8.8%	7.6%	-12.6%	-0.6%	10.7%	11.5%

(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 brands, were reclassified as passenger cars in Spain
Automobile manufacturers include the following brands:

PSA Group = Peugeot + Citroën + DS + Talbot

Renault Group = Renault + Dacia

Fiat Chrysler Automobiles = Alfa Romeo + Fiat + Iveco + Lancia + Maseratti + Ferrari + Chrysler + Jeep + Dodge

Ford Group = Ford Europe + Ford Etats-Unis + divers 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 + divers

BMW Group = BMW + Mini + Rolls-Royce

Other Japanese brands: Mazda, Mitsubishi, Subaru, Suzuki, ...

Tata Group = Jaguar + Land-Rover + Tata

The scope of consolidation of the Groups as of 1/1/2016.

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY BY COUNTRY AND BY GROUP IN 2015 (IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	TOTAL	PSA Group	Citroën and DS (1)	Peugeot	Renault Group	Fiat Group (including Chrysler)	Volkswagen Group	Ford Group	General Motors	BMW-Mini	Daimler	Japanese brands	Korean brands
Germany	3,206	106	51	54	157	92	1,259	225	230	291	326	290	167
	100%	3.3%	1.6%	1.7%	4.9%	2.9%	39.3%	7.0%	7.2%	9.1%	10.2%	9.0%	5.2%
Austria	309	18	7	10	24	16	106	17	22	19	15	36	30
	100%	5.7%	2.4%	3.3%	7.7%	5.3%	34.4%	5.6%	7.1%	6.2%	4.8%	11.5%	9.6%
Belgium	501	66	29	37	66	19	108	25	34	43	30	52	33
	100%	13.2%	5.8%	7.4%	13.2%	3.8%	21.5%	5.0%	6.8%	8.6%	6.1%	10.4%	6.5%
Denmark	207	35	14	21	15	4	48	14	11	6	7	42	21
	100%	16.8%	6.6%	10.2%	7.3%	1.8%	23.0%	6.9%	5.1%	2.8%	3.2%	20.5%	9.9%
Spain	1,034	138	62	76	122	47	235	64	77	46	44	147	93
	100%	13.4%	6.0%	7.4%	11.8%	4.6%	22.7%	6.2%	7.4%	4.4%	4.3%	14.2%	9.0%
Finland	109	5	2	3	4	1	30	9	5	5	5	27	9
	100%	4.4%	1.8%	2.5%	3.8%	1.1%	27.6%	7.9%	5.0%	4.6%	4.8%	25.0%	8.5%
France	1,917	559	231	327	480	72	252	81	64	76	63	190	54
	100%	29.1%	12.1%	17.1%	25.0%	3.7%	13.1%	4.2%	3.4%	4.0%	3.3%	9.9%	2.8%
Greece	76	9	4	5	3	5	13	4	7	4	4	20	4
	100%	11.5%	5.1%	6.4%	4.1%	6.5%	17.6%	4.7%	8.6%	5.7%	5.7%	26.9%	5.9%
Ireland	125	5	2	4	10	1	31	12	7	5	3	31	17
	100%	4.3%	1.5%	2.9%	7.9%	0.6%	24.8%	9.6%	6.0%	4.4%	2.1%	24.4%	13.7%
Italy	1,575	143	59	84	139	448	209	109	89	72	78	165	88
	100%	9.1%	3.7%	5.4%	8.8%	28.4%	13.3%	6.9%	5.7%	4.6%	4.9%	10.5%	5.6%
Luxembourg	46	4	2	2	5	2	13	2	2	6	4	3	2
	100%	9.3%	4.2%	5.2%	9.9%	4.8%	28.6%	4.5%	4.6%	13.3%	8.7%	7.2%	4.4%
The Netherlands	449	70	21	49	39	16	99	25	25	25	17	74	30
	100%	15.7%	4.7%	10.9%	8.7%	3.5%	22.1%	5.6%	5.7%	5.5%	3.8%	16.4%	6.6%
Portugal	179	25	9	17	25	9	36	8	10	15	16	24	5
	100%	14.2%	4.9%	9.3%	14.0%	4.9%	20.4%	4.8%	5.6%	8.4%	9.0%	13.2%	2.9%
United Kingdom	2,634	193	89	104	102	85	527	335	270	231	154	427	170
	100%	7.3%	3.4%	4.0%	3.9%	3.2%	20.0%	12.7%	10.2%	8.8%	5.8%	16.2%	6.5%
Sweden	345	15	5	9	16	9	93	12	7	22	14	56	27
	100%	4.3%	1.6%	2.7%	4.5%	2.5%	27.0%	3.6%	2.0%	6.5%	4.1%	16.3%	7.9%
Europe (15 countries)	12,712	1,391	587	804	1,206	825	3,059	943	861	867	780.567	1,584	749
	100%	10.9%	4.6%	6.3%	9.5%	6.5%	24.1%	7.4%	6.8%	6.8%	6.1%	12.5%	5.9%
Norway	151	8	2	6	3	1	41	8	3	10	8	47	7
	100%	5.1%	1.4%	3.7%	1.9%	0.4%	27.1%	5.6%	2.2%	6.9%	5.2%	31.1%	4.7%
Switzerland	322	24	11	13	20	15	99	14	14	29	26	50	16
	100%	7.5%	3.6%	3.9%	6.3%	4.8%	30.9%	4.2%	4.4%	8.9%	8.1%	15.7%	4.9%
Europe (17 countries)	13,184	1,422	601	822	1,229	841	3,199	965	878	906	814	1,682	772
	100%	10.8%	4.6%	6.2%	9.3%	6.4%	24.3%	7.3%	6.7%	6.9%	6.2%	12.8%	5.9%
Bulgaria	24	2	1	1	5	0	6	1	1	1	0	5	2
	100%	7.8%	2.7%	5.1%	21.8%	1.1%	23.7%	6.0%	4.8%	4.2%	1.4%	19.2%	6.3%
Croatia	36	3	2	2	5	1	11	2	4	1	1	5	3
	100%	9.8%	4.3%	5.5%	13.0%	1.9%	31.3%	5.7%	10.3%	3.2%	2.8%	13.7%	7.6%
Estonia	21	1	1	1	3	0	4	1	1	0	0	8	2
	100%	7.0%	3.0%	4.0%	12.3%	1.8%	21.1%	2.9%	4.0%	1.9%	1.3%	36.7%	8.6%
Hungary	77	3	1	2	7	3	18	8	9	2	2	19	5
	100%	4.0%	1.5%	2.5%	9.2%	3.5%	23.1%	9.8%	11.5%	2.9%	2.8%	24.9%	6.5%
Latvia	14	1	0	0	1	1	3	1	0	1	0	4	1
	100%	5.2%	2.7%	2.5%	5.4%	6.0%	24.6%	5.9%	3.6%	4.0%	2.2%	30.7%	6.9%
Lithuania	17	0	0	0	1	3	5	1	1	1	0	4	1
	100%	2.5%	1.3%	1.2%	5.6%	17.2%	28.7%	3.4%	3.9%	3.9%	1.7%	25.6%	5.5%
Poland	352	19	8	11	31	11	96	25	29	11	9	81	34
	100%	5.3%	2.2%	3.0%	8.8%	3.2%	27.2%	7.0%	8.1%	3.0%	2.5%	23.0%	9.7%
Czech Rep.	231	12	5	7	19	5	109	15	8	6	5	20	27
	100%	5.3%	2.2%	3.1%	8.0%	2.0%	47.2%	6.7%	3.5%	2.8%	2.1%	8.6%	11.8%
Romania	81	2	1	1	32	3	17	6	3	2	3	8	4
	100%	2.6%	0.8%	1.7%	39.1%	3.2%	21.0%	7.1%	4.1%	2.7%	3.5%	9.7%	5.5%
Slovakia	78	7	3	4	6	1	27	3	4	3	3	11	12
	100%	9.3%	3.5%	5.7%	8.1%	1.9%	34.7%	3.3%	5.4%	3.3%	3.3%	14.3%	15.3%
Slovenia	60	6	3	3	11	3	18	4	5	2	1	7	4
	100%	9.6%	4.2%	5.3%	18.9%	4.2%	29.8%	6.1%	7.5%	3.0%	1.9%	11.5%	7.3%
11 new EU members	991	57	23	33	120	30	314	65	64	30	24	172	95
	100%	5.7%	2.4%	3.4%	12.1%	3.0%	31.7%	6.6%	6.5%	3.0%	2.5%	17.3%	9.6%
Europe (28 countries)	14,175	1,479	624	855	1,349	871	3,514	1,030	943	936	839	1,853	867
	100%	10.4%	4.4%	6.0%	9.5%	6.1%	24.8%	7.3%	6.6%	6.6%	5.9%	13.1%	6.1%

(1) Respectively 548,914 and 75,201 units for Citroën and DS (EU28 areas).

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

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

	1990	2000	2010	2011	2012	2013	2014	2015
PSA Group		1,930	1,776	1,620	1,407	1,282	1,332	1,422
		13.1%	13.7%	12.7%	12.0%	11.1%	11.0%	11.8%
Renault Group		1,559	1,305	1,195	967	1,005	1,128	1,229
		10.6%	10.1%	9.3%	8.2%	8.7%	9.3%	10.2%
FCA		1,575	1,035	916	770	716	739	841
		10.7%	8.0%	7.2%	6.5%	6.2%	6.1%	6.9%
Ford Group		1,248	1,063	1,033	901	873	902	965
		8.5%	8.2%	8.1%	7.7%	7.6%	7.5%	8.0%
General Motors		1,720	1,119	1,099	944	906	861	878
		11.7%	8.6%	8.6%	8.0%	7.9%	7.1%	7.3%
Volkswagen Group		2,776	2,757	2,979	2,887	2,862	3,033	3,199
		18.8%	21.3%	23.3%	24.5%	24.8%	25.1%	26.4%
Daimler		811	662	659	653	672	695	814
		5.5%	5.1%	5.1%	5.6%	5.8%	5.7%	6.7%
BMW Group		499	735	792	780	775	809	906
		3.4%	5.7%	6.2%	6.6%	6.7%	6.7%	7.5%
Nissan-Infiniti		392	384	436	408	400	453	523
		2.7%	3.0%	3.4%	3.5%	3.5%	3.7%	4.3%
Toyota-Lexus-Daihatsu		576	582	531	507	497	506	536
		3.9%	4.5%	4.2%	4.3%	4.3%	4.2%	4.4%
Other Japanese brands		701	651	563	487	504	542	622
		4.8%	5.0%	4.4%	4.1%	4.4%	4.5%	5.1%
Hyundai-Kia		303	539	604	687	679	686	758
		2.1%	4.2%	4.7%	5.8%	5.9%	0.0%	0.0%
Volvo		230	222	245	222	221	245	273
		1.6%	1.7%	1.9%	1.9%	1.9%	2.0%	2.3%
Tata Group		112	97	94	124	135	142	174
		0.8%	0.7%	0.7%	1.1%	1.2%	1.2%	1.4%
Other brands (Including MG-Rover, Saab)		304	47	37	19	18	30	42
		2.1%	0.4%	0.3%	0.2%	0.2%	0.2%	0.3%
Total Europe (17 countries)		14,738	12,975	12,802	11,763	11,545	12,102	13,184
		100%	100%	100%	100%	100%	100%	100%
Year-on-year change		-2.1%	-5.0%	-1.3%	-8.1%	-1.9%	4.8%	8.9%

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	1990	2000	2010	2011	2012	2013	2014	2015
PSA Group	251	349	326	330	286	281	307	328
	16.5%	18.1%	22.1%	20.9%	20.8%	20.6%	20.4%	21.8%
Renault Group	278	272	251	261	224	215	237	273
	18.3%	14.1%	17.0%	16.5%	16.3%	15.8%	15.7%	18.2%
FCA	163	275	214	225	178	174	184	201
	10.7%	14.2%	14.5%	14.3%	12.9%	12.8%	12.2%	13.3%
Ford Group	195	180	161	176	154	161	199	250
	12.9%	9.3%	10.9%	11.1%	11.2%	11.8%	13.2%	16.6%
General Motors	81	92	75	89	73	72	79	96
	5.3%	4.8%	5.1%	5.6%	5.3%	5.3%	5.2%	6.4%
Volkswagen Group	134	202	170	200	197	194	210	202
	8.9%	10.5%	11.6%	12.7%	14.3%	14.2%	13.9%	13.4%
Daimler	74	178	133	141	133	140	151	163
	4.9%	9.2%	9.0%	8.9%	9.7%	10.3%	10.0%	10.8%
Nissan-Infiniti	105	100	41	51	46	43	44	48
	6.9%	5.2%	2.8%	3.2%	3.3%	3.2%	2.9%	3.2%
Toyota-Lexus-Daihatsu	81	69	37	40	31	28	35	38
	5.3%	3.6%	2.5%	2.5%	2.3%	2.1%	2.3%	2.5%
Other Japanese brands	69	102	36	33	23	25	28	38
	4.6%	5.3%	2.4%	2.1%	1.7%	1.9%	1.9%	2.5%
Hyundai-Kia	0	44	5	5	3	3	3	4
	0.0%	2.3%	0.4%	0.3%	0.3%	0.2%	0.2%	0.2%
Other brands	85	69	26	30	28	26	29	31
	5.6%	3.6%	1.8%	1.9%	2.0%	1.9%	1.9%	2.0%
Total Europe (17 countries)	1,516	1,931	1,475	1,580	1,376	1,364	1,506	1,673
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change		-2.6%	5.6%	11.1%	7.1%	-12.9%	-0.8%	10.4%

The scope of the groups reflects their situation as at 01/01/2016 (see page 70).

REGISTRATIONS

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

(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005	2009	2010	2011	2012	2013	2014	2015
PSA Group	99	75	73	69	64	63	63	57
	9.5%	8.3%	8.5%	8.2%	8.2%	8.1%	7.1%	5.7%
Renault Group	193	116	112	108	90	87	106	120
	18.7%	12.8%	13.0%	12.9%	11.5%	11.3%	11.9%	12.1%
FCA Group	50	59	45	34	30	25	26	30
	4.8%	6.6%	5.3%	4.0%	3.9%	3.2%	3.0%	3.0%
Ford Group	59	71	65	59	48	46	58	65
	5.7%	7.9%	7.5%	7.0%	6.2%	6.0%	6.6%	6.6%
General Motors	132	76	76	74	67	61	63	64
	12.7%	8.4%	8.9%	8.8%	8.5%	7.9%	7.2%	6.5%
Volkswagen Group	257	220	226	238	227	228	273	314
	24.8%	24.5%	26.4%	28.2%	28.9%	29.4%	30.9%	31.7%
Daimler	11	14	13	14	14	17	20	24
	1.1%	1.5%	1.6%	1.7%	1.8%	2.2%	2.2%	2.5%
BMW Group	11	14	17	20	21	21	24	30
	1.0%	1.6%	2.0%	2.4%	2.7%	2.7%	2.7%	3.0%
Nissan	19	21	23	28	28	24	28	35
	1.8%	2.3%	2.6%	3.3%	3.6%	3.1%	3.1%	3.6%
Toyota-Lexus-Daihatsu	60	56	47	41	41	47	57	65
	5.8%	6.2%	5.5%	4.8%	5.2%	6.0%	6.5%	6.5%
Autres marques japonaises	91	81	67	56	50	53	61	72
	8.7%	9.0%	7.9%	6.6%	6.4%	6.9%	6.9%	7.2%
Hyundai-Kia	39	83	75	81	86	89	88	95
	3.8%	9.2%	8.7%	9.7%	10.9%	11.4%	9.9%	9.5%
Volvo	7	10	9	10	9	9	10	12
	0.6%	1.1%	1.1%	1.2%	1.2%	1.2%	1.2%	1.2%
Tata Group	2	3	3	3	3	4	4	4
	0.2%	0.3%	0.3%	0.4%	0.4%	0.5%	0.4%	0.5%
Other brands (including MG-Rover, Saab)	7	3	6	5	5	1	3	3
	0.7%	0.3%	0.7%	0.6%	0.6%	0.2%	0.3%	0.3%
Total new EU members states	1,035	900	857	841	783	777	885	991
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-29.0%	-4.8%	-1.8%	-6.9%	-0.8%	13.9%	12.0%

► NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS IN NEW EU MEMBER STATES (1)

(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005 (2)	2009	2010	2011	2012	2013	2014	2015
PSA Group	20	22	18	25	20	22	23	26
	13.6%	19.0%	19.5%	22.9%	20.0%	21.2%	19.3%	18.4%
Renault Group	35	15	15	18	16	18	21	26
	24.4%	13.2%	16.3%	16.2%	16.3%	17.1%	17.8%	18.4%
FCA Group	21	20	19	21	20	21	23	28
	14.7%	17.1%	19.8%	19.0%	19.6%	20.1%	19.6%	20.4%
Ford Group	14	11	10	11	10	10	14	18
	9.8%	9.7%	10.1%	10.2%	10.1%	10.2%	11.5%	12.8%
General Motors	8	4	3	4	3	3	5	8
	5.2%	3.1%	3.2%	3.6%	3.3%	3.4%	4.5%	5.8%
Volkswagen Group	21	20	14	15	16	14	15	16
	14.7%	17.5%	14.9%	13.7%	15.5%	13.6%	13.1%	11.5%
Daimler	10	9	7	6	7	7	8	9
	6.8%	8.1%	7.9%	5.9%	7.1%	7.2%	6.7%	6.3%
Nissan	2	4	2	3	2	2	2	2
	1.4%	3.9%	2.5%	2.9%	2.2%	1.9%	1.5%	1.2%
Toyota-Lexus-Daihatsu	2	4	2	3	3	3	3	3
	1.6%	3.1%	2.2%	2.5%	3.0%	2.8%	2.8%	2.2%
Other Japanese brands	3	2	2	3	2	2	2	2
	2.3%	1.9%	2.1%	2.4%	1.7%	1.7%	1.8%	1.8%
Hyundai-Kia	5	2	1	0	0	0	1	1
	3.2%	1.5%	0.7%	0.3%	0.2%	0.1%	0.4%	0.4%
Other brands (including MG-Rover, Saab)	4	2	1	1	1	1	1	1
	2.5%	1.9%	0.8%	0.5%	1.0%	0.8%	0.9%	0.8%
Total new EU members states	145	115	95	108	100	103	118	139
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-44.7%	-17.5%	14.2%	-7.3%	2.5%	14.8%	17.4%

(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 01/01/2016 (see page 70).

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	2,426,187	3,349,788	3,378,343	2,916,259	3,082,504	2,952,431	3,036,773	3,206,042
Austria	227,548	288,618	309,427	328,563	336,010	319,035	303,318	308,555
Belgium	399,240	473,506	515,204	547,340	486,737	486,065	482,939	501,066
Denmark	73,774	80,654	112,688	153,583	170,587	181,896	188,612	206,999
Spain (1)	504,051	988,270	1,381,515	982,015	699,589	722,689	855,308	1,034,232
Finland	103,167	139,095	134,646	107,346	111,147	103,314	106,259	108,844
France	1,873,202	2,309,130	2,133,884	2,251,669	1,898,760	1,790,456	1,795,885	1,917,226
Greece	35,700	115,480	290,222	141,501	58,479	58,696	71,222	75,804
Ireland	93,563	82,584	230,989	88,445	79,494	74,364	96,343	124,945
Italy	1,717,432	2,307,055	2,415,600	1,961,578	1,403,024	1,304,573	1,360,430	1,575,424
Luxembourg	21,500	38,422	41,896	49,726	50,398	46,624	49,793	46,473
Norway	95,550	61,901	97,376	127,754	137,967	142,151	144,202	150,686
The Netherlands	450,076	502,732	597,640	482,527	502,455	416,733	387,551	449,012
Portugal	58,357	210,924	257,834	223,464	95,309	105,921	142,826	178,503
United Kingdom	1,513,761	2,008,934	2,221,670	2,030,846	2,044,609	2,264,737	2,476,435	2,633,503
Sweden	192,588	229,941	290,529	289,684	279,899	269,558	303,948	345,108
Switzerland	279,764	329,899	316,519	292,453	325,948	305,928	300,110	321,669
Eur. union (2)	8,568,735	12,467,479	14,312,087	12,554,546	11,299,001	11,097,092	11,657,642	12,711,736
Europe (17 countries)	10,065,460	13,516,933	14,725,982	12,974,753	11,762,916	11,545,171	12,101,954	13,184,091

► NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

	1980	1990	2000	2010	2012	2013	2014	2015
Germany	193,841	327,046	1,023,997	1,220,675	1,482,980	1,400,556	1,450,190	1,529,175
	8.0%	9.8%	30.3%	41.9%	48.1%	47.4%	47.8%	47.7%
Austria	7,425	74,197	191,402	167,106	189,496	180,847	172,382	179,821
	3.3%	25.7%	61.9%	50.9%	56.4%	56.7%	56.8%	58.3%
Belgium	54,897	154,804	290,301	415,728	334,305	314,844	299,149	299,357
	13.8%	32.7%	56.3%	76.0%	68.7%	64.8%	61.9%	59.7%
Denmark	2,352	3,305	14,898	72,670	68,215	58,119	59,852	64,095
	3.2%	4.1%	13.2%	47.3%	40.0%	32.0%	31.7%	31.0%
Spain (1)	-	140,740	734,256	693,905	482,049	479,318	565,409	648,213
	-	14.2%	53.1%	70.7%	68.9%	66.3%	66.1%	62.7%
Finland	-	7,215	-	44,574	42,846	38,372	41,299	38,882
	-	5.2%	-	41.5%	38.5%	37.1%	38.9%	35.7%
France	186,050	762,054	1,046,485	1,593,173	1,384,544	1,199,729	1,146,658	1,097,124
	9.9%	33.0%	49.0%	70.8%	72.9%	67.0%	63.8%	57.2%
Greece	-	60	2,006	5,661	23,384	33,993	45,383	47,875
	-	0.1%	0.7%	4.0%	40.0%	57.9%	63.7%	63.2%
Ireland	-	12,413	23,259	55,016	58,089	53,838	70,520	88,759
	-	15.0%	10.1%	62.2%	73.1%	72.4%	73.2%	71.0%
Italy	138,562	179,779	812,203	901,310	745,257	703,122	747,020	869,271
	8.1%	7.8%	33.6%	45.9%	53.1%	53.9%	54.9%	55.2%
Luxembourg	-	8,206	21,110	37,403	38,348	34,230	35,825	32,694
	-	21.4%	50.4%	75.2%	76.1%	73.4%	71.9%	70.4%
Norway	-	1,581	8,761	95,733	88,530	74,693	70,190	61,482
	-	2.6%	9.0%	74.9%	64.2%	52.5%	48.7%	40.8%
The Netherlands	30,450	54,738	134,426	98,477	142,697	103,518	105,018	129,851
	6.8%	10.9%	22.5%	20.4%	28.4%	24.8%	27.1%	28.9%
Portugal	-	10,426	62,417	149,046	67,239	76,575	101,710	121,643
	-	4.9%	24.2%	66.7%	70.5%	72.3%	71.2%	68.1%
United Kingdom	5,850	128,160	313,149	936,448	1,038,770	1,127,758	1,240,175	1,273,995
	0.4%	6.4%	14.1%	46.1%	50.8%	49.8%	50.1%	48.4%
Sweden	-	1,335	18,325	147,802	186,970	165,717	179,093	198,967
	-	0.6%	6.3%	51.0%	66.8%	61.5%	58.9%	57.7%
Switzerland	-	9,998	29,466	88,760	120,421	113,255	111,072	124,898
	-	3.0%	9.3%	30.4%	36.9%	37.0%	37.0%	38.8%
Europe (17 countries) (1)	619,427	1,866,021	4,726,461	6,723,487	6,494,140	6,158,484	6,440,945	6,806,102
% diesel in Europe	7.1%	13.9%	32.1%	51.8%	55.2%	53.3%	53.2%	51.6%
Year-on-year change		+0.7%	+10.7%	+6.9%	-9.0%	-5.2%	+4.6%	+5.7%

(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.

REGISTRATIONS

► NEW HYBRID OR ELECTRIC POWERED PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE

(IN UNITS AND AS A % OF TOTAL REGISTRATIONS)

	Power	2005	2009	2010	2011	2012	2013	2014	2015
Germany	electric	0	14	160	1,731	2,451	5,800	8,280	12,380
		0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.3%	0.4%
	hybrid	3,559	8,000	10,174	11,788	20,617	25,330	26,312	32,337
Austria	electric	0	39	112	631	426	654	1,281	1,677
		0.0%	0.0%	0.0%	0.2%	0.1%	0.2%	0.4%	0.5%
	hybrid	460	1,055	1,248	1,310	2,174	2,595	2,360	3,514
Belgium	electric	0	0	47	263	562	500	1,165	1,358
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.3%
	hybrid	471	1,839	4,073	6,676	5,875	6,283	8,350	10,711
Denmark	electric	2	78	50	460	527	533	1,637	4,468
		0.0%	0.1%	0.0%	0.3%	0.3%	0.3%	0.9%	2.2%
	hybrid	5	58	148	263	431	1,099	1,233	2,657
Spain	electric	0	1	69	367	439	811	1,076	1,461
		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%
	hybrid	908	4,582	6,253	10,061	10,073	10,152	12,458	20,526
France	electric	6	12	184	2,630	5,663	8,779	10,561	17,268
		0.0%	0.0%	0.0%	0.1%	0.3%	0.5%	0.6%	0.9%
	hybrid	2,857	9,876	9,655	13,635	27,889	46,745	43,143	61,619
Italy	electric	28	60	112	306	524	864	1,100	1,452
		0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
	hybrid	1,132	7,311	4,841	5,161	6,836	15,156	21,488	26,256
Norway	electric	7	117	355	1,996	3,950	7,882	18,090	25,779
		0.0%	0.1%	0.3%	1.4%	2.9%	5.5%	12.5%	17.1%
	hybrid	337	1,973	3,144	3,645	6,116	9,827	10,774	15,704
The Netherlands	electric	0	22	96	846	828	2,618	2,913	3,208
		0.0%	0.0%	0.0%	0.2%	0.2%	0.6%	0.8%	0.7%
	hybrid	2,940	16,275	16,099	14,868	25,614	43,639	26,748	56,281
United Kingdom	electric	0	55	167	1,098	1,262	2,512	6,697	9,934
		0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.3%	0.4%
	hybrid	5,766	14,645	22,148	23,398	25,892	30,203	45,148	64,790
Sweden	electric	1	21	9	181	268	435	1,240	2,880
		0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.4%	0.8%
	hybrid	1,947	3,058	3,628	2,909	3,539	5,823	10,421	14,478
Switzerland	electric	13	53	199	446	523	1,177	1,804	3,777
		0.0%	0.0%	0.1%	0.1%	0.2%	0.4%	0.6%	1.2%
	hybrid	1,413	3,905	4,210	5,358	6,945	7,225	6,949	8,400
Western Europe (Including countries not presented)	electric	57	475	1,611	11,263	17,707	32,990	56,796	87,121
		0.0%	0.0%	0.0%	0.1%	0.2%	0.3%	0.5%	0.7%
	hybrid	23,210	76,525	90,198	102,979	146,287	208,934	221,944	327,081
		0.2%	0.6%	0.7%	0.8%	1.2%	1.8%	1.8%	2.5%

REGISTRATIONS

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	101,393	125,384	212,290	202,446	224,957	217,966	233,882	243,306
Austria	15,473	21,539	27,243	28,130	31,643	30,849	31,320	33,013
Belgium	30,609	52,490	54,090	56,006	57,899	56,734	56,886	65,179
Denmark	15,711	19,649	33,092	16,848	24,626	24,532	29,133	33,177
Spain	88,042	229,821	299,246	116,770	77,088	85,855	114,247	155,400
Finland	12,574	27,507	15,056	11,550	12,298	11,194	11,359	11,986
France	277,887	393,795	414,966	417,612	384,050	367,331	372,074	379,426
Greece	45,124	29,480	23,008	10,935	3,780	3,534	5,066	5,757
Ireland	8,640	24,136	41,474	10,486	10,893	11,016	16,704	23,696
Italy	109,270	156,995	225,517	177,887	117,387	101,858	119,442	134,541
Luxembourg	1,014	1,863	3,083	3,291	3,485	3,325	3,600	4,016
Norway	11,395	20,582	31,627	30,422	33,416	32,293	30,717	34,394
The Netherlands	33,498	53,080	96,570	49,863	56,693	50,756	51,927	57,926
Portugal	38,597	64,236	152,836	45,756	16,046	18,222	26,290	30,996
United Kingdom	212,042	247,728	245,163	231,539	247,936	278,957	329,761	380,996
Sweden	12,038	26,362	31,854	38,543	39,970	37,690	42,223	45,124
Switzerland	18,091	22,753	24,121	26,507	33,537	31,938	31,689	34,297
Eur. union (1)	790,064	1,398,657	1,875,488	1,417,662	1,308,751	1,299,819	1,443,914	1,604,539
Europe (17 countries)	1,031,398	1,517,400	1,931,236	1,474,591	1,375,704	1,364,050	1,506,320	1,673,230

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	59,061	73,770	96,830	75,014	82,020	82,233	81,030	85,001
Austria	5,642	7,222	8,508	5,138	6,474	7,320	6,706	7,151
Belgium	8,604	10,690	11,061	7,133	8,277	7,400	7,638	8,188
Denmark	3,179	3,539	4,597	2,682	3,654	4,233	3,628	4,687
Spain	23,208	30,432	33,700	13,215	12,539	12,900	15,896	22,043
Finland	4,497	4,218	3,072	2,368	2,749	3,076	2,168	2,400
France	41,846	50,028	57,918	34,221	43,378	43,265	37,559	41,716
Greece	1,178	497	1,633	1,081	166	317	335	438
Ireland	3,511	2,748	4,666	1,011	1,113	1,553	1,747	1,867
Italy		31,973	38,388	17,532	13,273	13,324	11,957	15,060
Luxembourg	690	1,136	1,451	803	1,011	966	1,020	1,089
Norway	3,056	2,106	3,564	3,126	4,695	4,688	4,657	4,366
The Netherlands	13,346	14,804	16,835	9,390	11,896	13,057	10,201	13,556
Portugal	8,370	7,186	7,403	3,116	1,881	2,201	3,071	3,956
United Kingdom	57,489	45,794	51,864	27,988	38,995	49,796	35,033	44,364
Sweden	6,703	5,998	5,549	4,605	5,369	4,698	5,089	5,289
Switzerland	3,955	4,832	4,733	3,388	3,847	3,503	4,425	4,079
Eur. union (1)	187,726	272,597	343,475	205,297	232,795	246,339	223,078	256,805
Europe (17 countries)	244,335	296,973	351,772	211,811	241,337	254,530	232,160	265,250

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Germany	6,058	4,235	5,684	4,697	4,521	5,088	5,033	5,476
Austria	676	450	706	733	702	688	871	878
Belgium	585	580	974	909	576	626	982	778
Denmark	579	311	419	450	320	288	330	269
Spain	1,511	2,376	2,738	2,119	1,775	1,506	1,830	2,537
Finland	625	429		300	337	225	436	330
France	3,558	3,160	4,320	5,382	5,545	6,321	5,409	6,724
Greece		625	374	325	90	25	43	44
Ireland		24	121	47	232	163	206	313
Italy		3,825	4,152	3,931	2,200	2,401	1,797	2,140
Luxembourg	53	57	108	173	155	167	156	247
Norway	684	380	427	1,052	831	910	697	660
The Netherlands	1,082	1,069	949	524	688	587	649	332
Portugal		482	806	418	179	155	170	199
United Kingdom	5,792	3,324	4,496	3,203	3,798	3,648	3,373	3,931
Sweden	943	863	1,071	1,302	1,202	1,080	1,207	1,172
Switzerland	371	580	491	476	440	534	568	689
Eur. union (1)	17,707	20,068	26,918	24,513	22,320	22,968	22,492	25,370
Europe (17 countries)	22,517	22,770	27,836	26,041	23,591	24,412	23,757	26,719

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

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS IN NEW EU MEMBER STATES

In units	2000	2005	2010	2011	2012	2013	2014	2015
Bulgaria			15,646	18,631	20,986	20,718	21,186	24,176
Croatia	62,009	70,541	38,587	41,561	31,360	27,802	33,962	35,715
Estonia	10,600	19,640	10,295	17,070	19,424	19,694	21,135	21,033
Hungary	133,233	198,982	43,476	45,094	53,059	56,139	67,476	77,171
Latvia	7,300	16,602	6,365	10,980	10,665	10,636	12,452	13,766
Lithuania	6,158	10,467	7,970	13,234	12,165	12,163	14,461	17,071
Poland	478,752	235,522	333,490	297,937	270,895	288,998	325,371	352,378
Czech Republic	148,592	151,699	169,580	173,595	174,320	164,746	192,314	230,857
Romania	64,432	215,554	106,333	94,619	72,143	57,710	70,172	81,162
Slovakia	55,090	57,125	64,033	68,254	69,268	66,000	72,252	77,979
Slovenia	67,665	59,324	61,142	60,193	50,091	51,585	53,959	59,664
Total new EU members (1)	907,400	749,361	818,330	799,607	753,016	776,191	884,740	990,972

► NEW LIGHT COMMERCIAL VEHICLE (UP TO 5 T) REGISTRATIONS IN THE NEW EU MEMBER COUNTRIES

In units	2000	2005	2010	2011	2012	2013	2014	2015
Bulgaria			3,211	2,979	3,054	3,346	4,225	4,948
Croatia	3,360	7,671	2,845	3,653	3,658	5,309	5,240	6,909
Estonia	1,500	2,944	1,406	2,478	2,801	2,943	3,296	3,962
Hungary	26,686	20,479	9,337	11,564	11,058	11,573	16,066	17,719
Latvia	900	1,753	649	1,926	2,307	2,380	2,688	2,473
Lithuania	1,270	3,371	1,044	1,939	1,715	1,967	2,160	2,533
Poland	33,653	35,985	42,852	47,206	40,862	42,532	47,643	55,004
Czech Republic	14,786	16,024	11,318	13,149	11,669	11,768	13,344	17,597
Romania	14,789	35,842	10,404	11,791	12,269	10,046	11,399	13,471
Slovakia	5,812	14,428	6,953	5,717	5,135	5,094	5,661	7,297
Slovenia	6,274	6,897	4,744	5,791	5,820	6,072	6,373	6,686
Total new EU members (1)	90,900	101,881	91,918	104,540	96,690	103,030	118,095	138,599

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

In units	2000	2005	2010	2011	2012	2013	2014	2015
Bulgaria			18,857	21,610	24,040	24,064	25,411	29,124
Croatia	65,369	78,212	41,432	45,214	35,018	33,111	39,202	42,624
Estonia	12,100	22,584	11,701	19,548	22,225	22,637	24,431	24,995
Hungary	159,919	219,461	52,813	56,658	64,117	67,712	83,542	94,890
Latvia	8,200	18,355	7,014	12,906	12,972	13,016	15,140	16,239
Lithuania	7,428	13,838	9,014	15,173	13,880	14,130	16,621	19,604
Poland	512,405	271,507	376,342	345,143	311,757	331,530	373,014	407,382
Czech Republic	163,378	167,723	180,898	186,744	185,989	176,514	205,658	248,454
Romania	79,221	251,396	116,737	106,410	84,412	67,756	81,571	94,633
Slovakia	60,902	71,553	70,986	73,971	74,403	71,094	77,913	85,276
Slovenia	73,939	66,221	65,886	65,984	55,911	57,657	60,332	66,350
Total new EU members (1)	998,300	851,242	910,248	904,147	849,706	879,221	1,002,835	1,129,571

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

In units	2000	2005	2010	2011	2012	2013	2014	2015
Bulgaria*			1,000	1,300	800	1,300	1,300	1,300
Croatia	612	1,463	599	721	636	708	994	1,044
Estonia	400	927	502	798	848	1,034	910	934
Hungary	2,900	4,400	2,408	4,335	4,051	5,263	5,177	6,045
Latvia	1,000	1,284	520	1,406	1,525	1,323	954	1,372
Lithuania	1,000	2,297	1,355	2,756	2,789	3,456	2,373	3,633
Poland	7,464	11,079	11,611	16,800	16,461	19,748	17,884	23,429
Czech Republic	6,400	8,200	5,750	8,201	7,416	8,787	10,201	12,414
Romania	3,113	5,019	2,686	4,014	3,060	3,491	4,168	6,485
Slovakia	1,796	3,754	2,870	3,962	3,856	4,131	4,063	2,789
Slovenia	1,876	1,635	985	1,467	1,131	1,255	1,607	2,025
Total new EU members (1)	22,800	33,500	29,700	45,000	41,900	50,500	49,600	60,200

* CCEA estimates

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

WORLD PRODUCTION BY FRENCH MANUFACTURERS

► WORLD VEHICLE PRODUCTION BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	536,415	783,224	1,168,470	1,452,847	1,243,983	1,261,890	1,176,273	1,153,855
DS							115,835	103,342
Peugeot	734,461	1,369,359	1,708,968	2,152,331	1,667,424	1,552,416	1,602,350	1,702,393
Others					-	19,587	22,670	22,191
PSA Group (1)	1,647,221	2,152,583	2,877,438	3,605,178	2,911,407	2,833,893	2,917,128	2,981,781
Renault (including Trafic II)	1,659,099	1,571,264	2,356,616	2,099,027	2,150,993	2,128,489	2,091,282	2,201,998
Dacia			55,183	341,090	358,036	443,879	517,537	570,533
Renault Samsung Motors			14,517	276,169	155,872	132,307	153,150	206,418
Renault Group (2)	1,659,099	1,571,264	2,426,316	2,716,286	2,664,901	2,704,675	2,761,969	3,032,652
C.B.M.	105							
Renault Trucks (3)	54,086	60,263	96,040	31,874	n/a	n/a	n/a	n/a
<i>of which Mack Trucks</i>		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	5,576,308	5,538,568	5,679,097	6,014,433
KD and CKD units	616,466	287,512						

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	49,034	93,259	192,238	180,462	162,053	169,728	177,494	185,969
Peugeot	127,428	81,439	186,917	210,252	195,652	198,577	195,048	208,075
Others					-	19,587	22,670	22,191
PSA Group (1)	200,979	174,698	379,155	390,714	357,705	387,892	395,212	416,235
Renault (including Trafic II)	166,760	254,334	312,801	302,706	342,043	335,987	341,427	387,670
Dacia	-	-	12,580	17,704	13,853	20,610	21,987	28,208
Renault Group (2)	166,760	254,334	325,381	320,410	355,896	356,597	363,414	415,878
C.B.M.	105							
Renault Trucks (3)	54,086	60,263	96,040	31,874	nd	nd	nd	nd
<i>of which Mack Trucks</i>	-	15,423	34,562	-	-	-	-	-
Etalmobil (Sovam)	113	75	44	0	0	0	0	0
Unic	17,809							
Heuliez (4)	-	231	391	-	-	-	-	0
Irisbus-Renault (4)	-	-	2,547	-	-	-	-	0
TOTAL	439,852	489,601	803,558	742,998	713,601	744,654	758,626	832,113
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	2012	2013	2014	2015
Foreign manufacturers								
Bugatti				0	-	-	-	-
Fiat	-	-	10,377	888	0	-	-	-
Heuliez-Opel				0	0	0	0	0
Lancia	-	-	2,265	1,561	0	-	-	-
Smart	-	-	101,365	97,373	104,154	98,239	87,195	87,000
Toyota	-	-	0	158,512	200,521	192,166	226,208	228,033
Passenger cars	-	-	114,007	258,334	304,675	290,405	313,403	315,033
Light commercial vehicles (Fiat)	-	-	39,428	19,450	15,148	-	-	-
Heavy trucks (Scania)	-	-	10,710	9,594	nd	nd	nd	nd
Irisbus-Heuliez	-	-	-	451	nd	nd	nd	nd
Irisbus	-	-	-	2,473	nd	nd	nd	nd
Evobus	-	-	535	551	nd	nd	nd	nd
Coaches and buses	-	-	535	3,475	nd	nd	nd	nd
Total foreign brands	-	-	164,680	290,853	nd	nd	nd	nd
French manufacturers								
Total French brands	-	-	3,183,681	1,938,528	1,646,775	1,445,489	1,502,806	1,656,470
French and foreign manufacturers								
Total all vehicles	-	-	3,348,361	2,229,381	1,966,598	1,735,894	1,816,209	1,971,503

WORLD PRODUCTION BY FRENCH MANUFACTURERS

► PRODUCTION OF PASSENGER CARS BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	536,366	689,965	976,232	1,272,385	1,081,930	972,073	998,779	967,886
DS						120,089	115,835	103,342
Peugeot	607,033	1,287,920	1,522,051	1,942,079	1,471,772	1,353,839	1,407,302	1,494,318
PSA Group (1)	1,446,242	1,977,885	2,498,283	3,214,464	2,553,702	2,446,001	2,521,916	2,565,546
Renault	1,492,339	1,316,930	2,043,815	1,796,321	1,808,950	1,792,337	1,749,855	1,868,031
Dacia	-	-	42,603	323,386	344,183	423,269	495,550	542,325
Renault Samsung Motors	-	-	14,517	276,169	155,872	132,307	153,150	206,418
Renault Group (1)	1,492,339	1,316,930	2,100,935	2,395,876	2,309,005	2,348,078	2,398,555	2,616,774
TOTAL	2,938,581	3,294,815	4,599,218	5,610,340	4,862,707	4,794,079	4,920,471	5,182,320
KD and CKD units of which production in France	467,879	208,241	-	-	-	-	-	-
Citroën	-	-	504,323	468,398	455,925	236,463	220,516	204,040
DS	-	-	-	-	-	117,222	89,013	80,980
Peugeot	-	-	1,094,756	722,214	584,997	496,762	563,618	607,150
PSA Group (1)	-	-	1,599,079	1,190,612	1,040,922	850,447	873,147	892,170
Renault	-	-	1,166,724	475,185	336,050	313,283	307,234	349,624
Renault Group (1)	-	-	1,166,724	475,185	336,050	313,199	307,234	349,624

(1) See the notes on page 70.

► PASSENGER CAR PRODUCTION BY MODEL IN 2015 (IN UNITS)

Brands / Models	World production	Production in France	Production outside France
PSA Group	2,565,546	892,170	1,673,376
Citroën	967,886	204,040	763,846
C-ZERO	1,554		1,554
C1	60,628		60,628
C3	271,859	132,227	139,632
C4	406,744	58,456	348,288
ZX	3		3
C-ELYSEE	117,432		117,432
C5	35,395	13,249	22,146
NEMO	7,922		7,922
BERLINGO	66,241		66,241
SPACETOURER	108	108	
DS	103,342	80,980	22,362
DS3	48,392	48,392	
DS4	19,387	19,387	
DS5	20,299	13,201	7,098
DS6	15,264		15,264
Peugeot	1,494,318	607,150	887,168
ION	1,804		1,804
108	67,201		67,201
206	7,075		7,075
207	778		778
208	305,431	32,684	272,747
2008	231,192	175,159	56,033
301	98,434		98,434
308	350,805	240,279	110,526
RCZ	4,187		4,187
3008	139,922	73,306	66,616
5008	33,500	33,500	
408	115,197		115,197
4008	5,824		5,824
508	68,051	52,117	15,934
BIPPER	6,677		6,677
PARTNER	58,135		58,135
TRAVELLER	105	105	
Renault Group	2,616,774	349,624	2,267,150
Renault	1,868,031	349,624	1,518,407
TWINGO	128,549		128,549
CLIO	437,259	133,332	303,927
KWID	18,611		18,611
KADJAR	80,280		80,280
CAPTUR	258,034		258,034
ZOE	18,840	18,840	
PULSE	3,078		3,078
LOGAN	280,535		280,535
SANDERO	13,475		13,475
DUSTER	149,884		149,884
MEGANE	244,636	100,406	144,230
FLUENCE	59,275		59,275
LAGUNA	5,966	5,966	
TALISMAN	5,634	5,634	
ESPACE	25,876	25,876	
KANGOO	57,478	54,850	2,628
MASTER	4,720	4,720	
OTHERS	75,901		75,901
Dacia	542,325	0	542,325
LOGAN / SANDERO	296,037		296,037
DUSTER	170,323		170,323
DOKKER	42,882		42,882
LODGY	33,083		33,083
Renault Samsung Motors	206,418	0	206,418
ROGUE	117,565		117,565
SM3 / FLUENCE	23,692		23,692
SM5 / LATITUDE	27,040		27,040
QM5 (KOLEOS)	29,404		29,404
SM7	8,717		8,717
TOTAL	5,182,320	1,241,794	3,940,526

Source: CCFA - NB: Renault also produced 2,120 Twizys at its Valladolid plant (Spain)

WORLD PRODUCTION OF FRENCH MANUFACTURERS

► LIGHT COMMERCIAL VEHICLES (UP TO 5T) PRODUCTION BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	49,034	93,259	192,238	180,462	162,053	169,728	177,494	185,969
Peugeot	127,428	81,439	186,917	210,252	195,652	198,577	195,048	208,075
Others						19,587	22,670	22,191
PSA Group (1)	200,979	174,698	379,155	390,714	357,705	387,892	395,212	416,235
Renault (including Traffic II (2))	166,760	254,334	312,801	302,706	342,043	335,987	341,427	387,670
Dacia			12,580	17,704	13,853	20,610	21,987	28,208
Renault Group (1)	166,760	254,334	325,381	320,410	355,896	356,597	363,414	415,878
Renault Trucks (1)	11,632	7,464	8,321	0	0	0	0	0
Others	86	71	42	0	0	0	0	0
TOTAL	379,457	436,567	712,899	711,124	713,601	744,489	758,626	832,113
KD and CKD units	68,587	79,271	-	-				
of which production in France			370,538	243,029	269,803	281,759	322,425	414,676
Citroën			53,561	42,882	38,684	38,793	40,680	41,471
Peugeot			67,629	38,514	34,598	30,656	33,201	39,058
Others						19,587	22,670	22,191
PSA Group (1)			121,190	81,396	73,282	89,036	96,551	102,720
Renault			240,985	161,633	196,521	192,723	225,874	311,956
Renault Group (1)			240,985	161,633	196,521	192,723	225,874	311,956
Renault Trucks (1)			8,321	0	0	0	0	0
Others			42	0	0	0	0	0

(1) See notes on page 70.

(2) As of 2006, some Renault Trafic II vehicles are classified as passenger cars.

► LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2015 (IN UNITS)

Brands / Models	World production	Production in France	Production outside France
PSA Group	416,235	102,720	313,515
Citroën	185,969	41,471	144,498
C3	8,989	8,552	437
C4	2,726	2,440	286
NEMO	10,722		10,722
BERLINGO	80,235		80,235
JUMPY	30,479	30,479	
JUMPER	52,818		52,818
Peugeot	208,075	39,058	169,017
208	13,401	89	13,312
307	1,357	2	1,355
308	4,364	4,364	
BIPPER	11,581		11,581
PARTNER	83,563		83,563
EXPERT	34,603	34,603	
BOXER	59,206		59,206
Others	22,191	22,191	0
Renault Group	415,878	311,956	103,922
Renault	387,670	311,956	75,714
CLIO	33,416		33,416
MEGANE	4,248		4,248
KANGOO	117,863	96,762	21,101
LOGAN	2,494		2,494
TRAFIC	93,396	93,396	
MASTER	131,403	121,798	9,605
DIVERS	4,850		4,850
Dacia	28,208	0	28,208
DOKKER	28,208		28,208
TOTAL	832,113	414,676	417,437

Source: CCFA.

WORLD PRODUCTION OF FRENCH MANUFACTURERS

► HEAVY TRUCK (5 T AND OVER) PRODUCTION BY BRAND

In units	1980	1990	2000	2010	2012 (3)	2013	2014	2015
Renault Trucks (1)	39,475	50,493	87,719	31,874	38,231	32,295	25,702	31,598
<i>of which Mack Trucks</i>		15,423	34,562					
Others (2)	17,836	4	2	0	0	0	0	0
TOTAL	57,311	50,497	87,721	31,874	38,231	32,295	25,702	31,598
of which production in France			44,402	29,702				
Renault Trucks (1)			44,400	29,702				
Others (2)			2	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 tons and more

► COACH AND BUS (OVER 5 T) PRODUCTION BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
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	0	0	0	0	0
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	2015
TOTAL	52,172	43,956	38,648	46,973
More than 16 t	30,771	25,302	21,266	26,111
7 to 16 t	7,460	6,993	4,436	5,487
Less than 7 t	13,941	11,661	12,946	15,375

Source: CCFA

WORLD PRODUCTION OF FRENCH MANUFACTURERS

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

In units		1980	1990	2000 (1)	2010	2012	2013	2014	2015
Up to 3.5 t		318,633	402,994	577,926	531,452	501,018	543,866	544,739	588,686
	G	281,031	128,422	55,883	61,998	61,258	61,407	52,488	46,973
	D	37,602	274,572	521,229	469,178	433,587	476,896	486,431	537,345
	EL			814	276	6,173	5,563	5,820	4,368
From 3.5 t to 5.1 t		60,824	33,573	134,973	179,672	212,583	200,788	213,887	243,427
	G	14,675	1,961	1,724	0	0	0	0	0
	D	46,149	31,612	133,249	179,672	212,583	200,788	213,887	243,427
From 5.1 t to 12 t	D	25,538	6,377	13,593	2,453	nd	nd	nd	nd
From 12 t to 16 t	D	12,541	8,251	5,009	3,066	nd	nd	nd	nd
From 16 t to 20 t		6,909	5,518	7,304	4,484	nd	nd	nd	nd
Over 20 t		3,054	3,650	6,255	5,543	nd	nd	nd	nd
Road tractors	D	9,269	11,278	20,998	16,328	nd	nd	nd	nd
Coaches - Buses		3,084	2,548	2,938					
	D	3,035	2,548	2,606					
	GA			332					
	EL	49							
Total gasoline		295,706	130,383	57,607	61,998	61,258	61,407	52,488	46,973
Total diesel		144,097	343,806	710,243	680,724	nd	nd	nd	nd
Total electric		49	0	814	276	6,173	5,563	5,820	4,368
Total CNG or LPG				332	-	-	-	-	-
Total all categories		439,852	474,189	768,996	742,998	nd	nd	nd	nd

G: Gasoline. D: Diesel. EL: Electric. GA: CNG or LPG

(1) World production of French manufacturers as of 1997

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

In units	1980	1990	2000 (1)	2010	2012	2013	2014	2015
Passenger cars derivatives								
Citroën	26,904	22,942	29,449	14,972	15,147	13,590	13,072	11,715
Peugeot	69,411	55,208	41,451	33,403	21,514	22,650	18,720	19,122
PSA Group (2)	103,229	78,150	70,900	48,375	36,661	36,240	31,792	30,837
Renault Group	30,420	56,245	60,320	48,167	35,871	34,325	37,810	40,158
Total	133,649	134,395	131,220	96,542	72,532	70,565	69,602	70,995
Small vans								
Citroën	45,573	67,257	100,832	98,042	79,911	88,466	89,765	90,957
Peugeot	27,002	18,537	70,443	97,608	91,826	96,754	93,909	95,144
PSA Group (2)	90,178	85,794	171,275	195,650	171,737	185,220	183,674	186,101
Renault Group	126,779	129,335	147,670	97,142	113,034	137,447	109,070	117,863
Total	216,957	215,129	318,945	292,792	284,771	322,667	292,744	303,964
Large vans								
Citroën	23,813	32,209	61,957	67,448	66,995	67,672	74,657	83,297
Peugeot	33,031	47,623	75,023	79,241	82,312	79,173	82,419	93,809
Others						19,587	22,670	22,191
PSA Group (2)	56,844	79,832	136,980	146,689	149,307	166,432	179,746	199,297
Renault Group	40,508	84,681	104,811	148,404	171,622	157,682	189,314	224,799
Renault Trucks			8,321					
Sovam-Etalmobil	86	71	42					
Total	97,438	164,584	250,154	295,093	320,929	324,114	369,060	424,096
4WD								
Peugeot		1,730						
Pick-ups, small vans, others								
Renault Group			12,580	26,697	35,369	27,308	27,220	33,058

(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 Traffic 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	2010	2012	2013	2014	2015
Europe (1)	1,202 834	1,645 276	2,636 150	2,331 256	2,012 131	2,007 183	2,233 561	2,384 342
of which Eur. union (2)	946,760	1,479 316	2,261 904	1,893 455	1,492 650	1,469 718	1,659 147	1,871 647
Germany	202,939	277,424	337,743	299,072	273,409	237,280	266,233	266,587
Austria	35,775	36,175	41,510	50,767	49,411	42,564	41,119	41,349
Belgium-Luxembourg	105,966	144,896	172,806	182,241	154,540	149,689	142,305	146,015
Denmark	4,059	13,919	30,239	27,801	36,597	39,950	46,744	49,204
Spain	100,640	297,846	556,934	302,663	202,154	203,460	259,366	310,876
Greece		11,458	54,270	10,744	8,232	6,039	9,015	12,132
Italy	381,626	324,952	353,616	317,851	223,923	222,666	254,347	304,829
The Netherlands	84,063	95,340	120,438	108,951	112,575	87,484	95,028	106,236
Portugal	14,729	59,459	68,375	58,750	24,472	29,262	41,692	54,165
United Kingdom	156,071	245,989	432,507	280,244	210,254	243,338	275,266	294,142
Sweden	13,060	18,001	31,473	16,691	24,075	23,680	28,570	32,650
10 new EU member states				130,576	121,294	117,872	133,722	104,417
12, then 13 new EU member states (3)				176,330	153,469	159,864	185,575	170,849
of which: CEEC/CIS (3)	23,619	31,569	164,814	206,868	308,339	288,395	375,470	258,054
Hungary		2,040	23,887	6,156	8,767	9,599	10,725	11,031
Poland		806	59,093	53,521	48,847	46,709	52,141	50,485
Romania			7,520	41,804	27,578	29,677	37,989	45,361
Russia			6,042	158,018	263,335	243,839	354,701	272,461
of which: Switzerland	51,821	43,832	45,654	50,740	44,778	38,722	37,530	43,545
of which: Turkey		13,069	148,264	168,456	155,003	201,600	152,800	211,096
Africa	133,213	45,675	69,865	171,484	292,971	257,752	230,637	241,078
of which: South Africa	22,439	0	13,913	14,711	12,070	21,661	13,933	23,223
North Africa	15,542	20,432	37,236	139,790	258,295	211,448	186,116	184,708
Nigeria	61,133	8,319	8,860	210	433	1,049	1,244	301
America	145,204	29,360	230,270	559,780	646,567	703,734	458,990	426,937
of which: Argentina	11,899	516	97,605	149,746	189,169	243,448	122,434	122,408
Brazil			80,205	320,930	349,360	349,337	274,577	210,638
Colombia	11,885	9,112	16,659	6,329	3,852	2,383	49,331	50,819
Mexico		20	1,408	24,822	12,373	10,454	8,382	10,685
Asia (1)	26,178	96,645	166,261	1,201 459	905,283	833,072	1,001 386	1,070 526
of which: Japan	883	14,264	15,976	12,346	13,660	13,180	12,687	25,072
China		3,960	54,334	392,569	468,799	587,311	766,683	756,268
Iran	12,836	29,852	45,722	516,121	224,639	28,547	27,913	38,176
India				4,488	35,157	64,368	44,849	50,877
South Korea				157,824	54,588	63,711	114,027	90,056
Pacific	6,290	5,761	9,984	14,079	15,314	16,827	16,793	17,929
of which: Australia	2,398	820	2,765	9,761	10,939	11,827	11,933	13,435
Total all categories	1,529 652	1,881 998	3,174 447	4,306 065	3,898 019	3,842 199	3,961 884	4,159 198
KD and CKD units	471,744	208,241						

► NEW COMMERCIAL VEHICLE DELIVERIES BY DESTINATION

In units	1980	1990	2000	2010	2012	2013	2014	2015
Europe (1)	88,235	174,998	379,289	357,998	341,640	368,180	434,133	456,712
of which Eur. union (2)	74,382	156,268	312,421	312,293	286,108	321,887	384,461	418,876
Germany	17,490	23,581	50,081	46,406	57,935	67,191	82,541	90,020
Austria	2,185	3,702	4,697	6,797	7,361	6,873	6,711	7,585
Belgium-Luxembourg	11,455	18,383	22,857	29,330	27,603	32,353	27,736	29,267
Spain	71	44,110	57,516	28,263	19,310	26,866	29,591	38,386
Italy	26,207	19,923	35,910	39,690	21,845	35,519	45,236	34,656
The Netherlands	8,234	7,995	23,087	13,848	15,868	13,822	14,273	15,904
Portugal	2,805	14,291	34,551	18,557	7,167	9,663	13,238	15,539
United Kingdom	8,390	21,127	55,647	60,997	64,248	70,458	97,429	101,797
10 new EU member states				28,891	30,996	33,389	38,022	44,233
12, then 13 new EU member states (3)				33,784	37,332	40,842	49,636	55,213
of which: CEEC/CIS (3)	361	2,781	25,100	16,121	24,118	18,814	20,937	29,981
Poland	301	97	5,624	14,258	14,210	15,429	17,487	13,563
of which: Switzerland	3,317	2,921	4,293	8,500	9,528	8,266	7,944	7,855
Africa	75,802	18,320	16,074	27,769	46,758	41,457	40,132	27,611
of which: North Africa	18,334	8,588	13,509	24,690	42,231	37,558	36,911	26,466
America	5,875	5,453	36,682	85,810	107,161	109,866	75,224	61,943
Asia (1)	6,930	11,302	8,260	5,632	6,729	5,562	6,634	9,512
Pacific	776	1,364	1,797	2,208	2,940	4,069	4,547	6,064
Total all categories	178,126	213,502	444,516	480,430	506,303	530,355	571,759	563,013
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 derive from annual enterprise surveys (EAE) on the automaking sector. Since 2008, they have been replaced by the ESANE information system, which combines administrative data and surveys.

These statistics are one of the main sources of our understanding of French industry. SESSI, previously the Secretary of State for Industry's statistics department and now attached to INSEE, uses those figures.

The data reflects the activity of companies with French and foreign capital, located in France, and whose main activity can extend outside France.

The lifespan of companies (creation, reorganisation, acquisition, sale) can feature major variations from one year to the next.

The introduction of a new economic nomenclature, taking into account data both from surveys and administrative data (and in particular, cross-referencing both), and new rules governing statistics (ordering parties, etc.) are the reason behind a slight reduction in the scope of the sector between 2007 and 2008.

From 2016, INSEE was basing its work on the notion of 'enterprise' defined by decree 2008-1354 in application of the 'modernisation of the

economy' law (LME) which is based on the notion of groups of companies (rather than legal units), so as to better take into account the new economic realities that have arisen through globalisation. Data for 2012 and 2013 (below) come from this new source. Trends between the old and new scopes are minor for the moment.

► PHYSICAL AND FINANCIAL DATA FOR THE AUTOMOBILE MANUFACTURING INDUSTRY

	Units	1990	2000	2010	2011	2012	2013	2014 (1)	2015 (1)
Physical data									
Employees (2)	Units	216,848	190,830						
Employees on 12/31 (excluding temporary staff)				137,527	139,411	137,918	130,480	124,500	118,000
Production in France (only light vehicles since 2012)	Thousands		3,348	2,229	2,295	1,967	1,736	1,816	1,972
Production per employee			17.5	16.2	16.5	14.3	13.3	14.6	16.7
Financial data									
Net sales	€ millions	49,472	73,684	78,969	83,317	77,455	77,075	77,000	80,800
Export sales	€ millions	18,817	42,290	45,526	48,719	46,419	45,487	46,000	48,500
Exports as a % of total sales	%	38.0%	57.4%	57.6%	58.5%	59.9%	59.0%	59.7%	60.0%
Value added (VA) before tax	€ millions	10,650	13,282	10,112	9,541	7,622	8,288	8,500	8,900
Value added/sales	%	21.5%	18.0%	12.8%	11.5%	9.8%	10.8%	11.0%	11.0%
Value added per employee	€ thousands	49	70	74	68	55	64	68	75
Social security costs	€ millions	1,860	2,153	2,302	2,443	2,377	2,176		
Social security costs per employee	€ thousands	8.6	11.3	16.7	17.5	17.2	16.7		
Wages and salaries	€ millions	4,271	5,093	5,696	5,632	5,672	5,696		
Wages and salaries per employee	€ thousands	19.7	26.7	41.4	40.4	41.1	43.7		
Personnel costs	€ millions	6,132	7,246	7,999	8,075	8,049	7,872		
Personnel costs per employee	€ thousands	28.3	38.0	58.2	57.9	58.4	60.3		
Personnel costs/VA	%	57.6%	54.6%	79.1%	84.6%	105.6%	95.0%		
Gross operating surplus	€ millions	3,855	5,201	1,340	710	-1,129	-378		
Gross operating surplus/VA (3)	%	36.2%	39.2%	13.3%	7.4%	-14.8%	-4.6%		
Interest expense	€ millions	1,170	1,178	2,862	1,134	1,287	2,058		
Interest expense/VA	%	11.0%	8.9%	28.3%	11.9%	16.9%	24.8%		
Interest income	€ millions	1,095	2,508	2,191	2,049	2,147	2,251		
Interest income/VA	%	10.3%	18.9%	21.7%	21.5%	28.2%	27.2%		
Net interest income (expense)	€ millions	-74	1,330	-671	915	860	193		
Net interest income (expense)/VA	%	-0.7%	10.0%	-6.6%	9.6%	11.3%	2.3%		
Cash flow	€ millions	2,918	5,499	1,078	1,537	-327	-310		
Cash flow/VA	%	27.4%	41.4%	10.7%	16.1%	-4.3%	-3.7%		
Net income (loss)	€ millions	969	2,851	293	-521	n/a	n/a		
Net income/sales	%	2.0%	3.9%	0.4%	-0.6%	n/a	n/a		
Capital expenditure	€ millions	3,139	3,807						
Gross fixed investments exclusive of contributions	€ millions			2,078	2,230	2,324	1,913	1,950	2,100
Capital expenditure/sales	%	6.3%	5.2%	2.6%	2.7%	3.0%	2.5%	2.5%	2.6%
Capital expenditure/VA	%	29.5%	28.7%	20.6%	23.4%	30.5%	23.1%	22.9%	23.6%

(1) CCFA estimates for 2014 and 2015

(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 AUTOMOBILE 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. The trends witnessed since 2016 are described on the opposite page, featuring some changes to the presentation of the data. For example, headcount on December 31, 2013 was 80,416 using the previous scope, and 86,624 with the new one.

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	2010	2011	2012	2013	2014 (1)	2015 (1)
Physical data									
No. of companies (> 20 employees up to 2007)	units	320	243	639	616	687	624		
Employees (3)	units	112,963	94,171						
Employees on 12/31 (excluding temporary staff)	units			61,759	59,579	88,752	86,624	83,679	82,005
Financial data									
Net sales	€ millions	14,452	17,766	16,056	16,542	20,934	20,356	21,231	22,505
Export sales	€ millions	4,018	7,512	7,865	8,513	10,275	10,057		
Exports as a % of total sales	%	27.8%	42.3%	49.0%	51.5%				
Value added (VA) before tax	%			51%	53%	54%	55%	54%	55%
value added/sales	€ millions	4,530	4,643	3,885	3,761	5,201	5,187		
Value added per employee before tax	%	31.3%	26.1%	24.2%	22.7%	24.8%	25.5%		
Social security costs	€ thousands	40	49	63	63	59	60		
Social security costs per employee	€ millions	867	902	937	940	1,395	1,389		
Wages and salaries	€ thousands	7.7	9.6	15.2	15.8	15.7	16.0		
Wages and salaries per employee	€ millions	2,060	2,213	2,302	2,173	3,217	3,232		
Personnel costs	€ thousands	18.2	23.5	37.3	36.5	36.3	37.3		
Personnel costs per employee	€ millions	2,926	3,115	3,239	3,113	4,613	4,621		
Personnel costs/VA	€ thousands	25.9	33.1	52.4	52.2	52.0	53.3		
Gross operating surplus	%	64.6%	67.1%	83.4%	82.8%	88.7%	89.1%		
Gross operating surplus/VA	€ millions	1,337	1,206	412	417	264	247		
Interest expense	%	29.5%	26.0%	10.6%	11.1%	5.1%	4.8%		
Interest expense/VA	€ millions	387	440	177	129	140	339		
Interest income	%	8.5%	9.5%	4.6%	3.4%	2.7%	6.5%		
Interest income/VA	€ millions	213	337	217	305	591	355		
Net interest income (expense)	%	4.7%	7.3%	5.6%	8.1%	11.4%	6.8%		
Net interest income (expense)/VA	€ millions	-174	-103	40	175	451	15		
Cash flow	%	-3.8%	-2.2%	1.0%	4.7%	8.7%	0.3%		
Cash flow/VA	€ millions	883	889	341	428	454	345		
Net income (loss)	%	19.5%	19.2%	8.8%	11.4%	8.7%	6.7%		
Net income/sales	€ millions	400	-92	-17	201	36	-154		
Capital expenditure	%	2.8%	-0.5%	-0.1%	1.2%	0.2%	-0.8%		
Gross fixed investments exclusive of contributions	€ millions	899	1,024						
Capital expenditure/sales	€ millions			413	524	743	708		
Capital expenditure/VA	%	6.2%	5.8%	2.6%	3.2%	3.6%	3.5%		
Investissements/VA	%	19.8%	22.0%	10.6%	13.9%	14.3%	13.7%		

(1) FIEV estimates

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

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY BRAND

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	270,983	266,822	261,508	301,607	216,237	194,728	199,382	201,065
DS				26,539	50,193	43,589	31,746	30,257
Peugeot (1)	414,335	498,481	397,547	400,663	305,440	289,587	305,014	327,393
Dacia				104,641	80,790	89,844	102,516	97,441
Renault	759,312	639,440	602,415	497,820	343,345	337,608	353,890	382,504
Bolloré					1,543	658	1,170	1,191
Others France	56	146	63	54	425	249	52	50
TOTAL FRANCE	1,444,686	1,404,889	1,261,533	1,331,324	997,973	956,263	993,770	1,039,901
Alfa Romeo	25,380	15,916	12,774	13,033	10,323	8,047	7,608	6,353
Audi	17,455	32,762	34,937	50,936	61,754	59,147	56,395	58,734
BMW	17,239	29,580	31,576	46,074	48,045	46,742	47,682	53,558
Fiat	53,147	128,822	95,983	72,717	43,554	47,683	45,737	54,443
Ford	68,426	159,575	117,061	114,810	92,469	76,470	75,089	80,729
Honda	8,293	14,002	8,716	11,251	8,406	8,846	7,091	7,325
Hyundai			11,019	18,785	28,733	25,738	17,165	23,968
Infiniti				267	441	197	669	1,139
Jaguar	269	1,290	1,939	1,126	897	879	715	1,530
Jeep		3,824	3,001	1,177	3,228	1,327	2,783	8,585
Kia			2,631	24,056	33,018	33,503	28,186	29,146
Lada	13,069	15,758	1,867	346	248	59	9	3
Lancia	6,801	18,225	5,864	3,368	5,248	4,812	6,105	1,469
Land Rover	237	3,611	7,570	2,735	7,770	6,716	6,794	8,846
Lexus				1,921	2,456	2,960	3,486	4,457
Mazda	13,021	18,563	6,366	10,232	5,107	6,272	6,062	8,418
Mercedes	14,430	28,605	43,389	45,612	47,567	46,966	49,148	55,376
Mini				18,007	21,483	19,099	18,277	22,512
Mitsubishi	2,788	4,298	5,575	3,514	3,639	3,448	3,496	3,936
Nissan	17,700	25,707	31,330	54,084	69,692	62,983	68,072	74,102
Opel	32,709	113,490	133,576	94,877	71,666	59,620	61,246	64,170
Porsche	1,060	1,297	825	2,073	3,336	2,813	3,449	4,943
Rover	20,690	41,147	13,474					
Saab	179	2,459	3,265	574	40	7		
Seat	306	48,052	40,562	30,645	24,180	22,039	21,090	22,009
Skoda	1,636	1,825	11,570	18,533	22,464	19,341	20,412	21,759
Smart			6,645	6,408	5,441	5,267	4,149	8,107
Ssangyong			19	451	290	209	344	636
Subaru			2,312	1,146	971	928	731	841
Suzuki			11,355	22,070	16,026	15,485	15,835	18,506
Tesla				11	10	38	328	708
Toyota	13,095	15,839	43,698	65,390	68,007	71,693	66,774	71,755
Volkswagen	75,727	155,971	152,868	146,538	154,434	141,427	139,554	144,103
Volvo	8,207	12,415	6,777	11,841	13,396	11,024	12,459	13,876
TOTAL FOREIGN (2)	428,516	904,241	872,351	920,345	900,787	834,193	802,115	877,325
TOTAL ALL CATEGORIES	1,873,202	2,309,130	2,133,884	2,251,669	1,898,760	1,790,456	1,795,885	1,917,226
of which Temporary Transit	-	-	-	39,011	38,247	34,205	30,648	31,665
TOTAL FRANCE (AS A %)	77.1%	60.8%	59.1%	59.1%	52.6%	53.4%	55.3%	54.2%
TOTAL FOREIGN (AS A %)	22.9%	39.2%	40.9%	40.9%	47.4%	46.6%	44.7%	45.8%

(1) Including Talbot up to 1985

► USED PASSENGER CAR REGISTRATIONS

In units	1980	1990	2000	2010	2012	2013	2014	2015
TOTAL ALL CATEGORIES	4,441,423	4,758,750	5,082,122	5,386,007	5,371,599	5,317,717	5,446,131	5,562,082
Used/new ratio	2.4	2.1	2.4	2.4	2.8	3.0	3.0	2.9

► USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS

In units	1980	1990	2000	2010	2012	2013	2014	2015
TOTAL ALL CATEGORIES		644,925	651,033	806,398	778,270	750,371	772,709	789,073
Used/new ratio		1.6	1.6	1.9	2.0	2.0	2.0	2.0

REGISTRATIONS

► NEW DIESEL PASSENGER CAR REGISTRATIONS BY BRAND

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	24,158	111,881	138,628	228,977	166,894	144,873	134,756	113,446
DS				14,864	36,972	29,082	21,190	15,281
Peugeot (1)	65,199	189,322	206,153	307,518	242,860	203,291	214,419	190,548
Dacia				53,737	65,204	58,334	64,895	54,326
Renault	45,862	205,374	257,909	352,530	253,796	236,972	224,489	233,998
Total France (2)	135,219	506,577	602,711	957,626	765,726	672,552	659,749	607,599
Alfa Romeo		2,524	7,444	8,432	6,660	5,145	4,273	2,995
Audi	19,591	13,495	25,901	45,201	52,449	48,513	45,192	44,445
BMW-Mini		8,271	21,065	50,906	56,503	54,094	53,289	57,145
Chrysler-Dodge-Jeep			4,161	2,863	3,145	1,203	2,462	7,183
Fiat-Lancia	10,352	33,913	38,337	28,240	15,056	15,686	13,199	16,935
Ford	1,833	56,331	58,896	89,334	65,176	44,174	40,861	41,986
Honda			413	5,029	3,992	5,051	4,111	4,364
Hyundai			5,510	13,174	20,706	18,472	10,592	15,069
Kia			1,200	15,428	20,704	19,948	17,327	15,870
Land Rover		2,980	5,656	2,637	7,388	6,524	6,473	8,192
Mazda		5,200	3,204	6,768	3,386	5,221	4,792	4,802
Mercedes	10,635	15,676	30,007	41,460	43,537	41,355	43,542	47,646
Mitsubishi		1,623	3,227	3,102	3,539	2,828	1,953	2,053
Nissan-Infiniti	694	4,982	15,533	35,092	51,675	47,899	48,843	46,879
Opel	6,178	28,218	63,726	63,751	45,363	32,343	31,738	29,335
Rover		4,419	7,480					
Seat		14,367	27,861	25,462	18,718	14,467	11,696	10,683
Skoda			7,741	14,781	15,889	12,601	13,870	12,930
Suzuki			3,165	9,263	5,682	4,649	3,947	4,359
Toyota-Lexus		3,594	12,282	35,744	32,082	23,546	20,332	17,879
Volkswagen		50,975	89,487	118,702	117,017	99,149	91,387	80,893
Volvo	1,198	4,097	4,786	11,614	13,087	10,332	11,545	12,747
TOTAL FOREIGN (2)	50,815	255,477	443,774	635,547	618,818	527,177	486,909	489,525
TOTAL ALL CATEGORIES	186,034	762,054	1,046,485	1,593,173	1,384,544	1,199,729	1,146,658	1,097,124
of which Temporary Transit				34,432	35,962	31,988	27,127	27,141
% diesel	9.9%	33.0%	49.0%	70.8%	72.9%	67.0%	63.8%	57.2%
TOTAL FRANCE AS A %	72.7%	66.5%	57.6%	60.1%	55.3%	56.1%	57.5%	55.4%
TOTAL FOREIGN AS A %	27.3%	33.5%	42.4%	39.9%	44.7%	43.9%	42.5%	44.6%

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

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	53,245	80,958	77,048	70,579	64,259	61,601	63,233	59,295
DS				259	1,087	730	625	489
Peugeot (1)	58,986	60,813	74,950	72,228	63,671	60,469	59,197	59,649
Dacia				5,434	3,732	3,959	3,377	2,594
Renault	116,602	162,549	139,752	135,591	123,447	116,282	117,823	124,634
Others France	256	415	40	528	523	807	953	905
Total France	229,089	304,735	291,790	284,619	256,719	243,848	245,208	247,566
Fiat	8,326	10,139	25,253	34,659	34,036	33,021	30,757	32,071
Ford	9,099	16,080	18,110	20,437	18,478	16,929	20,273	22,534
Hyundai			588	237	276	299	194	195
Isuzu			108	1,961	1,788	2,167	1,960	2,024
Iveco	2,941	11,543	16,534	11,610	11,385	10,837	11,555	11,414
Land Rover	645	2,718	1,857	1,550	1,478	1,516	1,796	2,591
Mazda	579	1,067	916	482	160	60	63	58
Mercedes	5,495	11,156	23,139	19,051	18,275	18,024	17,710	18,643
Mitsubishi			3,392	2,639	1,716	1,625	1,341	1,836
Nissan	861	5,063	5,197	7,307	9,076	8,761	8,617	7,260
Opel	664	2,408	7,561	7,195	7,257	5,404	5,545	6,782
Toyota	7,112	6,099	1,771	4,013	4,505	3,932	4,669	5,210
Volkswagen	8,091	9,673	13,819	13,249	14,815	15,563	17,552	16,375
TOTAL FOREIGN (2)	48,798	89,060	123,176	132,993	127,330	123,483	126,866	131,860
TOTAL ALL CATEGORIES	277,887	393,795	414,966	417,612	384,049	367,331	372,074	379,426
TOTAL FRANCE AS A %	82.4%	77.4%	70.3%	68.2%	66.8%	66.4%	65.9%	65.2%
TOTAL FOREIGN AS A %	17.6%	22.6%	29.7%	31.8%	33.2%	33.6%	34.1%	34.8%

(1) Including Talbot up to 1985

(2) Including others.

(3) 2006 and more recent data are not comparable to data from prior years because some models were reclassified to "Other France" and "Foreign".

REGISTRATIONS

► NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY BRAND

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

In units	1980	1990	2000	2010	2012	2013	2014	2015
Citroën	324,228	347,780	338,556	372,186	280,496	256,329	262,615	260,360
DS				26,798	51,280	44,319	32,371	30,746
Peugeot	473,321	559,294	472,497	472,891	369,111	350,056	364,211	387,042
Dacia				110,075	84,522	93,803	105,893	100,035
Renault	875,914	801,989	742,167	633,411	466,792	453,890	471,713	507,138
Total FRANCE	1,673,775	1,709,624	1,553,323	1,615,943	1,254,692	1,200,111	1,238,978	1,287,467
Fiat	61,473	138,961	121,236	107,376	77,590	80,704	76,494	86,514
Ford	77,525	175,655	135,171	135,247	110,947	93,399	95,362	103,263
Land Rover	882	6,329	9,427	4,285	9,248	8,232	8,590	11,437
Mercedes	19,925	39,761	66,528	64,663	65,842	64,990	66,858	73,086
Nissan-Infiniti	18,561	30,770	36,527	61,658	79,209	71,941	77,358	76,001
Opel	33,373	115,898	141,137	102,072	78,923	65,024	66,791	70,952
Rover	20,812	41,343	13,564	0	0	0	0	0
Seat	306	51,999	42,230	31,080	24,180	22,039	21,090	22,009
Toyota-Lexus	20,207	21,938	45,469	71,324	74,968	74,968	74,929	81,422
Volkswagen	83,818	165,644	166,687	159,787	169,249	156,990	157,106	160,478
TOTAL FOREIGN	477,314	993,301	995,527	1,053,338	1,028,117	957,676	928,981	1,009,185
TOTAL ALL CATEGORIES	2,151,089	2,702,925	2,548,850	2,669,281	2,282,809	2,157,787	2,167,959	2,296,652
TOTAL FRANCE AS A %	77.8%	63.3%	60.9%	60.5%	55.0%	55.6%	57.1%	56.1%
TOTAL FOREIGN AS A %	22.2%	36.7%	39.1%	39.5%	45.0%	44.4%	42.9%	43.9%

Note: 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 T) REGISTRATIONS BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
Renault Trucks	17,984	20,453	20,818	10,908	12,929	12,069	10,367	11,568
TOTAL FRANCE	18,312	20,738	20,992	10,964	12,965	12,105	10,423	11,584
DAF	1,881	3,460	4,365	4,464	5,545	5,388	4,193	4,723
Iveco	6,578	7,204	6,998	4,003	4,488	4,449	4,354	4,783
MAN	327	1,433	3,498	2,729	4,540	4,145	3,811	4,581
Mercedes	8,014	9,500	9,976	5,229	7,100	7,766	5,911	6,128
Scania	1,389	2,711	4,963	2,553	2,823	3,499	3,626	4,359
Volvo	3,724	4,647	6,739	3,938	5,564	5,507	4,912	5,219
TOTAL FOREIGN	23,534	29,290	36,924	23,257	30,413	31,160	27,136	30,132
TOTAL ALL CATEGORIES	41,846	50,028	57,916	34,221	43,378	43,265	37,559	41,716
TOTAL FRANCE AS A %	43.8%	41.5%	36.2%	32.0%	29.9%	28.0%	27.8%	27.8%
TOTAL FOREIGN AS A %	56.2%	58.5%	63.8%	68.0%	70.1%	72.0%	72.2%	72.2%

► NEW HEAVY TRUCK (OVER 5 T) REGISTRATIONS

In units	1980	1990	2000	2010	2012	2013	2014	2015
Total	-	-	59,056	55,591	52,154	51,418	47,227	47,336
Used/new ratio	-	-	1.0	1.6	1.2	1.2	1.3	1.1

► NEW COACH AND BUS (OVER 5 T) REGISTRATIONS BY BRAND

In units	1980	1990	2000	2010	2012	2013	2014	2015
Renault	2,126	1,692	1,633					
Divers France	107	255	367					
Kässbohrer-Setra	479	392	261					
Mercedes	554	245	602					
TOTAL ALL CATEGORIES	3,558	3,160	4,320					
Groupe Iveco Bus (1)				2,412	2,603	2,902	2,483	3,197
Groupe Evobus (2)				1,433	1,846	1,933	1,964	2,050
Groupe VGF (3)				559	209	323	247	589
Bova				116	34	28	1	
Temsa				309	174	229	121	146
Van Hool	57	250	230	169	98	138	93	98
Others				384	580	768	500	644
TOTAL ALL CATEGORIES				5,382	5,544	6,321	5,409	6,724

(1) Irisbus Group: Irisbus, Irisbus-Heuliez, Irisbus-Renault, Karosa and Iveco

(2) Evobus: Kässbohrer and Mercedes

(3) Neoman Bus: MAN and Neoplan, Scania from 2015

VEHICLE OWNERSHIP

► **MOTORISATION RATE** (INTERNATIONAL COMPARISONS)
NUMBER OF CARS AND COMMERCIAL VEHICLES PER 1,000 INHABITANTS
ON DECEMBER 31

	1985	1995	2005	2014
European Union 28 countries			530	569
European Union 15 countries (1)	380	473	580	592
13 new EU member states			345	481
Germany	450	529	597	578
Belgium	363	463	527	570
Spain	276	430	580	576
France	446	520	591	598
Italy	412	541	666	687
United Kingdom	379	474	571	575
Sweden	400	445	514	540
Poland	117	229	388	620
Turkey	27	65	124	189
Canada	559	562	585	644
USA	708	759	803	808
South Korea	25	177	328	406
Japan	375	527	592	607
Argentina	173	167	181	320
Brazil	86	89	124	207
China	3	8	24	102
India	3	6	9	22

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

► **TOTAL VEHICLES IN USE** (ON JANUARY 1, 2016)

In thousands	All fuels	Diesel (1)
Passenger cars		
Up to 5 HP	14,475	8,098
6 to 10 HP	15,901	10,975
11 HP and over	1,624	826
TOTAL PASSENGER CARS	32,000	19,900
Light commercial vehicles (LCV)		
Up to 2.5 t	3,621	3,339
From 2.5 t to 3.5 t	2,393	2,384
From 3.6 t to 5 t	16	15
TOTAL LCVS UP TO 5 T	6,030	5,738
TOTAL PASSENGER CARS AND LCVS	38,030	25,638
Heavy trucks over 5 t		
Rigids		
From 5 t to 12 t	72	72
From 12 t to 16 t	44	44
From 16 t to 20 t	111	111
20 t and over	106	106
TOTAL RIGIDS	333	333
Tractors		
TOTAL HEAVY TRUCKS	532	530
Coaches and buses	90	87
TOTAL COMMERCIAL VEHICLES OVER 5 T	622	617
TOTAL COMMERCIAL VEHICLES ALL SIZES	6,652	6,355
TOTAL ALL VEHICLES	38,652	26,255

(1) Including diesel hybrid

Source: CCFA estimates

► **VEHICLE OWNERSHIP**

	Unit	1980	1990	2000	2010	2012	2013	2014	2015 (1)
Households without a vehicle	%	29.2%	23.2%	19.7%	16.5%	16.7%	16.9%	17.2%	17.1%
Households with a vehicle	%	70.8%	76.8%	80.3%	83.5%	83.3%	83.1%	82.8%	82.9%
Households with one vehicle	%	54.3%	50.5%	50.7%	47.6%	48.1%	48.3%	48.8%	48.4%
Households with two vehicles	%	14.8%	23.0%	25.4%	30.7%	30.4%	29.9%	28.9%	29.4%
Households with three or more vehicles	%	1.7%	3.3%	4.2%	5.2%	4.8%	5.0%	5.1%	5.1%
Average age of the vehicle	year		5.90	7.25	8.0	8.3	8.6	8.7	8.9
Average ownership period	year		3.66	4.43	5.0	5.2	5.3	5.4	5.5
Used passenger cars	%		50.0	56.1	58.9	57.9	59.0	58.5	58.5
Total average kilometers	km	12,200	13,041	13,560	11,755	11,639	11,282	11,083	11,245
Gasoline average kilometers	km	11,600	11,651	10,780	8,108	8,022	7,551	7,618	7,714
Diesel average kilometers	km	26,200	20,950	18,140	14,542	14,256	13,959	13,574	13,821
Domestic passenger road transportation									
By passenger car	billions of passenger-km		598.7	697.6	709.8	710.7	712.9	720.9	738.0
By coach-bus	billions of passenger-km		52.3	55.9	67.0	69.0	69.5	70.0	71.2
Total traffic	billions of passenger-km		736.6	849.5	889.8	896.9	901.6	909.1	927.9
Road transport as a % of total traffic	%		88.4	88.7	87.3	86.9	86.8	87.0	87.2
Annual change									
By passenger car	%			-0.1	+0.8	+0.1	+0.3	+1.1	+2.4
By coach-bus	%			+2.6	+4.4	+0.7	+0.7	+0.7	+1.7

(1) Provisional.

Source: TNS-SOFRES PARCAUTO, calculations by INRETS-ADEME, INSEE and SOeS

► **TOTAL VEHICLES IN USE ON JANUARY 1**

In thousands	1980	1990	2000	2010	2013	2014	2015	2016
Passenger cars								
Up to 5 HP	5,090	8,312	10,572	12,946	13,761	13,948	14,210	14,475
6 to 10 HP	11,460	13,385	15,723	16,583	16,266	16,115	15,990	15,901
Over 10 HP	1,890	1,313	1,186	1,521	1,573	1,588	1,600	1,624
TOTAL PASSENGER CARS	18,440	23,010	27,480	31,050	31,600	31,650	31,800	32,000
Of which diesel (1)	730	3,265	9,261	17,458	19,377	19,645	19,836	19,900
Commercial vehicles								
Up to 3.5 t	1,985	4,125	4,974	5,750	5,896	5,915	5,965	6,014
From 3.5 t to 5 t	103	20	12	10	14	15	15	16
From 5 t to 20 t	250	334	287	250	242	235	233	227
20 t and over	26	41	46	91	100	102	106	106
Tractors	129	160	210	202	199	195	200	199
TOTAL COMMERCIAL VEHICLES	2,493	4,680	5,529	6,303	6,451	6,462	6,608	6,562
Of which diesel (1)	976	2,342	4,202	5,632	6,033	6,091	6,280	6,355
Coaches and buses	57	68	80	85	87	88	89	90
OVERALL TOTAL	20,990	27,758	33,090	37,438	38,138	38,200	38,408	38,652
Of which diesel (1)	1,763	5,675	13,543	23,172	25,494	25,821	26,116	26,255

(1) Including diesel hybrid

Source: CCFA estimates

FUEL AND TAXATION, EMISSIONS AND CO₂

► ROAD FUEL CONSUMPTION, PRICES AND TAXES

	UNITS	1980	1990	2000	2010	2012	2013	2014	2015
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	7,335	6,650	6,397	6,336
Premium unleaded 95-E10	Millions of liters				1,379	2,331	2,714	2,971	3,146
% of total gasoline	%				12.7%	24.1%	29.0%	31.7%	33.2%
TOTAL GASOLINE	Millions of liters	24,223	24,276	18,253	10,880	9,666	9,363	9,368	9,482
DIESEL	Millions of liters	11,415	20,664	32,373	39,749	40,382	40,559	40,718	41,048
TOTAL ROAD FUEL	Millions of liters	35,638	44,940	50,627	50,629	50,047	49,922	50,086	50,530

Source: CPDP.

	UNITS	1980	1990	2000	2010	2012	2013	2014	2015
RETAIL PRICES OF FUEL (annual average)									
Regular gasoline inc. VAT	euros/litre	0.49	0.80						
Tax as a %	%	57	73						
Premium leaded - AVSR	euros/litre	0.52	0.81	1.17					
Tax as a %	%	57	74	71					
Premium unleaded 98	euros/litre	-	0.79	1.11	1.38	1.62	1.59	1.54	1.42
Tax as a %	%	-	71	69	60	54	55	56	61
Gasoline	euros/litre	0.52	0.81	1.12	1.35	1.58	1.54	1.48	1.35
Tax as a %	%	57	74	69	61	55	56	58	63
Diesel	euros/litre	0.37	0.54	0.85	1.15	1.40	1.35	1.29	1.15
Tax as a %	%	46	61	62	54	47	49	51	59

Source: Soes.

► TOTAL AUTOMOBILE EMISSIONS IN MAINLAND FRANCE BETWEEN 1990 AND 2015

	1990	1995	2000	2005	2010	2014	2015 (1)	Changes 2015/1990	Changes 2015/2014
Regulated pollutants (in thousands of tons)									
SO₂	143	117	23	4	1	1	1	-99%	1%
CO	5,902	4,198	2,609	1,515	784	441	400	-93%	-9%
NO_x	1,232	1,115	940	760	591	499	474	-62%	-5%
COVNM	905	681	444	244	112	57	50	-94%	-12%
Lead (in tons)	3,902	1,171	48	46	50	52	53	-99%	1%
PM10: particles	74	84	69	54	48	36	34	-54%	-6%
Other emissions (In millions of tons)									
CO₂	110	119	126	128	122	120	121	9%	1%

(1) 2015 estimates. Source: CITEPA / Secten data, updated May 2016

► CO₂ EMISSIONS IN MAINLAND FRANCE BY BUSINESS SECTOR

In millions of tons of CO ₂	1990	1995	2000	2004	2005	2010	2013	2014	2015 (1)
Energy processing	69	58	63	62	67	59	51	38	40
Manufacturing industry	114	110	109	102	104	90	82	79	80
Residential/Commercial	84	87	88	98	98	91	85	71	78
Transport	117	126	134	137	135	128	126	126	127
<i>of which road</i>	110	119	126	130	128	122	120	120	121
<i>of which other transportation</i>	6.8	7.1	7.8	7.0	6.8	6.1	6.2	6.0	6.1
Agriculture/silviculture	11.2	11.6	12.0	12.7	12.4	12.1	12.8	12.6	12.5
Total excluding LLUCF (2)	395	393	407	412	416	380	356	326	337
LLUCF (2)	-37	-43	-41	-54	-55	-46	-60	-58	-58
Total without LLUCF (2)	358	350	367	358	362	334	295	269	279

(1) 2015 estimates. (2) LLUCF: Land Use, Land Use Change and Forestry. Source: CITEPA/ CORALIE/ Secten format, May 2016.

► AVERAGE CO₂ EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE

In grams of CO ₂ per km	1995	2000	2005	2010	2012	2013	2014	2015	2015/2000
France									
Gasoline	177	168	159	130	127	122	119	116	-52
Diesel	175	155	149	130	123	117	114	111	-44
Total	176	162	152	130	124	117	114	111	-51
Europe 15 countries									
TOTAL	186	171	161	141	132	127	122	119	-52

Source: ADEME (June 2016)

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%
2014	13,651	3%	2,988	22%	2,557	13%	20,261	-3%	39,457	2%	1,222	-1%	40,679	2%
2015	14,967	10%	4,161	39%	2,882	13%	21,013	4%	43,024	9%	1,364	12%	44,388	9%
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%
2014	22,263	5%	2,999	4%	2,961	-13%	15,819	1%	44,043	2%	1,118	-3%	45,161	2%
2015	25,145	13%	3,155	5%	3,456	17%	17,641	12%	49,398	12%	1,223	9%	50,621	12%
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	
2014	-8,612		-12		-404		+4,442		-4,586		+104		-4,482	
2015	-10,178		+1,006		-573		+3,372		-6,374		+141		-6,233	
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	
2014	61		100		86		128		90		109		90	
2015	60		132		83		119		87		112		88	

FOB (free-on-board): transaction value including freight and insurance up to the border of the exporting country.

CIF (cost, insurance, freight): transaction value including freight and insurance up to the border of the importing country.

Source: customs data processed by CCFA

► AUTOMOTIVE TAXES AND DUTIES

In € millions	1980	1990	2000	2010	2012	2013	2014	2015
Tax on road-use oil products (including VAT)	9,078	21,335	30,630	32,324	35,608	35,891	35,782	36,294
Automotive insurance tax	478	2,780	3,429	4,126	4,378	4,468	4,588	4,673
Tax on vehicle registration certificates	157	846	1,373	1,917	2,117	2,039	2,071	2,086
Road tax	866	1,901	539	0	0	0	0	0
Tax on company cars	199	345	644	992	985	876	827	753
Tax based on number of axles	59	75	223	168	172	171	170	169
Fixed rate police and traffic fines, sentence fines	154	317	720	1,255	1,624	1,666	1,579	1,596
Driver's license tax	88	86	4					
Regional development tax	0	0	442	539	535	538	571	555
Government royalty	-	30	132	186	198	300	314	326
Total	11,079	27,716	38,136	41,507	45,616	45,949	45,902	46,452
VAT on spending to acquire and use vehicles			15,300 (1)	20,149	20,814	20,309	18,700	
Freeway tolls (including VAT)	610	2,592	5,330	9,700	10,106	10,501	10,944	11,268
Tax on fuels: TICPE and VAT on TICPE				28,200	28,200	28,400	28,200	
Tax on polluting activities (TGAP) (3)				500.0	600.0	800.0	700.0	
Total expense by the APUs for the road				17,200	17,900	18,100	17,200	16,500

(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.

(3) According to agrofuels rate

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

USEFUL ADDRESSES

► FRENCH AUTOMOTIVE MANUFACTURERS

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DS

6, rue Fructidor
75,017 Paris
Tel.: 01 58 79 79 79
www.DSautomobiles.com

RENAULT GROUP

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 St 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 ORGANISATIONS IN FRANCE

ASSOCIATION FRANÇAISE DU GAZ NATUREL POUR VÉHICULES (AFGNV)

10, rue Saint-Florentin - 75001 Paris
Tel.: 01 42 97 97 99 - Fax: 01 42 97 40 60
www.afgnv.com

FFC - CONSTRUCTEURS

Immeuble Le Cardinet
8, rue Bernard Buffet - 75017 Paris
Tel.: 01 44 29 71 00 - Fax: 01 47 66 41 08
www.ffc-carrosserie.org

CHAMBRE SYNDICALE INTERNATIONALE DE L'AUTOMOBILE ET DU MOTOCYCLE (CSIAM)

5, square de l'Avenue du Bois
BP 2116 - 75771 Paris cedex 16
Tel.: 01 53 64 50 30 - Fax: 01 40 67 95 94
www.csiam-fr.org

COMITÉ D'ORGANISATION DES SALONS INTERNATIONAUX DE L'AUTOMOBILE, DU CYCLE, DU MOTOCYCLE ET DES SPORTS (AMC PROMOTION)

39, avenue Franklin Roosevelt
75008 Paris
Tel.: 01 56 88 22 40 - Fax: 01 42 56 50 80
www.amcpromotion.com

CONSEIL NATIONAL DES PROFESSIONS DE L'AUTOMOBILE (CNPA)

50, rue Rouget-de-l'Isle - 92158 Suresnes cedex
Tel.: 01 40 99 55 00 - Fax: 01 47 28 44 15
www.cnpa.fr

FÉDÉRATION DES INDUSTRIES D'EQUIPEMENTS POUR VÉHICULES (FIEV)

79, 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

GROUPEMENT PLASTURGIE AUTOMOBILE (GPA)

125, rue Aristide Briand
92,300 Levallois
Tel.: 01 44 01 16 38 - Fax: 01 44 01 16 38
www.autoplasticgate.com

PFA - FILIÈRE AUTOMOBILE ET MOBILITÉS

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 (SNLVD)

Immeuble DIAPASON
218, avenue Jean Jaurès
75934 Paris cedex 19
Tel.: 01 53 68 40 40 - Télécopie: 01 53 68 40 99
www.snlvd.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 ORGANISATIONS

ASSOCIATION DES CONSTRUCTEURS EUROPÉENS D'AUTOMOBILES (ACEA)

85, avenue des Nerviens - 1040 Bruxelles (Belgique)
Tel.: 00 32 2,732 55 50 -
Fax: 00 32 2,738 73 10
www.acea.be

ORGANISATION INTERNATIONALE DES CONSTRUCTEURS D'AUTOMOBILES (OICA)

4, rue de Berri - 75008 Paris
Tel.: 01 45 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

ACA - ASSOCIATION FRANÇAISE DES AUTOMOBILISTES

Head office: 38 avenue du Rhin CS 80049 F- 67027 Strasbourg cedex
Tél. + 33 9 70 40 11 11
Paris office: 9 rue d'Artois - 75008 Paris
Tel.: + 33 1 40 55 43 00
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 ORGANISATIONS 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)

Ecole 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

IFP ENERGIES NOUVELLES (IFPEN)

1 & 4, avenue de Bois Préau

92852 Rueil Malmaison cedex

Tel.: 01 47 52 60 00 – Fax: 01 47 52 70 00

www.ifpennergiesnouvelles.fr

INSTITUT FRANÇAIS DES SCIENCES ET TECHNOLOGIES DES TRANSPORTS, DE L'AMÉNAGEMENT ET DES RÉSEAUX (IFSTTAR)

IFSTTAR head office

Département Economie 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

PÔLE MOV'EO

SIÈGE SOCIAL HAUTE-NORMANDIE

Technopôle du Madrillet

Avenue Galilée BP 20060 - 76801 Saint Etienne du

Rouvray cedex

Tel.: 02 32 91 54 50

www.pole-moveo.org

PÔLE VÉHICULE DU FUTUR

(VEHICLE OF THE FUTURE CLUSTER)

Head office: Etupes

Centre d'affaires Technoland

15, rue Armand Japy - 25461 Etupes cedex

General secretariat: Mulhouse

Technopole de Mulhouse - BP 2118 – 40, rue Marc

Seguin

68060 Mulhouse cedex

Tel.: 03 89 32 76 44 – Fax: 03 89 32 76 45

www.vehiculedefutur.com

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ET D'INNOVATION DANS LES

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Tour Sequoia – 92055 La Défense cedex

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THE STRONG CONNECTION BETWEEN THE PUBLIC AND CARS



► A FRENCH MONUMENT TO THE COUNTRY'S AUTOMOTIVE HISTORY

Since 1898, the City of Lights is inseparable from the representation of the state-of-the-art in the automobile world: first in Les Tuileries, then the Grand Palais and finally, Porte de Versailles. At the 'Salon de l'Auto', Hispano-Suiza, Packard, De Dion-Bouton... all the big names that left us before the war were unaffordable for most citizens. In a European automobile world, yet to enjoy the 'car for the people' revolution, the 'Salon' was the place that you could see 'for real', the cars that had appeared in films featuring Jean Gabin, Clark Gable and Greta Garbo. After the war, access to cars, at the 1946 show, heralded the new mobility we know so well today. Pictures from past shows illustrate the diversity of exhibits and the incredible wealth of France's automobile history. 'Faire le Salon de l'Auto' is a particular form of business, with the cost covered several-fold in terms of product visibility. Bulky special issues of 'l'Illustration' from the 1930s to today's continuous news channel documentaries means that for almost two months France lives and breathes automobiles.



► INNOVATION AT YOUR FINGERTIPS

The Mondial de l'Auto has been central to all revolutions in mobility. Different engine types: petrol, diesel, electric, hybrid have all had their place on the exhibitors' stands. In 2016, Le Mondial is the first car show in the world to present such a wide range of products linked to connectivity and autonomous vehicles. What several years ago was presented as major R&D advances today features on vehicles and equipment on sale to all. The major auto makers, equipment manufacturers and tyre manufacturers make the most of the show to promote their know-how and mastery of their technologies. Beyond the technical aspects, new uses for the automobile are also shop-windowed in Paris. Buying, renting, sharing your vehicle ... all forms of mobility are on show at Le Mondial. The future of the automobile is always at your fingertips.



THE STRONG CONNECTION BETWEEN THE PUBLIC AND CARS



► A SHRINE TO AUTOMOBILE USE

Contrary to other car shows which are primarily focussed on professionals, Le Mondial is very much open to the general public. Automobile revolutions only work if customers buy into them. At Le Mondial, you see – even buy – the future! More than 25% of visitors to the Mondial are in the final phase of research before purchasing a car. The show allows them to 'touch' the vehicle and to compare it more easily with its competitors. Each auto maker's stand is indeed equipped for order-taking and offers financing packages. Le Mondial is the perfect place for vehicle trading.

► FROM REALITY TO DREAM

Dreams can be found in each alley of Le Mondial: Luxury models, sports models, special series, concept cars... all line up at Le Mondial de l'Automobile next to everyday cars. A functional car can also be a thing of pleasure, and sometimes a thing of fantasy. The link with the imagination is heightened in special exhibitions. In 2016, the 'Moteur! L'automobile fait son cinéma' exhibition once again marks the popular communion of cinema and cars. James Bond and Fantomas remind us immediately of pictures of Aston Martins and DSs. And the 2CF in bits: 'it won't work so well now!' At the Mondial de l'Automobile, we step out of our day-to-day lives and into a waking dream.



For more information :
www.mondial-automobile.com





**MONDIAL DE
L'AUTOMOBILE**
— PARIS —
1-16 OCTOBER 2016

VIVEZ L'AUTOMOBILE!



PARIS EXPO PORTE DE VERSAILLES
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