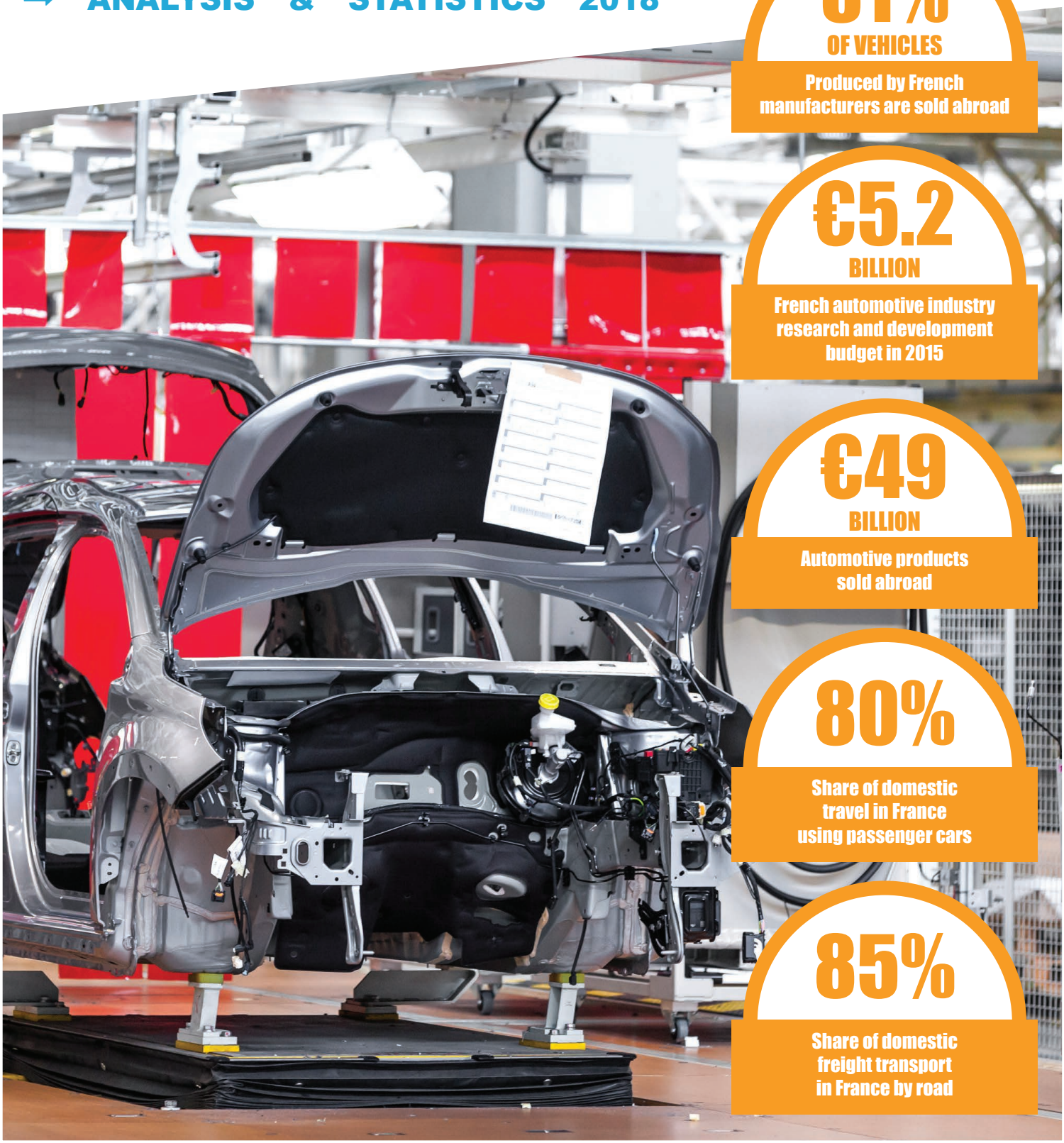
THE FRENCH AUTOMOTIVE INDUSTRY

CCFA

→ ANALYSIS & STATISTICS 2018



7.8
MILLION VEHICLES
Produced by French manufacturers worldwide

81%
OF VEHICLES
Produced by French manufacturers are sold abroad

€5.2
BILLION
French automotive industry research and development budget in 2015

€49
BILLION
Automotive products sold abroad

80%
Share of domestic travel in France using passenger cars

85%
Share of domestic freight transport in France by road

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A WORD FROM THE PRESIDENT

At the 24-hour Le Mans race, before the end of the Hunaudières section, the key thing is to be ready for the Mulsanne corner… Today, like in that famous race, the global auto industry is getting to the end of a straight line and in spite of a very buoyant business climate, several manufacturers are reporting falling profits. French manufacturers, for their part, are in good shape as they prepare for this cyclical phenomenon, which comes at a time when the challenges they face are of unparalleled proportions.

More than ever, the automobile meets the world's needs for mobility. The global market for vehicle sales has reached a new record level, at **97 million** units. In 2017, French auto groups sales grew, both in terms of **trading results** and **scope** (Opel-Vauxhall/PSA and AvtoVAZ/Renault). The **renewal** of car bodies with "SUV/Crossovers" proved to be a good bet, as was the idea of introducing light commercial vehicles. Renault Trucks' complete revamp of its heavy trucks range started in 2013 has also been a great success.

However, the industry is heading into turbulence.

Globally, uncertainty as to **international trade** formats, triggered by the Trump Administration, steel and aluminium, customs duty on vehicles and components, Iran and Russia, are certainly weighing heavily on the auto sector. The rules introduced to build a stable structure for trade have been brought into question and today, the risk of protectionism is very real. The European automotive industry is also facing uncertainty due to the lack of clarity on the consequences of **Brexit**.

"The Volkswagen scandal" in the US really **damaged the image** of European cars. The worst affected was the German auto industry, the economic powerhouse on the other side of the Rhine, which was plunged into an unprecedented crisis, revolving mainly around the issues of diesel and emissions.

Diesel has gone into **steep decline**. Triggered by the success of petrol engine models, it was accelerated by fraudulent practices (or suspicions thereof), and then amplified by traffic restrictions. A paradoxical situation given that the diesel emission problem had been resolved with Euro 6d Temp. This loss of trust also impacted the **CO_2 issue**. Right in the middle of the change of accreditation protocol, from the NEDC to the **WLTP**, consumption values have changed with CO_2 levels. This is happening during the review period on European Commission objectives, where unrealistic positions are being discussed for the 2030 horizon. It is crucial that we get real on this topic. Auto manufacturers have always shown their commitment by drastically reducing emissions, but it is the market – and therefore customer choice – that drives performance. The decline in diesel and the sluggish electric vehicle market are leaving a dark cloud of massive financial penalties if European 2020 objectives are not met, thereby weakening manufacturers who have to invest in new technologies.

"Technological neutrality" of regulations is a key element: the public authorities have to define realistic targets and industrialists need to find the appropriate technologies to meet them. Thus, the electrification of powertrains does not mean the end of the thermal engine. Its acceptance by customers is dependent upon recharging infrastructure and cost. Imposing technologies puts the European auto industry's R&D knowhow in jeopardy, in particular when they have to face the ambitions of China.

In a buoyant trading climate, French manufacturers increased **production in France**. There has been a 25% increase compared to 2013, i.e. 460,000 additional vehicles. This recovery is linked to the internal efforts of the PSA and Renault groups, with the reorganisation of sites and new company agreements, as well as help from the CICE tax credit. However, the tax burden on production is still too high in France compared to other European countries. The CCFA is working on this competitiveness question with France Industrie and the Medef.

In a dynamic **French market**, the diesel crisis is all too present. Its market share was 47% in the registration of new passenger vehicles in 2017 (40% by mid-2018). This collapse will not be without industrial and human consequences: the automotive industry's Strategy Committee (CSF), along with the State, needs to accompany the identification and reconversion of employment areas of France that are under threat. The increase in CO_2 values, linked to the WLTP accreditation of passenger vehicles on September 1, 2018, needs to be neutralised from a fiscal point of view, but in the time it will take for the legal texts to come through, the market could be disrupted. This comes on top of the burden of French taxation on cars and remains a recurrent negative point for households and for the renewal of the vehicle stock.

This situation, although positive in the short term, is riddled with uncertainty, French manufacturers will, over the long term, be faced with considerable challenges and investment needs, which, by definition, accompany major automotive revolutions.

The electrification of engines is underway. This technology is the major thrust of CSF commitments. There are now more than 20,000 charging stations open to the public in France; and this will increase to 100,000 by 2022, increasing sales of electric and rechargeable hybrid vehicles fivefold.

France has made the **autonomous vehicle** a major industrial programme. PSA and Renault groups, very much involved in this process, share this experience under the CSF umbrella. The public authorities have drawn up a roadmap to facilitate the testing of autonomous vehicles in France. In the **digital** field, the public authorities also need to assess the challenges involved in data sharing amongst vehicles and understand the manufacturer's role as an architect, which is inseparable from that of guardian of its customers' data. The "**extended vehicle**" constitutes an international standard developed by the French automotive industry, encompassing the vehicle and off-board servers. It has found its legal translation within the CSF framework.

Today, French manufacturers are making the most of the buoyant auto cycle, but remain vigilant as to the medium to long-term challenges they face. The public authorities have to ensure that the conditions are right to solve problems and guide them in the right direction. Consolidated in their traditional professions, the French manufacturers are fully committed to the "new automobile frontier" with the connected, autonomous vehicle and digital services.

French manufacturers are sticking to their race plan…

Enjoy the read!
Christian PEUGEOT

THE FRENCH AUTOMOBILE MANUFACTURERS' ASSOCIATION

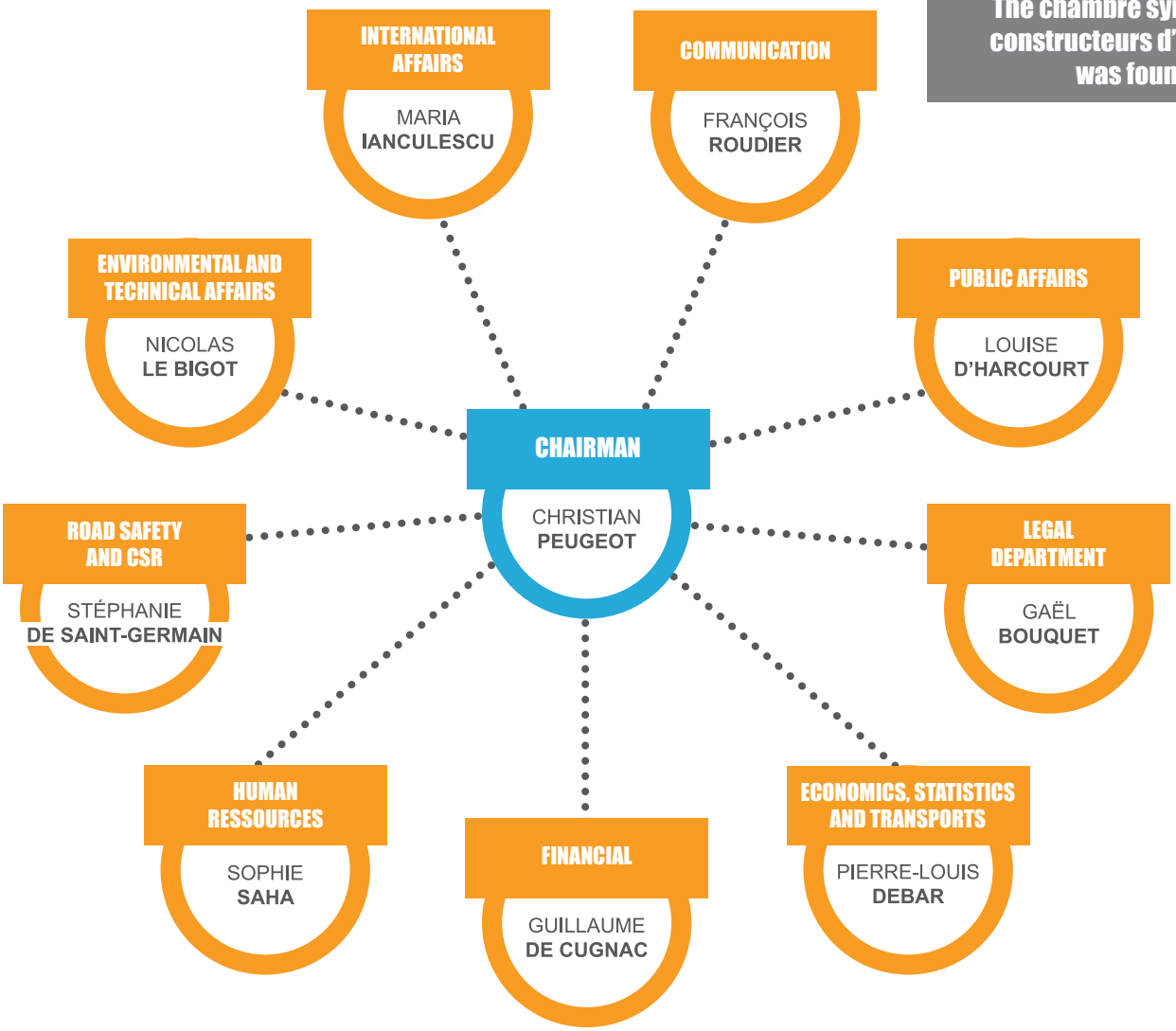
The Comité des Constructeurs Français d'Automobiles (CCFA) is the French automobile manufacturers' trade association. Its members are: Alpine, PSA (Automobiles Citroën – Automobiles Peugeot), Renault and Renault Trucks. Its mission is to study and defend the business and industrial interests of all French 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 include 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, 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 manufacturersand their suppliers came together within the Liaison Committee of Automotive Suppliers (CLIFA - Comité de Liaison des Fournisseurs de l'Automobile) to establish the PFA, French Automotive & Mobility Cluster, which has the task of contributing to reinforcing the French automotive industry. In 2012, the Automotive Technical Committee (CTA - Comité Technique Automobile) with its two boards, the Automotive Technical Standardisation Council (CSTA - Conseil de Standardisation Technique Automobile) and the Automotive Research Council (CRA - Conseil de Recherche Automobile), which role is to guide research and development, were created. At the end of 2017, PFA entered into a new phase with the following missions: boosting the innovation dynamic, competitiveness initiatives right through the industry, planning ahead for employment and skill requirements, expressing joint positions for the industry, coordination and organisation of professional shows and communications throughout the industry.

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

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



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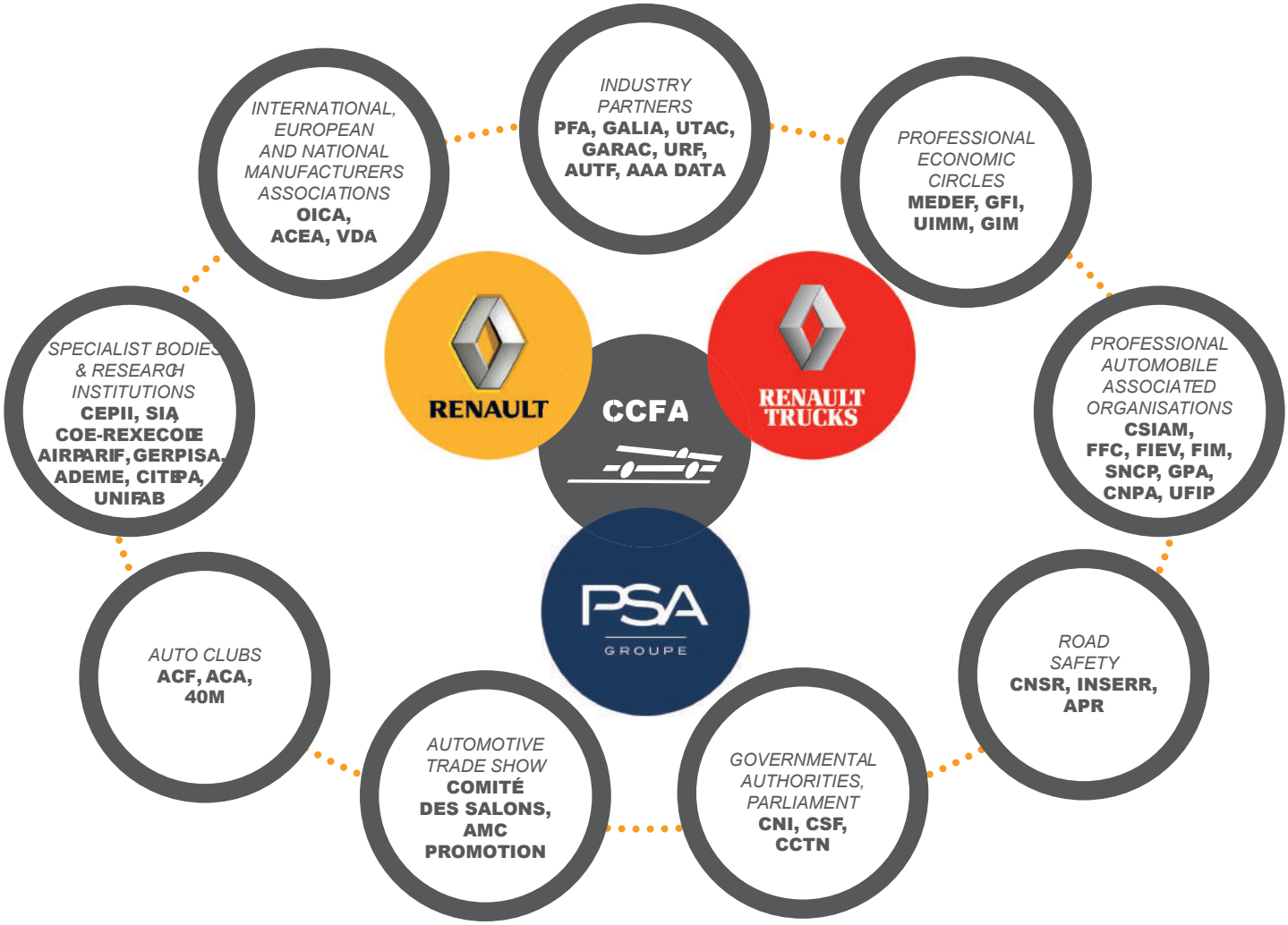
THE CCFA AND ITS PARTNERS



► 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: French Automotive & Mobility Cluster
GALIA: Groupement pour l'Amélioration des Liaisons dans l'Automobile
UTAC: Union Technique de l'Automobile, du Motocycle 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 Permanents 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
COE-Rexecode: Centre d'observation économique et de Recherche pour l'Expansion de l'économie et le Développement des Entreprises

► 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 (Mettallurgy employers' association)
GIM: Groupe des Industries Métallurgiques de la Région Parisienne (Paris region metallurgical industries group)

► PROFESSIONAL AUTOMOBILE ASSOCIATED ORGANISATIONS

CSIAM: Chambre Syndicale Internationale de l'Automobile et du Motocycle
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)
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

► ROAD SAFETY

CNSR: Conseil National de la Sécurité Routière (National Road Safety Council)
INSERR: Institut National de la Sécurité Routière et de Recherches (National Institute of Road Safety and Research)
APR: Association Prévention Routière (National Council of Automotive Professions)

EUROPEAN MARKET AT THE HIGHEST LEVEL SINCE THE CRISIS: A SOLID PILLAR FOR FRENCH GROUPS

The European markets, which had fallen to very low levels during the financial crisis, continued the recovery begun in 2014, offering French groups the possibility of clawing back substantial additional volumes. The diversification of markets outside Europe brought new opportunities for French groups (China, India, Turkey) and limited the impact of violent financial crises in other emerging markets before their recoveries (Brazil, Russia, etc.). Lada joined Renault Group on January 1, 2017 and Opel joined PSA Group on August 1, 2017. Globally, since 2014, turnover growth for French groups has been robust and their share in the global auto manufacturing market grew with their extended scope in 2017

► KEY DATA (IN THOUSANDS)

	1997	2007	2016	2017	Change 2017/2016	Change 2017/2007
World production of French groups	**4,046**	**6,188**	**N/A**	**N/A**	**N/A**	**N/A**
Passenger cars	3,472	5,301	5,782	6,884	19.1%	29.9%
Light commercial vehicles	507	830	881	910	3.3%	9.7%
All light vehicles	3,979	6,131	6,664	7,795	17.0%	27.1%
Heavy trucks (at constant scope)	36	58	N/A	N/A	N/A	N/A
Production of French groups in France	**2,525**	**2,573**	**1,753**	**1,908**	**8.8%**	**-25.9%**
Passenger cars	2,235	2,165	1,300	1,436	10.5%	-33.7%
Light commercial vehicles	258	352	453	471	4.0%	33.8%
All light vehicles	2,493	2,518	1,753	1,908	8.8%	-24.2%
Heavy trucks	30	55	N/A	N/A	N/A	N/A
Vehicles exports outside France	**2,822**	**4,697**	**5,353**	**6,365**	**18.9%**	**35.5%**
Passenger cars	2,526	4,110	4,735	5,695	20.3%	38.6%
Light commercial vehicles	276	549	598	650	8.8%	18.4%
All light vehicles	2,802	4,659	5,333	6,345	19.0%	36.2%
Heavy trucks	20	38	20	20	-0.5%	-46.7%
Vehicles exports outside europe (17 countries)	**659**	**2,110**	**3,254**	**3,830**	**17.7%**	**81.5%**
Passenger cars	563	1,914	3,034	3,620	19.3%	89.1%
Light commercial vehicles	88	178	209	199	-4.8%	11.7%
All light vehicles	651	2,092	3,243	3,818	17.8%	82.5%
Heavy trucks	8	18	11	11	3.6%	-37.9%
Vehicles registrations in France	**2,068**	**2,629**	**2,478**	**2,606**	**5.1%**	**-0.9%**
Passenger cars	1,713	2,110	2,015	2,111	4.7%	0.1%
Light commercial vehicles	313	461	410	439	7.0%	-4.9%
All light vehicles	2,026	2,571	2,425	2,549	5.1%	-0.8%
Heavy trucks	39.3	52.5	47.1	50.4	7.0%	-4.0%
Coaches and buses	3.1	5.5	6.1	6.0	-1.3%	8.9%
Registrations in Europe (17 countries) of vehicles from French groups	**3,300**	**3,906**	**3,455**	**3,989**	**15.5%**	**2.1%**
Passenger cars	2,841	3,181	2,780	3,227	16.1%	1.4%
Light commercial vehicles	432	690	652	738	13.1%	6.9%
All light vehicles	3,273	3,871	3,432	3,964	15.5%	2.4%
Heavy trucks	27	35	23	25	8.0%	-27.9%

In 2017, global production of French groups' light vehicles reached a new record level. It is up about 30% compared to 2007, in a global economic context marked by the continuation of significant growth in emerging countries until 2013 and the recovery of European markets since 2014. Their production has grown by 9% in France and 20% outside France compared to 2016. To face the challenges of competitiveness of their factories, internationalisation, environment and digital, the groups significantly increase their investments (+63% between 2014 and 2017).

In France, road traffic has grown since 2012 at a more sustained pace (+1.5% on average). The key factors have been more dynamic economic growth and lower fuel prices until 2016. Automotive expenditure now represents 9% of household expenditure compared to almost 11% in 1990. However, the vehicle purchase item is recovering because of buoyant sales in the new car market featuring advanced technologies to adhere to new environmental standards. These factors contribute to the renewal of the vehicles in use. Both for passenger cars and commercial vehicles, renewal trends are more efficient and more virtuous. In 2017, consumption of fuel in France was close to that observed at the beginning of the 2000s, whilst total traffic has increased by 17%.

+1,2 MILLION

More registrations of vehicles made by French groups in Western Europe since 2013

A STILL DYNAMIC GLOBAL AUTOMOTIVE MARKET ONCE AGAIN OFFERS GROWTH OPPORTUNITIES TO FRENCH GROUPS THAT CONTINUE TO EXPAND THEIR SITES

The weight of French groups in the global production of vehicles amounted to 8% in 2017, one point more than in 2017 and 1.7 points more than in 2014.

	Units	2016	2017	Change 2017/2016
Market share of French groups (new light vehicles)				
In France	%	55.2%	56.3%	1.1 point
In Europe (17 countries) excluding France	%	15.6%	18.4%	2.8 point
In Europe (17 countries)	%	21.7%	24.4%	2.7 point
Market share of French brands (new heavy trucks)				
In Europe (17 countries)	%	7.9%	8.4%	0.5 point
French groups' share in world production (PSA and Renault Groups)				
Passenger cars share	%	8.0%	9.4%	1.4 point
Commercial vehicles	%	3.9%	3.8%	-0.1 point
Total	%	7.0%	8.0%	1.0 point
French automobile international trade				
Exports	€ billions	46.2	50.5	+ 9.5%
Imports	€ billions	55.8	60.0	+ 7.5%
Balance	€ billions	-9.6	-9.4	- 1.6%
Automotive industry contribution to foreign trade goods balance				
Exports	%	10.4%	10.9%	0.5 point
Imports	%	10.9%	11.0%	0.1 point
World key figures for french manufacturers (PSA and Renault Groups)				
Sales	€ billions	105.3	124.0	+ 17.8%
Capital expenditure	€ billions	4.1	4.6	+ 11.9%
Number of employees	thousands of people	295	354	+ 20.1%
Jobs related to the automotive industry in France				
Automotive industry	thousands of people	216	213	
As a share of industry (including food industries, etc.)	%	7%	7%	
Total jobs (directly and indirectly related)	thousands of people	2,182	2,190	
As a % of the employed working population	%	8%	8%	

In 2017, in Western Europe, markets for new vehicles once again grew thanks in particular to the continued recovery of the Italian and Spanish markets and despite the decline in the UK market. In a context which nevertheless remains highly competitive, this has led to a growth of market share of French groups which have integrated new brands (a share of 18.4% in 2017 compared to 14.7% in 2013) in that zone (excluding France). The share of European sales as a proportion of all French groups' sales will not last, because of auto-density variations between this mature zone and the emerging countries. Indeed, they produced around 60% in their zone of origin in 2017, compared to 80% in 2006.

In Eastern Europe, the markets progressed in the member countries of the European Union and recovered in Russia. The robustness of the growth of sales in China, which became the biggest automotive market in the world in 2009, explains the overall growth of the Asian market.

The exports of the French groups, 1.5 million vehicles in 2017, have again increased in Asia (+8%), thanks in particular to the Iranian market.

In Latin America, the markets recovered and the impact was reflected in sales by French groups. Their deliveries of passenger cars rebounded by 13% in 2017 (+18% in Argentina and +10% in Brazil), after several years of decline due to the sharp decline in local markets.

Finally, the exports of French groups continue to shrink in Africa and reach 213,000 vehicles, in a market still in sharp decline. In the Maghreb, where they are present including in terms of production plants, Algeria (-5%) has seen a decline, unlike Morocco (+4%).

In the emerging countries, where sales should grow longer term, French groups continued to develop both commercially and industrially, with or without partnerships, so as to satisfy growing vehicle needs. They have decided on new investments and to renew and adapt their vehicle ranges. In particular they continue their efforts in Asia (PSA, with its partners in China and in India, and Renault in the same countries) and in different countries of Africa.

WORLD VEHICLE PRODUCTION

In 2017, global vehicle production increased by 2.4% to 97.4 million, i.e. 2.3 million additional units. It has reported continuous growth since the 2009 collapse. Asia and Africa grew 3%, Western Europe 1%. South America (+20%) and Eastern Europe (+7%) progressed strongly. Growth was more dynamic in emerging zones than in mature markets.

Global production of vehicles was around 50 million units in 1990, and then around 60 million in 2000. It crossed the 70 million threshold pre-crisis, before collapsing in 2009. In 2012 and 2015, production reached 80 and 90 million units respectively. Since 2000, the annual growth rate has been 3% on average.

In mature zones, production trends compared to 2007 levels are divergent; decline in Western Europe (-12%) and Japan (-16%), but 13% growth in NAFTA (Canada, US, Mexico) and 1% in South Korea.

In emerging zones and countries, including Asia, today's automotive expansion segment, production is far higher than before the crisis. In 2017, compared to 2007, it was 227% higher in China, +196% in Indonesia, +95% in the Philippines and +54% in Thailand.

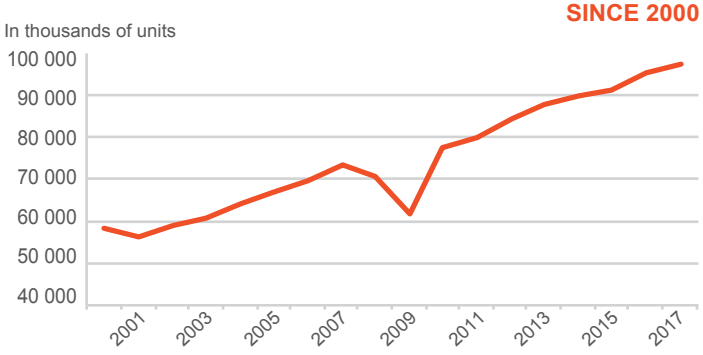
97.4 MILLIONS

New record for the number of vehicles produced in the world in 2017

In thousands	2016	2017	Change %
EUROPE	**21,490**	**22,200**	**3.3**
Western Europe	**14,630**	**14,733**	**0.7**
Germany	5,747	5,646	-1.8
Belgium	399	377	-5.6
Spain	2,886	2,848	-1.3
France	2,082	2,226	6.9
Italy	1,103	1,142	3.5
The Netherlands	90	157	75.0
United Kingdom	1,817	1,749	-3.7
Sweden	205	226	10.0
Central and Eastern Europe	**5,374**	**5,771**	**7.4**
Turkey	1,486	1,696	14.1
AMERICA	**20,822**	**20,658**	**-0.8**
NAFTA (1)	18,151	17,458	-3.8
South America	2,670	3,200	20
ASIA-OCEANIA	**51,846**	**53,601**	**3.4**
ASEAN (2)	4,021	4,058	0.9
China	28,119	29,015	3.2
South Korea	4,229	4,115	-2.7
India	4,519	4,783	5.8
Japan	9,205	9,694	5.3
AFRICA	**904**	**931**	**3.1**
TOTAL	**95,061**	**97,389**	**2.4**

(1) NAFTA: Canada, USA, Mexico.
(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
Sources: OICA - CCFA estimates June 2018

CHANGES IN WORLD MOTOR VEHICLE PRODUCTION SINCE 2000



In Western Europe, production increased 1% in 2017 compared to the previous year with contrasting results. Countries like Portugal (+23%), Sweden (+10%), France (+7%), Italy (+4%) progressed, whilst others such as Germany (-2%) and Spain (-1%) declined. In Eastern Europe, production in Russia recovered (+5%).

In America, production fell in NAFTA (-4%) but recovered in South America (+20%) after the sharp decline observed previously (-42% between 2014 and 2016).

As for Asia-Oceania, which represents more than half of global output, production progressed in Iran (+18%), in Indonesia and in China (+3%). It also increased in Japan (+5%) but fell back in South Korea for the second consecutive year (-3%).

WORLD VEHICLE PRODUCTION

Between 2010 and 2017, global production of vehicles (95.3 million) increased 25% i.e. by 19.7 million units. Since 2010, the global automotive industry has remained dynamic overall, except in South America and South Korea.

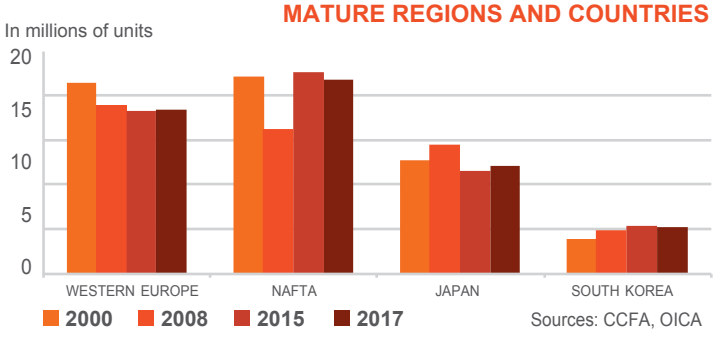
In mature zones and countries, production increased by almost 6 million vehicles since 2010 to 46 million units (+15%). They represented less than half of global production in 2017, compared to 51% in 2010. Within those zones, production in North America increased by 5.3 million units (+43%) thanks to Mexico, in particular, whilst in Western Europe, it increased by 900,000 (+7%). Japan's production is almost stable (i.e. +1% compared to 2010). However, that of South Korea decreases by 4%.

In emerging countries and zones, production increased by 13 million vehicles, based on the five following areas:

- China (+10.8 million), which represented 30% of global production in 2017, compared to 24% in 2010 ;
- Central and Eastern Europe and Turkey (+1.4 million units and a share of 8%, i.e. the same level as in 2010) ;
- Indonesia, Iran, Malaysia and Thailand (+710,000 units and a share of 5%, compared to 6% in 2010) ;
- South America (-1 million units and a share of 3%, compared to 6% in 2010) ;
- India (+1.2 million units and a share of 5%, i.e. the same level as 2010).

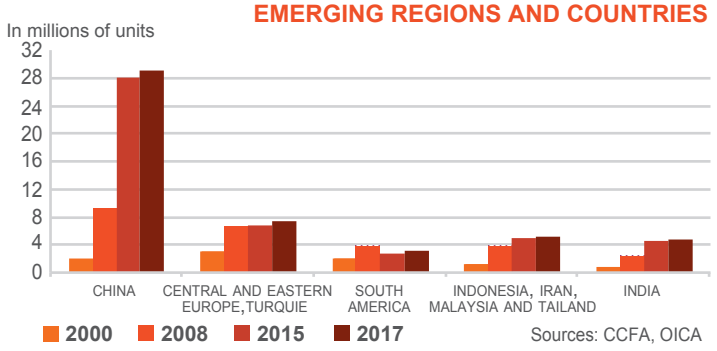
In Central and Eastern Europe, the vigour demonstrated by the new member states of the European Union contrasts with the severe decline in production in Russia, with 1.6 million vehicles in 2016 (-31% compared to it's highest level in 2012).

MATURE REGIONS AND COUNTRIES



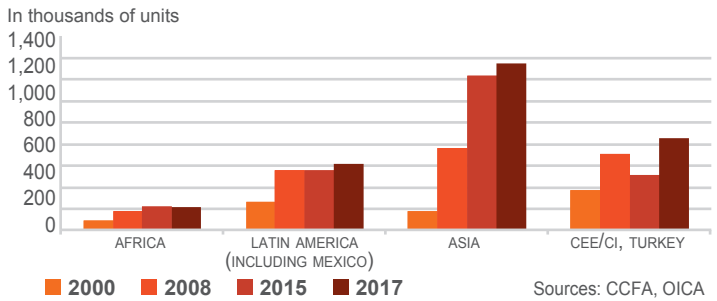
Sources: CCFA, OICA

EMERGING REGIONS AND COUNTRIES



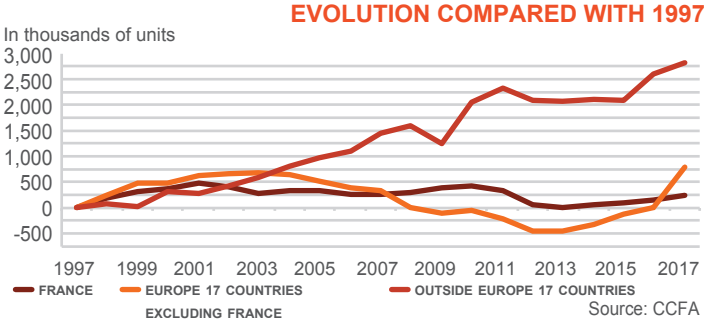
Sources: CCFA, OICA

MARKETS OF FRENCH GROUPS OUT EU-17: ALL VEHICLES



Sources: CCFA, OICA

WORLD MARKETS OF FRENCH GROUPS: EVOLUTION COMPARED WITH 1997



Source: CCFA

In this context of dynamic growth of global production, French groups have substantially bolstered their deliveries to emerging areas. After a growth between 2000 and 2008, deliveries outside the 17 countries of the European Union had dipped in 2009 and then recovered substantially over the following years. In 2017, they integrate the volumes of the Lada and Opel brands, belonging respectively to the Renault Group since January 1, 2017 and to the PSA Group from August 1, 2017.

They increased compared to 2010, except in Latin America, including Mexico (-28,000 units). Hence, deliveries were up in the countries of Central and Eastern Europe and Turkey (+461,000 units), in Asia (+340,000 units) and in Africa (+13,000 units). In Europe, deliveries to Spain and Italy continued to grow (respectively +116,000 and +147,000 units since 2010) after a downturn caused by the global crisis.

51%

Share of developed/emerging zones and countries in global vehicle production

WORLD RANKING OF AUTOMOBILE MANUFACTURERS

8%

Market share of French groups in world automobile production in 2017

The 10 biggest manufacturers, including French groups PSA and Renault, represented around 70% of global production. Each produced over 3.5 million vehicles.

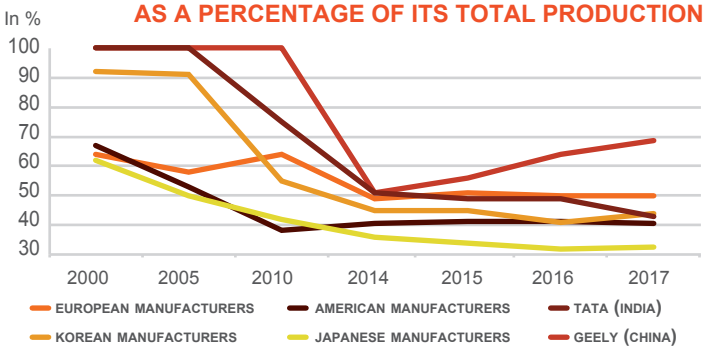
In 2017, French groups benefitted in volume terms from the continued growth of the European market and the integration of Lada into the Renault Group on January 1, 2017 and Opel into the PSA group on August 1, 2017; they ranked respectively ninth and tenth in the world. French group production accounted for 8% of world production, higher than in 2013 and 2014 (6%).

Car manufacturers have become substantially internationalised since 2000 and continue to develop industrial facilities outside their home countries. European, America, Japanese and Korean manufacturers produced between 60 and 70% of their vehicles in their own areas in 2000, compared to 30-50% in 2017. Japanese manufacturers were the most internationalised (they only made 33% of their vehicles in Japan), followed by the Koreans (44% in Korea). Even emerging countries manufacturers, Geely and Tata, made a large part of their production outside their home countries (31 and 57% respectively).

► WORLD VEHICLES PRODUCTION IN 2017 (1)
(IN THOUSANDS)

Rank	Group	2016	2017	Change %
1	VOLKSWAGEN	10,312	10,590	2.7
2	TOYOTA	10,213	10,466	2.5
3	GM (2)	9,490	9,941	4.7
4	HYUNDAI	7,890	7,218	-8.5
5	FORD (2)	6,458	6,387	-1.1
6	NISSAN	5,556	5,769	3.8
7	HONDA	4,999	5,237	4.8
8	FIAT	4,681	4,601	-1.7
9	**RENAULT**	**3,373**	**4,154**	**23.1**
10	**PSA**	**3,153**	**3,650**	**15.8**
11	SUZUKI	2,945	3,302	12.1
12	DAIMLER AG	2,964	3,054	3.0
13	SAIC	2,565	2,867	11.8
14	BMW	2,360	2,506	6.2
15	GEELY	1,266	1,950	54.0
16	CHANGAN	1,716	1,616	-5.8
17	MAZDA	1,586	1,608	1.4
18	DONGFENG MOTOR	1,315	1,451	10.3
19	BAIC	1,344	1,254	-6.6
20	MITSUBISHI	1,092	1,210	10.9
21	SUBARU	1,025	1,073	4.7
22	GREAT WALL	1,094	1,041	-4.9
23	TATA	925	932	0.8
24	IRAN KHODRO	636	711	11.8
25	SAIPA	531	648	22.1
26	MAHINDRA	605	613	1.2
27	ISUZU	654	612	-6.4
28	CHERY	631	605	-4.1
29	FAW	557	593	6.4
30	GAC	385	514	33.5
31	ANHUI JAC AUTOMOTIVE	651	493	-24.3
32	BYD	511	422	-17.4
33	BRILLIANCE	464	362	-22.0
34	HUNAN JIANGNAN	336	315	-6.0
35	CHINA NATIONAL HEAVY DUTY TRUCK	200	297	48.3
36	CHONGQING LIFAN MOTOR CO.	278	214	-23.1
37	VOLVO-UD TRUCKS-**RENAULT TRUCKS**-MACK TRUCKS	200	212	5.9
38	SHANNXI	116	189	62.9
39	ASHOK LEYLAND	145	160	10.2
40	SOUTH EAST (FUJIAN)	115	159	39.3
41	PACCAR	140	153	9.9

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



Note: The production of Chinese manufacturers does not include joint-ventures.
(1) The vehicles include passenger cars, light commercial vehicles, heavy trucks, and coaches and buses. There may be double counts between manufacturers.
(2) The output of GM and Ford include their activities in China.
Sources: OICA, CCFA estimates July 2018

In a context of dynamic growth, global production however increased by 2% with contrasting results from one group to another.

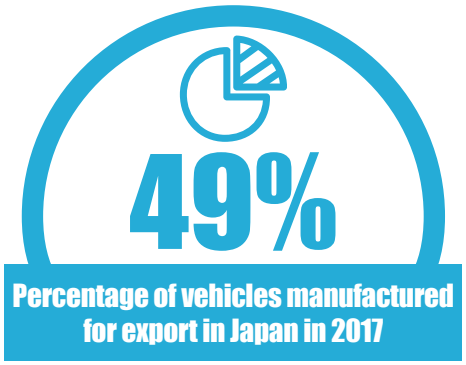
The Volkswagen group (+3%), which has a very high profile in emerging countries, kept its n° 1 ranking in 2017. The Toyota group, once again second-biggest global manufacturer having occupied the top spot for 10 years, saw production increase (+2%). That of GM also increased (+5%) whilst Ford reported a decline (-1%).

Amongst the Japanese manufacturers, the situation is globally positive. Hyundai-Kia (-9%/4th ranking), Nissan (+4%/6th ranking), Honda (+5%/7th ranking) protected their rankings. Suzuki-Maruti (+12%/11th rank) improved theirs ranking.

The European groups increased production: generalist manufacturers Renault (+23%), PSA (+16 %), and specialist German groups making higher-end vehicles: BMW (+6%), Daimler (+3%). On the other hand, Fiat continued its decline (-2%).

Emerging country manufacturers (China, India) also reported buoyant growth. The production of SAIC, the biggest Chinese group, increased (+12%), as did that of Dongfeng (+10%), whilst Tata group production grew only slightly (+1%).

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



China, which became the largest manufacturer in the world in 2010, manufactures primarily to satisfy its domestic market: imports (+16% at 1.2 million vehicles) and exports (+31% at 1.1 million units), each represent less than 5% of production.

The European Union (now 28 countries) is the second world's leading production area thanks to the net growth in the domestic market and buoyant exports (1/3 of production).

In North America, including Mexico, production decreased (-4%), but remains at a high level. Production is primarily for the local market, with exports only accounting for 12%. Imports, on the other hand, represent 29% of production.

In Japan, exports account for 50% of production, which increased 1% since 2010. Imports still account for around 6% of total registrations

	European Union (1)		USA, Canada et Mexico (3)		Japan	
PASSENGER CARS						
PRODUCTION	**in thousands**	**index (100=2000)**	**in thousands**	**index (100=2000)**	**in thousands**	**index (100=2000)**
2000	14,779	100	7,092	100	8,359	100
2010	15,260	103	5,084	72	8,310	99
2015	16,324	110	7,019	99	7,831	94
2017	16,973	115	5,683	80	8,348	100
IMPORTS (2)	**in thousands**	**share of production**	**in thousands**	**share of production**	**in thousands**	**share of production**
2000	2,629	18%	2,225	31%	268	3%
2010	1,900	12%	2,310	45%	186	2%
2015	2,639	16%	2,496	36%	285	4%
2017	3,612	21%	2,162	38%	305	4%
EXPORTS (2)	**in thousands**	**share of production**	**in thousands**	**share of production**	**in thousands**	**share of production**
2000	2,715	18%	1,130	16%	3,796	45%
2010	3,400	22%	857	17%	4,275	51%
2015	5,494	34%	1,706	24%	3,970	51%
2017	5,595	33%	1,750	31%	4,218	51%
COMMERCIAL VEHICLES						
PRODUCTION	**in thousands**	**index (100=2000)**	**in thousands**	**index (100=2000)**	**in thousands**	**index (100=2000)**
2000	2,327	100	8,669	100	1,782	100
2010	1,819	78	7,089	82	1,319	74
2015	1,929	83	10,935	126	1,448	81
2017	1,881	81	11,775	136	1,346	76
IMPORTS (2)	**in thousands**	**share of production**	**in thousands**	**share of production**	**in thousands**	**share of production**
2000	242	10%	915	11%	8	0%
2010	310	17%	1,136	16%	2	0%
2015	391	20%	2,164	20%	1	0%
2017	459	24%	2,946	25%	1	0%
EXPORTS (2)	**in thousands**	**share of production**	**in thousands**	**share of production**	**in thousands**	**share of production**
2000	248	11%	339	4%	659	37%
2010	330	18%	177	2%	566	43%
2015	445	23%	283	3%	608	42%
2017	457	24%	350	3%	487	36%

(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) Mexico is included since 2009.
Sources: OICA, Eurostat, CCFA, Ward's, JAMA

► CHINA
ALL VEHICLES
Sources: OICA, CAAM

	Production		Exports		Imports	
	In thousands	Index (100=2010)	In thousands	Share of production	In thousands	Share of production
2010	18,265	100	499	3%	-	-
2015	24,567	135	755	3%	1,103	4%
2016	28,119	154	810	3%	1,077	4%
2017	29,015	159	1,064	4%	1,247	4%

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 10% versus 2000 (compared to +15% in 2007 versus 2000) and trade, already buoyant, more than doubled.

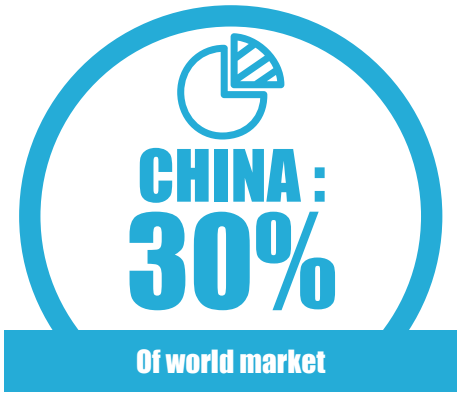
In North America, including Mexico, since 2009, production exceeded 2000 output by 11%. Imports, already very high in 2000, and sustained since, exceeded 2000 levels by 60%. Exports only represented 12% of production (1/3 for the EU and 1/2 for Japan) with a very high weight for passenger cars (31% versus 3% for commercial vehicles). As for imports, the imbalance between these two categories of vehicles is much lower.

Finally in Japan, vehicle output remained stable because of the decline in the domestic market and slow export growth, initially boosted in line with the depreciation of the yen, at a level of 51% above 2000 figures by 2008. In 2015, exports were only 4% higher, primarily because Japanese manufacturers are manufacturing outside Japan.

Finally, in Japan, vehicle production rose by 5% in both the domestic and export markets. The latter had increased significantly, in line with the depreciation of the yen, and they exceeded in 2008 by 51% the level of 2000; in 2016, they were only 6% higher, mainly due to the production of factories of Japanese manufacturers outside Japan.

In China, production and exports have increased substantially since 2010, with respective gains of 59% and 113%.

WORLD VEHICLE MARKETS



In 2017, the global automotive market continued to grow strongly (+3.1% to 96.8 million vehicles), setting a new record for the eighth consecutive year. Registrations increased in all areas except Africa.

The world's five leading markets (China, USA, Japan, Germany, India) accounted for 60% of global sales. In 2005, China and India ranked third and twelfth, respectively. In 2017, sales in China out-paced those in all other continents taken separately (including Asia excluding China).

Automotive markets are strongly correlated to the economic situation, with cyclical phenomena mostly reflecting those trends. They are also characterised by substantial short-term fluctuations, both for renewals and first purchases.

The share of the global market of the main industrialised zones, where car ownership rates have arrived at maturity, was 46% in 2017, compared to 69% in 2005. But volumes still evolve around 45 million units.

In emerging markets, market trends are generally been downward, despite rebounds in 2017, compared to previously higher levels. Since 2012, sales in Russia and Brazil have fallen respectively by 49% and 41%. The Algerian market lost almost 2/3 compared to its high point in 2013.

	Passenger cars				Commercial vehicles				Total		Change 2017/2016
	2016		2017		2016		2017		2016	2017	
	thousands	%	thousands	%	thousands	%	thousands	%	thousands	thousands	%
EUROPE	**17,292**	**24.9**	**17,937**	**25.3**	**2,843**	**11.7**	**2,979**	**11.5**	**20,135**	**20,916**	**+3.9**
Western Europe	13,971	20.1	14,318	20.2	2,174	8.9	2,246	8.7	16,145	16,564	+2.6
Central and Eastern Europe	3,320	4.8	3,619	5.1	669	2.7	733	2.8	3,990	4,352	+9.1
AMERICA	**11,748**	**16.9**	**11,302**	**16.0**	**13,804**	**56.6**	**14,487**	**55.8**	**25,552**	**25,789**	**+0.9**
NAFTA (1)	8,600	12.4	7,752	10.9	12,898	52.9	13,479	51.9	21,497	21,232	-1.2
USA	6,873	9.9	6,096	8.6	10,993	45.1	11,488	44.3	17,866	17,584	-1.6
Central and South America	3,148	4.5	3,550	5.0	907	3.7	1,007	3.9	4,055	4,557	+12.4
ASIA-OCEANIA	**39,488**	**56.8**	**40,747**	**57.5**	**7,416**	**30.4**	**8,157**	**31.4**	**46,904**	**48,904**	**+4.3**
China	24,377	35.1	24,962	35.2	3,651	15.0	4,161	16.0	28,028	29,123	+3.9
South Korea	1,534	2.2	1,495	2.1	289	1.2	303	1.2	1,823	1,799	-1.3
Japan	4,146	6.0	4,391	6.2	824	3.4	848	3.3	4,970	5,239	+5.4
ASEAN (2)	2,081	3.0	2,169	3.1	1,085	4.4	1,125	4.3	3,166	3,294	+4.1
Other Asia-Oceania	7,350	10.6	7,729	10.9	1,560	6.4	1,720	6.6	8,910	9,450	+6.1
AFRICA	**979**	**1.4**	**863**	**1.2**	**336**	**1.4**	**333**	**1.3**	**1,315**	**1,196**	**-9.1**
TOTAL	**69,507**	**100.0**	**70,849**	**100.0**	**24,399**	**100.0**	**25,955**	**100.0**	**93,906**	**96,804**	**+3.1**
CHANGE 2017/2016	**1.9%**				**6.4%**				**3.1%**		

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

In the US, the market decreased at around 17.6 million vehicles in 2016. It has nevertheless remained at a very high level. The market grew by 7 million units compared to its low cycle level of 2009 (10.6 million).The Mexican market fell by 5% to 1.6 million units.

Western Europe continues its recovery observed in 2014 to settle at 16.6 million vehicles. This level is still below the record observed in 2007 (17.3 million units). In 2013, the lowest point of the cycle, they reported 13.2 million units. The variations per country, symbolising the diversity of cycles observed in national European markets are disparate but nevertheless positive with the exception of the markets in the United Kingdom (-5%), Ireland (-10%) and Denmark (-1%). Otherwise, growth rates range from +2% for Norway to +16% for Iceland and +8% for the Netherlands. The Spanish and Italian markets, which had been hard hit by the crisis, have risen by 76% and 54% respectively since 2013.

Central and Eastern Europe continued its recovery started in 2016 (+9%) after three years of decline. The evolution remains nevertheless contrasted. Growth rates in the markets of the new member states of the European Union was +11%, an increase of 69% since 2012. The Russian markets increased from -42% in 2015 to +14% in 2017 and Ukrainian, from -51% to +26%, regain their dynamism.

In China, in spite of the limitations on the number of new vehicles in major cities , the market grew by 4% to 29 million vehicles. China, which became the largest market in 2009, remains the engine room of global growth, with 30% of vehicles sold.

In Japan, the market recovered by 2%, after two years of decline, amounting to 5.2 million vehicles. Registrations in South Korea have been relatively stable around 1.8 million units since 2015.

In Asia-Oceania, excluding China, Japan and South Korea, the market has fluctuated around 12 million vehicles since 2012. The changes have been very contrasting: up 14% in Thailand and 19% in Iran, a relative stability in Indonesia, but down 16% in Saudi Arabia.

In South America, after a 35% fall in three years, the market recovered (+12%) in 2017, like the first continental market, Brazil (+9%) and also Argentina (+27%).

In Africa, the markets have again strongly decreased (-9%): the trend gap observed in recent years between Algeria and Morocco continues but at a slower pace, with respectively -5% and +4%.

WORLD'S VEHICLES IN USE

In 2015, the global vehicle stock (passenger and commercial vehicles) was 1.3 billion units (of which over 75% 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 (average growth of +3% between 2007 and 2009).

Stocks were practically stable in the mature markets of developed countries (increases generally between 0 and 2%) and showed strong growth in emerging countries (between 3% and 12%).

The US stock is the biggest in the world with almost 264 million vehicles, ahead of China and Japan (163 and 77 million units respectively). France is in eighth position worldwide (39 million vehicles), behind Italy.

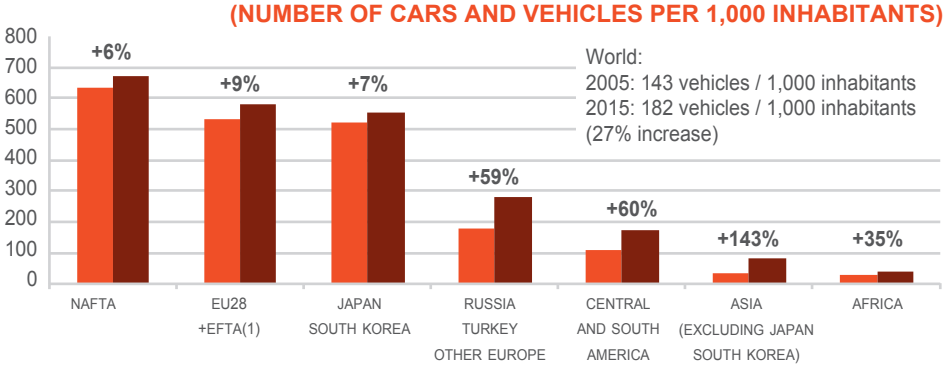
Automobile density across the world was on average 182 vehicles per 1000 inhabitants (+27% compared to 2005). However, the gap is large between 42 vehicles in Africa and 670 in the NAFTA zone (USA, Canada, Mexico) via 85 in Asia (excluding Japan and South Korea), 176 in Central and South America and over 500 for the EU and Japan/South Korea. Density in Europe overall is slightly above 471.

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 to 19 million units.

	Total		Change 2015/2014
	2014	2015	
	thousands	thousands	%
EUROPE	**380,136**	**387,519**	**+1.9**
Western Europe	246,641	250,037	+1.4
Central and Eastern Europe	133,496	137,482	+3.0
AMERICA	**403,022**	**413,725**	**+2.7**
NAFTA (1)	316,631	324,763	+2.6
USA	258,027	264,194	+2.4
Central and South America	86,390	88,962	+3.0
ASIA-OCEANIA	**409,362**	**436,222**	**+6.6**
China	145,981	162,845	+11.6
South Korea	20,118	20,990	+4.3
Japan	77,188	77,404	+0.3
ASEAN (2)	55,415	58,419	+5.4
Other Asia-Oceania	110,660	116,564	+5.3
AFRICA	**42,366**	**44,803**	**+5.8**
TOTAL	**1,234,887**	**1,282,270**	**+3.8**

(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 VEHICLES PER 1,000 INHABITANTS)



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

In 2015, 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.

Within the European zone, accounting for almost one third of the global stock, the increase was quicker in the east than in the west (see page 19). The number of vehicles per 1,000 inhabitants is also contrasted, ranging from 166 in Albania to 796 in Iceland, via 308 in Romania, and 550-600 in the main countries of Western Europe. The number of vehicles in the zone has grown by almost 65 million units since 2005, of which 73% outside Western Europe (+20 million additional units in Russia).

In the Americas, NAFTA, with 25% of the global stock, is a mature market with a high level of car ownership, especially in the US (821). Mexico has the highest progression in terms of number of vehicles (+4% between 2010 and 2015). However, Central and South America is an emerging zone which accounted for 7% of the global car market in 2015, with a density ratio of 176. The number of vehicles in America has swelled by 86 million units since 2005, almost at the same pace as NAFTA and Central and South America. The three countries with the highest progression in terms of number of vehicles are the US, Brazil and Mexico with 26, 20 and 16 million units respectively.

In Asia, Japan and Korea (8% of the global stock), which are mature markets, have car ownership levels of 609 and 417 respectively. However, emerging countries with bigger populations have lower automobile density: 22 in India, 87 in Indonesia and 118 in China. Since 2005, almost all of the vehicle stock growth has come from Asia, excluding Japan and South Korea. China (131 million additional units) is way ahead of India (+19 million) and Indonesia (+13 million).

WORLD TRADE IN AUTOMOTIVE PRODUCTS

Global trading in auto products is particularly influenced by multilateral agreements under the auspices of the WTO and increasingly, bilateral or regional agreements which are signed between different geographical areas.

According to the WTO, in 2016, global trading in automotive industry products decreased by 3%, to $1,362 billion, 11% above the 2008 level.

In 2016, global trade in auto industry products accounted for 9% of global merchandise exports and 12% of manufactured products.

2016 was marked by the stability of the euro against the dollar, whilst the yen-dollar exchange rate fell 12%.

Faced with higher market activity in NAFTA and the European Union, the share of interregional trade in global trade has stabilised at around 60% since 2011, compared to 66% in 2009. In NAFTA, Europe (excluding CIS) and South America, this share slipped to 75% (after several years above 80% in the latter region). However, it reached barely 30% in Asia-Oceania, whose focus lies very much outside its zone with national markets that are not so open (Japan, etc.).

Auto sales balances were positive in the European Union (+$142 billion), Japan (+$124 billion) and South Korea (+$50 billion). However, there was a big – indeed record – deficit in the United States (-$168 billion). China's balance deficit was high too (-$27 billion).

The European Union ($682 billion), NAFTA (288 billion dollars), Japan ($145 billion) and South Korea ($65 billion) were major exporters. Chinese exports have increased over recent years but are at a lower level ($48 billion).

Excluding intra-zone trade, imports from the European Union exceeded those from China, contrary to previous years ($81 vs. 75 billion in 2016). These imports are however well below those of NAFTA, which rose to a new record level ($189 billion).

► EXPORTS (FOB) / IMPORTS (CIF) TO THE MAJOR REGIONS (IN US$ BILLION)

Areas	World		
Land	EXP.	IMP.	Balance
USA			
2010	99.7	189.8	-90.0
2015	129.5	292.9	-163.4
2016	126.3	294.6	-168.3
CANADA			
2010	50.1	59.6	-9.5
2015	61.8	68.1	-6.2
2016	65.6	70.3	-4.7
EUROPEAN UNION (1)			
2010	546.4	426.9	119.4
2015	654.4	496.9	157.5
2016	682.2	540.1	142.1
JAPAN			
2010	149.5	14.2	135.4
2015	136.7	19.4	117.2
2016	145.1	21.5	123.6
SOUTH KOREA			
2010	54.5	8.0	46.5
2015	70.9	15.1	55.8
2016	65.2	15.4	49.7
CHINA (EXCLUDING HONG-KONG)			
2010	28.0	53.0	-25.0
2015	49.5	73.0	-23.5
2016	48.2	75.5	-27.3
BRAZIL			
2010	12.6	17.0	-4.4
2015	9.9	14.2	-4.4
2016	11.1	10.8	0.4

$1,400 billion

Total global trading in automotive industry products in 2016

► INTRAREGIONAL TRADE BY AREA
(AS A PERCENTAGE OF TOTAL TRADE IN THE AREA)

	2005	2010	2016
Intra Asia	24%	32%	30%
Intra Europe	78%	73%	73%
Intra North America	83%	76%	78%
Intra Latin America	51%	79%	75%

Source: WTO

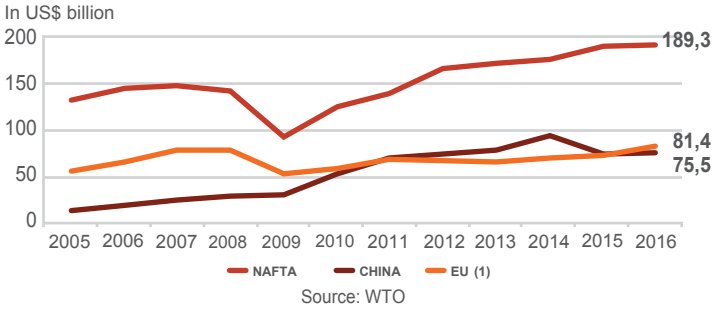
► TRADE OF THE MAIN EUROPEAN UNION COUNTRIES (1) (IN US$ BILLION)

	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
2015	275.7	118.3	157.5	57.4	65.6	-8.2	63.4	45.9	17.5	39.9	39.7	0.3	48.7	76.6	-27.9
2016	278.6	133.6	145	59.5	72.1	-12.6	68.9	48.3	20.6	41.6	47.8	-6.2	50.1	73.5	-23.3

(1) For the comparisons, 15 EU countries have been included since 1993, 25 since 2004, 27 since 2006 and 28 since 2014.
Sources: OMC, CCFA estimates from Eurostat data since 2013

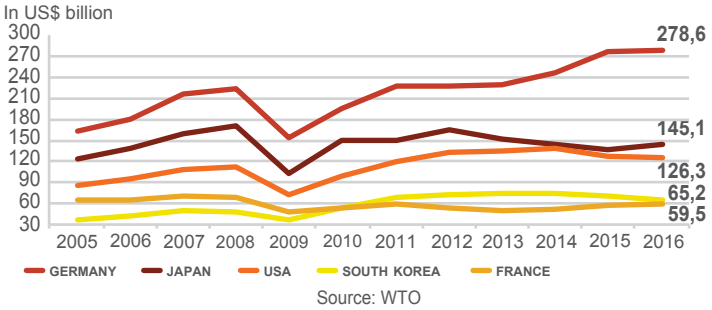
WORLD TRADE IN AUTOMOTIVE PRODUCTS

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



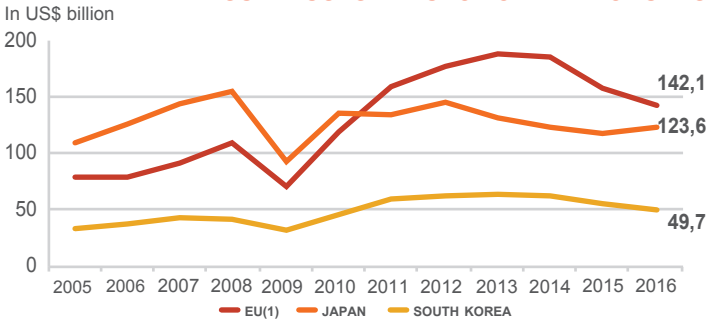
Source: WTO

MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



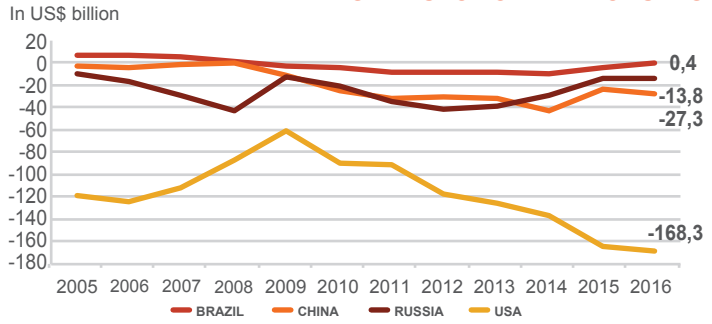
Source: WTO

SURPLUSES IN AUTOMOTIVE PRODUCTS



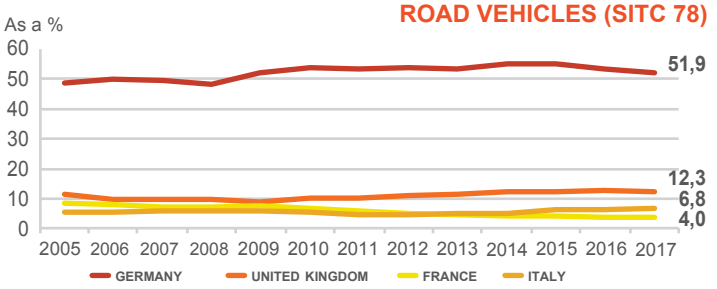
Source: WTO

DEFICITS IN AUTOMOTIVE PRODUCTS



Source: WTO

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



Source: Eurostat

4%

France's share of global automotive industry product trading in 2016

(1) For the comparisons, 15 EU countries have been included since 1993, 25 since 2004, 27 since 2006 and 28 since 2014.

Between 2005 and 2016, trends in auto industry balances were very variable between countries and between zones. South Korea's surplus increased from $34 to 50 billion, Japan's from $110 to 124 billion, and the European Union's from $80 to 142 billion. With a slightly higher auto market level than that observed during the record year of 2005, the United States' deficit grew still further (-$168 billion).

On the other hand, Canada's +$9 billion surplus in 2005 has turned into a $5 billion deficit, down to the role taken by Mexico in trading within NAFTA. Mexico reported surplus of $51 billion, compared to 2 billion in 2007. The $7 billion surplus also resulted in a slightly positive balance for Brazil. China, which in the meantime has become the biggest auto market in the world, has seen its surplus rise from $4 to 27 billion.

India's surplus increased from 1 to over $7 billion, further to a sharp increase in exports, from $3 billion to over 12 billion.

In 2016, Germany, at $279 billion, remained the biggest automotive industry exporting country with a market share of 20% compared to 18% in 2008.

Second globally, Japan exported $145 billion, $55 billion of which to North America (i.e. 38% of their total exports, compared to more than 50% at the beginning of the 2000s). Its exports to China fell between 2011 and 2016 to $12.6 billion. This can usefully be compared to the $17 billion of exports to EU28.

Exports from the 28 countries of the European Union reached $682 billion, 67% of which in intracommunity trade (73% in 2009). EU-to-China exports totalled €35 billion. They reached $8 billion to Russia, $16 billion to Africa and $13 billion to the Middle East.

According to Eurostat data, more than half of exports from the EU to outside the EU were from Germany (52% in 2017), ahead of the UK (12%), Italy, Spain and France (around 5% each for those three countries). The share of the six new entrants (Hungary, Poland, Romania, Slovakia and Slovenia) was cumulatively 9%.

France represented 4% of global exports with $59 billion (including intra-EU trade), compared to almost 8% in 2004.

The US were still the biggest global importer of automotive products, at $295 billion; due in particular to the buoyancy of its domestic market, its deficit in automotive products hit a new high of $168 billion, i.e. higher than the $120 billion observed between 2004 and 2006.

Chinese imports recovered in 2016 (+3% to $75 billion). Since 2005, they had increased 17% per year. In 2012, the origins of those imports were the EU28 (56% compared to 42% in 2009), ahead of Japan (22% compared to 36% in 2009), NAFTA (13%) and South Korea (7%).

Reflecting oil resources trends, imports have grown substantially since 2005 in Russia, Saudi Arabia and the United Arab Emirates. They progressed at an annual average of 4%, 7% and 9% respectively. But, in Russia, they were divided by 2 compared to 2014 ($16 billion). They amounted to $25 and 20 billion respectively in Australia and Saudi Arabia.

The depressed domestic British market was characterised by a drop in imports, but their automotive balance was once again negative.

NEW PASSENGER CAR REGISTRATIONS PER COUNTRY

+24%

Increase of the new passenger car market in Western Europe since 2013

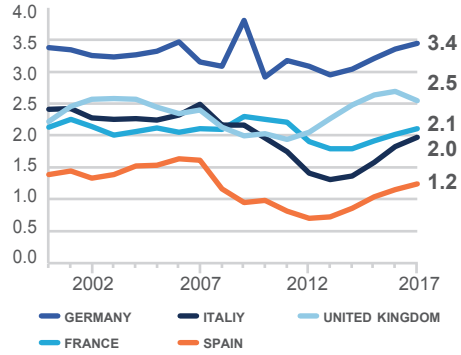
The West European market, i.e. 90% of the European market, grew for the fourth year running (+2.5% to 14.3 million units). It has grown by 24% since 2013, i.e. 2.6 million additional units. This increase partially made up for the decline during the years of the crisis (-3.3 million cars between 2007 and 2013). The current level is 3% down on 2007.

In 2017, developments in Western Europe have been contrasting by country. But among the major markets, only the United Kingdom has suffered a drop (-6%) after a record year in 2016. Ireland has also experienced a sharp decline (-10%). Other markets (Switzerland, Denmark and Finland) have decreased, but slightly, and thus remain at high levels. Germany and France are still at the top of the cycle.

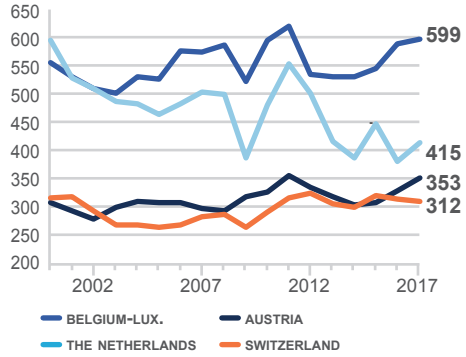
Southern European countries (Spain, Italy, Portugal and Greece) continued to grow after the low point of 2013 (+8%). These markets grew by 60% over this period but are still down by 23% compared to 2007.

In millions of units

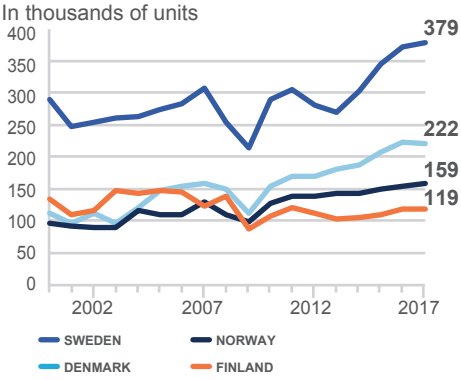
In millions of units



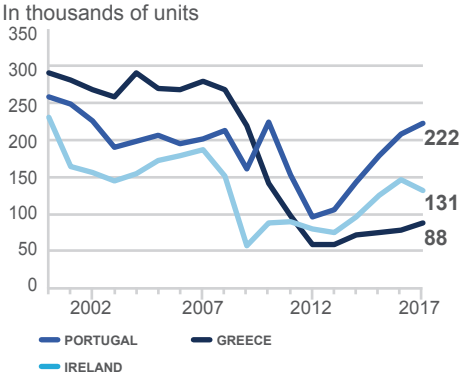
In thousands of units



In thousands of units

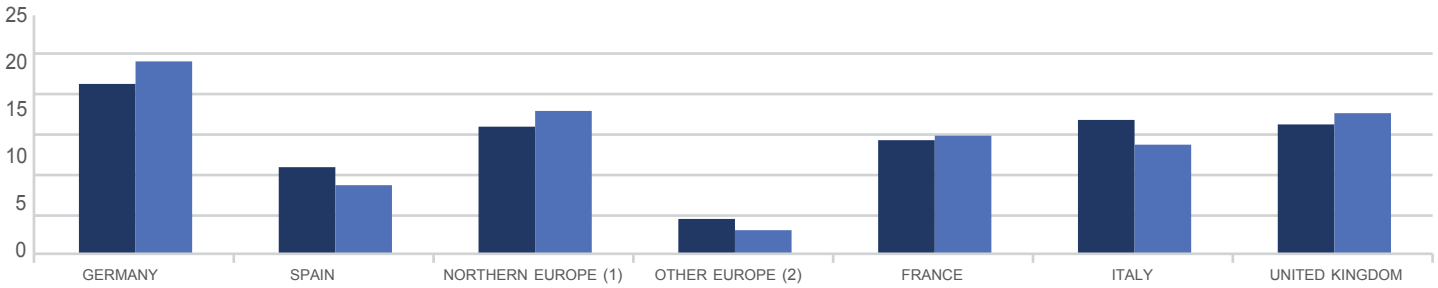


In thousands of units



As a % of Western Europe market

MARKET SHARES OF COUNTRIES ON THE NEW PASSENGER CAR MARKET



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

The West European market comprises 18 countries (15 pre-2004 EU members, plus European Free Trade Association - EFTA countries: Switzerland, Norway and Iceland). These countries have similar environments and obey similar economic rules.

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 more than 50% for Southern Europe (Spain, Italy, Portugal and Greece).

NEW PASSENGER CAR REGISTRATIONS PER GROUP

In 2017, market share of French groups in West European market increased by more than 2 percentage points to 23%, thanks in particular to the integration of Opel in the PSA group since August 1.

French manufacturers rely on the complementary nature of their brand ranges. The Renault group have Renault (7.6% market share) and Dacia (2.6%); the latter accounted for only 0.5% of the market in 2007. The PSA group now has four brands since August 1, 2017: Peugeot (6.2%), Citroën (3.8%), Opel/Vauxhall (2.2 %) and, since 2009, DS (0.3%).

Six major "generalist" European groups, producing a complete range of vehicles, each held around 6% of the market or more. The market trend towards higher-end vehicles did not help them.

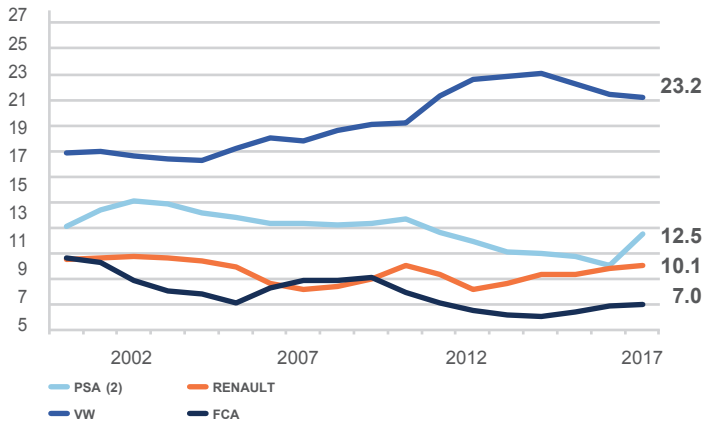
Volkswagen's market share is in decline for the third year running.

23%

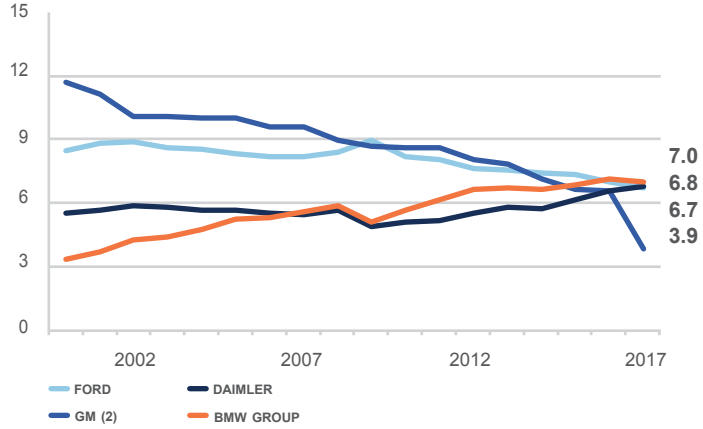
Share of new passenger cars sold in Western Europe manufactured by a French group

► MARKET SHARES OF GROUPS (1) IN EUROPE

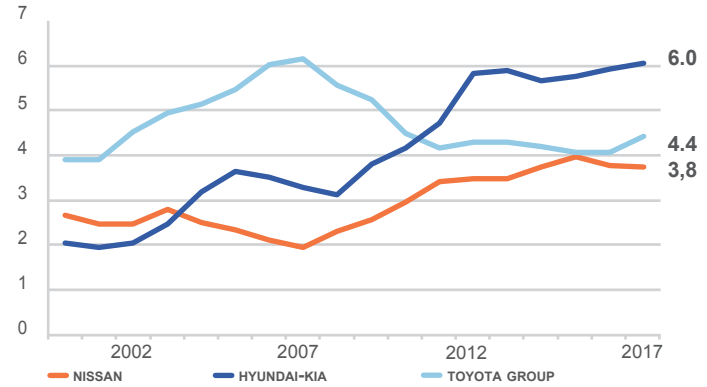
As a % of the total market



As a % of the total market



As a % of the total market



(1) The scope of the groups reflects their situation as at 01/01/2018.
(2) Opel in included in GM group until July 31, 2017 and PSA group since August 1, 2017.
See page 74 for groups definitions.

Since 1999, the Volkswagen group (VW), with its four main brands, has strengthened its positions and exceeded the threshold of 20% of market share, but lost 1.8 percentage points to 23% compared to 2014.

Market share of the French groups Renault and PSA (23% in total) increased, over 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 39% in 2017. Dacia's share progressed and DS's share is emerging.

The market share of the General Motors (GM) group, now without the Chevrolet brand which is no longer distributed in Europe and without Opel brand since August 1, 2017, was 3.9%, i.e. a decline of 2.7 percentage points. In 2017, Ford's market share was 6.7%. 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 market share was up at 7% compared to almost 13% in 1997 and 15% in 1989. In 2017, Fiat's market share was 5%.

The German Daimler and BMW groups, specialists in higher ranges and sales to companies, are pursuing a strategy of expanding their range and have remained at very high levels in 2017. Thus Daimler (Mercedes and Smart) consolidated the growth begun in 1997 with the effect of the diversification of its vehicle range, to 6.8%. BMW, including the Mini brand, fell slightly (7.0%).

Toyota group's share, in continuous growth from 1995 (3%) to 2007 (6%), then fell back one third over a period of four years, before stabilising at around 4.2%.

The market share 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 6% in 2017, a record level.

RANGE RANKING IN 2017

64 & 93

Models and body styles offered by French groups

The French groups expanded their vehicle ranges by proposing 50 or so models (excluding Opel integration) compared to 27 in 2000. Over recent years, they have developed their ranges on different product segments (multipurpose vehicles, 4WD, SUV, sedan). They regularly renew existing models (308, 5008, Koleos, Megane Scenic, Captur) or develop new ones (C3 Aircross). In addition, each body includes different versions depending on the equipment of the car which involves the marketing of several thousand possible combinations (more than 8,000 according to ADEME).

Groups	Brands	Economy and low range	Low-mid range	High-mid range	Premium range
PSA GROUP	CITROËN	C-Zero, C1, C3 (Picasso), C4-Cactus, Nemo, Berlingo, E-Mehari	C4 (Picasso), C3 Air Cross, C4 Air Cross, Jumpy, Space-Tourer, Jumper	C5, C-Elysee	
	DS	DS3	DS4	DS5, DS7 Crossback	
	PEUGEOT	i0n, 108, 208, 2008, Bipper, Partner	308, RCZ, 3008, 4008, 5008, Expert, Traveller, Boxer	508, 301	
	OPEL	Corsa, Adam, Meriva, Combo, Karl, Mokka, Crossland, Grandland	Astra, Zafira, Movano	Cascada, Insignia, Antara, Vivaro	
RENAULT GROUP	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE	Megane (Scenic), Master	Trafic, Kadjar, Koleos	Espace, Talisman
	DACIA	Logan, Sandero, Duster, Dokker	Lodgy		
	ALPINE				A110
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, CLA Classes, Vito	GLA	C, E, S, GL, SL, V, CLS, SLK, GLC, GLE, GLS Classes
	SMART	Fortwo, Forfour			
FIAT	ALFA ROMEO	Mito	Guiletta		Giulia, 4C
	FIAT	Panda, 500, Punto, Fiorino, Doblo, Qubo	Ducato, Tipo	Talento	
	JEEP	Renegade		Wrangler, Compass, Cherokee	Grand Cherokee
	LANCIA	Ypsilon	Delta		
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, Edge
GEELY	VOLVO			V40	S60, S90,V60, XC60, XC90
HONDA	HONDA	Jazz	Civic, HR-V	CR-V	
HYUNDAI	HYUNDAI	I10, I20, IX20	I30, Veloster, Elantra	IX 35, I40, Santa Fe, Tucson, Ioniq	Genesis
	KIA	Picanto, Soul, Stonic, Venga	Rio, Cee'd, Carens, Niro	Optima, Sportage	Stinger, Sorento
MAZDA	MAZDA	2, CX-3	3, MX5, CX-5	6	
MITSUBISHI	MITSUBISHI	i-MiEV	Lancer, Spacestar, ASX	Outlander	Pajero
NISSAN	NISSAN	Micra, Note, Juke	Leaf, Pulsar, Primastar, NV200, NV300	Qashqai, X-Trail	370Z, Pathfinder, GT-R, NV400
SUBARU	SUBARU			Impreza, XV, Legacy, Forester, Outback, Levorg, WRX	BRZ
SUZUKI	SUZUKI	Celerio, Swift, SX4, Jimny, Ignis, Vitara	Baleno	Grand Vitara	
TATA GROUP	JAGUAR				XE, XF, XJ, XK, F-TYPE
	LAND ROVER			RR Evoque	Discovery, Range Rover
TESLA	TESLA				S, X models
TOYOTA	LEXUS		CT		GS, IS, LS, RX, NX
	TOYOTA	IQ, Aygo, Yaris, Verso-S	Verso, Auris, Corolla, Proace	Avensis, Prius, CH-R, RAV4	GT86, Land Cruiser
VOLKSWAGEN GROUP	AUDI	A1, S1	A3, S3	A4, A5, TT, Q3	A6, A7, A8, Q5, Q7
	PORSCHE				911, Cayman, Macan, Cayenne, Panamera
	SEAT	Mii, Ibiza	Leon, Altea	Toledo, Ateca	Alhambra
	SKODA	Citigo, Yeti	Fabia, Rapid	Octavia	Superb
	VOLKSWAGEN	Up!, Polo, Caddy	Golf, Jetta, Touran,	Passat, Arteon, Scirocco, Tiguan, Transporter	Sharan, Touareg

Source: CCFA

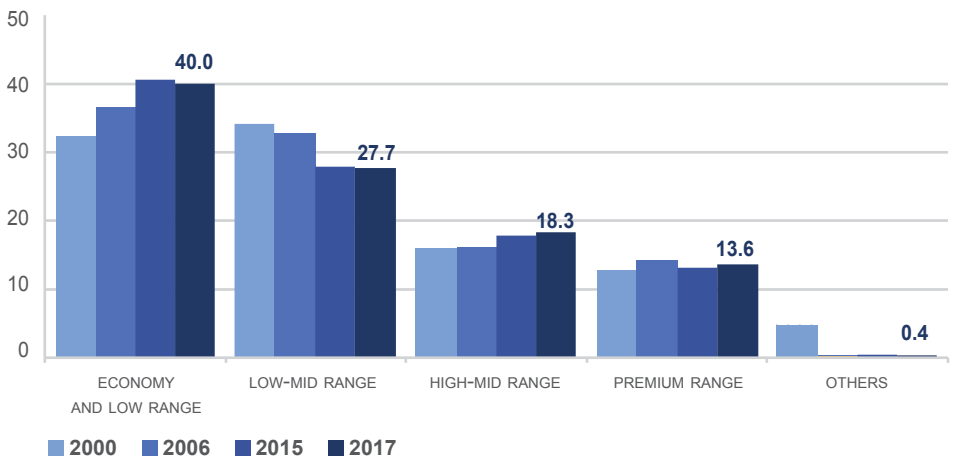
BREAKDOWN AND RANKING BY MODEL

Of the 15 best-selling models in Europe in 2017, seven belonged to a French group (as of December 31, 2017).

► RANGES AND BODY STYLES IN 2017 (As a % of new registrations by country)

	Economy and low range	Low-mid range	High-mid range	Premium range	Others	Sedans	Station wagons	Coupés	Conver-tibles	MPVs	Others
GERMANY	29	32	20	19	1	37	17	1	2	12	30
AUSTRIA	34	31	21	14	0	37	15	1	1	14	33
BELGIUM	36	28	20	16	0	39	13	1	1	13	33
DENMARK	47	29	17	7	0	54	17	0	0	7	21
SPAIN	39	33	21	8	0	50	5	1	0	8	34
FINLAND	21	31	29	18	1	40	26	0	0	4	30
FRANCE	52	28	13	7		49	6	1	1	11	33
GREECE	59	23	14	3	0	71	1	0	0	2	25
IRELAND	28	29	31	12	0	55	5	1	0	5	34
ITALY	60	19	13	7	0	52	7	1	1	9	31
LUXEMBOURG	30	27	21	23	0	37	12	2	2	10	37
THE NETHERLANDS	47	27	15	10	1	52	15	0	1	5	26
PORTUGAL	46	31	13	10		53	18	1	1	5	23
UNITED KINGDOM	36	26	21	17	0	51	6	2	2	6	33
SWEDEN	17	25	25	31	2	35	25	1	1	5	34
EUROPEAN UNION 15 COUNTRIES	**40**	**28**	**18**	**13**	**0**	**46**	**11**	**1**	**1**	**9**	**32**
ICELAND	33	25	29	13	1	31	5	1	0	4	60
NORWAY	19	29	28	25	0	38	17	0	0	6	39
SWITZERLAND	29	26	22	22	1	34	14	1	2	9	39
ALL 18 COUNTRIES	**40**	**28**	**18**	**14**	**0**	**46**	**11**	**1**	**1**	**9**	**32**

BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY RANGE IN EU-18



Source: CCFA

In 2017, there was great product diversity; market share of the 15 best-selling vehicles in Europe was 27% compared to 30% in 2015 and 40% in 2000. At the lower end, French manufacturers, who previously had eight models, now have over forty.

The share of higher-end models was 32% in 2017 in Western Europe, i.e. an increase of 4 percentage points compared to 2014. Growth overall was identical in France, but this ratio was 20%.

The share of sedans, still dominant, has declined since the recovery of the European market in 2014, in favour of the category «Other» which continues to benefit from the development of 4WD and SUV in the lower range (Peugeot 2008, Renault Captur , etc.). The latter has thus increased by 10 percentage points in three years and now represents 32% of the market.

Each European country model profile was stable until 2008, with Southern Europe preferring lower and lower-middle ranges, whilst Northern Europe continued to prefer higher-end vehicles and station wagons. But, in 2009, the success of lower-end ranges and sedans, particularly in Germany and in the UK, made this contrast between the two regions less stark. This trend continued until 2010 with the exception of Germany, where higher-end vehicles returned to slightly higher market shares (38%) than the long-term position (35%) for the third year running. Spain and Italy has also seen an increase in the market share of economy and lower-end vehicles of around 10 percentage points since 2000.

9 OUT OF 15

Best-selling models in Western Europe in 2017 were in the lower ranges

► RANKING OF THE 15 LEADING MODELS IN 2017

Models (1)	Rank	Market share
Volkswagen Golf	1	3.7%
Fiat 500	2	2.3%
Renault Clio	3	2.1%
Volkswagen Polo	4	1.8%
Ford Focus	5	1.8%
Renault Mégane	6	1.8%
Ford Fiesta	7	1.7%
Peugeot 208	8	1.7%
Nissan Qashqai	9	1.6%
Volkswagen Tiguan	10	1.5%
Citroën C3	11	1.5%
Opel Corsa	12	1.5%
Mini Mini	13	1.5%
Renault Captur	14	1.4%
Opel Astra	15	1.3%
Dacia Sandero		1.2%
Peugeot 2008		1.2%
Peugeot 3008		1.1%
Opel Mokka		1.1%
Peugeot 308		1.1%
Citroën C4		0.9%
Dacia Duster		0.8%
Renault Kadjar		0.7%
Renault Twingo		0.5%
Peugeot 108		0.4%
Citroën C4 Cactus		0.4%

(1) Opel data: whole year 2017.
Source: CCFA

TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS

-5 POINTS

Drop in the share of new cars fitted with diesel engines as a proportion of total registrations between 2016 and 2017

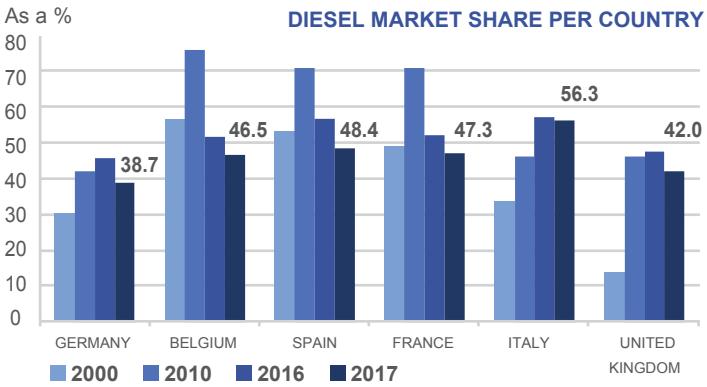
Having grown significantly from 1997 to 2007, the share of new cars equipped with diesel engines in Western Europe as a proportion of total registrations is around 50%. In 2017, it fell by more than five percentage points to 44%, 11 points below the 2011 record. In Western Europe, outside France, it was 44%, 8 percentage points down compared to the same reference year. The deterioration amounted to 29 percentage points in Belgium while in Italy, this share increased slightly (+1 point).

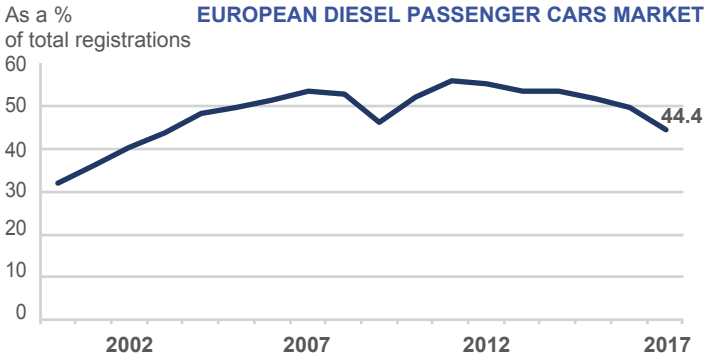
On this market of only 6.3 million units, French groups had a market share of 23% in 2017 (28% in 2010), i.e. around 1.4 million new diesel cars. The ratio is almost identical for other energies (22% compared to 19% in 2016). This fall involved an increase of nearly 90% (excluding Opel integration) of their registrations of petrol-powered cars or other, an additional 731,000 units.

Like France, the four other main Western European countries (Germany, Spain, Italy, UK) saw companies purchasing more diesel cars (around 60% of their registrations) than households (around 40% of their purchases). In 2017, the share of diesel in households had fallen around 30% in France and the United Kingdom.

► TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS IN EUROPE IN 2017

	Average cylinder capacity	Average power	4WD	Diesel
	cc	kW	%	%
GERMANY	1,700	111	19.8	38.7
AUSTRIA	1,598	94	23.4	49.7
BELGIUM	1,548	93	9.6	46.5
DENMARK	1,428	85	3.3	35.0
SPAIN	1,532	89	8.4	48.4
FINLAND	1,574	100	20.3	30.6
FRANCE	1,467	86	7.3	47.3
GREECE	1,379		4.0	44.6
IRELAND	1,563	86	5.9	65.2
ITALY	1,485	80	10.8	56.3
LUXEMBOURG	1,821	121	28.3	54.0
THE NETHERLANDS	1,371	86	4.7	17.5
PORTUGAL	1,452	82	3.4	61.6
UNITED KINGDOM	1,650	105	16.2	42.0
SWEDEN	1,769	114	34.2	48.5
EUROPEAN UNION 15 COUNTRIES	**1,580**	**97**	**13.8**	**44.8**
ICELAND			19.5	41.8
NORWAY	1,772	115	39.3	23.1
SWITZERLAND	1,804	125	45.4	36.3
ALL 18 COUNTRIES	**1,587**	**97**	**14.8**	**44.4**





Source: CCFA

In Europe, average engine sizes and power ratings of cars differ considerably from one country to another. They depend largely on economic, tax and geographical conditions in each national market. Because of the minimisation of engines (downsizing, identical engine power with a lower engine capacity), the average capacity of new private cars in Europe fell 153cm³ between 2007, the highest point, and 2017. On the other hand, the average power rating has increased by 7kW since 2013, to 97kW. These indicators tend to be higher in Northern Europe.

The share of 4WD continuously increased since 2010; it stood at 15% of the European market, i.e. 2.1 million units, compared to 8% in 2009. The level of equipment varies substantially depending on national characteristics. In Switzerland, Norway and Austria this share is higher to meet the demands of mountainous topography. In Germany, it was 20%, i.e. an increase of almost 9 percentage points compared to 2007.

The share of diesel is substantially influenced by regulations and tax arrangements in each country. In Europe, in a growing market in 2017, the share of diesel cars fell to 44.4%. Nevertheless, volumes decreased 8% because of the high level of demand. In Ireland and Portugal nearly two-thirds of new cars registered are still diesel cars, but this ratio is down by around 4 points compared to 2016. All Western European countries are seeing a sharp decline in this share of diesel: from 1 percentage point in Italy and Denmark to more than 10 points in Greece and Luxembourg, via the United Kingdom (-6 points in a declining market) and Spain (-8 points).

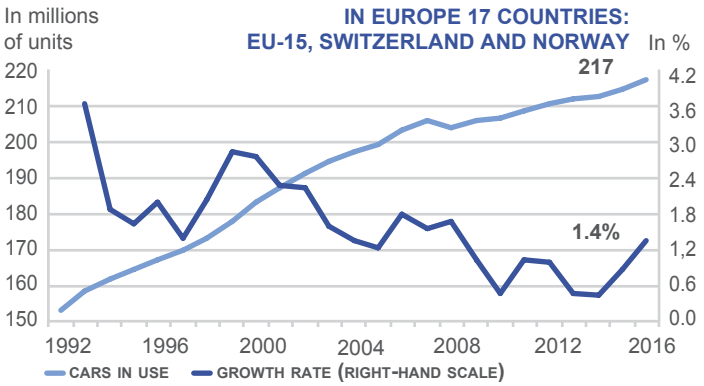
PASSENGER CARS IN USE IN EUROPE

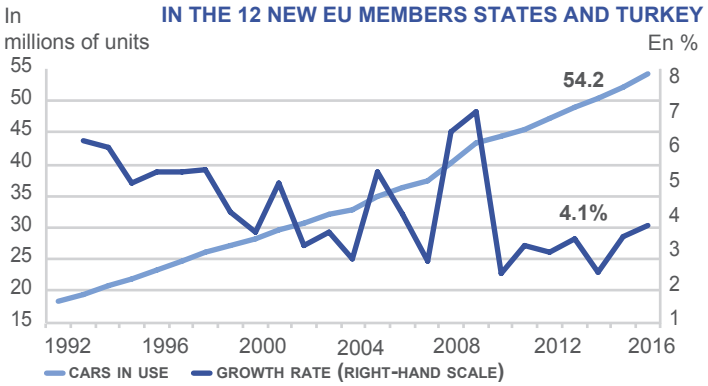
In Western Europe, an area of high auto density (from 494 in Ireland to 706 in Italy), the vehicles in use increased 1.4% to January 1, 2016. The marked contrast between a dynamic Northern Europe and the South of Europe affected by the financial crisis since 2013 has petered out.

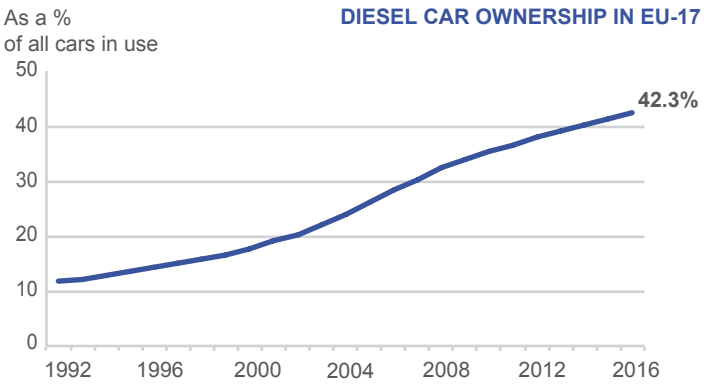
In the new EU member states and Turkey, where car ownership is lower (from 195 for Turkey to 628 for Poland), the economic and financial crisis substantially slowed the rate of vehicle stock growth: nearly 4% compared to 5-7% between 2005 and 2009. Demand for smaller price-tag cars remained primarily satisfied by imports of second-hand vehicles. In 2016, this zone accounted for 20% of the European vehicles in use compared to 15% in 2005.

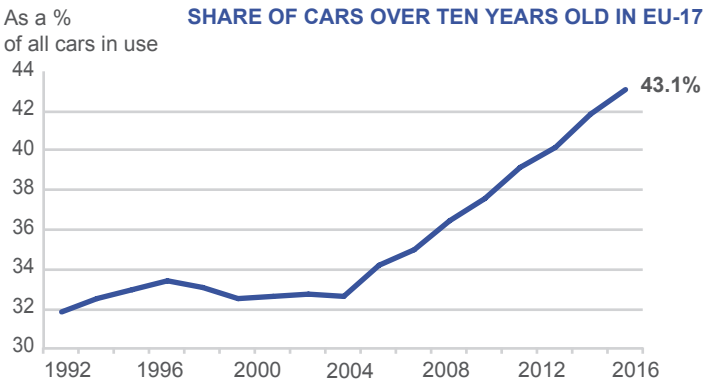
Having settled at around one third between 2000 and 2009, the share of cars of more than 10 years of age in Western Europe has constantly increased to reach 43% in 2016. The low number of registrations of new passenger cars, particularly in Southern Europe, is one of the reasons for this high percentage. Western Europe has become a renewal market. Within the new EU member states and Turkey, this share can be estimated at a little over 50%.

Passenger cars in use on January 1 each year







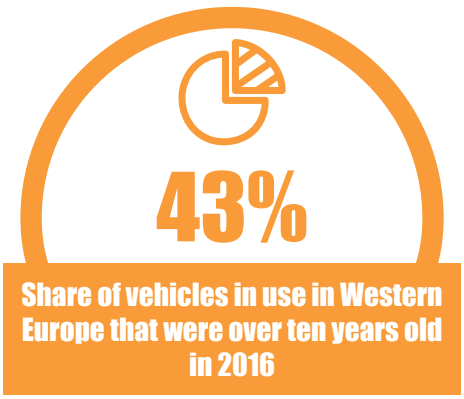


(1) The change was calculated on a like-for-like basis.
National sources: statistics organisations, French Transport and Interior Ministries, professional sources

On January 1, 2016, the number of passenger cars in use in Western Europe (EU-15, Switzerland and Norway) was 217 million cars. High levels of ownership and the crisis affected growth, and the pace is now more in line with population growth. Whilst the vehicles in use decreased in certain countries of Southern Europe, it did increase in the countries of Western Europe overall in 2015. In 2016, Italy (+0.7%), Spain (+1.5%) and Portugal (+2.2%) returned to substantial growth rates close to those recorded for the UK (+2.2%) and Germany (+1.5%). In France (+0.6%), growth was lower than in the main West European countries.

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 remains the majority: Austria, Belgium, Spain, France and Luxembourg. However, although in progress, the share is lower in Germany (32%) and almost equivalent to the overall average in the UK (40%) and in Italy (42%).

In the new EU member states and Turkey, growth in the vehicles in use was contrasted. The vehicles in use of Slovenia and Hungary increased by 1.9% and 6.1% respectively between 2010 and 2016. Over the same period, vehicles in use in Romania (+21%), Poland (+26%) and Slovakia (+28%) increased at a high rate. The Czech Republic recorded a moderate growth (+14%), but this figure applies to what is already a large number of vehicles in use. The growth of Turkey's vehicles in use remained extremely high (+49%). Within these new EU member states and Turkey, the share of diesel engines is 33%, up around one and a half percentage points annually over recent years.



NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

41%

Share of French groups in sales of light commercial vehicles in Western Europe in 2017

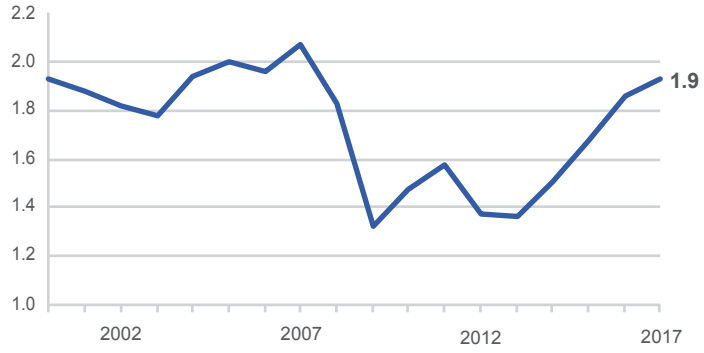
The West European market for light commercial vehicles, which was highly impacted by the 2009 crisis, stabilised at around 1.5 million units before growing, since 2014, to 1.9 million units in 2017 (+42% since 2013). However, the decline is still 137,000 units compared to the record level of 2007.

Between 2007 and 2017, the UK and German markets were slightly up (+47,000 and +22,000 respectively). In the other three major markets, volumes fell from -23,000 in France to -77,000 for Spain, with in between, -43,000 for Italy. Increases since 2013 are spectacular in Southern Europe, but pre-crisis levels have not yet been reached, unlike in Northern Europe. Southern Europe, including France, accounted for 45% of the European market, compared to 52% in 2007.

In 2017, French groups saw sales up 21% to 785,000 units, thanks in particular to the integration of the Opel brand into the PSA Group since August 1, 2017; they reached 41% of the market. Despite their strong presence in Southern Europe, French companies have nevertheless been able to increase their market share to a record level, seven percentage points higher than that observed in 2007.

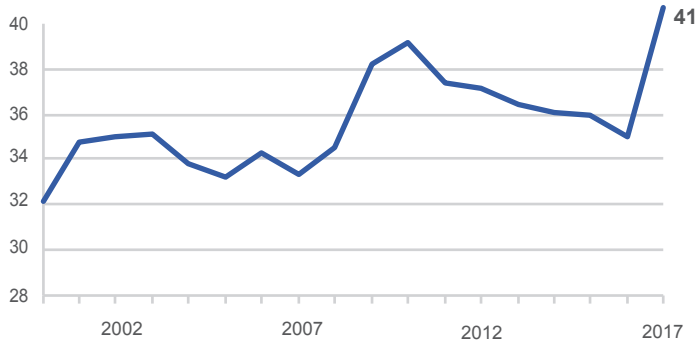
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (18 COUNTRIES)

In millions of units



FRENCH MARKET SHARE

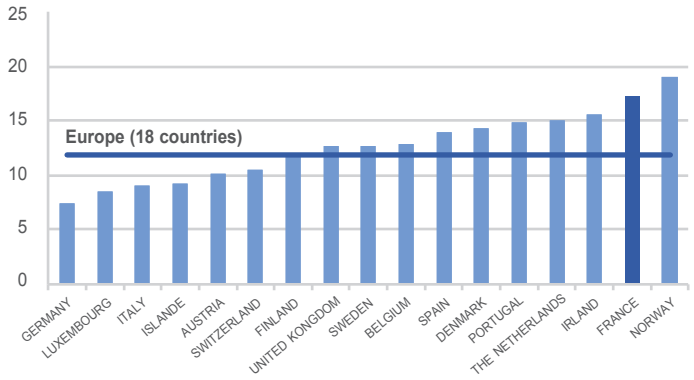
As a % of total market



(1) In 2006, there was a change of scope in Spain: see note on page 74.

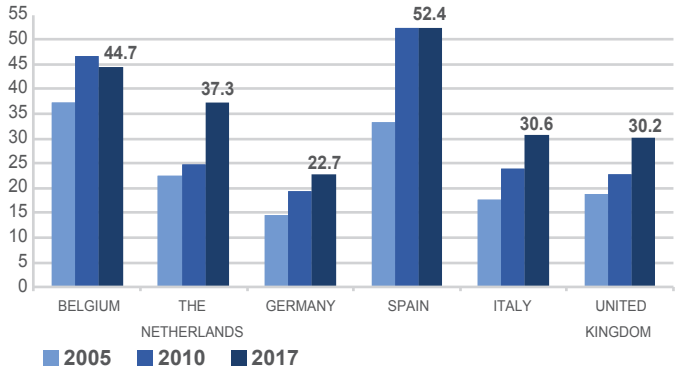
SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2017

As a %



MARKET SHARE OF FRENCH MANUFACTURERS IN MAJOR EUROPEAN COUNTRIES

As a %



Source: CCFA

Since tax rules are not the same in all European countries, the number of light commercial vehicles as a percentage of all light vehicles goes from 7% in Germany to 19% in Norway. Overall, the 2017 average was 12%.

For many years, the renewal of products and the adapted answer they bring to today's economy in terms of transportation, services and mobility 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 groups' market shares were protected by the success of Renault Master, Peugeot Boxer and Citroen Jumper. In the small van segment, competition is cut-throat, but French groups can rely on a wide range (Citroën Berlingo and Nemo, Peugeot Partner and Bipper and Renault Kangoo). In 2017, four of the ten highest-selling models were French (Citroën Berlingo, Peugeot Partner, Renault Kangoo, Renault Trafic).

In Spain and Belgium, French groups' market share easily exceeded 40% in 2017. In Germany and in Italy, who have their own domestic manufacturers, their market share was 23% and 31% respectively, higher than in 2005. In numerous countries such as Portugal, Denmark and Ireland, gains in market share since 2010 have exceeded eight percentage points.

Total sales of new light commercial vehicles have risen sharply in the past three years: between 2016 and 2017, they grew by +8% in Germany, +11% in Spain and Belgium, and +13% in Denmark.

France remained the largest European market (439,000 units) ahead of the United Kingdom (370,000 units), Germany (275,000 units), Spain (200,000 units) and Italy (195,000 units).

HEAVY TRUCK MARKET AND PRODUCTION IN EUROPE

The European market for commercial vehicles over 5 tonnes slightly progressed in 2017 (+1%) at nearly 300,000 units, compared to less than 210,000 in 2009. Contrary to the 1993 crisis, where the market recovered its high sales levels five years later, the 2009 crisis is different and seems to be settling at a new equilibrium, lower level.

Western European production fell by 3% to 475,000 units. After having suffered the serious crisis of 2009, production is now more than twice the trough of that year, emphasising the scale of fluctuations linked to economic conditions in this sector and the importance of extra-European demand

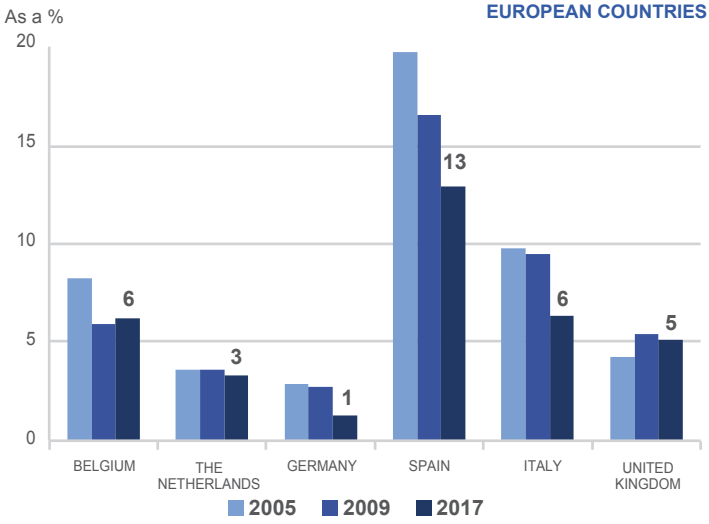
299,000

Level of registrations of heavy trucks in Western Europe in 2017

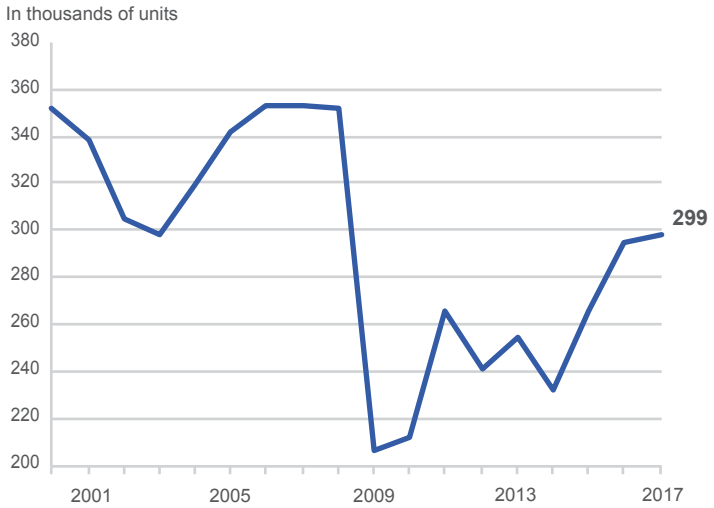
► HEAVY TRUCKS MARKET AND PRODUCTION IN WESTERN EUROPE (IN THOUSANDS OF UNITS)

	2005	2015	2016	2017	Change 2017/2016
NEW HEAVY TRUCK REGISTRATIONS					
From 5.1t to 15.9 t	87	48	53	52	-2.1%
16t and more	254	217	241	247	2.2%
TOTAL	342	265	295	299	1.4%
HEAVY TRUCKS PRODUCTION					
TOTAL	453	465	490	475	5%

RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



NEW HEAVY TRUCK REGISTRATIONS IN EUROPE



RENAULT TRUCKS' MARKET SHARE IN EUROPE

Source: CCFA

In Europe, the heavy truck 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, i.e. 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 1990s. In 2017, eight years on, the market is 44% up compared to 68% up in 2001.

The favourable trend for heavy commercial vehicles is slow and regular. Since 2003, the share of vehicles of 16 tonnes and more (rigids or tractors) represents more than 8 out of 10 vehicles.

The share of alternative energies for heavy trucks (NGV, electric, other) is very low (around 1% of the market).

Renault Trucks' international development was affected by the collapse of Southern European markets (Spain and Italy). The weight of this zone in Western Europe, outside France, fell from 27% to 14% between 2007 and 2014 before bouncing back to 21% in 2017. Renault Trucks' European market share outside France (4%) has also fallen compared to that observed in 2008 (6%). Overall, its registrations increased in 2017 (+8%) and its market share in Europe was at 8%. Outside Europe, Renault Trucks has substantial volumes in Africa (Maghreb) and the Middle East.

FRENCH MANUFACTURERS IN THE NEW EU MEMBER STATES

23%

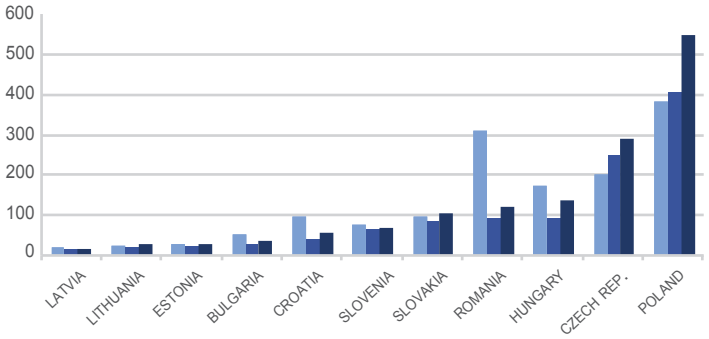
New light vehicle market share of French groups in the major new EU countries

In 2017, vehicle production increased (+2% to 4 million vehicles), settling at a record level. The sales of new vehicles increased 11% to 1.5 million units. The difference between production and sales of new vehicles was therefore 2.5 million vehicles. The local market for new vehicles is way below 2007 level.

French groups are commercially present in this zone for many years, and also have industrial sites: PSA in Slovakia, Czech Republic (with Toyota in Czech Republic) and in Poland (with Opel integration since August 1, 2017); Renault in Slovenia and in Romania. All these sites made around 1,000,000 units in 2017. Registrations of new vehicles still represent small volumes for French groups with 200,000 units. These volumes should increase given the very low automotive densities observed when compared to Western Europe.

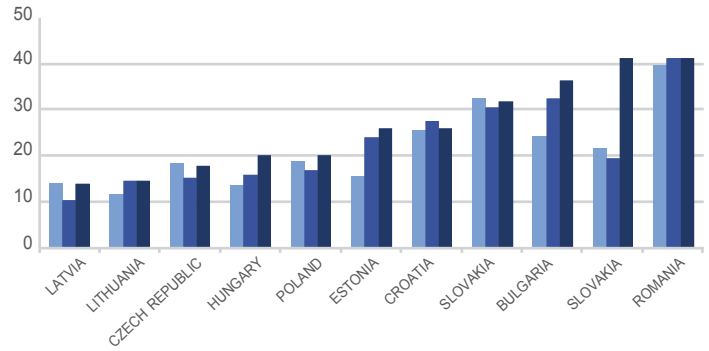
In thousand of units

NEW LIGHT VEHICLE REGISTRATIONS (UP TO 5T)



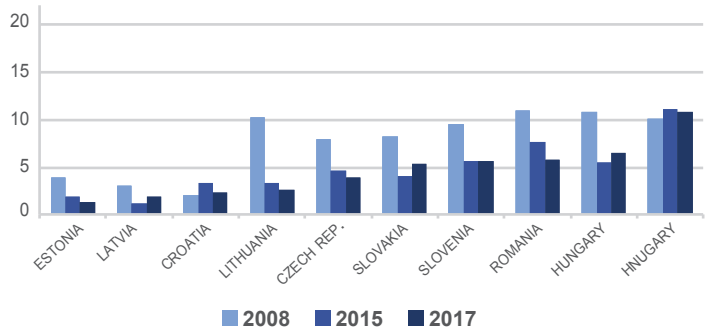
FRENCH GROUPS MARKET SHARE: NEW LIGHT VEHICLES

As a % of total market



FRENCH GROUPS MARKET SHARE: NEW HEAVY TRUCKS

As a % of total market



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

	2016	2017	Change
VEHICLE PRODUCTION			
Passenger cars	3,829	3,858	0.8%
Light commercial vehicles	126	173	37.5%
Heavy trucks			
NEW VEHICLE REGISTRATIONS			
Passenger cars	1,148	1,291	12.4%
Light commercial vehicles	151	156	3.4%
Heavy trucks	69.6	67.5	-3.0%

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

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

In 2017, Central and Eastern European Countries (CEEC) activity progressed just like that of Western Europe after the recovery of the European market.

In 2017, new vehicle sales progressed sharply for the fourth consecutive year. Sales have substantially increased over all countries (with the exception of Latvia and Czech Republic), and more particularly in Hungary (+15%) and Poland (+17%).

The average cylinder capacity and power of passenger cars registered in this zone (1,580cm^3 and 96kW respectively) are almost identical to those in Western Europe. The share of 4WD stands at 12%, two points lower than in Western Europe. In contrast, the weight of diesel (28%) is much lower (-16 percentage points). The ratio of the lower ranges is 65% and that of the higher ranges is 34% (compared to 68% and 32% respectively).

The share of electric and hybrid passenger cars was 0.2% and 2.5% respectively in 2017 (compared to 0.9% and 4.1% in Western Europe).

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2015, the European automotive industry employed 2.4 million people, 45% of whom in vehicle manufacture. In Western Europe, a rebound has taken place since 2013 (+49,000 people) thanks to Germany (+36,000 people), Spain, the United Kingdom (+11,000 people each) and Sweden (+4,000 people). The British workforce has even increased by 19% since 2011. Nevertheless, since 2005, the number of employed people decreased in Western Europe (approximately -160 000 people) and increased in Eastern Europe (around +330,000 people).

The automotive sector also generates indirect jobs (around one third of the number of direct jobs, according to ACEA).

The added value per person in work has increased in France since 2012 but remains lower than the European average and the level of expenditure on headcount per person in work is still higher than the European Union average.

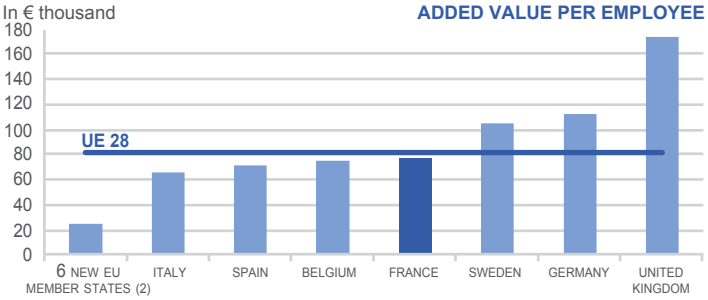
The share of employers' social contributions as a proportion of staff cost was 29% in France compared to 18% in Germany, with the European average at 22%.

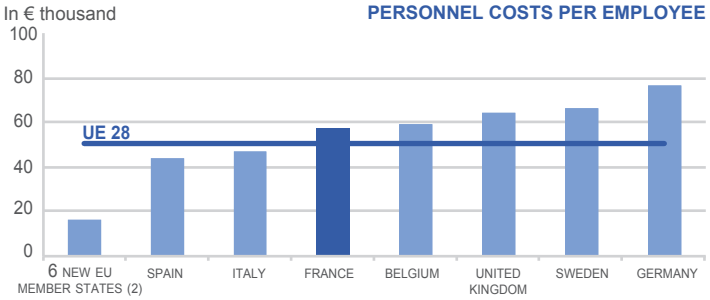
+49,000 PEOPLE

Increase in staff numbers in the automotive industry in Western Europe between 2013 and 2015

► THE AUTOMOTIVE INDUSTRY IN THE EU 28 IN 2015 (1)

	Units	European Union (28 countries)	Germany	France	6 new EU member states (2)	United Kingdom	Spain	Italy	Sweden	Belgium
People employed	**thousands**	**2,442**	**851**	**223**	**674**	**154**	**143**	**160**	**70**	**30**
of which automobile assembly	thousands	1,085	533	119	145	82	68	66	48	16
of which body and trailer manufacturers	thousands	157	44	23		18	9	10	4	5
of which automotive equipment manufacturing	thousands	1,200	274	81	529	53	66	84	19	9
Sales	**€ million**	**1,032,492**	**462,108**	**110,569**	**141,642**	**92,359**	**66,370**	**68,672**	**36,875**	**15,074**
Production	**€ million**	**865,230**	**370,792**	**77,803**	**136,519**	**83,011**	**61,475**	**57,164**	**27,410**	**14,431**
Production/Sales	%	83.8	80.2	70.4	96.4	89.9	92.6	83.2	74.3	95.7
Added value (to factor costs)	**€ million**	**200,415**	**94,811**	**17,041**	**16,769**	**26,774**	**10,180**	**10,465**	**7,339**	**2,241**
Added value/production	%	23.2	25.6	21.9	12.3	32.3	16.6	18.3	26.8	15.5
Added value per employee	€ thousand	82.1	111.4	76.3	24.9	174.4	71.2	65.3	104.3	75.8
	base 100: 6 new EU member states	330	448	307	100	701	286	263	419	305
Purchases of goods and services	**€ million**	**842,167**	**368,068**	**93,729**	**120,043**	**68,128**	**58,153**	**59,947**	**29,399**	**12,903**
Purchases as a % of production	%	97.3	99.3	120.5	87.9	82.1	94.6	104.9	107.3	89.4
Personal expenses	**€ million**	**123,570**	**65,106**	**12,788**	**10,699**	**9,913**	**6,251**	**7,548**	**4,648**	**1,745**
Expenses per employee	€ thousand	50.6	76.5	57.3	15.9	64.6	43.7	47.1	66.0	59.0
	base 100: 6 new EU member states	319	482	361	100	407	275	297	416	372
Gross operating surplus (GOS)	**€ million**	**76,844**	**29,706**	**4,253**	**12,895**	**16,861**	**3,929**	**2,917**	**2,691**	**496**
GOS/Added value	%	38.3	31.3	25.0	76.9	63.0	38.6	27.9	36.7	22.1





(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, Romania, Slovakia and Slovenia: body and trailer manufacturing employees are included in the figures for vehicle manufacturers.
Sources: Eurostat and CCFA estimates

The automotive industry, one of the 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 explain the lack of reliable figures post-2015.

Germany accounted for 35% of all employees in the automotive industry. France had 9%, 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 28%.

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 the workforce in the automotive industry was employed in vehicle production, 53% in France and 54% in the United Kingdom, while this share was around 22% in the six new EU member states. It was 41% and 47% respectively in Italy and Spain.

According to ACEA, the ratio of auto industry jobs as a portion of the working population averaged 1% in the European Union in 2016 with disparities between the member countries. The range was 2-3.2% in Germany, Slovakia and Czech Republic, compared to 0.6% in the UK. In France and Italy the percentage was around 0.7%. Poland's was slightly higher than the European average, at 1.1%.

FRENCH AUTOMOTIVE GROUPS IN 2017

PSA group: www.psa.fr

In 2017, in a context of growing markets, particularly in Europe, and the integration of Opel on August 1, 2017, PSA Group sales increased by 15%. Growth is very dynamic in Europe (+ 23%), where the group still ranks second (passenger cars + light commercial vehicles). Outside this zone, the manufacturer's sales increased significantly in Latin America, but fell sharply in Southeast Asia.

The international development strategy is based largely on long-term targeted cooperation ventures with other manufacturers. In China, the group is cooperating with Dongfeng Motor, with which it has developed a strategic partnership, and with China Changan Automobile Group. Furthermore, the group has several projects for setting up production or assembly plants in markets with development potential (India, Iran, Morocco, Algeria, Malaysia, Uzbekistan, etc.).

PSA Group has a headcount of around 170,000 people (excluding Opel/Vauxhall) throughout the world, 68,000 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 up to several thousand people.

In the technology field, the group has three priority objectives: clean technologies (improving the efficiency and environmental performance of its vehicles), autonomous, connected cars (promoting the emergence of new transport and mobility models, whilst saving time and energy for customers), and finally, making attractive cars. It is also developing an ecosystem of partners to meet its targets.

In 2017, the group made €2.4 billion of tangible investments and 2.2 billion in research and development.

At the beginning of 2016, in a logical continuation of its "Back in the race" programme the manufacturer introduced a performance and profitable organic growth plan entitled "Push to pass" for the 2016-2021 period. Its objectives revolve around increasing operating margins and turnover. Product development, the internationalisation of the group, the growth of activities particularly in after-sales and used vehicle sales, are also priorities within this plan.

Renault group: www.renault.com

Renault's global sales strongly increased (+9%) thanks to sturdy European market sales growth and the integration of Lada brand since January 1, 2017. The Renault brand ranks second on the market for light vehicles in Europe. Outside Europe, the group has grown over all geographical zones and more particularly in Africa and Asia.

The venture with Nissan within the Alliance which begun in 1999 has been optimised and enlarged over time (agreement signed with Daimler in 2010, integration of Mitsubishi in 2016). New synergies (industrially, on electric vehicles, support functions, etc.) and new projects are being set up. The strategic partnership with AvtoVAZ, with the objective of accelerating their growth and strengthening their presence in Russia, achieved a new level with the inclusion of the Russian manufacturer in the Renault group.

The group's innovation priorities are the electric vehicle (improving performance and competitiveness), the connected vehicle (developing communications systems linking vehicles, infrastructures and the driver), and the autonomous vehicle (experimenting with technologies and new forms of mobility). It is also developing partnerships (universities, partner companies, etc.).

Renault group employs 180,000 people throughout the world, 48,000 of whom are in France on 15 sites: assembly, manufacturing of engines and mechanics (Cleon, Ruitz); R&D centres (Guyancourt); head office, etc.

In 2017, Groupe Renault made €2.3 billion of tangible investments and, excluding AvtoVAZ, invested €2.6 billion in research and development.

At the end of 2017, the group launched a new strategic plan called "Drive the future – 2017-2011". Its priorities: increase competitiveness, strengthen global presence, and by 2022, build the mobility of the future (electric, connected, autonomous, shared). Their targets in figures focus particularly on increased turnover and operating margins.

Renault Trucks: www.renault-trucks.com

Renault Trucks progressed in 2017 in a slightly growing Western European market. Its market share was 8%.

Renault Trucks assembles its trucks in France at its Bourg-en-Bresse (Ain) and Blainville-sur-Orne (Calvados) plants. The truck manufacturer relies on partners for local assembly outside Western Europe, in Morocco and in Iraq. Its subsidiary, Renault Trucks Defense (which became Arquus in 2018), the protected mobility vehicle specialist for defence and safety produces 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 9,500 employees, 80% of whom are 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 manufacturer offers 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. In 2018, the manufacturer will market a range of 100% electric vehicles and will implement a line dedicated to them in the Blainville plant.

	Units	PSA group	Renault group
Sales	€ million	65,210	58,770
Capital expenditures	€ million	2,351	2,290
Net income	€ million	2,358	5,210
Employees worldwide (1)	no. of people	172,927 (3)	181,344
of which France	no. of people	68,526	47,711

364,000 PEOPLE

Worldwide employees of French groups

	Units	PSA group					Renault group		
		Automotive activity: Peugeot , Citroën and Opel/Vauxhall	Automotive equipment: Faurecia	Financing: PSA Finance	Others	Eliminations	Automotive sector	Financial sector	Others
Sales	€ million	47,145	17,947	116	2		55,878	3,045	-153
Operating income	€ million	2,786	1,170				2,685	1,050	119
Capital expenditures (2)	€ million	2,351					2,285	5	
Employees worldwide (1)	no. of people	85,797	86,319		811		177,969	3,375	

(1) On December 31.
(2) The capital expenditure given for automotive activities are those for all industrial and commercial activities, excluding financing.
(3) Opel/Vauxall social data are consolidated since January 2018.
Sources: PSA and Renault Groups annual reports

FRENCH AUTOMOTIVE GROUPS IN 2017

EUROPE

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

Germany
18 Eisenach
19 Rüsselheim

PSA GROUP

RENAULT GROUP

Belarus
20 Minsk

Spain
21 Palencia
22 Saragosse
23 Valladolid
24 Vigo
25 Villaverde

Italy
26 Val di Sangro

Poland
27 Gliwice (Opel)

Portugal
28 Mangualde

Czech Republic
29 Kolín (Toyota)

RENAULT TRUCKS

SEVELSUD

Romania
30 Pitesti (Dacia)

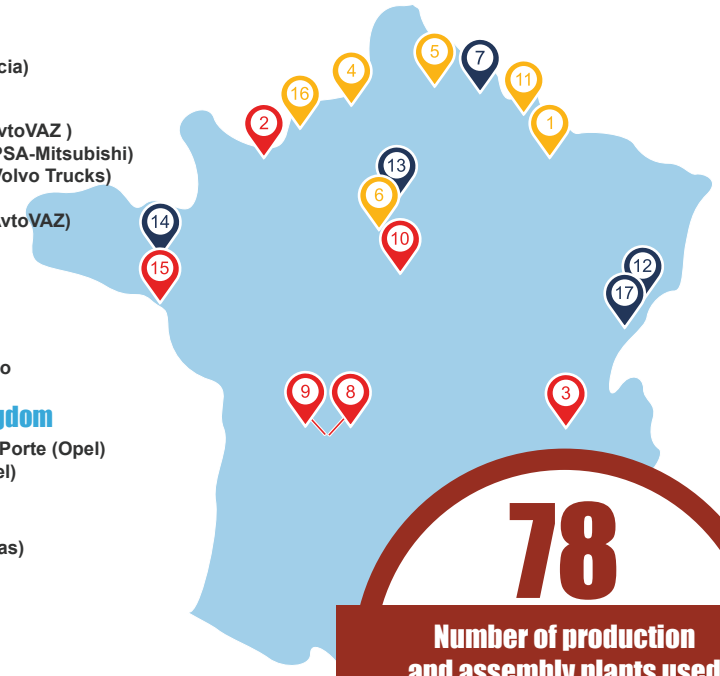
Russia
31 Izhevsk (AvtoVAZ)
32 Kalouga (PSA-Mitsubishi)
33 Kalouga (Volvo Trucks)
34 Moscou
35 Togliatti (AvtoVAZ)

Slovakia
36 Trnava

Slovenia
37 Novo Mesto

United Kingdom
38 Ellesmere Porte (Opel)
39 Luton (Opel)

Turkey
40 Bursa (Tofas)
41 Bursa



78

Number of production and assembly plants used by French groups worldwide, including 13 projects

AMERICA

Argentina
42 Buenos Aires
43 Santa Isabel

Brazil
44 Curitiba
45 Porto Real

Colombia
46 Medellin

Uruguay
47 Montevideo (Nordex) (project)

AFRICA

Algeria
48 Oran (project)
49 Oued Tlelat
50 Meftah (BSF Souarki) (project)

Ethiopia
51 Wukro

Kenya
52 (URYSIA) (project)

Morocco
53 Kenitra (project)
54 Casablanca
55 Tanger

Nigeria
56 Kaduna (PAN Nigeria Ltd)

Tunisia
57 Tunis (STAFIM) (project)

ASIA

China
58 Chengdu
59 Shenzhen
60 Wuhan
61 Shenyang (Brilliance) (Project)
62 Wuhan

South Korea
63 Busan (Renault Samsung Motors)

India
64 Tamil Nadu (CK Birla) (project)
65 Chennai (Renault-Nissan)

Indonesia
66 (Indomobil)

Iran
67 Kashan (SAIPA) (project)
68 Teheran (Iran Khodro) (project)
69 Teheran (Iran Khodro)
70 Teheran (Pars Khodro)

Japan
71 Mizushima (Mitsubishi)
72 Okazaki (Mitsubishi)

Kazahstan
73 Koustanaï

Malaysia
74 Gurun
75 Tan Chong Motors (project)

Uzbekistan
76 Jizzakh
(SC Uzavtosanoat) (project)

Pakistan
77 Karachi (Al-Futtaim) (project)

Vietnam
78 Chulai (Thaco)

WORLD PRODUCTION OF FRENCH GROUPS

236 MILLION

Vehicles produced by French automotive groups worldwide since 1898

In 2017, global production of French groups continues to grow (+17% at 7.8 million vehicles); it thus reached a new record level thanks in particular to the integration of Lada into the Renault group on January 1, 2017 and that of Opel into the PSA Group on August 1, 2017. Since 1996, production has increased by 106%, i.e. an annual average growth of 3.5%, thanks primarily to the increase in opportunities in Europe outside France and subsequently, outside Europe. Groups have developed their production capacities in the latter zone, which in 2017 accounted for around 30% of overall production.

Passenger car production amounted to 6.9 million cars, a new record level after 2010, 2011 and 2016; that of light commercial vehicles amounted to 910,000 vehicles, the highest level, ahead of that of 2016 with 29,000 additional units (Lada not producing light commercial vehicles). Compared to 2007, production increased by 30% for passenger cars (+1.6 million units), and it also increased by 10% for commercial vehicles (+80,000 units).

The French groups have a great diversity of sites: the historical factories (Sochaux, Flins), the large ones (Vigo, Pitesti), those producing a single type of model (Kolin, Novo Mesto) or a great diversity (Mulhouse, Togliatti), light commercial vehicles or their derivatives (Hordain, Batilly).

► PRODUCTION OR ASSEMBLY SITES PER MODEL

PSA group	
Brands and models	**Production or assembly sites in 2017**
Peugeot: i0n / Citroën: C-ZERO	Mizushima (Japan) (Mitsubishi)
Peugeot: 108 / Citroën: C1	Kolin (Czech Republic) (TPCA)
Citroën: E-Mehari	Rennes (France)
Peugeot: 206, 207	Teheran (Iran) (Iran Khodro)
Peugeot: 208	Poissy (France), Trnava (Slovakia), Porto Real (Brazil)
Citroën: C3 / DS: DS3	Poissy (France), Trnava (Slovakia), Porto Real (Brazil)
Peugeot: 301 / Citroën: C-Elysée, C3-XR	Vigo (Spain), Wuhan (China) (DPCA)
Peugeot: 308	Sochaux (France), Buenos Aires (Argentina), Wuhan (China) (DPCA)
Peugeot: 2008	Mulhouse (France), Porto Real (Brazil), Wuhan (China) (DPCA)
Peugeot: 3008	Sochaux (France), Chengdu (China) (DPCA)
Peugeot: 5008	Sochaux (France), Chengdu (China) (DPCA)
Citroën: C4 / DS: DS4	Mulhouse France), Vigo (Spain), Buenos Aires (Argentina), Kaluga (Russia) (PCMA), Wuhan, Shenzen (China) (DPCA, CAPSA)
Citroën: C4 Cactus	Madrid (Spain)
Peugeot: 4008 / Citroën: C4 Air Cross	Okazaki (Japan) (Mitsubishi)
Citroën: C5 / DS: DS5	Rennes-la-Janais (France), Sochaux (France), Wuhan, Shenzen (China) (DPCA, CAPSA)
DS: DS6	Shenzen (China) (CAPSA)
DS: DS7 Crossback	Mulhouse (France)
Peugeot: 405	Teheran (Iran) (Iran Khodro)
Peugeot: 408	Buenos Aires (Argentina), Kalouga (Russia) (PCMA)
Peugeot: 508	Rennes-la-Janais (France), Wuhan (China) (DPCA)
Peugeot: Bipper / Citroën: Nemo	Bursa (Turkey) (Tofas)
Peugeot: Partner / Citroën: Berlingo	Vigo (Spain), Mangualde (Portugal), Buenos Aires (Argentina)
Peugeot: Expert / Citroën: Jumpy	Hordain (France)
Peugeot: Traveller / Citroën: Spacetourer	Hordain (France)
Peugeot: Boxer / Citroën: Jumper	Italy (Sevelsud)
Opel: Nouvelle Astra	Ellesmere Port (United Kingdom)
Opel: Vivaro	Luton (United Kingdom)
Opel: Corsa, Adam	Eisenach (Germany)
Opel: Astra, Nouvelle Astra, Cascada	Gliwice (Poland)
Opel: Zafira, Insigna, Nouvelle Insigna	Rüsselheim (Germany)
Opel: Corsa, Meriva, Mokka, Crossland / Citroën: C3 Aircross	Saragosse (Spain)
Opel: Grandland	Sochaux (France) (PSA)

Source: PSA Group

RENAULT group	
Brands and models	**Production or assembly sites in 2017**
Renault: Twingo	Novo Mesto (Slovenia)
Renault: Kwid	Chennai (India), Curitiba (Brazil)
Renault: Clio	Flins (France), Dieppe (France), Bursa (Turkey), Novo Mesto (Slovenia)
Renault: ZOE	Flins (France)
Renault: Captur	Valladolid (Spain)
Renault: Sandero	Curitiba (Brazil), Envigado (Colombia), Togliatti (Russia) (AvtoVAZ)
Renault: Logan	Curitiba (Brazil), Envigado (Colombia), Oran (Algeria), Togliatti (Russia) (AvtoVAZ), Teheran (Iran) (Iran Khodro, Pars Khodro)
Renault: Kadjar	Palencia (Spain), Wuhan (China) (DRAC)
Renault: Koleos	Busan (South Korea) (RSM), Wuhan (China) (DRAC)
Renaullt: Duster	Curitiba (Brazil), Envigado (Colombia), Chennai (India), Moscou (Russia)
Renault: Fluence	Bursa (Turkey), Cordoba (Argentina)
Renault: Megane	Douai (France), Palencia (Spain), Bursa (Turkey)
Renault: Espace	Sandouville (France)
Renault: Talisman	Douai (France)
Renault: Kangoo, Kangoo ZE	Maubeuge (France), Cordoba (Argentina)
Renault: Master	Batilly (France), Curitiba (Brazil)
Renault: Trafic	Sandouville (France)
Dacia: Logan	Pitesti (Romania)
Dacia: Sandero	Pitesti (Romania)
Dacia: Duster	Pitesti (Romania)
Dacia: Lodgy	Tanger (Morocco)
Dacia: Dokker	Tanger (Morocco)
RSM: Fluence	Busan (South Korea)
RSM: Latitude	Busan (South Korea)
RSM: Koleos	Busan (South Korea)
RSM: Talisman	Busan (South Korea)
RSM: SM7	Busan (South Korea)
RSM: Rogue (Nissan)	Busan (South Korea)
Lada: XRAY, Largus, Kalina, Granta, Priora, 4X4	Togliatti (Russia) (AvtoVAZ)
Lada: Granta, Vesta	Izhevsk (Russia) (AvtoVAZ)

Source: Renault Group

MARKETS FOR NEW VEHICLES FROM FRENCH GROUPS

In 2017, French groups' sales outside France grew more strongly (+19%, i.e. +1.1 million units) than their national markets (+7%, i.e. +73,000 units), mainly as a result of integration of Lada into the Renault Group on January 1, 2017 and Opel into the PSA Group on August 1, 2017.

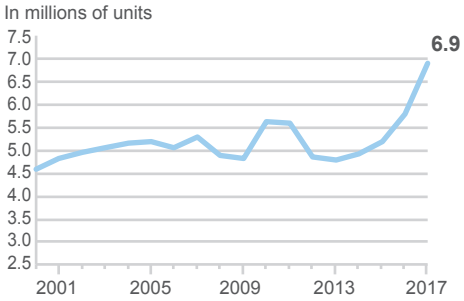
French groups' share of sales in France was 19% overall: 17% for passenger cars, 29% for light commercial vehicles and 41% for heavy vehicles. These ratios are down for light vehicles because of increases in deliveries to the rest of Europe and to South America.

Foreign markets accounted for 81% of French groups' sales, compared to two thirds around the year 2000 and short of 60% in 1990.

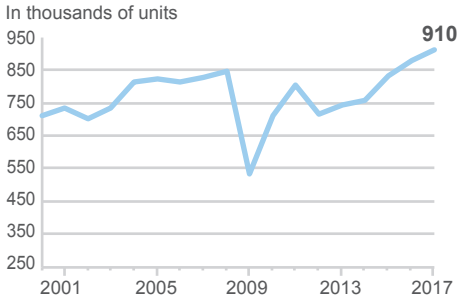
Deliveries outside the European Union were around 53% of total sales in 2017 for French groups i.e. a lower level than 2010 and 2013. The continued partial recovery of the markets of Southern Europe and the decline in some of those in emerging countries left this ratio practically stable in 2016 and 2017. It was under 30% in 2000.

► WORLD PRODUCTION OF FRENCH GROUPS

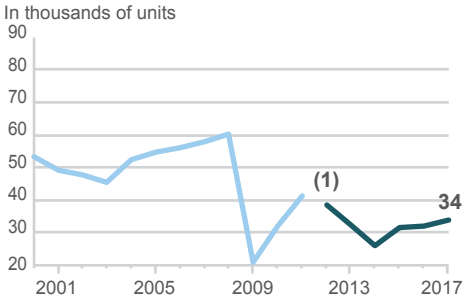
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)



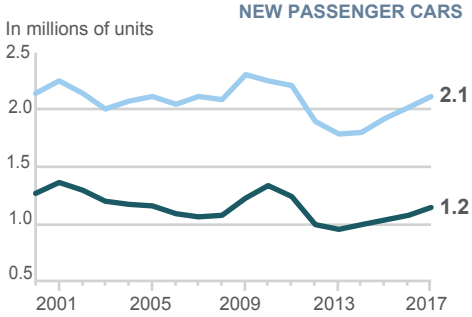
NEW HEAVY TRUCKS (OVER 5T)



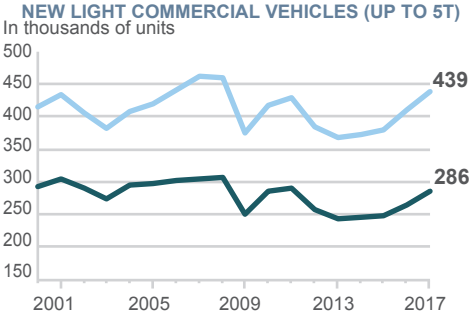
(1) Since 2012, the scope of heavy trucks deals with invoices for 7t and more (see note page 81).

►VEHICLES REGISTRATIONS IN FRANCE

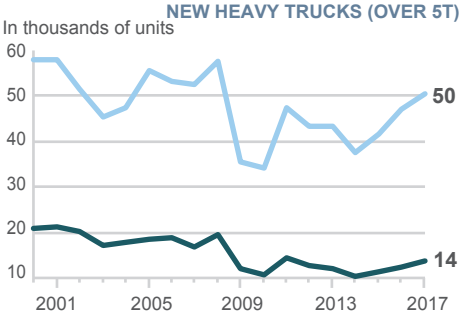
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)

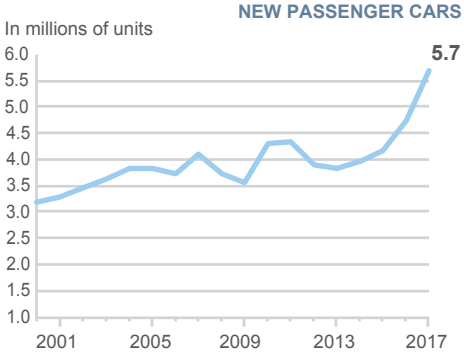


NEW HEAVY TRUCKS (OVER 5T)

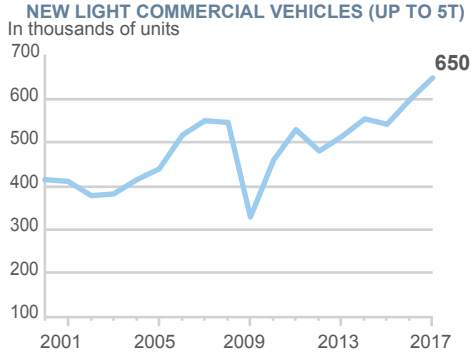


►FRENCH EXPORTS

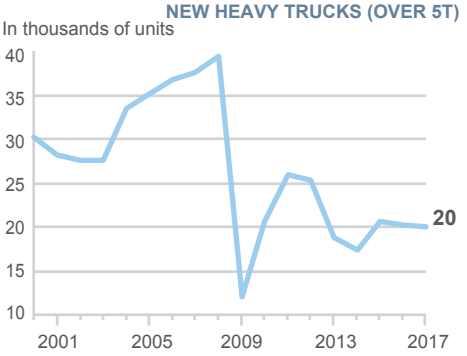
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)



NEW HEAVY TRUCKS (OVER 5T)



French groups developed their activities around the world further to the opening up and development of emerging markets. In 1990, the French market for new passenger cars represented 2.3 million units, compared to 3.3 million units produced worldwide by the PSA and Renault groups. These data amounted respectively to 2.1 and 4.6 million cars in 2000. In 2017, registrations in France amounted to 2.1 million units, while production of these same manufacturers reached 6.9 million units.

From 2009 to 2015, the impact of the crisis in countries where French groups have a strong presence did impact their deliveries of passenger cars outside France. In 2017, they rose (+20% to 5.7 million units), like those of light commercial vehicles (+9% to 650,000 units). On the other hand, those of heavy trucks fell slightly (-1%).

ECONOMIC RATIOS OF THE AUTOMOTIVE INDUSTRY IN FRANCE

2.6%

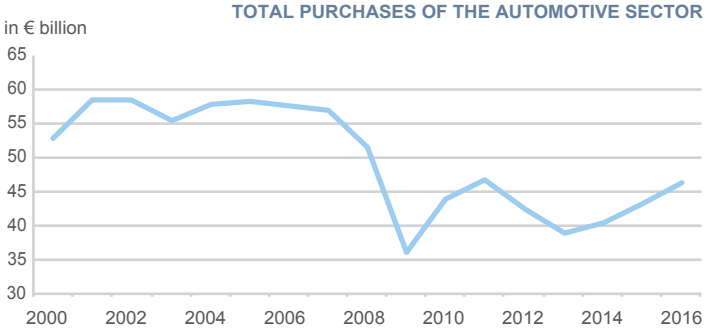
Average of the share of sales devoted to investment into automotive industry

At the crossroads of numerous techniques, auto-manufacturing requires major investments: since the 2009 crisis, almost 2.6% of turnover. In the industry perimeter (including extraction industries, agro-foods), the automotive industry accounted for 4% of tangible investments in 2015 (7% in 2009).

Given the growth in societal demands (environment, road safety, new mobilities, etc.) and the development of the digital economy, the automotive industry is investing more in intangibles and R&D (cf. following pages) to which the automotive competitiveness clusters are particularly well suited.

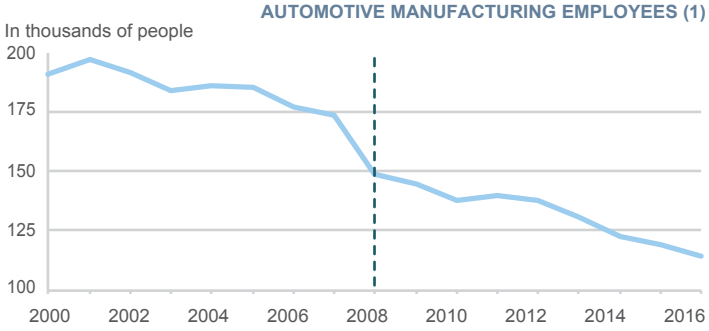
Value added per employee (in 2015 Euro) amounted to 105,000 euros in 2016, a record level, thanks to the growth of the European market which increases the markets and the internal efforts of the manufacturers.

TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR



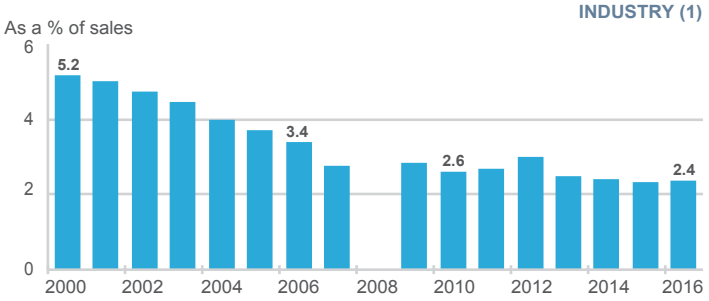
Source: INSEE, National accounts base 2014 (see also page 66).

AUTOMOTIVE MANUFACTURING EMPLOYEES (1)

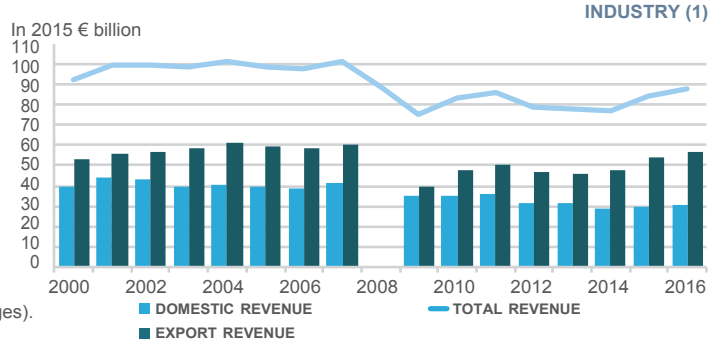


ADDED VALUE PRODUCED BY THE AUTOMOTIVE MANUFACTURING INDUSTRY (1)

CAPITAL EXPENDITURE BY THE AUTOMOTIVE MANUFACTURING INDUSTRY (1)



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



(1) CCFA estimates for 2016: see also pages 88 and 89 (in particular for concept changes).

Source: SESSI, INSEE since 2008

Each year, INSEE produces annual company surveys, one of the main aids to reading French industry trends. A major revamp of these surveys has been undertaken with the ESANE information system. Also, a new economic activity nomenclature was introduced at the beginning of 2008 (see pages 88 and 89).

The automotive industry includes the production 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 (see also page 67).

Automotive manufacturing

After 2004, in line with booming vehicle production, the added value (before tax) in automotive industry, 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. Since 2012, it has progressed regularly. In 2016, the increase was 90% up from 4 years earlier. So as to develop new models and optimise production capacities, automobile manufacturing has dedicated almost 2.6% of its turnover to investment, i.e. almost €2 billion. Research and development costs (see page 34) are not included in these figures. The share of turnover made from exports has increased uninterruptedly since 1990, when it reached 38%, and is now around 64%, compared to around 34% for the manufacturing industry as a whole.

THE AUTOMOTIVE INDUSTRY IN FRANCE'S REGIONS

4.1

Units of value added in the national economy generated for each unit of added value in the automotive sector

All told, including direct jobs (manufacturers' 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.

► AUTOMOBILE CONNECTED JOBS IN THE REGIONS

Regions	Direct jobs	Indirect jobs	Induced jobs	Reference year	Sources
Bourgogne-Franche-Comté	45,000		n/a	2015	INSEE Bourgogne-Franche-Comté, Analyses nb 33, May 2018
Nord-Pas-de-Calais	18,928	17,692	n/a	2011	Insee NPDC, La filière automobile en Nord-Pas-de-Calais, February 2014, October 2012, September 2010
Haute-Normandie	8,070	18,900	n/a	2010	Insee Haute-Normandie, Aval nb 122, September 2012
South Alsace (Mulhouse) and Nord Franche-Comté	9,400	3,500	2,345	2007	Insee Alsace, Chiffres pour l'Alsace nb 2, March 2009
Nord Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	Insee Franche-Comté - L'essentiel nb 113 - May 2009
Lorraine	almost 20,000 people		n/a	2006	Insee Lorraine, Economie Lorraine nb 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 nb 291 - January 2008
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

► ADDED VALUE MULTIPLIERS BY SECTOR (EXCLUDING COKING-REFINING)

Sectors	Agriculture	Agri-food products	Capital goods	Automotive	Aeronautics and space	Other transport equipment (excl. aeronautics)	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

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 aeronautics and space 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' (direct and indirect) and their families' consumption.

Various regional INSEE publications show the importance of the automotive industry in terms of direct, indirect and induced jobs. A study of INSEE Bourgogne-Franche-Comté shows the presence, in 2015, of 45,000 employees excluding temporary work in the automotive sector, 14,570 of whom in the automotive industry and 14,820 in the manufacture of automotive equipment. The core workforce of the automotive industry (manufacturers, equipment manufacturers) is in a wide range depending on the region: from 1,400 employees in Provence-Alpes-Côte d'Azur to 46,700 in Île-de-France. The number of these jobs has decreased by 24% on average in metropolitan France since 2008 (from -11% in Occitania to -40% in Brittany).

According to DARES, the automotive industry employed, in 2015, 24,200 temporary workers (in full-time equivalent), including 3,800 in Île-de-France, 3,100 in Nord-Pas-de-Calais and 2,300 in Franche-Comté.

The research and development sites of the automotive industry as a whole are located in Île-de-France (eg: PSA in Vélizy and Renault in Guyancourt), but also in other regions. For Nord-Pas-de-Calais-Picardie statistics agency (INSEE) estimated that 12% (13% on average in France) of domestic research and development expenditure (DIRDE) for the region was accounted for by the automotive industry in 2013 ("Des dépenses de recherche en progression", May 2016). In its regional profile, the Bourgogne-Franche-Comté statistics agency (according to April 2016 survey) observed that the automotive industry accounted for 70% of research and development expenditure in midcap companies and large enterprises present locally.

The automotive industry's regional associations (ARIA), a regional relay point for PFA, French Automotive & Mobilities Cluster, 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 11 members end 2017 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, etc.), the UIMM and other professional organisations, and competitiveness clusters.

► NUMBER OF EMPLOYEES IN THE CORE OF THE SECTOR (IN THOUSANDS)

	2008	2015
Ile-de-France	60,600	46,700
Auvergne-Rhône-Alpes	54,300	44,000
Great East	51,200	40,200
Hauts-de-France	45,400	32,900
Bourgogne-Franche-Comté	34,600	28,200
Normandy	27,600	20,100
Pays de la Loire	20,800	16,800
New Aquitaine	15,400	9,600
Britain	14,600	8,800
Center-Loire Valley	13,000	8,200
Occitan	7,600	6,800
Provence-Alpes-Côte d'Azur	1,600	1,400
Metropolitan France	**346,700**	**263,700**

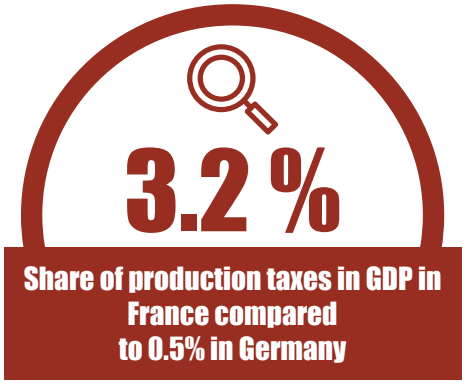
Source: Insee Bourgogne-Franche-Comté, Analyses nb 33

COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

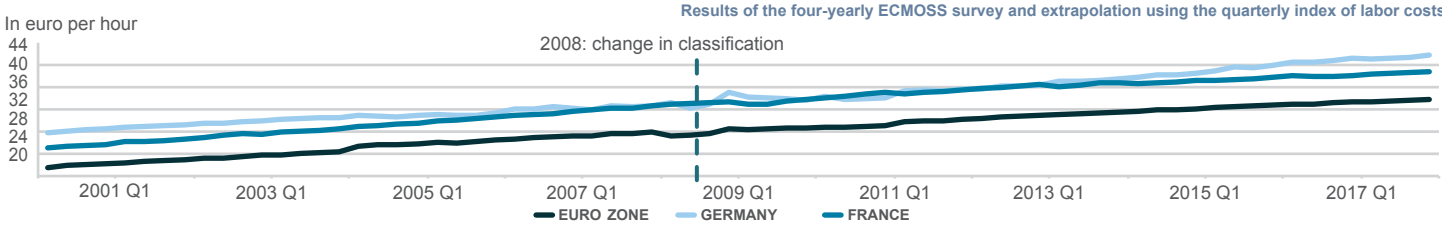
In a highly competitive global market, French groups must be competitive whilst addressing factors affecting the whole industry. The latter includes the scale of compulsory charges on the factors of production, exchange rates, and other, more automotive-sector-specific elements like the opening up of the base market to competition, etc. All these factors affect profit margins (difference between gross operating profit and added value). This ratio has an impact on companies' capacity to invest in production (modernisation of sites), in developing products to challenge the competition, in research and development particularly to meet environmental standards, digital for the autonomous and connected car, new mobilities etc. In order to cope with these current revolutions, investments remain important (see pages 24, 88 and 89).

In France, after the crisis, the government introduced a policy to promote competitiveness; manufacturers have also used all the internal levers they had to develop their activities and keep industrial and research sites in France. All of these actions have borne fruit, but the French industrial apparatus continues to show degraded economic competitiveness.

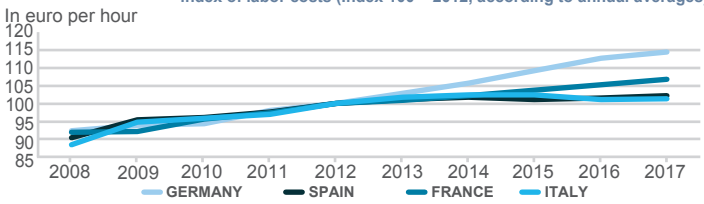
The INSEE defines taxes on production as all taxes that companies pay on account of their production activities, irrespective of the quantity or value of its assets and services produced or sold. In 2016, they stood at 3.2% of GDP in France compared to 1.5% in Italy and 0.5% in Germany (source: Conseil National de l'Industrie – CNI). The CNI also estimates that over 20% of tax revenues from three of the five biggest taxes on production (corporate property tax (CFE), the company value-added contribution (CVAE), the company social solidarity contribution (C3S) come from the industry which, in 2017, accounted for 14% of added value of the economy as a whole (source: INSEE). The industry is highly exposed to international competition and, according to CNI, its investment capacity is what allows it to strengthen its competitiveness, excluding price competition.



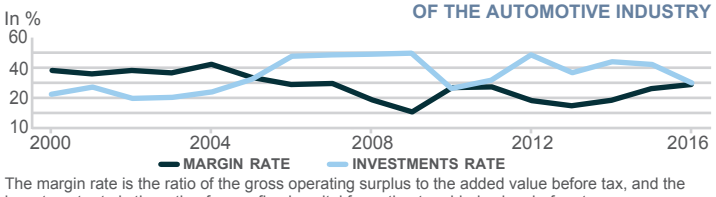
LABOR COSTS IN MANUFACTURING INDUSTRY
Results of the four-yearly ECMOSS survey and extrapolation using the quarterly index of labor costs



LABOR COSTS IN THE MANUFACTURING INDUSTRY
Results of the four-yearly ECMOSS survey and extrapolation using the quarterly index of labor costs (Index 100 = 2012, according to annual averages)



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



The margin rate is the ratio of the gross operating surplus to the added value before tax, and the investment rate is the ratio of gross fixed capital formation to added value, before tax.
Source: INSEE (national account, base 2014)

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.

Generalist European manufacturers started to recover from 2014 onwards, further to the bounce-back of 4 million additional units registered since 2013 lowest point. So, to continue its development, the French automotive industry has to ensure comparable performance to that of its European, American, Japanese, Korean and, in future, Chinese and even Indian competitors. Operating margin (operational profit/turnover) is one of the tools used to measure automotive groups performance. Between 2009 and 2013, it was 1% on average for French groups compared to a range of 5 to 8% for German groups. By 2017, that average had reached 7% for French groups, and was at a high level, and close to German manufacturers at the top end thanks to so-called "premium" brand margins. This levelling is necessary to be able to invest substantially to face the many challenges ahead. Beyond problems of global competitiveness of the economy or of industry (salary, social and fiscal costs), some competitiveness factors are specific to the French automotive industry, derived both from the characteristics of the car as a good and those of the global automotive 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. Nevertheless, compulsory charges on production impact automotive manufacturing directly and indirectly right through the supply chain.

In 2012, as part of a competitiveness drive, the government introduced the competitiveness and employment tax credit (CICE), calculated according to the total wage bill, but excluding salaries more than 2.5 times the minimum wage (SMIC). The tax reduction rate has increased from 4% of the gross wage bill in 2013 to 7% in 2017. According to the CICE monitoring committee's 2016 report, CICE eligibility in 2016 stood at 47% for the transport equipment sector (including the automotive industry) compared to 63% for the economy as a whole. The highest rates, above 78%, were enjoyed by non-industrial sectors.

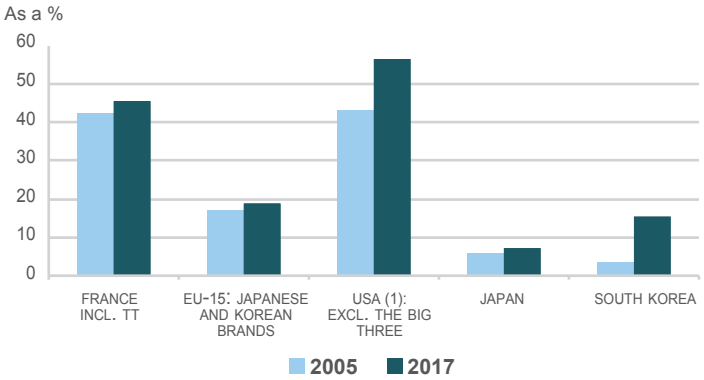
Furthermore, exchange rate fluctuations can have a non-negligible impact on terms of trade because of the substantial and growing share of production outside the euro zone.

From 2002 to 2014, the recovery of the euro has affected the competitiveness of French exports and companies have had to multiply their efforts, commercially and industrially, to continue to develop opportunities outside the euro zone. The latter, however, accounted for two-thirds of total external outlets in 2017, up from 47% in 2002. In 2017, the euro is on average at a lower level than between 2009 and 2014 compared to the dollar and the won.

On the other hand, there are factors linked to the opening up of the market whether domestically and abroad. In general, the domestic market, known as the "basement market", is a solid pillar for sustaining growth in external markets through international development and innovation. For the French automotive industry, the French market and especially the European market can be considered like their base market; it is open to competition and non-European manufacturers enjoy a significant and constantly growing share. In other car-manufacturing countries such as 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.

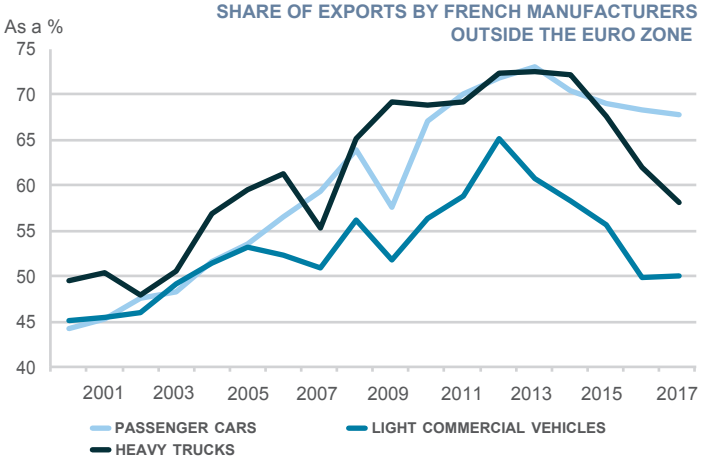
COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

SHARE OF FOREIGN BRANDS IN PASSENGER CAR MARKETS



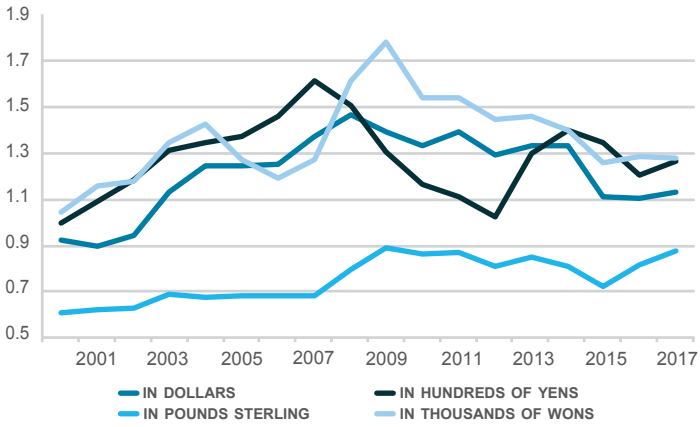
(1) USA: market share based on light vehicles.The Big Three are General Motors, Ford and Chrysler (excluding European brands).
Source: CCFA

SHARE OF EXPORTS BY FRENCH MANUFACTURERS OUTSIDE THE EURO ZONE



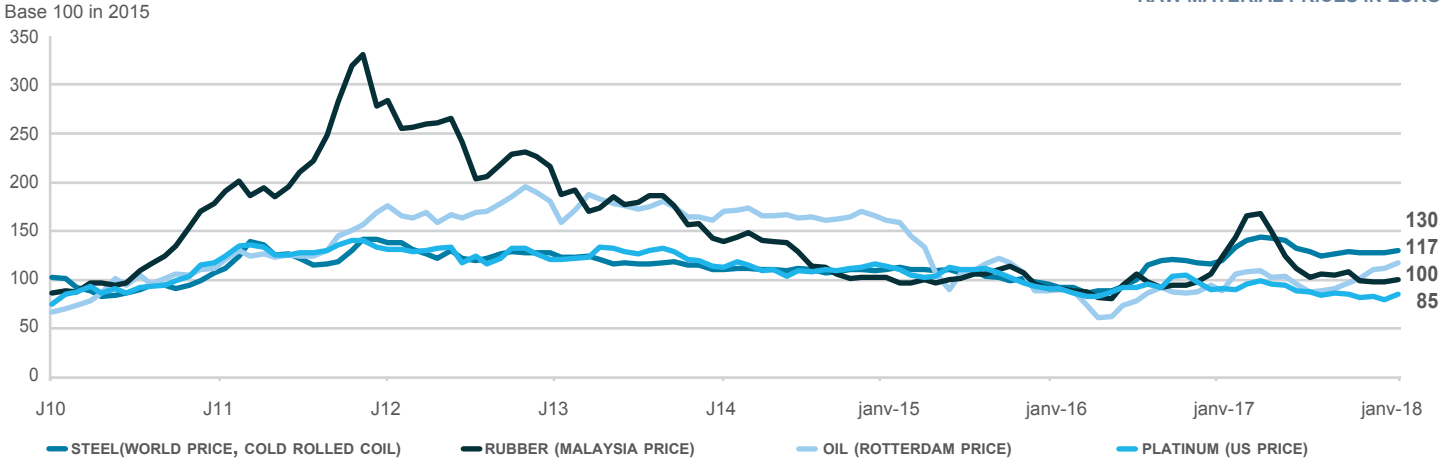
Source: CCFA

EURO EXCHANGE RATE VARIATION: FOR 1 EURO



Source: BCE

RAW MATERIAL PRICES IN EURO



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Share of non-Euro zone in French groups' external sales (all vehicles)

Raw material prices expressed in euros grew strongly between 2001 and 2012. Passing on those prices in final sales prices was difficult in a context of cut-throat competition and households having to arbitrate on spending. In 2014-2015, the rate kept low, before increasing substantially in 2016 and early 2017, although not reaching the high levels observed post-crisis. They fell again in 2017. In addition, the price of raw materials at the time of purchase by the user company may be particularly affected by the commercial policy of the geographical area concerned.

CONSOLIDATION OF THE AUTOMOTIVE INDUSTRY

2018

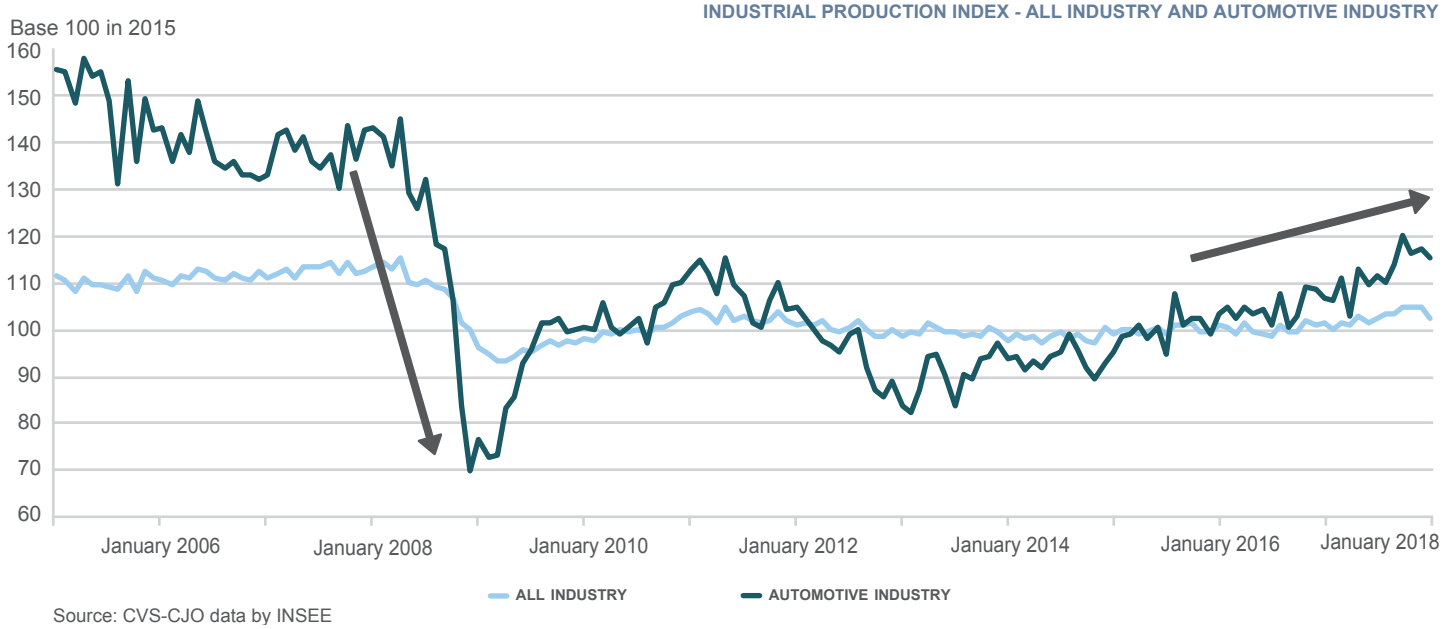
Signing of the 2018-2022 sector contract

With wide fluctuations on the European automotive market, the automotive industrial production index in France measured by INSEE (base 100 in 2015) has gone through several distinct phases. The first started at the beginning of the crisis, when the index fell sharply from more than 140 early 2008 to 70 at the end of that same year. Then, it fluctuated around 100. Then, in a context where the index increased by 24% between 2013 and early 2018 and in an environment comprising three revolutions: technological, digital and societal, the PFA, Automotive and Mobilities Cluster started a new stage at the end of 2017.

To address a crisis on such a collapse, the automotive sector had to structure itself. Thus, the Plateforme de la Filière Automobile (PFA) was introduced in 2009 by French groups and their suppliers within the automotive suppliers' liaison committee (CLIFA) to improve the efficiency of their sector. It is now called PFA, Filière Automobile et Mobilités - French Automotive & Mobilities Cluster.

As part of the industry's national council (CNI), the automotive sector strategic committee (CSF) was set up. The automotive CSF includes all members of the segment, upstream and downstream, including trade unions. A new sector contract was signed in the spring of 2018.

INDUSTRIAL PRODUCTION INDEX - ALL INDUSTRY AND AUTOMOTIVE INDUSTRY



Source: CVS-CJO data by INSEE

The financial and economic crisis had major repercussions for the automotive sector, upstream with suppliers and downstream through to vehicle sales/maintenance, via transport of goods, equipment manufacturing and service to companies, including research and development. Because of reduced business levels, degraded competitiveness and cut-throat competition, the fabric weakened 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.

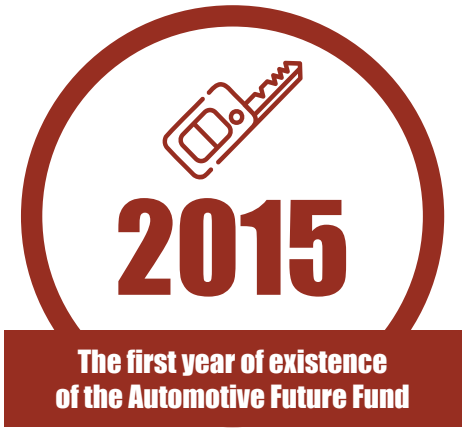
Since 2010, this has relied at a regional level on the regional automotive industry associations (ARIA). After an initial phase of activity, it consolidated in 2012, in particular around the automotive technical committee (CTA) and its two councils, the automotive technical standardisation council (CSTA) and the automotive research council (CRA). Five programmes were defined: 2L100 (the car consuming 2L per 100 km), 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 Plant 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. The PFA works in partnership with competitiveness clusters and is a stakeholder in automotive CSF. At the end of 2017, the PFA entered a new stage. Its missions focus on fostering innovation dynamics, promoting competitiveness throughout the industry, anticipating jobs and skills, and expressing common positions in the sector, the coordination of the organisation of trade fairs and the sector's communication.

The automotive CSF was created in 2010 within the existing CNI, further to the industry conference signed up the same year, which now includes 15 other committees. It includes passenger car and heavy truck manufacturers present in France, Tier 1 equipment manufacturers and a large number of SMEs and mid-tier firms which supply the automotive industry and come from different sectors (mechanical, plastics, die-stamping, foundry, etc.). The heavy trucks industry, including body builders, is included through the steering comittee of the transport industrial sector (COFIT). The downstream activities of the sector (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: a shared vision for the segment to anticipate economic changes, innovation and R&D, solidarity of the sector and internationalisation of actors. In May 2018, a new sector contract was signed for the period 2018-2022. It includes four structuring projects: be a player in the energy and ecological transition, create the autonomous vehicle ecosystem and experimenting on a large scale to offer new mobility services, anticipate changing skills and employment needs, and strengthen the automotive industry competitiveness.

INTERVENTION FUNDS, RESEARCH TAX CREDITS, FUTURE INVESTMENTS

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, within the energy transition. Manufacturers must also meet new digital challenges (autonomous and connected car). The automotive industry is a capitalistic industry that relies on substantial financing.

During the financial crisis, this particularity was 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 manufacturers. The organisation continues to be based on two levels of funding: Tier 1 and Tier 2 (see 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 and FSI (now Bpifrance Participations).

Automotive future fund (FAA) (since January 2015)	Objectives and attributions
Automotive future fund (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. 2018: 4-year extension with an investment capacity of €135 m.
Automotive future fund (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 invested in three automotive companies. The fund for the modernisation of automotive equipment manufacturers Tier 1 (FMEA Tier 1), into which French manufacturers had injected €400 m in addition to the €200 million by the FSI, invested with the fund for the modernisation of automotive equipment manufacturers Tier 2 (FMEA Tier 2) in several companies supplying the automotive industry.

Investments for the future were 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 aimed at becoming more economical and more environmentally efficient; €750 m had already been committed by the end of 2016.

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 electrified vehicle, delegated driving and connectivity, mobility and shared energy. It includes nearly 50 members and partners: 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 million, one third of which is financed by the manufacturers themselves. VEDECOM is also working with PFA on the autonomous vehicle. The Institute grew in 2016 when the City on the Move Institute (IVM) joined. Their field is research and action in urban mobility.

French manufacturers are also stakeholders in the Jules Verne Technological Research Institute (IRT), on a single site in Nantes. It focuses on the transport equipment sectors, including automotive, and energies. The budget commitment is €110 million divided between 73 projects. Its work in connection with the automotive sector concerns the development of processes for manufacturing multi-material parts (composites-metallic).

The public authorities are also supporting R&D development of companies via the 'research tax credit' (CIR), a tax measure created in 1983, improved in 2004, but more importantly simplified and amplified by the 2008 Finance law. Manufacturing industry in 2014 benefited from 59% of all CIR relief, i.e. €3.4 billion. The automotive industry was the third biggest beneficiary of CIR with 6%, i.e. €323 million.

European Investment Bank loans (EIB) and the European Union's Framework Programme for Research and Development (''horizon 2020'' plan for the current one) also provide an effective stimulant to R&D financing. 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

12%

Share of the automotive industry in the total research and development budget of companies in 2015

In 2015, 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. 12% of all companies' R&D expenditure.

The crisis substantially reduced financial resources but domestic R&D spending fell only by 2% in 2009 and 2010, emphasising the vital importance of the long-term view. Since, they oscillate around €4 billion. It represents 40% of the gross added value of the branch.

The manufacturers must now invest not only to satisfy their customers and respect regulatory standards, but also to face up to the growth of digital applications.

Cumulative over the past 5 financial years, the sector has invested more than €28 billion. Spending has a pull effect on suppliers, such as those from the plastics, electronics industries, etc. In investment terms, the automotive industry ranks higher than both aeronautics and space, and pharmaceuticals industries. It is also the first filer of patents.

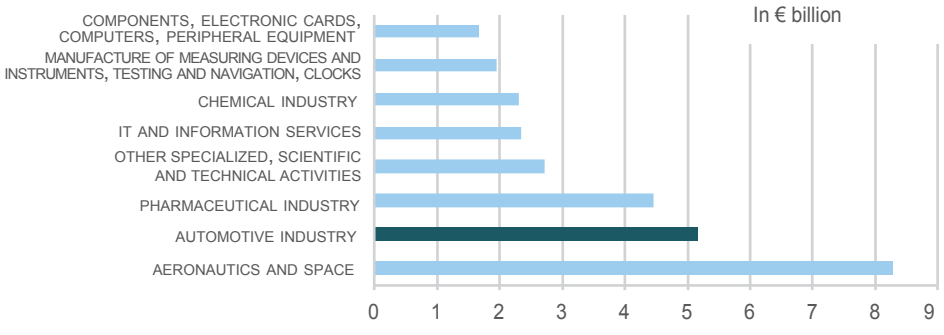
According to ACEA, automotive innovation spending in Europe amounted to €50 billion in 2015.

► GROSS DOMESTIC EXPENDITURE ON RESEARCH AND DEVELOPMENT IN THE MAIN CORPORATE RESEARCH SEGMENTS IN FRANCE IN 2015 (1)

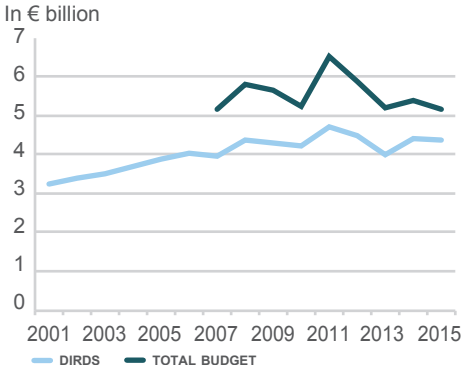
	DRDS (2)	ERDS (3)	Total Budget		Of which public financing (4)	
	in € millions	in € millions	in € millions	As a % of total	in € millions	As a % of total
Aeronautics and space	3,571	4,697	8,268	19.1%	1,090	37.2%
Automotive industry	4,368	809	5,176	12.0%	33	1.1%
Pharmaceutical industry	3,023	1,428	4,451	10.3%	47	1.6%
Other specialized, scientific and technical activities	2,148	570	2,718	6.3%	268	9.2%
IT and information services	2,161	181	2,341	5.4%	115	3.9%
Chemical industry	1,819	486	2,305	5.3%	125	4.3%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,696	258	1,954	4.5%	334	11.4%
Components, electronic cards, computers, peripheral equipment	1,475	192	1,668	3.9%	146	5.0%
Manufacture of electrical equipment	1,024	542	1,566	3.6%	29	1.0%
Publishing, audiovisual, and broadcasting	1,167	210	1,378	3.2%	46	1.6%
Manufacture of machinery and equipment not included elsewhere	1,073	197	1,270	2.9%	38	1.3%
Manufacturer of metallic products except machine and equipment	812	349	1,161	2.7%	s	s
Other branches	7,420	1,637	9,057	20.9%	659	22.5%
TOTAL	**31,756**	**11,557**	**43,314**	**100.0%**	**2,931**	**100.0%**

(1) Semi-final data.
(2) DRDS: Domestic Research and Development Spending.
(3) ERDS: External Research and Development Spending.
(4) Excluding research tax credits.
s: statistics secret.

TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2015 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



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. The latter declined slightly in recent years.

In 2015, 18% of DRDS in the automotive sector was triggered by subsidiaries of companies under foreign control (owning over 50% of their capital).

In 2015, 30,000 people equivalent full-time (EFT), of whom 19,000 researchers, were included in the R&D headcount of the automotive sector. These numbers were down 3% compared to 2003 (in spite of an increase in 37% for researchers).

According to the national industrial property institute (INPI), in 2017 the PSA (including Faurecia) and Renault groups occupied top positions as major filers of patents; it is important to emphasise that four major automotive suppliers were also amongst the top 20.

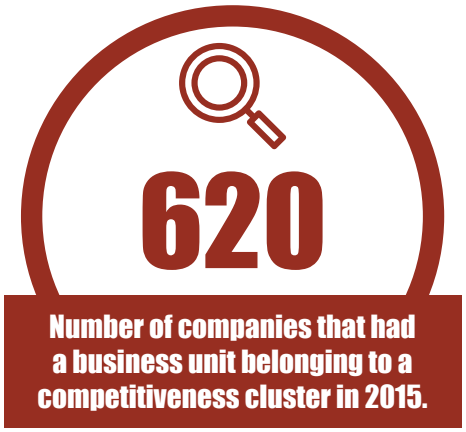
AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

Initiated by the State and the territorial authorities in 2005, competitiveness clusters federate companies (major groups and SMEs/intermediate-sized companies), 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 competiveness 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.

Companies can belong to several clusters with different specialties in order to obtain know-how (example: software skills for the autonomous vehicle).

The 'national pact for growth, competiveness 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 growth of companies and job creation. This new phase was implemented with performance contracts for the period 2013-2018. Automotive clusters have developed their work programmes accordingly, focusing on innovation, skills, networking and launching new solutions.

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



► AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE IN 2015

	Mov'eo	Vehicle of the Futur	CARA (ex LUTB)	iD4CAR
With a…	world-wide implication	domestic implication	domestic implication	domestic implication
Number of companies with a business unit in a competitiveness cluster	201	204	128	87
of which SMEs	149	135	71	57
of which intermediate-sized enterprises	25	47	34	22
Employees of business units involved in the cluster (number of people) (1)	28,028	47,686	20,355	18,375
Collaborative R&d project funding for the major public funding institutions (2) (in thousand €)	4,642	8,833	3,852	4,406
Number of projects linked to the major public funding bodies	7	1	4	6

(1) Information concerning employees is calculated on the basis of 2014 data.
(2) Major public funding bodies: Fonds unique interministériel (FUI), Local authorities (FUI financing only), Bpifrance (ISI programme), Structuring research and development projects for competitiveness (PSPC) and the National Research Agency.
Sources: DGE - Annual survey of the clusters, INSEE databases

In 2017, 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 car manufacturers, equipment manufacturers, innovative SMEs/intermediate-sized companies, research laboratories and training organisations, including universities.

The global Mov'eo cluster (www.pole-moveo.org) covers the Île-de-France and Normandie regions. Mov'eo is dedicated to mobility of the future. Its research and development themes are: safety of road users, intelligent mobility solutions, innovative vehicles and energy storage, materials and systems, drivetrains and energy management. 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 including the autonomous and/or connected vehicle and the launch in 2017 of a project to make the Seine Valley an experimentation site of the latter.

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 three themes: innovation, industrial excellence serving companies (piloted by the PerfoEST cluster association, which is the ARIA of Alsace - Franche-Comté - Bourgogne) and accompanying companies' growth. In terms of innovation, Mov'eo is concerned with automotive components, electric vehicles, hydrogen vehicles, recycling and mobility services. In 2017, 28 SMEs in the automotive sector were accompanied by the PerfoEST programme on the factory of the future.

The ambition of the CARA (cara.eu), is to support the changes in transport systems in urban areas and to represent and animate the automotive and industrial vehicles sector in the Auvergne-Rhône-Alpes region At the end of 2017, the competitiveness cluster LUTB Transport & Mobility Systems and the Automotive Cluster of the Auvergne-Rhône-Alpes Region took the name of CARA. The latter coordinates structuring activities for the region: manufacturers, transport operators and research centres. Research projects revolve around five key themes: engines and drivetrains, safety and security, vehicle architecture, intelligent transport systems, modelisation and mobility management.

The iD4CAR cluster (www.id4car.org), set up in the West of France (Brittany, Pays de la Loire) focuses on special vehicles and sustainable mobility. The four strategic areas of activity are: materials, intelligence of on-board systems, applications and industrialisation, and information and communication technologies serving mobility. A new strategic plan was introduced for the 2016-2020 period. The cluster also plays the role of an ARIA in its geographical area since early 2017.

Other clusters, not specifically dedicated to the automotive industry, have applications which are of interest to the sector. These clusters work on materials, rubber, plastic, mechanics or mobility. Elastopole, a national cluster, including the regions of Val de Loire, Auvergne-Rhône-Alpes, Pays de la Loire and Île-de-France, is dedicated to rubber and polymers, and three quarters of its applications concern the automotive sector. It also works in collaboration with the automotive clusters. I-Trans, a global cluster in Hauts-de-France which specialises in sustainable terrestrial transport solutions, with five target sectors, including automotive equipment. In 2015, 13% of the employees of the member establishments of this cluster worked for the automobile industry. In addition, I-Trans's innovation challenges are: reducing energy consumption, limiting environmental impacts, developing performance and reliability, enhancing safety and security, and developing design.

FRENCH AUTOMOTIVE FOREIGN TRADE

2017 was marked by a more dynamic growth of global trade (+3%) and also of the European economy. In this environment, exports of automotive products from French sites amounted to €49 billion, i.e. more than €10 billion additional since 2013 for the activity of French industrial sites. The automotive industry remains one of the leading export sectors next to aeronautics, agri-foods, accounting for more than 10% of total exports. In 2016, in customs rankings, two companies in the sector were among the top five exporters.

Accelerated growth on the European market, natural outlet for French industrial sites, resulted in a very strong increase in exports (+9%); as for imports, they rose (+8%), with a still significant share of new light vehicle flows from Germany (€8.7 billion). The balance of the industrial automotive sector thus stood at -€9.7 billion.

The positive balance of the 'parts and engines' item fell again (-31% to €1.6 billion), but exports grew by 4% to €22 billion. 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 billion in exports).

€49 BILLION

Exports of automotive products from France in 2017

► FRENCH AUTOMOTIVE FOREIGN TRADE (IN € BILLION)

	New passsenger 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
EXPORTATIONS (FOB)									
2010	15.2	1.7	2.3	20.4	39.6	1.1	40.7	389.7	10.4%
2016	15.6	4.4	3.1	21.6	44.7	1.5	46.2	443.0	10.4%
2017	18.4	4.7	3.3	22.5	48.9	1.6	50.5	464.0	10.9%
Change 2017/2016 as a %	+17.9	+8.0	+5.9	+4.0	+9.4	+10.0	+9.4	+4.7	-
IMPORTATIONS (CIF)									
2010	22.4	2.9	2.4	15.3	43.0	1.2	44.2	458.0	9.6%
2016	27.6	3.7	4.0	19.3	54.5	1.2	55.8	509.2	10.9%
2017	29.5	4.1	4.1	20.9	58.6	1.3	60.0	544.2	11.0%
Change 2017/2016 as a %	+7.2	+11.7	+4.1	+8.2	+7.6	+5.6	+7.5	+6.9	-
BALANCES									
2010	-7.1	-1.2	-0.1	+5.1	-3.4	-0.1	-3.5	-68.2	-
2016	-12.0	+0.7	-0.8	+2.3	-9.8	+0.2	-9.6	-66.2	-
2017	-11.1	+0.6	-0.8	+1.6	-9.7	+0.3	-9.4	-80.2	-

(1) Not including military equipment.
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

► EXPORTERS RANKING - YEAR 2016

Rank	Company (1)
2	Renault SAS
4	Peugeot Citroën Automobile SA
14	Renault Trucks
22	Automobiles Peugeot

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

Exports from the automotive industry totalled more than €50 billion in the mid-2000s, before falling back to €34 billion in 2009 with the crisis. Since, they have fluctuated between €39 billion and 45 billion but are still growing since 2014 and totaled €49 billion in 2017.

Exports of passenger cars valued more than €25 billion in 2004-2005 before a very sharp drop to €13.7 in 2009. Subsequently, they fluctuated between €13 billion and 16 billion further in particular to the weak Southern European markets where French manufacturers are well represented. They grew to €18 billion in 2017 thanks to the dynamism of the European market. The difficulties of competitiveness and the crisis have impacted the passenger car production in France with low unit value.

After a sharp fall in 2009, light commercial vehicle exports have grown continually thanks to the production of new vans in France and the development of that for partners by French groups. They now stand at €4.7 billion, a new record level. Industrial vehicles saw two more years of decline in 2012 and 2013. They stood at €3.3 billion in 2017. Imports of light commercial vehicles and heavy trucks increased, but at a slower pace than in 2016. The balance of the first, which was structurally deficit, has nevertheless become surplus since 2015.

Exports of parts and engines increased by 4% whilst imports increased by 8%. The balance therefore worsened for the fourth consecutive year (€1.6 billion).

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 destination for new passenger cars from France are mainly European, including the other four main markets of the European Union. In 2017, Belgium (€3.1 billion) is slightly ahead of Germany. The United Kingdom ranks fifth with €1.1 billion. Algeria ranks tenth with €370 million.

Germany was the biggest importer of light commercial vehicles with €1.1 billion, ahead of Belgium (€800 million) and the United Kingdom (€559 million). From 2010 to 2017, the value of exports to the top five importing countries more than tripled to €3.1 billion. In 2017, the total value of light commercial vehicle exports reached a record level of €4.7 billion.

An increase in commercial vehicle over 5 tonnes exports of almost 50% has taken place since 2013, despite a downturn in the European market in 2017. Exports to Germany have increased by 40% and exports to Spain and the United Kingdom doubled.

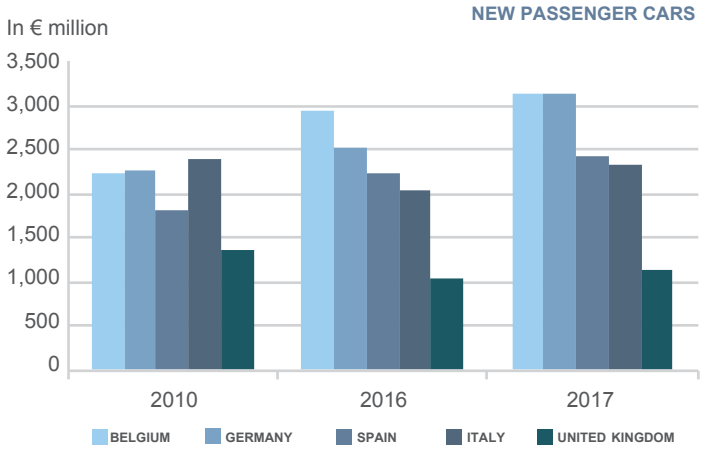
Exports of parts and engines increased compared to 2010. The top five destinations were in Europe. Germany ranked first (€4.7 billion). Exports to the United Kingdom are almost stable compared to the previous year, but decreased by 9% since 2015. China (€492 million) and Brazil (€379 million) rank respectively eleventh and fifteenth. The latter country has seen a rebound in its market after four years of falling.

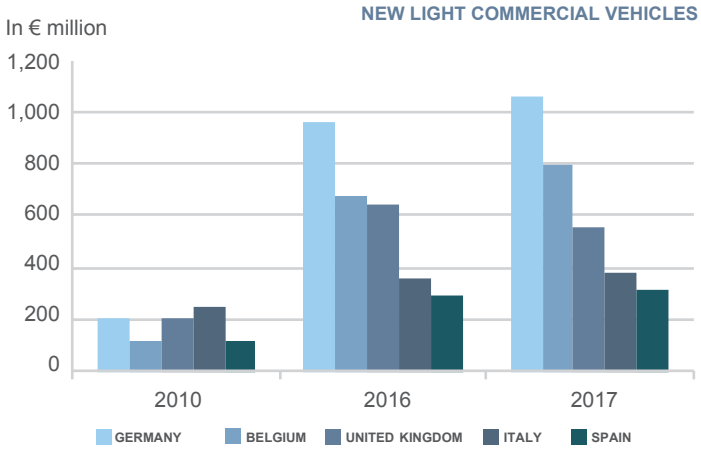
Imports of new passenger cars from Germany (€7.9 billion), UK (€2.0 billion) and Japan (€1.3 billion) are high. For heavy trucks, imports from Germany totalled €1.4 billion. All of the imports cited have decreased compared to 2016.

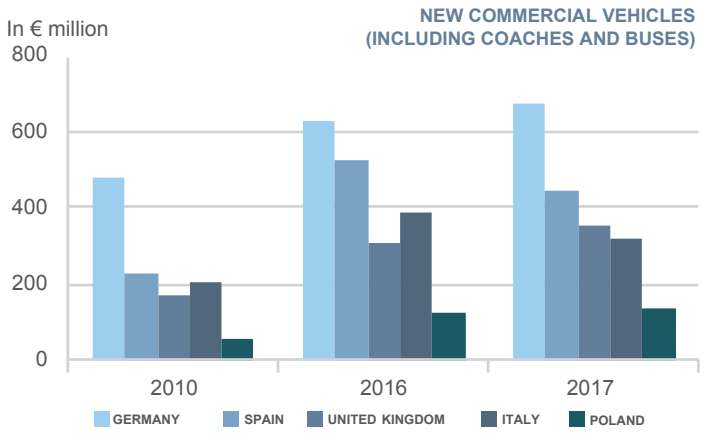
GERMANY

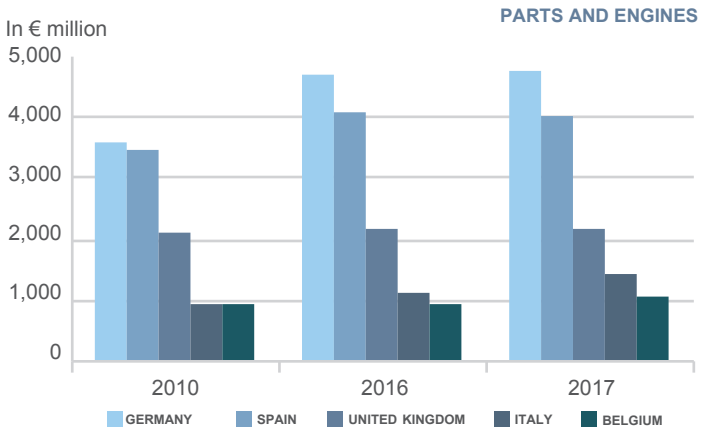
Leading business partner of the automotive industry in France

► LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE









Sources: Customs data processed by CCFA

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

In 2017, the market share of new diesel passenger cars continued its strong decline, down 28% from the 2012 record of 386,000 units. This ratio thus reached 47% (-5 percentage points compared to 2016) while it was higher than that of other energies since 2001. This broad movement is explained by objective factors: taxation less favorable to diesel, over-enrichment of diesel engines following the evolution of standards, development of the offer of 3-cylinder petrol engines and also by more subjective factors (Volkswagen problem in the United States, announcements of municipalities in France, etc.).

In Western Europe excluding France, the record level (52%) of diesel passenger cars was reached in 2011; since then, the latter has fluctuated around 51% for 4 years, before falling sharply in 2016 and especially in 2017 to now 44%.

Hybrid and electric engines are emerging in France, with respective market shares of 3.9 and 1.2%. In Western Europe, development is slower for electric motors (0.9% of the market) while that of hybrids accelerated in 2017 (+1.2 percentage points to 4.1%), thanks in particular to Germany, Spain, Italy and the United Kingdom. The ratio of electric passenger cars is 0.2% in Eastern Europe and close to 0% in Greece.

► DIESEL PASSENGER CARS

	2000	2005	2010	2015	2016	2017	Change 2017/2016 as a %
PRODUCTION							
In units	1,648,448	2,328,108	2,178,408	2,066,449	1,979,607	2,026,239	+2,4
As a % of total production	35.8%	45.0%	38.8%	39.9%	34.2%	29.4%	
EXPORTS							
In units	975,038	1,500,989	1,346,022	1,452,186	1,492,686	1,588,324	+6,4
As a % of total exports	33.7%	39.1%	31.3%	34.9%	32.4%	34.4%	
REGISTRATIONS							
In units	1,046,485	1,466,296	1,593,173	1,097,124	1,050,418	998,116	-5,0
As a % of total registrations	49.0%	69.2%	70.8%	57.2%	52.1%	47.3%	
CARS IN USE							
In units	9,980,000	14,348,000	18,165,000	19,900,000	19,937,000	19,811,000	-0,6
As a % of all cars in use	35.6%	47.7%	58.0%	62.2%	61.6%	60.6%	

► ELECTRIC AND HYBRID PASSENGER CARS REGISTRATIONS

	2010		2015		2016		2017	
	Units	Market share	Units	Market share	Units	Market share	Units	Market share
Electric	184	0.0%	17,268	0.9%	21,751	1.1%	24,910	1.2%
Hybrid	9,655	0.4%	61,619	3.2%	58,389	2.9%	81,559	3.9%
of which non rechargeable	-	-	56,030	2.9%	50,960	2.5%	69,691	3.3%
of which rechargeable	-	-	5,589	0.3%	7,429	0.4%	11,868	0.6%

Source: CCFA

In 2017, France is now in fourth place on the European market for diesel engines for new passenger cars, with one million registrations, behind Germany (1.3 million units), Italy and the United Kingdom (1.1 million units each).

In terms of the number of cars on the road in France, 61% of the cars in circulation on January 1, 2018 were equipped with a diesel engine. This ratio has decreased by almost 2 percentage points since the high point of 2014.

In Western Europe, diesel penetration in the new passenger car market has decreased (-5 percentage points to 44%), i.e. 6.3 million units. In 2017, excluding Europe, the market share of diesel cars is more than 40% in India, a stability compared to 2016, but down 18 points in five years, and it grew by about 20 points in South Korea since 2011 to reach 38% in 2017.

In 2017, 2 million diesel passenger cars were produced by the French groups, an increase of 2% compared to 2016 (-16% compared to the record level of 2004), compared to a 28% increase of that of the other engines. French groups also supply diesel engines to other brands as a result of cooperation agreements.

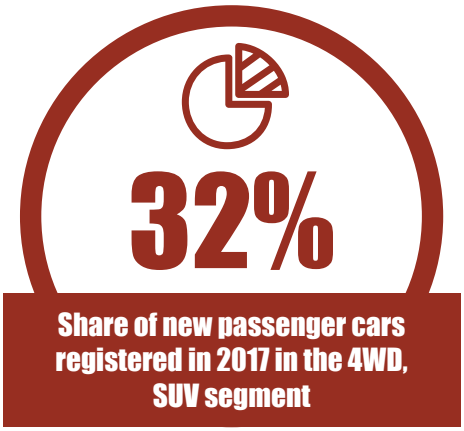
In 2017, registrations of new hybrid passenger cars totalled to 81,600 units, i.e. an increase of 40% (+60% for rechargeable). New electric passenger cars rose by 15% to 24,900 units. The growth of these sales is supported by the Government's Automobile Plan of July 2012. To meet the needs of this type of car, 8,320 charging stations open to the public, representing 22,308 recharging points, were installed in France at the January 1, 2018 according to AVERE. French groups have developed a range of products (Renault Zoé, Citroën C-Zero, Peugeot iOn). The French market is the second largest European market for electric passenger cars, behind that of Norway.

NEW PASSENGER CAR REGISTRATIONS BY MODEL, RANGE AND BODY STYLE

The economy and low range, predominant in France, peaked in 2010 thanks to the bonus-malus system and the scrap incentive scheme. Then, a slight decline occurred. Subsequently, the renewal of the economy range of cars (108, C1, Twingo, ZOE), the success of models from the existing low range (208, C3, Clio, Sandero) and the development of the product offering 4WD, SUV on this range (C4-Cactus, 2008, Captur, Duster) stimulate this segment whose share decreases but remains above more than 50% (40% on average in Western Europe in 2017).

4WD, SUV continued their strong growth (+23 percentage points since 2010 to 32%), building on the mid-range offer (C3 Aircross, DS7, 3008, 5008, Kadjar, Koleos). On the other hand, over the same period, sedans (-10 percentage points at 51%) and multipurpose vehicles (-8 points at 11%) seemed to lose their appeal. As for station wagons, their demand is less fluctuating and they still occupy about 6% of the market.

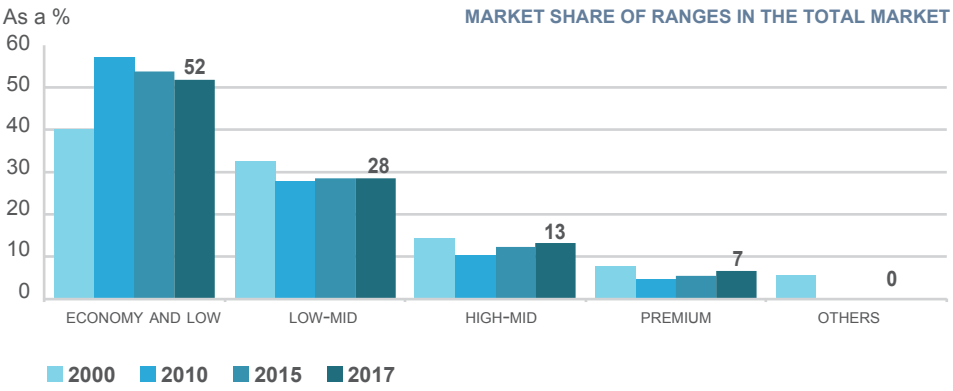
The share of higher-end models was 20% in 2017 compared to 15% in 2010. They have benefitted in particular from the demand from companies, and French groups can rely on proven models (Espace, Talisman).

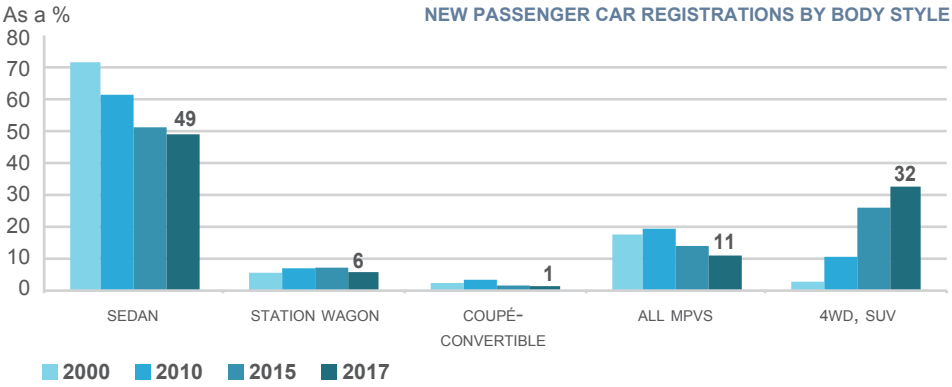


► MAIN NEW DIESEL PASSENGER CARS RANKINGS IN 2017

Rank	Brand (1)	Model	% market
1	Renault	Clio	5.6
2	Renault	Megane	4.7
3	Peugeot	208	4.6
4	Citroën	C3	3.8
5	Peugeot	3008	3.5
6	Renault	Captur	3.3
7	Peugeot	2008	3.2
8	Peugeot	308	3.1
9	Dacia	Sandero	2.9
10	Citroën	C4	2.8
11	Fiat	500	2.0
12	Renault	Twingo	1.8
13	Volkswagen	Polo	1.8
14	Volkswagen	Golf	1.8
15	Dacia	Duster	1.8
16	Renault	Kadjar	1.5
17	Toyota	Yaris	1.5
18	Nissan	Qashqai	1.3
19	Mini	Mini	1.3
20	Volkswagen	Tiguan	1.2
21	Opel	Corsa	1.1
24	Ford	Fiesta	1.0
22	Peugeot	5008	0.9
23	Opel	Mokka	0.8
25	Peugeot	108	0.8
26	Citroën	C4 Cactus	0.8
27	Ford	Focus	0.8
28	Toyota	C-HR	0.8
29	Renault	ZOE	0.7
30	Ford	KUGA	0.7

(1) Opel data: whole year 2017
Source: CCFA





► NEW PASSENGER CARS REGISTRATIONS BY RANGE

Ranges	2000		2010		2015		2016		2017	
	units	%	units	%	units	%	units	%	units	%
Economy and low ranges	855,161	40.1	1,283,902	57.0	1,031,441	53.8	1,052,155	52.2	1,091,792	51.7
Low-mid range	695,146	32.6	627,694	27.9	545,819	28.5	558,923	27.7	601,368	28.5
High-mid range	303,028	14.2	234,664	10.4	235,633	12.3	264,265	13.1	278,439	13.2
Premium range	163,293	7.7	105,313	4.7	104,333	5.4	139,834	6.9	139,149	6.6
Others	117,256	5.5	96	0.0	0	0.0	0	0.0	0	0.0
TOTAL	2,133,884	100.0	2,251,669	100.0	1,917,226	100.0	2,015,177	100.0	2,110,748	100.0

► NEW PASSENGER CARS REGISTRATIONS BY BODY

Bodies	2000		2010		2015		2016		2017	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	979,415	51.1	1,029,860	51.1	1,034,379	49.0
Station wagon	119,739	5.6	153,476	6.8	134,934	7.0	126,368	6.3	118,330	5.6
Coupé-Convertible	50,527	2.4	70,353	3.1	24,836	1.3	26,411	1.3	25,028	1.2
All MPVs	369,434	17.3	430,857	19.1	269,015	14.0	258,144	12.8	232,103	11.0
of which compact MPVs	241,190	11.3	233,363	10.4	163,826	8.5	157,785	7.8	146,825	7.0
4WD, SUV	57,116	2.7	205,106	9.1	494,728	25.8	559,116	27.7	681,574	32.3
Others	9,392	0.4	14,379	0.6	14,298	0.7	15,278	0.8	19,334	0.9
TOTAL	2,133,884	100.0	2,251,669	100.0	1,917,226	100.0	2,015,177	100.0	2,110,748	100.0

Source: CCFA

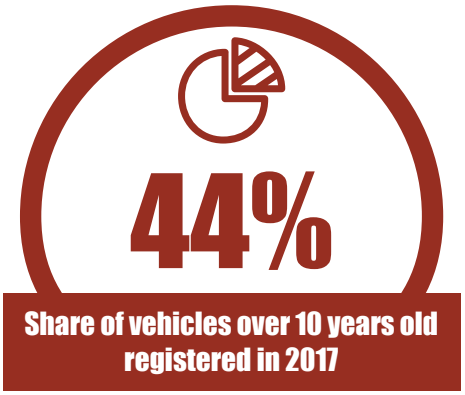
USED PASSENGER CARS

In 2017, registrations of second-hand passenger cars achieved a new record at 5.7 million units (+0.6%). Sales have surpassed the 5 million threshold since 2000.

Each year, two or three second-hand cars are sold for every new car sold: as a percentage of all passenger cars in use, around 17% of vehicles change hands each year. Since 2012, the used/new ratio has been oscilating around the very high level of 2.8, well beyond levels observed during previous periods of contraction of the new car market in 1993 and 1997 (2.5).

Households kept their vehicles almost five and a half years on average in 2015 (compared to five years in 2010 and four in 1995).

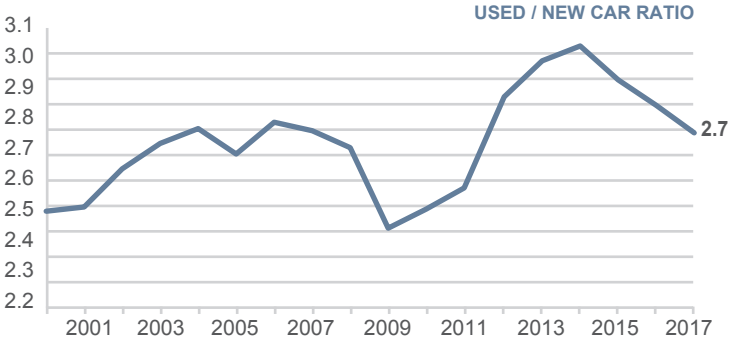
The share of vehicles over 10 years old registrations was 44% in 2016 compared to 37% in 2010 because of longer cycle life.

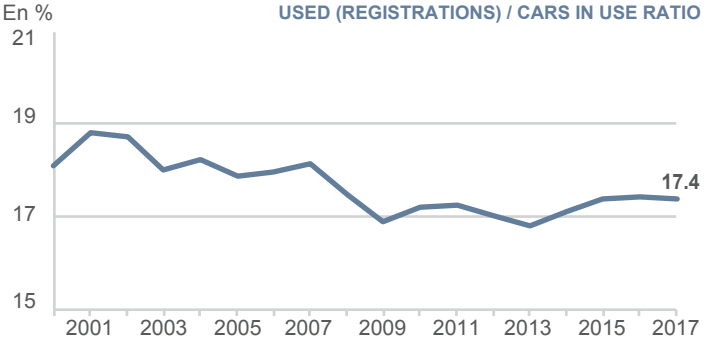


► USED PASSENGER CARS

	Units	2000	2005	2010	2015	2016	2017
REGISTRATIONS							
New passenger cars	thousands	2,134	2,118	2,252	1,917	2,015	2,111
Used cars	thousands	5,082	5,383	5,386	5,562	5,643	5,679
Used/new ratio	-	2.4	2.5	2.4	2.9	2.8	2.7
Cars less than 5 years old	% used	40	40	37	33	32	33
-Cars less than 1 year old	% used	12	10	8	8	8	9
-Cars less than 1 year old	% new	29	25	19	23	23	25
Cars 5 to 9 years old	% used	-	25	26	24	24	23
Cars 10 to 14 years old	% used	-	22	21	24	24	23
Cars more than 15 years old	% used	-	13	15	19	20	21
Used diesel cars	thousands	-	2,996	3,558	3,745	3,759	3,669
	% used	-	55.7	66.1	67.3	66.6	64.6
CARS IN USE (ON 12/31)	**thousands**	**28,060**	**30,100**	**31,300**	**32,000**	**32,390**	**32,700**
USED (REGISTRATIONS) / CARS IN USE RATIO	**%**	**18.1%**	**17.9%**	**17.2%**	**17.4%**	**17.4%**	**17.4%**

Source: CCFA





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 million second-hand cars are traded per year. This market is subject to longer cycles than the new car market. In 2017, demand for new cars increased by 4.7% to reach again the 2.1 million units threshold, and for second-hand cars by 0.6% to 5.7 million units. The used/new ratio decreases slightly to 2.7. Demand for second-hand cars is generally closer to the trends on the overall number of cars in use, 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 (67% in 2017 vs 48% in 1990). Furthermore, the share of cars over 15 years old has more than doubled since the beginning of the 2000s and increased by 6 percentage points compared to the pre-crisis period to level, at 21% in 2017.

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 518,000 registrations, i.e. 25% of the new car market, which is 2 percentage points above the 2012-2016 average, but above all higher than during the years when the scrap incentive scheme was in progress, and new car prices were more competitive. From 2001 to 2009, the share of cars under one year old as a proportion of all registrations of second-hand passenger cars reduced constantly and represented around 8% since 2010 (12% in 2001).

The share of diesel in second-hand cars was less than 65% in 2017, i.e. a decline of almost 4 points since 2012, half since 2016.

In 2017, 58% of cars owned by or available to households were purchased second hand, compared to 51% in 1991. For cars purchased, this share rose to 60% in 2017. At the time of purchase, the average mileage was around 68,000 kilometres and more than one quarter of vehicles purchased second hand by households had more than 100,000 kilometres on the clock.

NEW VEHICLE REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS (DOM)

The annual markets for new vehicles in the five overseas departments (Guadeloupe, Guyana, Martinique, Mayotte and Reunion Island) continued their sharp rebound with a 14% increase in 2017 to 75,000 units, i.e. 2007 record level. They were around 60,000 units in 2013 and 2014, a decrease of 20% compared to 2007. Like in metropolitan France, the share of the diesel market is decreasing; it went from 64% in 2012 to 40% in 2017. That of electric cars amounts to 0.6%.

The share of commercial vehicles over 5 tonnes as a proportion of all registrations was lower in those territories (1.1%) than in Metropolitan France (2.2%), given the geographical context. However, the share of light commercial vehicles was practically the same (16.2% compared to 16.8% in metropolitan France).

French groups have to deal with intense competition on the market for passenger cars in those territories. Their market share was 45% then it evolved around 51% before reaching 53% in 2017 thanks to the integration of Opel in the PSA group from August 1, 2017. They occupy 57% of the market for light commercial vehicles (up 3 percentage points compared to 2014), which remains much lower than in mainland France (about two-thirds of the market). In the narrow market for heavy trucks, Renault Trucks' market share, up sharply to 32% in 2017, is higher than that observed in metropolitan France.

The registration of second-hand passenger cars totalled 123,000 units in 2017, 28% up on 2009 (96,000 units), but 5% down from 2016. After oscillating around 2,3 between 2012 and 2016, the used/new ratio drops to 2.

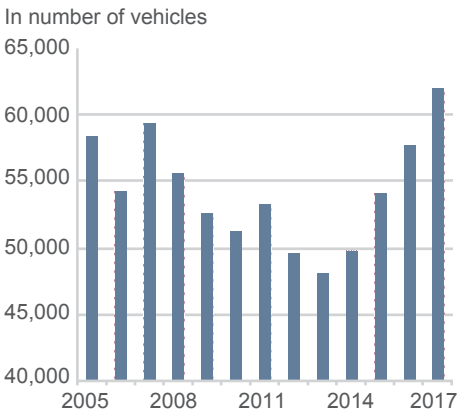
NEW PASSENGER CARS	2000	2010	2015	2016	2017	Change 2017/2000	Change 2017/2016
GUADELOUPE	13,691	13,438	13,409	14,160	16,063	17.3%	13.4%
FRENCH GUIANA	4,031	4,382	4,414	4,671	4,858	20.5%	4.0%
MARTINIQUE	14,424	13,147	12,931	14,197	14,580	1.1%	2.7%
MAYOTTE (1)	-	-	1,083	1,064	1,221	-	14.8%
REUNION ISLAND	21,463	20,295	22,288	23,701	25,306	17.9%	6.8%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	**53,609**	**51,262**	**54,125**	**57,793**	**62,028**	**15.7%**	**7.3%**
TOTAL DOM USED PASSENGER CARS	**N/A**	**104,381**	**125,457**	**129,117**	**122,968**	**N/A**	**-4.8%**

NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)	2000	2010	2015	2016	2017	Change 2017/2000	Change 2017/2016
GUADELOUPE	2,685	2,394	2,214	2,283	2,538	-5.5%	11.2%
FRENCH GUIANA	1,143	1,239	1,159	1,138	1,333	16.6%	17.1%
MARTINIQUE	2,368	2,016	2,156	2,133	2,212	-6.6%	3.7%
MAYOTTE (1)	-	-	230	272	326	-	19.9%
REUNION ISLAND	5,200	4,166	4,975	5,390	5,729	10.2%	6.3%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	**11,396**	**9,815**	**10,734**	**11,216**	**12,138**	**6.5%**	**8.2%**

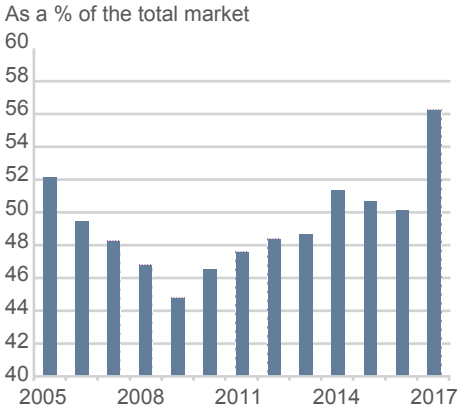
NEW COMMERCIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5T)	2000	2010	2015	2016	2017	Change 2017/2000	Change 2017/2016
GUADELOUPE	146	135	97	128	131	-10.3%	2.3%
FRENCH GUIANA	66	85	50	76	80	21.2%	5.3%
MARTINIQUE	187	84	128	165	126	-32.6%	-23.6%
MAYOTTE (1)	-	-	48	94	66	-	-29.8%
REUNION ISLAND	362	293	434	456	391	8.0%	-14.3%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	**761**	**597**	**757**	**919**	**794**	**4.3%**	**-13.6%**

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

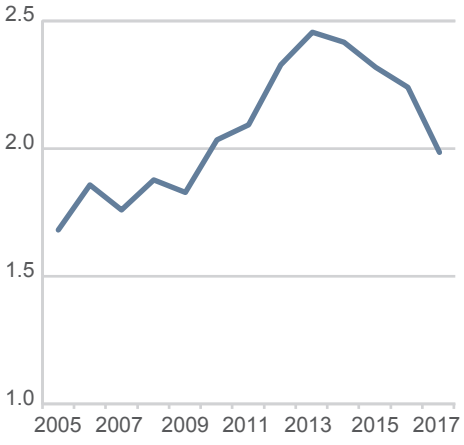
NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS



FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEASDEPARTMENTS (NEW PASSENGER CARS)



PASSENGER CARS: USED/NEW RATIO

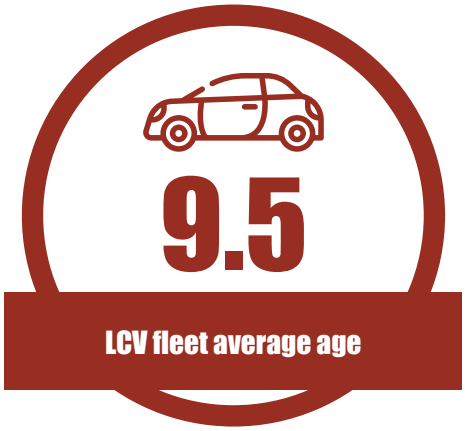


NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

In 2017, registrations of new light commercial vehicles are again dynamic (+7.0% after +8.1%) and exceed the pre-crisis level of 2008 with 440,000 units. This increase stabilizes the average age of the fleet of vehicles in use around 9.5 years in 2017 (it was 8.5 years in 2010).

Diesel vehicles dominate (95.7% of the fleet), increasing for 10 years (+11 percentage points since 2008). However, for the last 3 years, a very slight decrease in new diesel registrations has been observed in favour of petrol and electric vehicles.

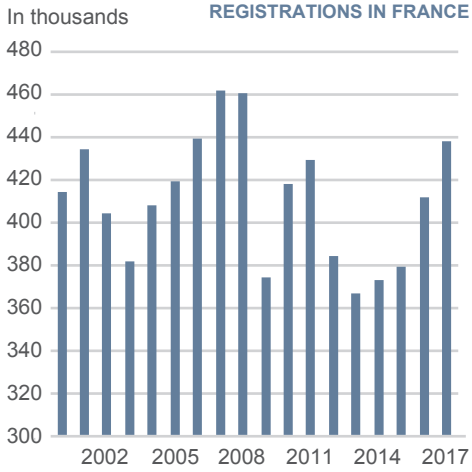
In 2017, the fleet of new light commercial vehicles reached 6.17 million units (+1.1%). The share of vehicles under 5 years old increases for the first time since 2008, from 30% to 31%; 42% of the park is over 10 years old.



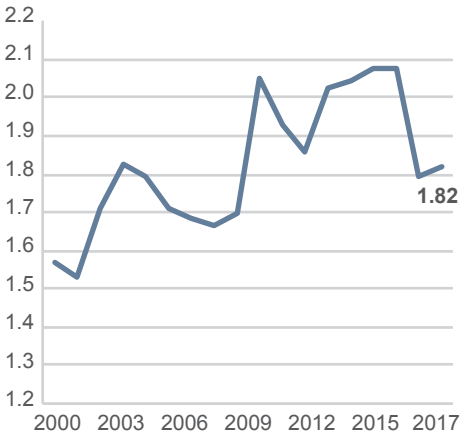
► NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY BODY

BODIES	2000		2010		2015		2016		2017	
	units	%	units	%	units	%	units	%	units	%
CARS DERIVATIVES	133,679	32.2	116,582	27.9	85,976	22.7	86,170	21.0	84,671	19.3
SMALL VANS	110,727	26.7	113,152	27.1	99,227	26.2	104,741	25.5	108,895	24.8
VANS	99,953	24.1	136,647	32.7	140,153	36.9	160,559	39.2	181,647	41.4
MINI-BUSES/COACHES	867	0.2	525	0.1	621	0.2	534	0.1	350	0.1
PICKUP	6,327	1.5	12,126	2.9	12,877	3.4	17,232	4.2	20,690	4.7
4WD, SUV	4,470	1.1	9,302	2.2	9,908	2.6	9,345	2.3	9,161	2.1
OTHERS	58,943	14.2	29,278	7.0	30,666	8.1	31,521	7.7	33,231	7.6
TOTAL	414,966	100.0	417,612	100.0	379,428	100.0	410,102	100.0	438,645	100.0

NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN FRANCE



RATIO USED/NEW



Source: CCFA

► BREAKDOWN OF LIGHT COMMERCIAL VEHICLES BY WEIGHT

	2005	2010	2017
<1.5T	2.9%	4.3%	0.7%
1.5T TO <2.5T	56.3%	52.2%	45.1%
2.5T TO 3.5T	40.5%	43.0%	53.8%
>3.5T TO 5T	0.2%	0.5%	0.3%
TOTAL	100.0%	100.0%	100.0%

Light commercial vehicles are defined as vehicles of less than 5 tonnes gross vehicle weight rating (GVWR), allowed for carrying goods. In many sectors (agriculture, construction, services, etc.), they are also used to come and go at work, to transfer between sites, to transport equipment. They come in different categories: passenger cars derivatives, multi-purpose vehicles, small vans, vans, pickups and 4WD, SUV.

In 2017, new van sales continue their strong growth (+33% since 2010) to reach more than 40% of registrations. Pickups have been growing strongly, especially since 2015 (+60% since 2015), but still represent only 2.1% of sales. While passenger cars derivatives accounted for one-third of registrations in 2000, they now account for only 19%.

Since 2016, new light commercial vehicles from 2.5 to 3.5 tonnes are the majority in the registrations; their share reached 54% of sales in 2017 (+17 percentage points over the last 15 years) while that of vehicles from 1.5 to 2.5 tonnes went from 59% in 2002 to 45% in 2017. Since 2010, sales of vehicles from 2.5 to 3.5 tonnes grew by +31% while sales of all other categories declined.

In 2017, the registrations of second-hand light commercial vehicles regained a high level around 798,000 units (+8.1%). However, the used/new ratio remains below 2 for the second year running, due to the rise in sales of new vehicles, a level well below that observed for passenger cars. Indeed, for a new passenger car, between 2 to 3 used cars are sold (2.7 in 2017).

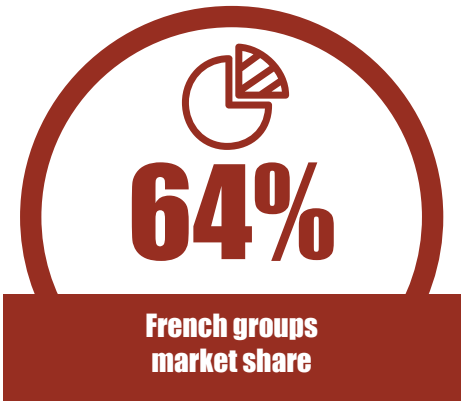
Specific French, 8% of new commercial vehicle registrations are made by individuals who prefer pick-ups and vans in their purchases; 40% of the fleet was maintained by individuals in 2011, according to an SDES survey. The average age of their vehicles is higher than that of professionals (in 2011, 13.1 years against 6.6 years respectively).

Light commercial vehicles are vehicles that are used intensively: they travel each year more than 16,000 km/year against 13,000 km/year on average for a passenger car (Source: CGDD circulation report). While individuals travel fewer kilometres with their light commercial vehicles (around 10,000 km/year), some sectors are very intensive users and reach 20,000 km/year or more: transport, courier, storage, and specialised activities (scientific and technical, administrative and support services) and manufacturing. These vehicles are mainly used in urban areas or on the road (off-highway). The courses of over 150 km accounted for only 10% of the kilometres travelled in 2010 by professionals.

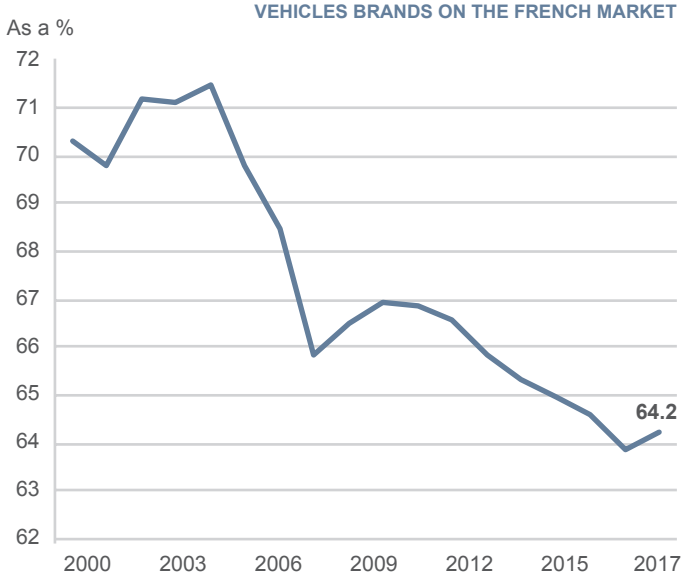
CHARACTERISTICS OF NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

French groups are traditionally more present on the light commercial vehicle market than that of passenger cars. With the opening up of markets in Europe, as happened on the market for passenger cars, their market share has reduced in France but has increased amongst our European neighbours. In 2017, sales of French groups represented 64% of the total market for light commercial vehicles in France, a market share that has been in decline since 2005 (down 6 percentage points).

French groups are reference manufacturers and also manufacture for their partners on their production sites (Renault for Fiat, Nissan and Daimler; PSA for Toyota). Production in France, wholly by French groups, represented 2% of global production in 2017, i.e. 479,000 units, 81,000 of which were for partners, i.e. 17% of total production.



MARKET SHARE OF FRENCH LIGHT COMMERCIAL VEHICLES BRANDS ON THE FRENCH MARKET

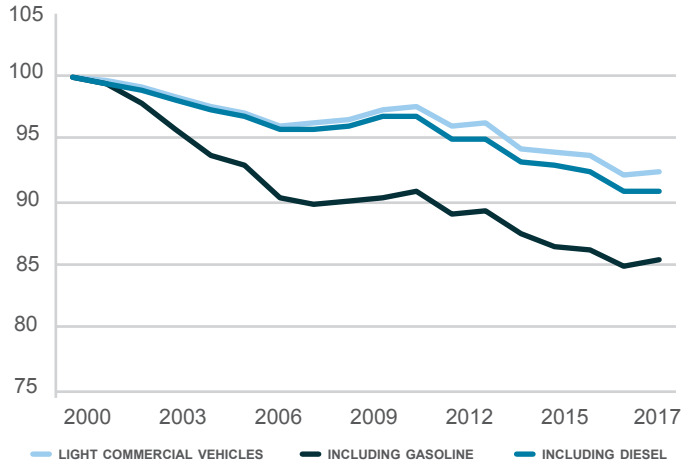


► RANKING OF MAJOR NEW COMMERCIAL VEHICLES IN 2017

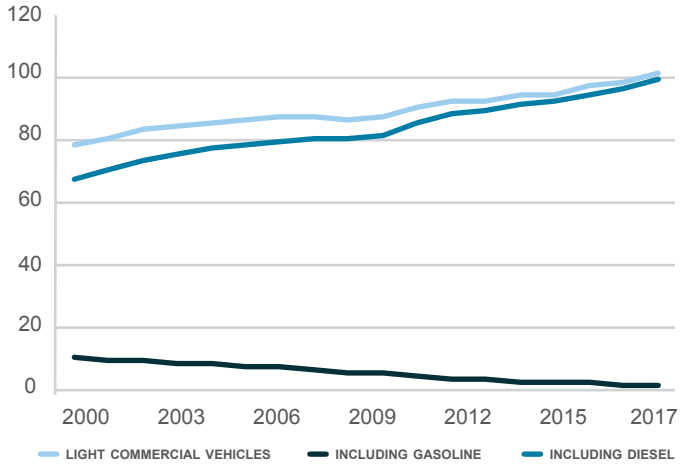
Brand	Model	2017	Market share
RENAULT	KANGOO	39,359	9.0%
RENAULT	CLIO	31,051	7.1%
CITROËN	BERLINGO	26,591	6.1%
RENAULT	MASTER	26,363	6.0%
RENAULT	TRAFIC	25,915	5.9%
FIAT	DUCATO	25,240	5.8%
PEUGEOT	PARTNER	21,549	4.9%
PEUGEOT	EXPERT	17,293	3.9%
PEUGEOT	208	15,474	3.5%
CITROËN	JUMPY	14,718	3.4%

Source: CCFA

CO_2 CONSUMPTION IN G/KM OF LIGHT COMMERCIAL VEHICLES - BASE 100 IN 2000



TRAFFIC IN FRANCE BY TYPE OF VEHICLE (IN BILLIONS OF VEHICLE-KILOMETRES)



Sources: MTES/SDES, CCFA calculations

The production of light commercial vehicles now represents 21% of total production of light vehicle production in France (compared to 16% in 2013). Light commercial vehicles are high value-added products that are more easily manufactured in France.

Thanks to the sales successes of their models (Renault Kangoo, Citroën Berlingo, Peugeot Partner), French groups are particularly dominant on the small van sector (87% of sales on this market) as well as passenger car derivates (83%) (Renault Clio, Peugeot 208), whilst the pick-up market is dominated by foreign groups (97% market share). Concerning the biggest market, the van segment, competition is tougher: French groups represent 60% of the market, which is up 2 percentage points since 2010.

In a context where everything is expanding: traffic (+30% since 2000), vehicle stock (+21%), and vehicle size, the increase in $C0_2$ emissions has been restricted to 20%. Improved energy efficiency has seen CO_2 emissions in g/km fall by 8%. The electric light commercial vehicle stock, although small, was estimated at 40,000 units on January 1, 2018 – and is progressing (+38%).

HOUSEHOLD VEHICLES IN USE

In 2017, multi-car households represented 39% of all households compared to 26% in 1990 and 16% in 1980; this share has slightly increased for two years (+1 point).

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

65% of households in the Paris area have cars. In other French urban agglomeration, the rate is closer to 80%.

62% of modest households (less than €15,000 income per year) are equipped with at least one car.

83% of households between 65 and 74, as well as 75% of those over 75, have cars. Possession of a driving licence and the proportion of drivers in this age category continues to grow.

74% of under 25 have cars, compared to 65% in 2010 and 49% in 2000.

The rate of possession of a driving license among people under 25 does not decline: it is around 65% among 18-21 and around 85% among 22-25.

► CAR OWNERSHIP RATE (HOUSEHOLDS WITH AT LEAST ONE CAR) (AS A %)

	1990	1995	2000	2005	2010	2015	2017
BY SOCIO-PROFESSIONAL CATEGORY							
Farmers	95.9%	98.9%	91.1%	100.0%	92.1%	88.0%	92.4%
Farm workers	74.7%	-	-	-	-		
Tradesmen, craftsmen, business owners	95.2%	89.4%	90.6%	91.2%	91.1%	90.9%	89.7%
Self-employed professionals, executives	94.4%	85.5%	84.6%	83.7%	84.1%	83.2%	86.1%
Middle management	93.3%	88.7%	90.8%	87.6%	89.8%	88.0%	89.1%
White collar workers	78.3%	75.9%	77.5%	80.9%	82.5%	80.1%	80.7%
Blue collar workers	87.2%	89.7%	88.7%	89.1%	91.2%	90.9%	91.6%
Non-working population	54.6%	65.8%	70.9%	72.8%	77.1%	77.6%	78.6%
of which retired persons	59.4%	70.9%	76.0%	76.2%	80.1%	80.6%	81.1%
BY AREA OF RESIDENCE							
Rural areas	82.1%	88.6%	91.1%	92.4%	92.7%	92.9%	93.4%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	88.4%	90.2%	91.1%	89.7%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	83.7%	87.1%	87.8%	86.9%
Towns with over 100,000 inhabitants	74.2%	75.1%	76.6%	78.5%	80.8%	81.4%	82.3%
Greater Paris	77.0%	60.8%	60.4%	61.5%	63.6%	59.7%	64.7%
Inner Paris	47.3%						
BY LOCATION OF RESIDENCE							
Town center	-	67.6%	69.4%	69.2%	73.0%	71.6%	73.3%
Suburb	-	79.3%	80.5%	80.9%	83.2%	82.1%	82.5%
Peri-urban area	-	88.5%	89.8%	91.2%	91.6%	92.5%	92.2%
Rural area	-	85.3%	90.4%	92.6%	94.8%	94.4%	94.5%
BY AGE OF HEAD OF HOUSEHOLD							
Under 25	-	51.2%	49.3%	63.3%	64.9%	74.0%	73.8%
25 to 34	-	85.1%	82.4%	82.3%	83.9%	82.5%	85.7%
35 to 44	-	86.7%	86.3%	87.5%	88.0%	87.3%	87.3%
45 to 54	-	87.5%	87.4%	86.1%	88.1%	84.7%	85.8%
55 to 64	-	84.9%	87.0%	86.7%	86.9%	85.1%	85.2%
65 to 74	-	61.9%	69.0%	70.8%	76.2%	78.6%	83.2%
over 75	-						74.8%
ALL	**76.5%**	**78.4%**	**80.3%**	**81.2%**	**83.5%**	**82.9%**	**83.9%**
VEHICLES WITH A WOMAN AS THEIR MAIN DRIVER	**-**	**-**	**40.4%**	**40.7%**	**41.5%**	**41.9%**	**42.4%**

Sources: INSEE until 1993, KANTAR TNS PARC AUTO since 1994

The rate of car ownership can be measured by the percentage of households having at least one car. After several years of decline, the increase observed in 2016 in this rate is confirmed in 2017 (+1 point since 2015).

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

• 20% of the hightest-income households had a car ownership rate above 90% in 2015. Regarding the 20 % of the lowest-income ones, 60 % had at least one car.

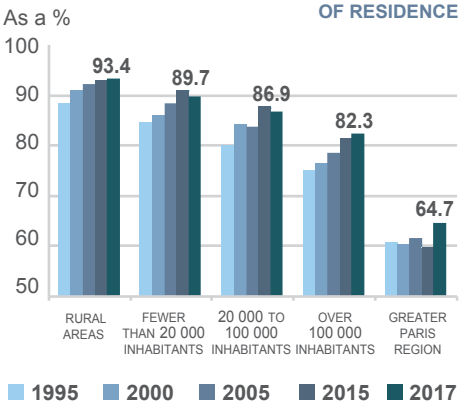
• The rate of car ownership in cities with over 100,000 inhabitants increases in 2017 (+1 percentage point compared to 2016): 83% had cars in 2017 compared to 75% in 1995. After a slight decline in 2016, this ratio is returning to growth in Marseille (84%) and Lyon (81%) areas; it remains at a high level in the Paris area (65%) thanks to the rise of the rate of ownership; it decreased slightly in the Lille area (79%), while remaining at a high level.

• Rural households, large families and workers are those recording the highest levels of car ownership. Their rate of car ownership is as an average at more than 90%.

• 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 (+3.2 and +7.7 percentage points respectively).

Since 2010, the proportion of "demotorised" households has grown each year by 2-3%. However, this increase seems to have halted in 2017 at around 57% of non-motorised households. The change in family situation (death, divorce, etc.), the cost of purchase and maintenance, health problems, public transport alternatives and parking problems are the main causes. Amongst non-motorised households, 14% are thinking of buying again over the next two years, which is stable over time.

CAR OWNERSHIP BASED ON AREA OF RESIDENCE



HOUSEHOLD VEHICLES IN USE

After steadily declining until 2014, daily use of the car stabilises: the share of vehicles on the road used daily or almost daily reached 74% in 2017, compared to 79% in 2000.

The share of vehicles used for the home-to-work run continues to exceed 50%. In 2017, 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 5.6 years in 2017 compared to 4.4 years in 2000 and 4.1 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 125,700 km (+15,000 km since 2000); petrol cars are used less intensely and are down to 77,800 km (-5,000 km since 2000).

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

	units	1990	1995	2000	2005	2010	2015	2017
Total	millions	23.0	25.1	27.4	31.0	33.6	34.1	35.1
Average age	year	5.8	6.6	7.3	7.7	8.0	8.9	9.1
Average ownership period	year	3.7	4.1	4.4	4.7	5.0	5.5	5.6
BREAKDOWN BY AUTOMOTIVE GROUP								
Renault Group	%	33.3	33.3	33.3	30.2	28.6	28.3	27.5
PSA Group (1)	%	38.3	36.2	35.2	36.4	38.2	36.5	39.9
Foreign brands	%	28.4	30.5	31.4	33.2	33.2	35.2	32.6
BREAKDOWN BY POWER CATEGORY FOR TAX PURPOSES								
2 and 3 HP	%	3.4	1.6	0.7	43.3	44.4	49.2	51.9
4 and 5 HP	%	38.4	38.9	40.5				
6 and 7 HP	%	47.1	48.6	50.0	46.6	42.5	39.0	35.5
8 HP and above	%	12.8	10.9	8.8	10.1	13.1	11.8	12.6
BREAKDOWN BY VEHICLE RANGE								
Low range	%	39.4	43.4	45.1	44.5	46.8	49.3	49.2
Low-mid	%	20.8	24.3	27.3	32.2	30.9	29.2	29.1
High-mid	%	26.0	22.2	19.9	16.2	11.5	7.9	7.1
Premium range	%	8.7	7.0	7.0	5.7	5.0	3.0	2.7
Others	%	5.1	3.2	0.8	1.4	5.7	10.6	14.0
Percentage of vehicles purchased new	%	50.4	45.2	43.9	40.1	41.1	41.5	41.6
BREAKDOWN BY TYPE OF FUEL USED								
Premium unleaded - Petrol	%	0.0	38.4	49.1	51.1	40.1	38.8	41.7
Premium leaded - AVSR	%	0.0	28.8	11.9				
Diesel	%	0.0	30.9	38.1	48.9	59.9	61.2	58.3
Average mileage	km	69,500	84,080	93,140	99,460	103,470	105,590	105,810
Percentage of vehicles used on daily or near daily basis	%	75.1	77.4	78.7	75.7	71.8	71.9	73.6
Percentage of vehicles used for travel to and from work	%	55.4	54.3	55.1	55.2	53.7	52.2	53.0

Note: Years after 2007 cannot be compared directly with previous years; the scope of light commercial vehicles has been enlarged.
(1) Since 2017, Opel is integrated within PSA group.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO since 1994

The PARC AUTO survey, conducted by KANTAR TNS 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 4% of the total number.

The share of vehicles over 5 years of age was 68% in 2017 and that of over 10 years has stabilised at a record level (33%). The average age of the vehicle stock according to energy type is 9.1 years, rising due to the aging of the diesel cars stock (8.8 years on average, i.e. +2 years in 10 years). The one for petrol has decreased by one year since 2014, reaching 9.4 years.

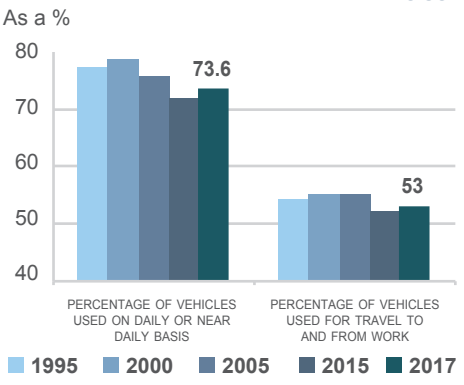
The share of multi-car households equipped exclusively with cars aged 5 years and over was 47% in 2017, compared to 43% in 2010.

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 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 in 2017, compared to 7% for cars from the mid-high range. The share of cars of the “others” range, composed mainly of 4WD, grows strongly (+3.4 percentage points since 2015).

Comfort features are increasingly present. In 2017, the majority of cars (80%) had an air conditioning system. For safety equipment, rates continue to rise; now more than half of the cars in the park have a speed limiter (54% in 2017, compared to 48% in 2015); a third are equipped with an emergency braking system (36%), a recoil radar (35%) or an electronic trajectory correction (31%). On-board connectivity and “Stop&Start” is emerging and represents 36% and 21% of the vehicle stock respectively. The rate for all these elements is much higher for the main cars of multi-car households.

Concerning driving frequency, more than 80% of rurals and inhabitants of small towns use their vehicle regularly. In Paris area, regular use is only 50%, and tends to decrease in Paris intramuros and the first crown. On the other hand, in the other big towns, the use is intensifying: nearly 7 out of 10 households regularly use their cars in 2017.

VEHICLES USE



DOMESTIC PASSENGER TRANSPORT

+1%

Increase in 2017 in domestic passenger transport in all mode, expressed in passenger-kilometres

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 and its share remains stable in 2017: 80% for the passenger car and 6% for buses, coaches and trams.

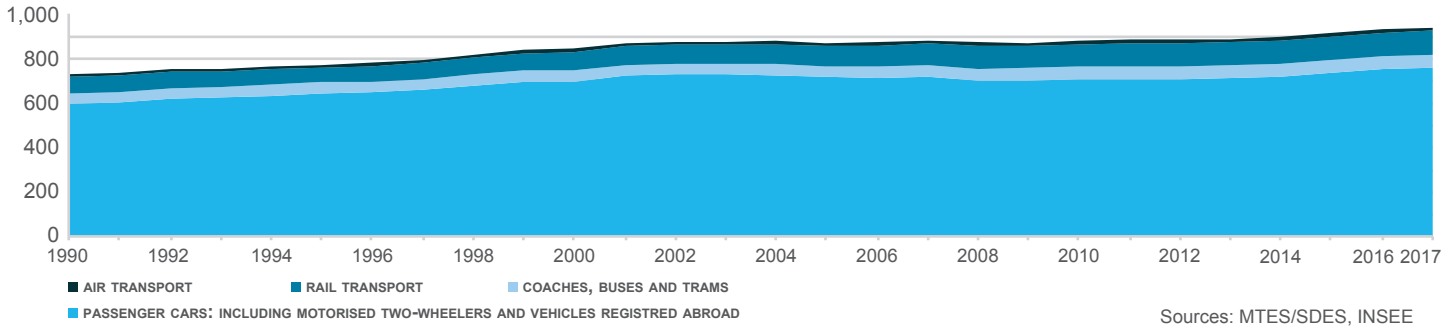
The private car but also the light commercial vehicle, is used for door-to-door mobility. They cater to a large number of individual constraints (the elderly, children, disabled, transport of heavy or bulky objects) and provide a suitable solution in low-density housing areas or where flows are not sufficient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

In 2017, domestic passenger transport grew by 1%, a rate equivalent to its annual average since 2010, after two years of stronger growth (+1.9%). This deceleration is linked to that of passenger car mobility, which after having increased sharply in 2015 and 2016 (+2.2% and +2.4%) to a record level, mechanically slowed down in 2017 (+0.4%), also probably slowed down by rising fuel prices.

Public transport increased sharply in 2017 (+3.4%), but in a contrasted way from one type of transport to another. Public transport by road fell by 1.3%, probably impacted by the increase in fuel prices and foreign travellers' switch to air and rail. Rail transport reported a sharp increase (+6.4%) after a dip in 2016, stimulated in particular by SNCF's commercial policy focusing on new product ranges and lower prices. Finally, air transport increased by 4%, probably linked to the arrival of new low-cost airlines and the return of foreign tourists.

In billions of passenger-kilometres

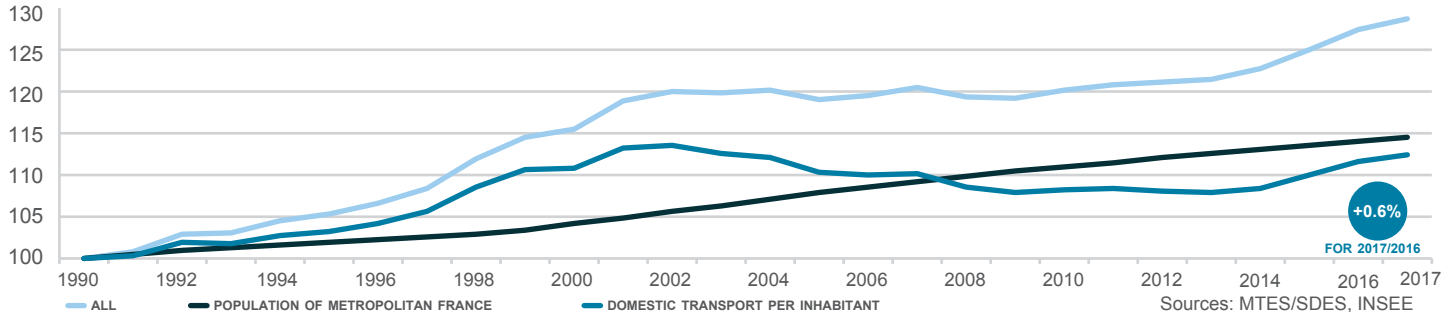
DOMESTIC PASSENGER TRANSPORT



Sources: MTES/SDES, INSEE

CHANGES IN DOMESTIC PASSENGER TRANSPORT

Base 100 in 1990



Sources: MTES/SDES, 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 determining factors in the choice of type of transport, for the transport of merchandise, include origin-destination, distance, time and quantities/volumes of merchandise transported. These choices now being impacted by the digital economy that has given rise to the development of new individual transport services.

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, each mode of transport appears pertinent and complementary.

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 -0.5% per year was recorded between 2002 and 2013. Finally, since 2014, domestic passenger transport per inhabitant grew on average by 1% per year, mainly related to the increase in individual mobility, particularly in 2015 and 2016.

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.

Road freight transport ticks a number of boxes in favour of modal transport. Its share in the freight transport remains stable (around 85% of tonnes-kilometres covered) and distances under 300 kilometres stand out, making the transfer to modal transport more difficult: 50% of tonnes loaded under the French flag are delivered fewer than 50 kilometres away in 2017.

Between 2010 and 2015, road transport of merchandise fell by 1.3% on average annually, in line with the decline in the activity of French operators (-2.6%/year), whilst foreign operators increased 0.8% each year. In 2016, it bounced back with +2.5% growth and its increase accelerated in 2017 (+6.5%) thanks to the increase in the foreign operators (+5.6%), but also the recovery of the French operators (+7.5%), following the economic recovery. However, activity remains below its pre-crisis level of 2008.

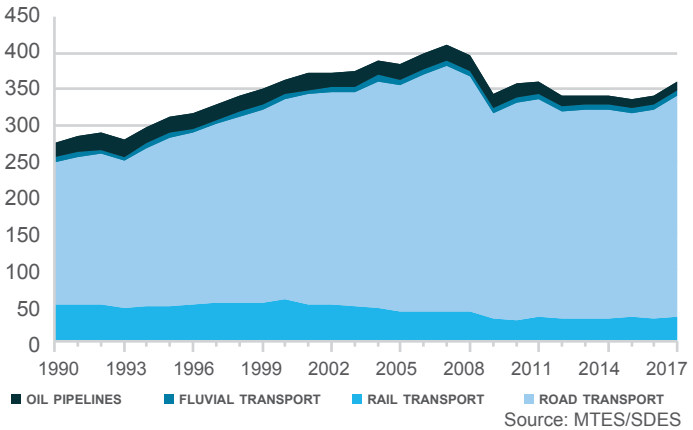
Rail transport rose again in 2017 (+2.7%), after a year of decline in 2016 (-4.9%). Between 2011 and 2017, rail freight transport fell by an average of 0.4% per year and its market share is now only 9.3%. Similarly, river transport fell by 1.8% in 2017, following a drop of 8.4% in 2016, a decline of 2.6% per year on average since 2011.

+5.5%

Increase of domestic freight transport measured in tonnes-kilometres in 2017

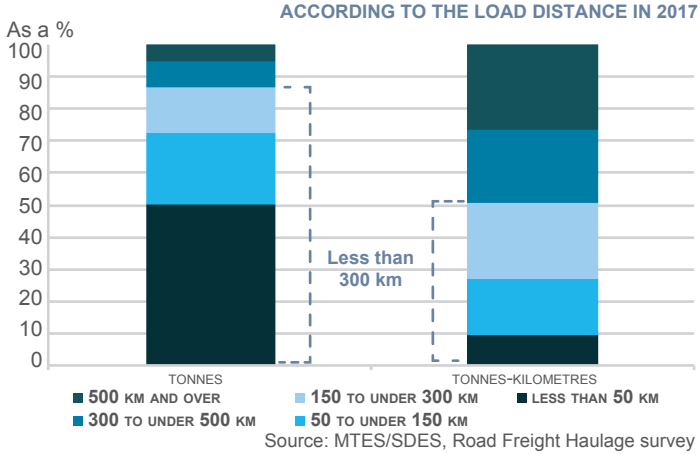
DOMESTIC FREIGHT TRANSPORT IN FRANCE

In billions of tonnes-kilometres



Source: MTES/SDES

BREAKDOWN OF FREIGHT TRANSPORT USING FRENCH CARRIERS ACCORDING TO THE LOAD DISTANCE IN 2017



Source: MTES/SDES, Road Freight Haulage survey

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 operators.

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. Thus, the social and fiscal cost on the road mode, whether common law or specific (fuel tax), should not differ too much from that prevailing in other European countries, in order to cope with the competition and facilitate export activity.

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.

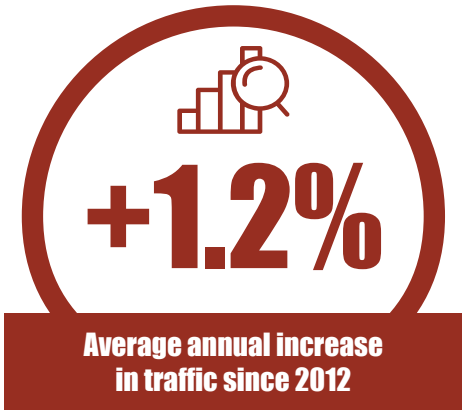
Because of the great variety of freight and goods, numerous factors come into play and shape the choice of modes of transport. Such is the case for:
- the weight of freight: automotive manufacturers transport their spools of steel mainly by rail or river;
- the value of freight and goods transported;
- 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 kilometres, 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 tonne at the time of loading and tonnes-kilometres. The road remains dominant in freight transport with a stable 85% share of tonnes-kilometres completed. The road freight transport survey carried out by the Transport Ministry shows the predominance of distances under 300 tonnes-kilometres: 50% of tonnes are transported by French hauliers over distances under 50 kilometres and 50% of tonnes-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%) and 2016 (+2.5%). It is up 1.1% in 2017.

In a context of higher fuel prices and record traffic levels, the circulation of passenger cars and buses and coaches rose slightly in 2017 (+0.5% and +0.1% respectively). This quasi stability results in particular from a decrease in the average journey per vehicle. The circulation of foreign buses and coaches fell sharply (-8%).

On the other hand, the circulation of light commercial vehicles and heavy trucks registered in France accelerated in 2017 (+3.3% and +1.8% respectively) thanks to the recovery of the economic activity. In the same way, the circulation of foreign heavy trucks continues to grow (+5% after +3.4% in 2016) with the recovery of European growth.

At the end of 2017, over 40% of the passenger cars on the road met Euro 5 or Euro 6 standards. For heavy trucks, the percentage of trucks respecting Euro V and Euro VI standards was almost 50%. 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	2015	2016	2017	Average annual change as a %		
							05/90	17/05	17/16
TOTAL VEHICLES (ANNUAL AVERAGES)	**thousands of vehicles**	**28,106**	**33,464**	**38,562**	**38,888**	**39,312**	**+1.7**	**+0.8**	**+1.1**
New passenger cars		23,280	27,770	31,900	32,170	32,520	+1.7	+0.7	+1.1
Petrol (and others)		19,760	18,150	12,032	12,269	12,665	-1.4	-2.1	+3.2
Diesel		3,520	9,621	19,868	19,900	19,855	+9.6	+3.2	-0.2
Light commercial vehicles (LCV)		4,223	5,062	6,019	6,081	6,152	+1.8	+0.9	+1.2
Petrol		2,279	1,302	312	278	265	-5.3	-11.4	-4.7
Diesel		1,944	3,761	5,707	5,802	5,887	+5.8	+2.4	+1.5
Heavy trucks (>5t)		535	551	550	544	547	+0.4	-0.4	+0.6
Coaches and buses		68	81	93	93	94	+1.5	+0.9	+0.3
KILOMETRES (ANNUAL AVERAGES)	**thousands of km**								
New passenger cars		13.4	13.5	13.0	13.3	13.2	-0.1	+0.0	-0.6
Petrol		11.9	10.7	8.5	8.6	8.9	-1.3	-0.9	+3.4
Diesel		21.3	18.8	15.7	16.1	15.9	-1.5	-0.5	-1.4
Light commercial vehicles (LCV)		14.6	15.5	16.2	16.3	16.6	+0.5	+0.5	+2.2
Petrol		9.9	8.3	7.6	7.7	7.9	-1.4	-0.2	+2.0
Diesel		20.2	18.0	16.7	16.7	17.0	-1.0	-0.2	+2.0
Heavy trucks (>5t)		36.1	41.2	30.8	31.9	32.5	+0.8	-2.0	+1.8
Coaches and buses		31.0	30.2	36.8	37.6	37.5	+0.2	+1.5	-0.2
CONSUMPTION PER VEHICLE	**litres/100 km**								
Passenger cars: petrol		8.68	8.12	7.42	7.27	7.31	-0.7	-0.6	+0.6
Passenger cars: diesel		6.73	6.74	6.16	6.06	6.07	-0.1	-0.7	+0.2
LCV: petrol		9.39	9.29	8.03	7.87	7.91	-0.6	-0.8	+0.5
LCV: diesel		9.77	9.67	8.93	8.78	8.79	-0.3	-0.6	+0.1
Heavy trucks: diesel		36.23	36.62	33.90	33.87	34.06	-0.0	-0.5	+0.6
Buses and coaches: diesel		32.00	32.99	30.20	31.22	31.40	+0.1	-0.3	+0.6
FUEL CONSUMPTION (ALL ROAD TRANSPORTATION)	**millions of litres**								
Petrol		24,110	18,729	9,773	10,416	11,005	-3.1	-2.8	+5.7
Diesel		17,977	30,779	38,622	39,274	39,611	+4.7	+0.9	+0.9
Total		42,086	49,508	48,395	49,690	50,617	+1.3	-0.1	+1.9
TOTAL TRAFFIC	**billions of vehicles-km**	**420**	**518**	**585**	**600**	**606**	**+1.9**	**+0.8**	**+1.1**
Light vehicles (excl. motorcycles)		389	476	541	555	560	+1.8	+0.9	+1.0
Heavy trucks		22.4	29.5	26.5	27.3	28.1	+2.4	-1.2	+2.9
ROAD TRAFFIC									
Passengers in passenger cars (1)	billions of passengers-km	598.7	697.6	736.5	754.3	757.3	+1.2	+0.5	+0.4
Passengers in coaches and buses	billions of passengers-km	46.4	49.7	58.5	58.9	58.1	0.5	1.3	-1.4
Freight	billions of tonnes-km	197.0	276.9	281.6	288.6	307.6	3.2	-0.2	6.5

(1) Including vehicles registered abroad and motorcycles
Sources: MTES/SDES/CCTN

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 2017, the number of cars registered in France grew 1.1%, i.e. at a faster pace than the one observed in recent years (+0.7% annual average since 2011), but lower than that observed during the 1990s.

The decline in diesel engine popularity was confirmed in 2017. Globally, for light vehicles, its share in the vehicle stock fell 0.6%, and that in traffic as a whole by 1.1 percentage points to 78.3%. Four out of five petrol-driven vehicles are now compatible with super unleaded 95-E10, which represents 39% of total petrol supplies.

In 2017, the reduction observed over the past ten years in average unitary consumption on cars has come to an end. The continuous improvement in technical performance no longer outweighs the impact of the resurgence of petrol-driven vehicles in new registrations and the attraction for SUVs. Between 2006 and 2016, average unitary consumption on diesel cars fell 7.6% and on petrol cars by 6%.

Heavy trucks returned to growth in 2017 (+0.6%) after 15 years of decline. The Euro VI standard, which came in to force on January 1, 2014, goes some way to explaining the increase in heavy trucks fuel consumption. Another factor explaining the rise is the regular increase in gross vehicle weight (GVW) for heavy trucks.

ROAD TRAFFIC AND CO_2 EMISSIONS

-22%

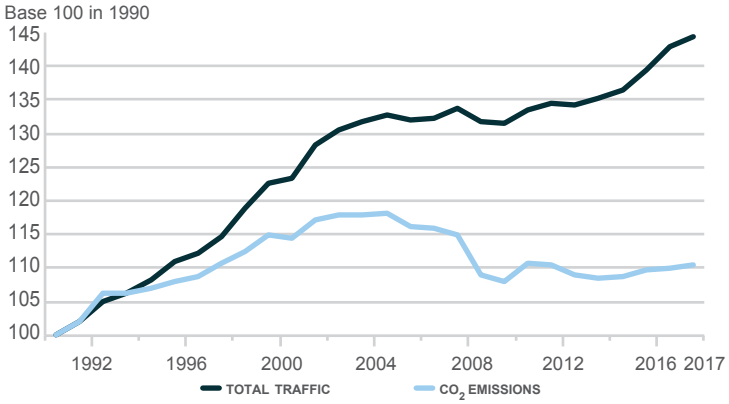
Drop in average unitary consumption of passenger cars on the road since 1990

Since 1990, traffic of French and foreign vehicles in France has increased by 44%; the associated CO_2 emissions, net of renewable energies, have only increased by 10%.

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 22% over the period 1990 to 2016 (dieselisation of cars on the road, manufacturers and drivers' efforts and the impact of the bonus-malus scheme introduced in 2008). In 2017, this downward trend was interrupted, particularly because of the increase in the share of petrol vehicles in registrations since 2013 and in the park since 2016.

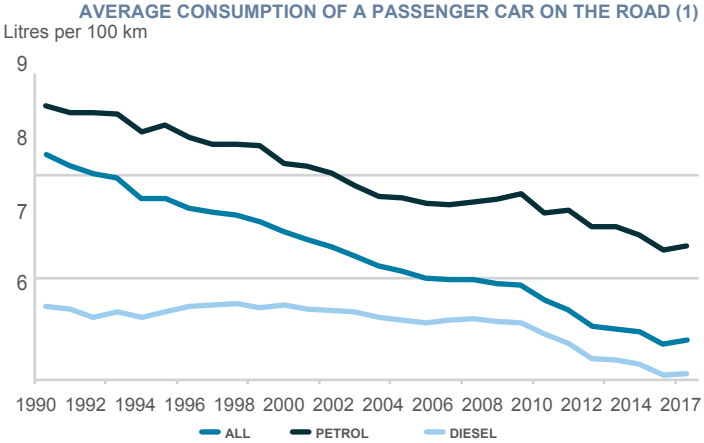
Energy efficiency in merchandise transport continued to improve. The quantity of CO_2 emitted by heavy trucks to transport 1 tonne of merchandise per kilometre in France fell again by 3% between 2016 and 2017 and has fallen 32% since 1990. This improvement is primarily explained by improved vehicle performance (better engine performance, bigger vehicle size, allowing massification), optimisation of logistics (better fill rates, fewer returns empty), and the dissemination of good eco-driving practices.

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



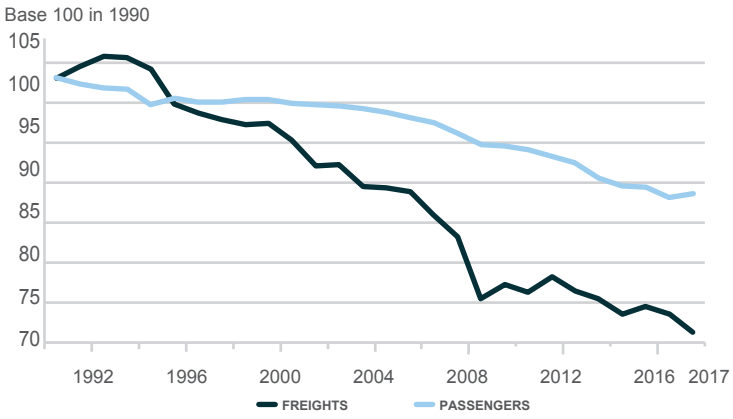
Sources: CITEPA, MTES/SDES/CCTN

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



(1) Unit consumption includes the overconsumption effects associated with biofuels.
Sources: MTES/SDES/CCTN

CHANGE IN TRANSPORT ENERGY EFFICIENCY (2)



(2) Energy efficiency relates to the change in the amount of CO_2 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 CO_2 emissions due to the use of biofuels is taken into account.
Sources: MTES/SDES, calculs CCFA

Numbers of private cars on the road result from two components: vehicle stock and annual average mileage. Over the long term, the growth rate of the vehicle stock has fallen sharply after the access-to-vehicle mobility phase. The development of multimotorisation and then substantial increases in fuel prices are the major factors behind the drop in annual average mileage between 2000 and 2012. Since, there has been an increase in the growth rate of the vehicle stock and in annual average mileage, in a context in a context of recovery of economic growth

In 2017, new estimates provided by the Centre Interprofessionnel d'Etudes de la Pollution Atmosphérique (CITEPA) for road transport reported net CO_2 emissions from renewable energies at 122 million tonnes. After the ceiling reached in the first decade of the 21st century, around 130 million tonnes, a net fall was recorded between 2004 and 2009, linked amongst other things to the effects of the economic crisis. Since, CO_2 emissions have stabilised at around 120 million tonnes, thanks to energy efficiency improvements.

In 2016, CITEPA estimates net CO_2 emissions from renewable energies used in road transport were broken down as follows: 56.6% for cars, 20.1% for light commercial vehicles, 22% for heavy trucks, including coaches and buses, and 1.2% for two-wheelers.

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, transport services with drivers, 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.

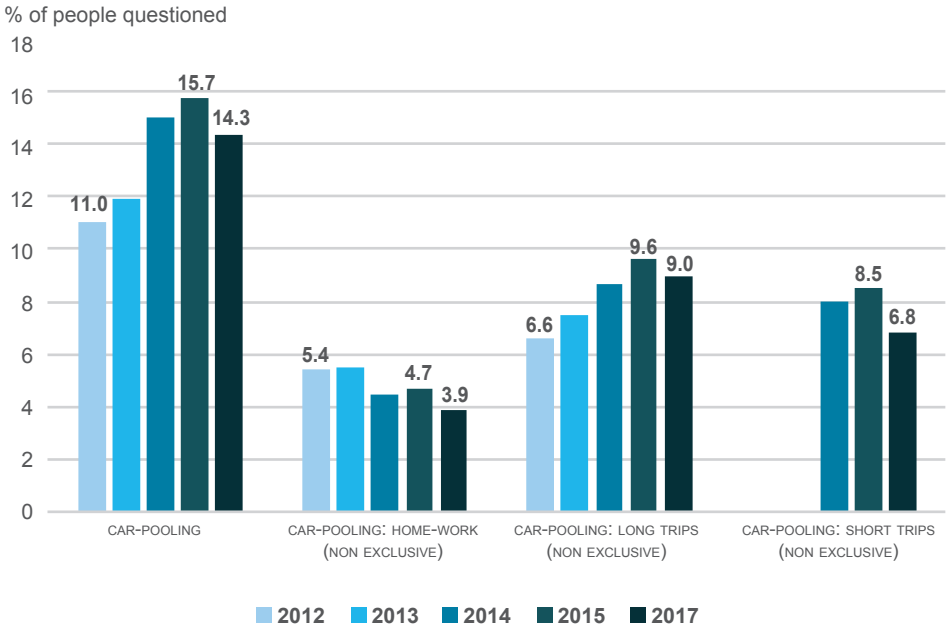
In rural and peri-urban areas, car-sharing and car-pooling also increase transport possibilities at a lesser cost to the authorities because it requires almost no new infrastructure.

Automotive manufacturers now include these new forms of mobility in their development strategies through industrial cooperation projects, investments in companies linked to mobility and development of car-sharing services.

14.3%

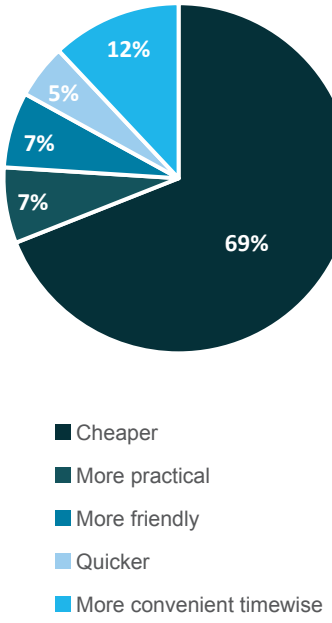
Of people questioned had used car-pooling in 2017 (KANTAR TNS survey)

SURVEY ON CAR-POOLING OVER THE PAST 12 MONTHS



Source: PARC AUTO KANTAR TNS survey

MAIN REASONS FOR CAR-POOLING



Source: PARC AUTO KANTAR TNS survey

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.

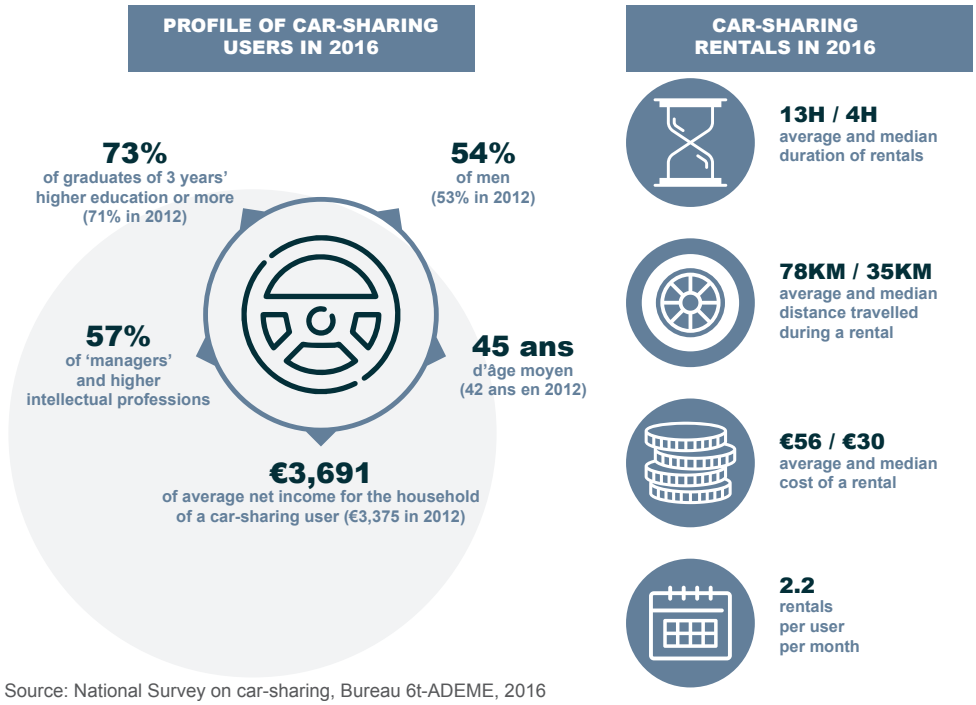
The dissemination and development of car-pooling is difficult to measure. According to different surveys, 5-10% of the French population car-shares regularly, but the figure is rising rapidly. The 2018 PARC AUTO KANTAR TNS survey indicates that 3.9% of people questioned had already used car-pooling for home-to-work trips over the past 12 months, 9% for journeys over 100 km and 6.8% for distances less than 100 km. In all, 14.3% of people questioned had used car-pooling during 2017, i.e. a figure slightly lower than 2015 (15.7%).

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 sharing – generally over long distances (364 km on average) – is now more structured. Link-up platforms enable transactions between drivers and passengers. Thus, according to PARC AUTO survey, the percentage of long journeys organised with a hook-up structure increased from 25% in 2012 to 59% in 2017. On the other hand, 93% of home-to-work trips and 82% of short trips were organised without any structured platform. Indeed, regular car sharing – mostly over shorter distances – in particular for commuting, is more difficult to organise. However, players are investing in this segment.

Companies are also increasingly involved in the framework of the Companies Travel Plans, in order to facilitate the networking of their employees. Mobility operators or local authorities are also involved through the provision of information or carpooling areas.

NEW USES FOR THE AUTOMOBILE



Source: National Survey on car-sharing, Bureau 6t-ADEME, 2016

► RANKING OF THE 10 MOST-MENTIONED ADJECTIVES BY USERS TO DESCRIBE CAR SHARING

2012			2016		
Rank	Adjective	% users answering	Rank	Adjective	% users answering
1	Practical	69%	1	Practical	68%
2	Economical	54%	2	Economical	52%
3	Ecological	38%	3	Ecological	30%
4	Easy	15%	4	Easy	14%
5	Flexible	14%	5	Flexible	13%
6	Useful	10%	6	Useful	9%
7	Fast	8%	7	Fast	8%
8	Makes autonomous/Freedom	7%	8	Makes autonomous/Freedom	8%
9	Available	7%	9	Available	7%
10	Expensive	6%	10	Expensive	7%

Source: National Survey on car-sharing, Bureau 6t/Ademe, 2012 & 2016

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. French groups have developed offers abroad, especially in Madrid, with local partners.

In France, an increasing number of cities have self-service car systems. The latest national car-sharing survey (6t/Ademe) identified 26 car-sharing services either in round trips or direct routes in 2016. The Autolib' service, developed in 2011 in Paris and in more than 90 communes of Paris area, reached, in January 2017, 109,000 active subscribers (one-year subscription), with 3,946 electric vehicles in service at 1,097 electric vehicle stations. But this type of service is for a minority of users who, according to the "national car share survey" (2016), are older (45 years old on average), better qualified (73% have a baccalaureate +3 years or more) and financially better off than the populations of the big towns in which they live.

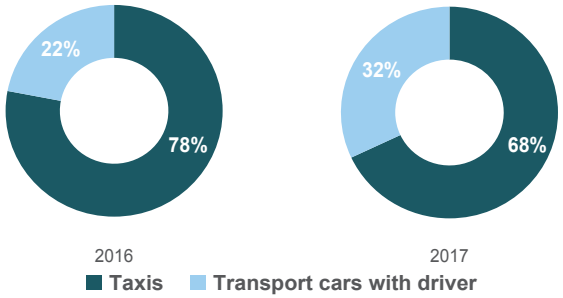
The economic model of these new services remains vulnerable and they are coming into competition with new services like those offered by VTCs (transport services with drivers).

NEW USES FOR THE AUTOMOBILE

32%

Share of Transport services with drivers in individual public transport in 2017

SHARE OF TAXIS AND TRANSPORT CARS WITH DRIVER IN THE OFFER OF PUBLIC TRANSPORT OF INDIVIDUALS IN 2016 AND 2017



Note: Preliminary data for the number of taxis in 2017.
Source: National Observatory of Special Public Transport of People, CGDD, July 2018

TRANSPORT SERVICES WITH DRIVERS (VTC)

The VTC business is part of the individual public transport sector (T3P), as defined by the transport code, which also includes taxis and two- and three-wheeled motorised vehicles which are commonly called “moto-taxis”.

Since their arrival in France at the beginning of the second decade of this century, VTC services have contributed to increasing mobility by offering transport services for individuals by pre-order. However, their rapid development has raised a number of questions as to their legality and their competitive stance versus taxis, which has led the public authorities to review existing legislation.

Originally, VTC status was inherited from the “voiture de grande remise” status and the “Grand Remisier” professions: drivers of luxury tourism vehicles. In 2009, this regime was transformed by the Novelli law, which deregulated the sector and created the status of “tourism vehicle with driver”. The Thévenoud (2014) and Grandguillaume (2018) laws brought in new regulations governing VTCs, which are now called “transport cars with driver”, to better define the contours of the profession.

And so today, the VTC business is subject to particular set-up and operating conditions that distinguish them from taxis.

- The vehicle used must meet certain “top-of-the-range” criteria; a throwback to its luxury tourism car past. The vehicle must have between four and nine places (including the driver), be less than six years old (excluding vintage vehicles) and comply with certain technical characteristics (size, power).
- The driver has to obtain a professional VTC card, having passed an examination at the end of a VTC training course, and sign up to the national VTC operator register.
- The customer has to reserve the vehicle. The vehicle therefore cannot park or drive on the public highway looking for customers, or be hailed by customers in the street, as this activity is reserved to taxis. Electronic pick-up via geolocalisation applications allowing customers to locate available vehicles is forbidden to VTCs and reserved to taxis.
- The price of the fare is totally deregulated, contrary to taxi rates, which are regulated and fixed by government decree.

The national observatory on individual public transport (Observatoire national des transports publics particuliers de personnes) created in 2017, is responsible for drawing up an inventory of the sector, and did so for the first time in 2017. It shows that 15,000 VTC drivers were registered in 2016 (i.e. 22% of the T3P product offering) and that figure jumped to 26,000 in 2017 for 56,000 taxis, i.e. 32% of the individual public transport offering (T3P). This increase is the consequences of the Granguillaume law, which requires drivers to sign up to the register before December 31 to continue their business. The observatory also indicates that the VTC offering is the highest in the Ile-de-France area, which accounts for 80% of what is available nationally, compared to one third of taxi services.

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 the KANTAR TNS PARC AUTO survey, 10% of households having used rental services in 2017 (i.e. 7% of the sample) rented from private individuals, which still makes it a very marginal solution for the population as a whole, and more than 96% of people questioned have neither the intention of making their vehicle available for rent, nor renting one via a platform for rental between private vehicle owners.

According to an annual CNPA report, this activity represented 6% of total short-term rentals (in number of days) in 2016, compared to 3% 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.

6%

Share of rentals between private individuals in the short-term rental market in 2016

THE AUTONOMOUS AND CONNECTED CAR

51
Authorisations

Experimentation of vehicles with driving delegation delivered between the end of 2014 and the end of 2017

New technologies allow driver functions to be delegated for different types of vehicles and different vehicle applications: private vehicles, public transport vehicles, freight and logistics vehicles.

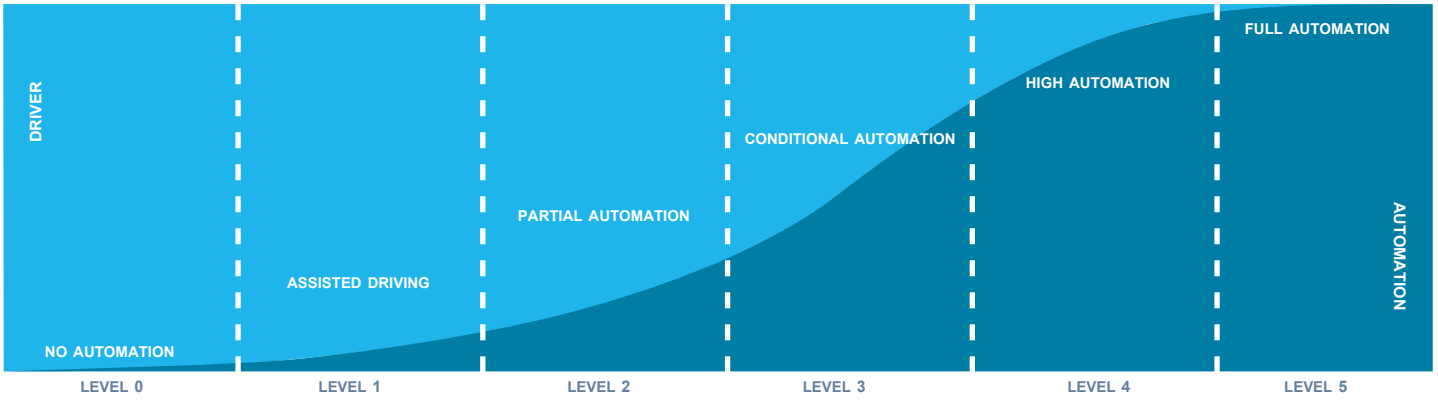
The connected vehicle is based on communication and information sharing between vehicles, as well as between vehicles and the road infrastructure or communication infrastructures. It is equipped with Advanced Driving Assistance Systems (ADAS) with a view to improving driver safety and comfort, and managing infrastructures and the environment. Several national and European projects such as SCOOP@F, Intercor and C Roads for example, are under way.

An autonomous vehicle is one equipped with on-board intelligence systems that relieve driving tasks under certain conditions and which, once fully developed, will be able move around on the public highway automatically without the user intervening.

On the graduated scale of automation from 1 to 5, 1 and 2 level vehicles are already available on the market.

The challenges encompassing the development of the autonomous vehicle are many: improving road safety, making traffic more fluid, and promoting economic driving. Connectivity and autonomy will also facilitate mobility with the development of new mobility services to accompany the ecological transition.

LEVELS OF DRIVING AUTOMATION



Automation levels were defined by SAE J3016.

Levels of driving automation	DEGREE OF SURVEILLANCE	LIMITS
LEVEL 0 NO AUTOMATION	Total.	No limit.
LEVEL 1 ASSISTED DRIVING	The driver must monitor the system constantly.	The system is not able to detect the limits of all of its capabilities. Responsibility of the driver.
LEVEL 2 PARTIAL AUTOMATION	The driver must monitor the system constantly.	"Non-driving activities are not permitted. When the system identifies its limits, the driver must be able to regain control of the vehicle."
LEVEL 3 CONDITIONAL AUTOMATION	The driver does not have to monitor the system constantly. Non-driving activities are allowed on a limited basis.	The system identifies the limit of its performance, however it is not able to bring the system back to a minimum risk state for all situations. As a result, the driver must be able to regain control of the vehicle within a certain period of time. Emergency situations can be taken into account by the system, provided that it can be relayed by a human driver.
LEVEL 4 HIGH AUTOMATION	The driver does not have to monitor the system constantly. Non-driving activities are permitted at all times during the use case.	The system identifies the limit of its performance and can automatically cope with any situation that arises during the use case. At the end of the emergency, the driver must be able to regain control of the vehicle.
LEVEL 5 FULL AUTOMATION	The driver is not required.	The system identifies the limit of its performance and can automatically cope with any situation occurring during the entire journey.

Source: Report on the National Strategy for the Development of Autonomous Vehicles, May 2018

Issues and uses

Connected to the infrastructure and to other vehicles, the driverless vehicle must optimise travel time, fuel consumption, improve road safety by anticipating road events that present a risk and provide more comfort for users, freeing them up for other tasks than driving. The automation of vehicles, a process already under way through driving aids, enhances driver comfort, road safety and vehicle maintenance. Nevertheless, its acceptance by users however will depend on how the fundamental challenges of improving road safety are addressed to optimise infrastructures, reduce environmental impact and improve mobility.

The prospects for driverless vehicles are multiple, and concern different types of vehicles in different situations: cars, trucks, buses, shuttles; driving on a fluid motorway or at low speed in congested traffic, automatic valet services, small collective vehicles, flow management vehicles in logistics centres or areas, pelotons of urban shuttles (balancing out car-share parks). For long distance road transport of merchandise, convoys of heavy trucks could see driverless trucks following a lead vehicle driven by a guide driver.

THE AUTONOMOUS AND CONNECTED CAR

The support of the public authorities in the development of autonomous connected vehicles

The French government has committed to an ambitious approach to develop autonomous vehicles with the objective of securing French leadership on the market. The national strategy on automated vehicles, presented in Anne Marie Idrac's report in May 2018, "Development of autonomous vehicles – strategic orientations for public initiative", establishes the roadmap for developing the autonomous vehicles in the years ahead, putting the emphasis safety requirements that have to be met before commercial roll-out. Auto sector players have come together and entered into a strategic contract with the State covering its industry that includes a specific programme on the development of an autonomous vehicle and the promotion of real-life testing.

For such experiments, the French public authorities are proposing to adopt measures to authorise them under safe conditions, including the prospect of driver inattention or absence. These experiments on "highly-automated" vehicles (levels 4 and 5) are crucial to guaranteeing road safety in and securing buy-in from users and members of the public.

A regulation framework is also planned to allow use of autonomous vehicles by 2022 and to ensure conditions of access to connected vehicle data, required to enable the development of mobility service provision.

The government's road map for the development of 5G frequencies, published on July 16, 2018, brings strong impetus to moving ahead with the use of connected autonomous vehicles.

Also, the international and European legal framework, in particular the Vienna convention of 1968 (see box below), is currently being adapted to allow autonomous vehicles to be developed. Clearly, some of its provisions are unsuited to current technologies available and requirements imposed by innovation and new mobilities.

According to the terms of the Vienna Convention of November 8, 1968, only driver-controlled vehicles are authorised to use roads and the driver must be able to "neutralise or deactivate" said vehicle, worded in the Convention as follows:

- Every moving vehicle must have a driver (§ 8.1); every driver shall at all times be able to control his vehicle (§ 8.5); a driver of a vehicle shall at all times minimize any activity other than driving (§ 8.6);
- Every driver of a vehicle shall in all circumstances have his vehicle under control (§ 13.1).

General experimentation framework

In France, the Order of August 3, 2016 subjects the experimental road use of partially or totally automated vehicles on a highway open to public traffic to prior authorisation from the transport minister. In application of the Decree of March 28, 2018 and the Ruling of April 18, 2018, applicants for such authorisations are required to present a file detailing the conditions under which the experiments are implemented and how security is ensured.

Experimental programme

A programme of experimentations was introduced with the emphasis on rationalising feedback and implementation all over the country. They will be deployed gradually: (i) first of all with professional drivers, (ii) and then with ordinary drivers under the supervision of professional drivers, (iii) and finally with ordinary drivers, without supervision, for experiments on shuttles, vehicle robots, passenger vehicles or freight transport. The last category covers highly-automated vehicles and will be performed by drivers without supervisors or without supervisors ready to take back control but with a remote experimental supervisor.

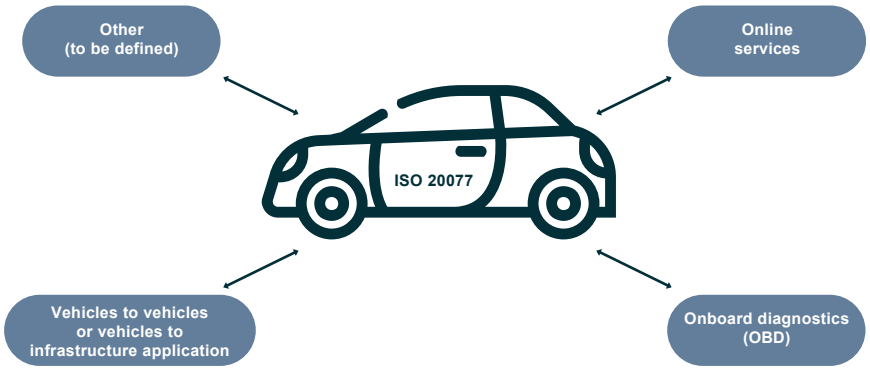
Experiments on "highly-automated" vehicles (levels 4 and 5) are crucial to guaranteeing road safety in and securing buy-in from users and members of the public. These experiments, which are designed to be rolled out in the final phase, are necessary to: (i) show and technically validate the safety of the autonomous vehicle; (ii) prepare future regulations, with a view to vehicle accreditation, (iii) assess the socioeconomic effects expected from the introduction of autonomous vehicles. In reality, the assessment of the safety of a highly-automated vehicle depends on experiments alone, given the fact that it is impossible to establish reliable comparisons with other types of transport (rail, air), which are substantially less subject to unforeseen external forces.

Some examples of experiments

"EVRA"

A call for experimental projects on an autonomous road vehicle (EVRA), designed to support experimental projects targeting the different uses of autonomous vehicles coming onto the market by 2022 (level 3), will be finalised before the end of the year. It seeks to create an eco-system for the roll-out of automated vehicles (consortium combining manufacturers, transport operators, regional authorities, infrastructure managers, and research laboratories) sharing a vision of the challenges faced and results expected (including the notion of "shared asset").

THE EXTENDED VEHICLE (EXVE) AND ITS STANDARDISED INTERFACES



Source: ACEA

SYMBIOZ

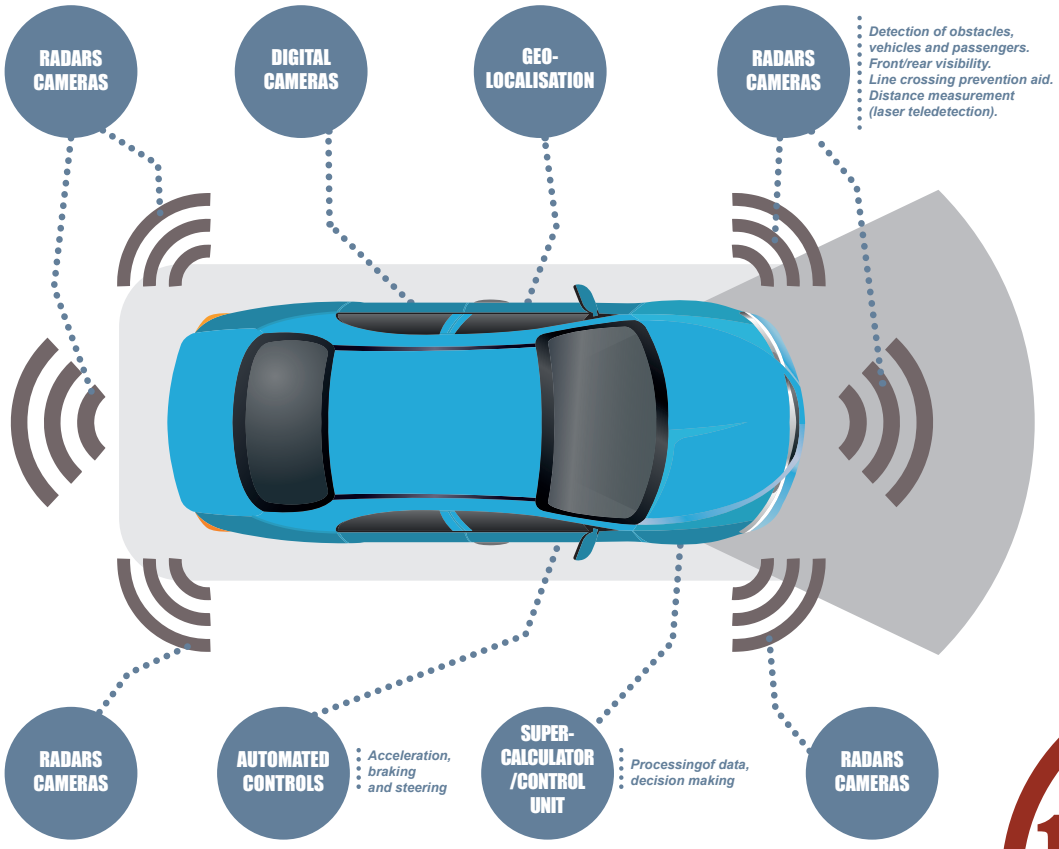
Renault group and Sanef group launched a pilot project in June 2016 to study the behaviour of autonomous vehicles on approach to toll barriers and roadwork sections. This experiment is currently underway in Normandy on the A13 motorway, using connected infrastructure, with the Renault SYMBIOZ prototype (an autonomous, electric, connected vehicle equipped with a level 4 autonomous driving capacity, also called "Mind off"). It is being tested in normal traffic flows, and includes the crossing of toll sections in autonomous mode.

SCOOP

This is a European pilot implementation project for the roll-out of cooperative intelligent transport systems, i.e. based on the exchange of information between connected vehicles and between the vehicle and the road. The vehicles are equipped with detectors to pick up on events (slippery road, impacts, sudden breaking, etc.) and on-board units which send information to the vehicles upstream (V2V) as well as to the operator (V21), via roadside units. The operator can thereby send information (on roadworks, etc.) to the on-board units in the vehicles (I2V). The project involves numerous public and private partners working with its coordinator, the transport ministry: local authorities, road operators, car manufacturers PSA and Renault, universities and research centres. SCOOP is looking to deploy 3,000 vehicles over 2,000 km of road scattered around five sites: Ile-de-France, A4, Isère, the Bordeaux ring-road, and Brittany. One of SCOOP's objectives is to improve road safety, worker safety for those who intervene on roads for roadworks and other road-management operations, make traffic management more efficient and contribute to reducing emissions, optimise infrastructure management costs, prepare the vehicle of the future and roll out new services.

THE AUTONOMOUS AND CONNECTED CAR

► EXAMPLES OF ONBOARD INTELLIGENCE SYSTEMS FOR AUTOMATED DRIVING



100,000 km

Covered in France as part of autonomous vehicle experiments and no recorded material or personal accident

First real-life tests with 5G connected cars

Manufacturers, including PSA, Qualcomm and Savari, have carried out several demonstrations on the Montlhéry circuit of C-V2X technology and its various applications. PSA provided the cars whereas Qualcomm provided the 5G communications platform and Savari the C-V2X communications software. Six different applications were presented: anticipation of emergency breaking, risk of collision on approach to an intersection or bend, presence of a slow-moving or stationary vehicle, changing traffic lights and anticipation of a pedestrian crossing the road.

The French automakers are also working together within the VEDECOM institute (advanced research), IRT SystemX (electronic and cyber security architecture) and UTAC CERAM, to perform experiments on connected tracks with reconstitution of driving conditions on motorways and in the urban setting.

The question of access to data

The use of connected and autonomous vehicles is subject to a whole set of progressively evolving rules. They focus on the management of data surrounding automated vehicles which can exchange information with the environment: a major personal privacy challenge. In this respect, European regulations on personal data protection (GDRP), which came into force in May 2018, is intended to enhance the protection of personal user data. European regulations on cyber security and cooperative intelligent transport systems are also key contributors. This mechanism is supplemented by “flexible” legal rules with standardisation (ISO) and a CNIL compliance pack on connected vehicles.

The “extended vehicle” (ExVe) is a concept that the auto manufacturers, in league with the major equipment manufacturers and independent dealers, have be trying to standardise at international level (ISO) since 2014. The concept is based on the idea of taking into account the extension of the now very connected vehicle’s field of action (mobility services, repair and maintenance diagnostics, entertainment, etc.) with the impact that such an extension implies in terms of system integrity and safety.

Extended vehicles standards enable a system that is coherent, responsible and interoperable in terms of its management of vehicle data:

- Coherent, because it involves a joint standard that every company will need to respect and because it avoids a multiplication of heterogeneous access systems which would lead to a multiplication of risks in terms of safety for property and individuals.
- Responsible, because they limit the chances of vehicle functions being compromised (steering, breaking, etc.) for all situations encountered, whatever the external solicitations, including malevolent ones (the issue of cyber security).
- Interoperable, because the creation of an internationally applied and supported standard means cross boarder data management systems will be inter-compatible.

The development of connected autonomous vehicles is therefore a new challenge for the auto market. As emphasised in Cédric Villani’s report of March 2018, “Giving a meaning to artificial intelligence”, the acceleration of artificial intelligence has a key role to play in the ecosystem and must contribute to the industry’s innovation and digital transformation by structuring it around the main mobility challenges of the future.

PASSENGER TRANSPORT PRICE INDEXES

After two years of decline, the price index for private vehicles (purchases and use) increased sharply in 2017 (+3.3%). Over the period 2009-2016, prices have therefore increased at +14%.

In the road transport of people, we are witnessing a sharp rise in prices in 2017 (+3.1%) after the slowdown observed in 2016. After a period of ''price war'' with the opening to competition of regular transport by coaches (called Macron coaches), there is a high concentration of players in 2017 and an upward adjustment of prices. Prices in the air transport sector are also rising in 2017. This increase is linked to the increase in the price of fuel and the level of airport taxes and charges.

Over the past five years, real price indices for the different forms of passenger transport have shown very differentiated trends: from +9% for road passenger transport (excluding taxis) to -2% for private vehicles, via a 5% drop for air travel and a 6% rise for rail transport.

+3.3%

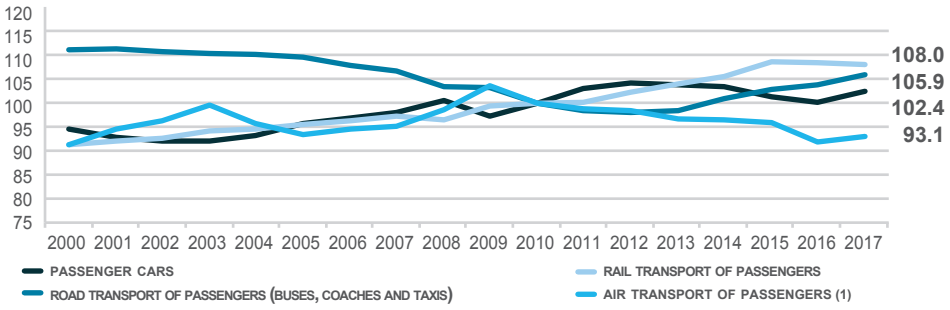
+3.1%

Respective price index variations in 2017 for passenger cars and passenger transport

► ANNUAL VARIATION IN PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES (AS A %)

	Passenger cars	Passenger rail transport	Passenger road transport (buses, coaches and taxis)	Including passenger transport by buses and coaches	Including passenger transport by taxi or transport services with drivers	Passenger air transport (1)
2005	4.6%	2.8%	1.3%	0.4%	3.5%	-0.5%
2006	3.0%	2.5%	0.1%	-1.2%	3.4%	2.8%
2007	2.5%	2.4%	0.4%	-0.4%	2.2%	2.0%
2008	5.4%	2.1%	-0.4%	-1.6%	2.6%	6.6%
2009	-3.0%	3.1%	-0.1%	-1.7%	3.7%	5.2%
2010	4.3%	2.1%	-1.7%	-3.0%	1.4%	-2.1%
2011	5.2%	2.3%	0.5%	-0.3%	2.0%	0.8%
2012	3.0%	4.0%	1.5%	0.5%	3.8%	1.5%
2013	0.5%	2.6%	1.4%	0.8%	2.6%	-0.7%
2014	0.03%	2.0%	3.1%	2.7%	3.8%	0.2%
2015	-2.0%	3.1%	1.8%	2.2%	1.0%	-0.6%
2016	-0.9%	-0.04%	1.2%	1.6%	0.2%	-4.0%
2017	3.3%	0.65%	3.1%	4.1%	0.6%	2.4%

PASSENGER TRANSPORTATION FORMS PRICE INDEXES



(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 indexes 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 indexes primarily concern inter-urban connections. The indexes for private 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 indexes of the different forms of passenger transport have seen a variety of trends since 2003: between 2003 and 2017, the real indexes for personal vehicles (purchase and use) increased by11%, exceeding by far its 2000 level. That of rail transport increased by 15%, continuing its progression begun in 2000, whilst passenger transport by road (excluding taxis) fell by 12%; it is important to remember that only the portion that is paid directly by households is taken into account.

FREIGHT TRANSPORT PRICE INDEXES

In 2017, freight transport prices are up in all sectors, compared to the average levels observed in 2016, with the exception of air freight, where prices have fallen until the third quarter, but much less strongly than before (-0.9% in 2017). River freight prices stabilised in 2017 (+0.3%) after three years of decline. Same trend for rail freight where after 3 years of decline, prices rise slightly in 2017 (+0.6%), in connection with the recovery of prices in national transport (+1% compared to -1.6% in 2016), while international ones stagnated (+0.2%). Finally, in road freight transport, prices increased by 1% in 2017, in particular due to the increase in interurban freight transport (+1.8%) while local freight is stagnating (+0.2%) and international transportation rose by 0.8%.

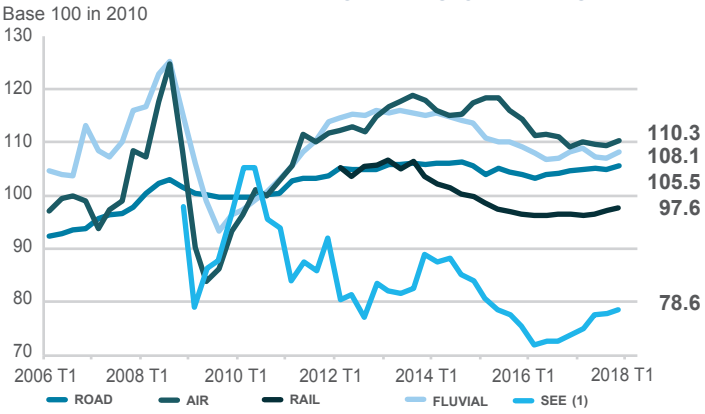
Since 2006, the road transport freight price index has risen on average +1.1% per year, ranging from +1.4% for local transport to 1% for interurban transport. Over the same period, the river transport price index rose more timidly (+0.1% per year), ranging from +0.4% for international to +0.7% for domestic. 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 observed, there was a fall of 1.3% primarily due to lower national rail prices (-1.7%), whilst international rail prices increased 1%. Since opening to competition in 2006, the new operators have grown and now account for 40% of the volumes transported, a level comparable to that of Germany.

+1%

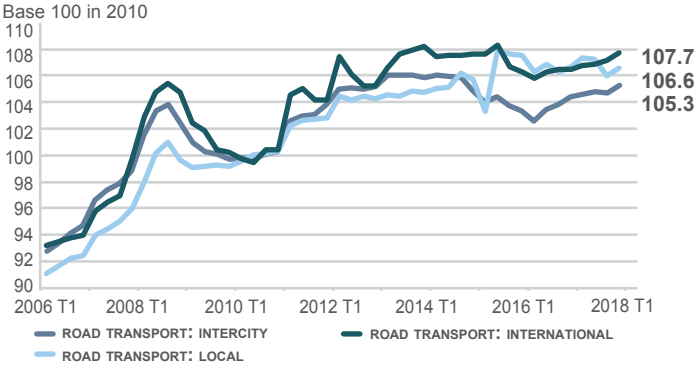
+0.6%

Respective price index increase in 2017 for road and rail freight

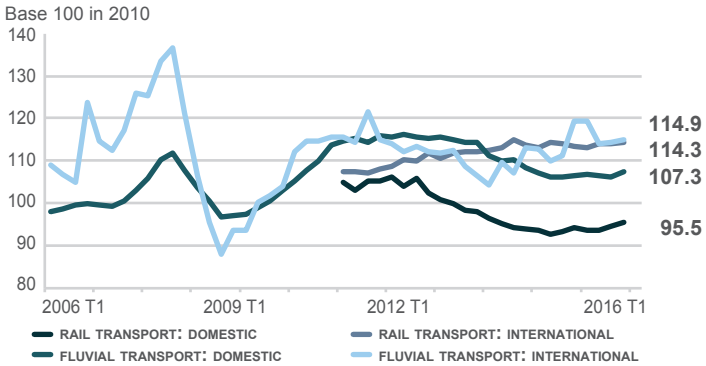
FREIGHT TRANSPORT INDEXES IN FRANCE



FREIGHT TRANSPORT INDEXES IN FRANCE: ROAD



FREIGHT TRANSPORT INDEXES IN FRANCE: RAIL AND FLUVIAL



(1) 2006-2009: very high volatility of maritime freight price indexes. The index increased from 110.1 in Q2 2006 to 195.5 in Q2 2008, before falling back to 79.1 in Q1 2009.
Source: MTES/SDES

Freight transport price indexes are calculated by the transport ministry's SDES statistics department. For road, river and rail transport, these indexes 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.

Air freight the price index is 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. The index is drawn up using so-called 'unitary value methodology' which includes the excess charges for fuel and security, paid to the airline doing the shipping. It is in line with highly volatile fuel prices.

The maritime transport price index 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 indexes, unitary prices and tariffs. It is very volatile, in line with bulk price trends.

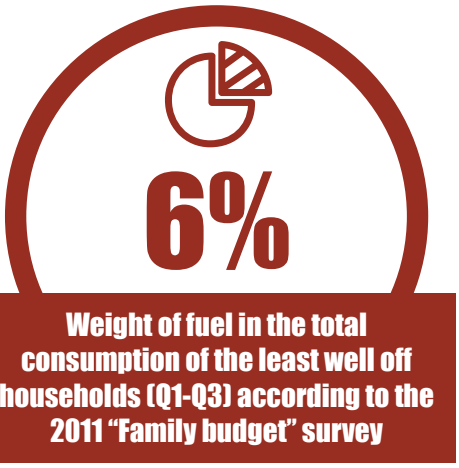
Concerning road freight, infra-annual variations are less substantial, compared to river or air, even though fuel does represent between 20 and 30% of total road freight transport as the CNR survey shows (see page 59).

HOUSEHOLD MOTORING COSTS

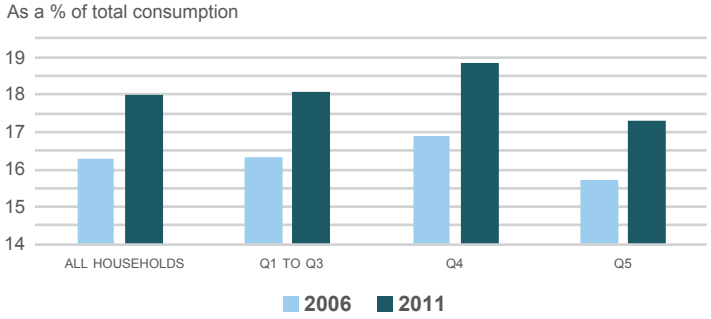
According to the most recent 2011 "Family budget" survey, households dedicate on average 18% of their budget to cars (acquisition and use). The fuel item represents the largest car budget item accounting for 5.2% of the total. Cutting up income brackets by quintiles (fifths) shows that the least well-off households (Q1-Q3) dedicate a bigger portion of their budget (6%) than wealthier ones (4.3%). Similarly, rural households spend a larger share of their budget on this item.

Between 2006 and 2011, there were also changes to distribution patterns concerning the purchase item for new cars, which increased by 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 new cars item (+0.5 points) was almost balanced by the dip in the used car item (-0.4 points).

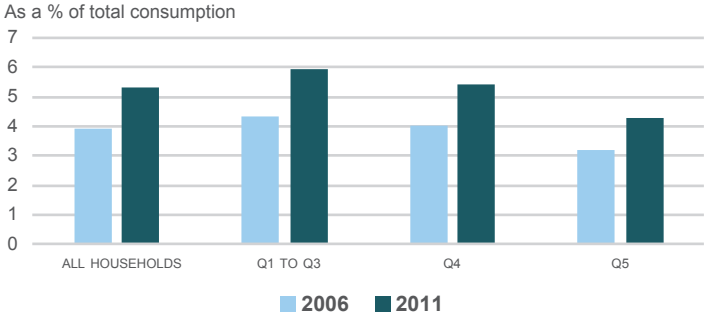
According to Eurostat data, French households spend a bigger part of their budget on the car item than their European neighbours (+0.7 percentage points compared to the average across the Euro zone). This difference is a result in particular of the greater weight of the "vehicle purchase item" (+2 points) in their budget; it is the third biggest ratio behind Luxembourg and Finland. Concerning the other car budget items, there is little difference between the European countries, with the exception of the "maintenance and repair" item, to which French households dedicate a smaller portion of their budget (-0.5 percentage points compared to the average of the Euro zone).



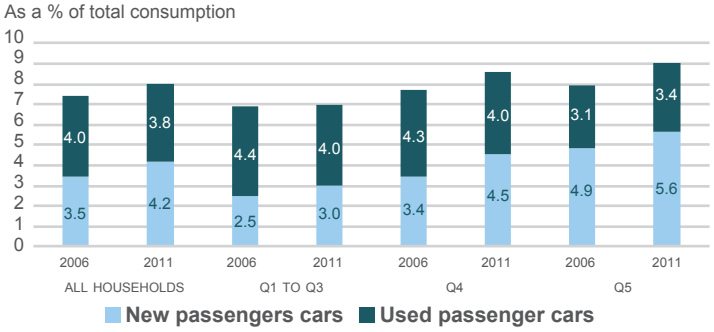
AUTOMOTIVE BUDGET : COMPARISON BETWEEN 2006 AND 2011



SHARE OF FUEL IN 2006 AND 2011



SHARE OF AUTOMOTIVE PURCHASING IN 2006 AND 2011



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

Source: INSEE, 2011 and 2006 Family budget survey

The "Family budget" surveys carried out every five years by INSEE give 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 area dedicate almost 3% of their consumption to this, compared to more than 6% in rural communes.

ROAD FREIGHT COST PRICE

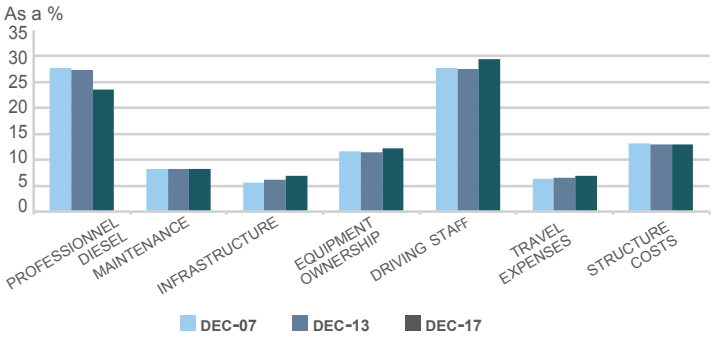
23.5%

Share of professional diesel in the CNR index for long-haul road merchandise transport costs in 2017

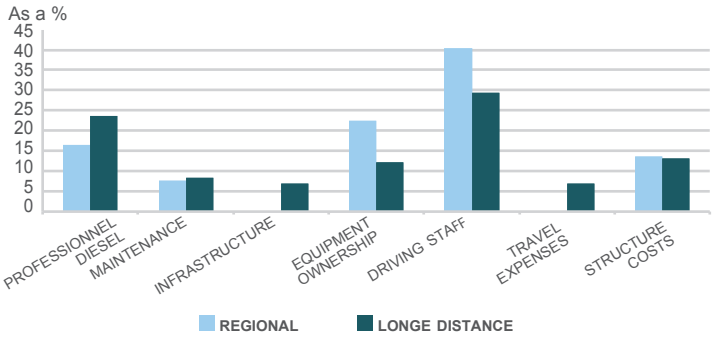
According to the national haulage committee (CNR), long-haul and regional road merchandise transport costs increased in 2017 (+2.2% and +1.9% respectively), after having remained stable in 2016. This rise is explained clearly by the rise in oil prices and therefore the cost of professional diesel, which has had a greater impact on long-distance transport than regional transport.

Since the end of 2015, the share of professional diesel in the product cost of long-haul road freight transport rose again (+2.8 percentage points) and reached 23.5% at the end of 2017. Conversely, the share of driving staff has declined by one percentage point since 2016. The share of long-haul equipment ownership remained stable in 2017, following a slight decline last year.

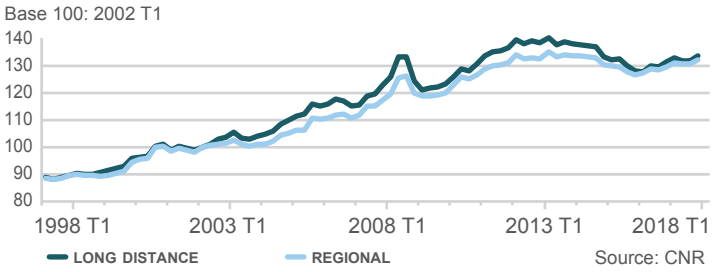
ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2017



ROAD FREIGHT TRANSPORT COST PRICE



Source: CNR

The national road committee (CNR) publishes, amongst other things, two indexes 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.

The cost structure resulting from the CNR annual survey depends both on the evolution of each component and on the associated operating conditions (kilometres traveled, number of hours worked). Thus, an item can see its weight in the structure vary differently than the evolution of its unit cost can suggest. Here we are mainly interested in the evolution of the cost structure, which better reflects the reality experienced by carriers.

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 to level out at 29% in 2011. From 2012 onwards, it fell on a regular basis to 20.7% in 2015. In 2016 and 2017, the rebound observed on diesel prices pushed up this share to 23.5%.

The share of equipment ownership (tractor and semi-trailer) remained stable in 2017 at 12.2%, after having fallen between 2007 and 2012 (11% at the end of 2011) then rising again between 2014 and 2016 with the rise in new vehicle prices, linked to the implementation of the environmental standard EURO VI on January 1, 2014 (around 10%) and the new mandatory safety equipment. The impact of these increases is diluted in the calculation of the cost of ownership by the gradual renewal of vehicles (about 1/6 of the fleet per year) and by the slight drop in prices observed on semi-trailers. In addition, in 2017, interest rates remain at historically low levels. On the other hand, the cost of car insurance, which also falls in the "equipment" item, rose by +1.7% in 2017.

After several years of decline, the maintenance cost index, which includes tyres and vehicle maintenance and repairs, increases in 2017. Tyre prices are on the up and maintenance on Euro VI vehicles, applicable for 4 years, seems more expensive than for previous generations (example: exhaust with filtering particles). Despite this, the weight of the maintenance item remains stable in 2017, at 8.2% of the total cost. Finally, the "infrastructure" item continued to increase in 2017 (+0.2%), reaching 6.7% of the total cost.

In regional transport, the share of driving staff continues to decline in 2017 to reach 40.3% at the end of December. The cost of ownership of equipment, the second item of expenditure, stagnated in 2017 at 22.3% of costs. The weight of professional diesel comes third in the cost price of regional transport. After falling between 2011 and 2015 (-5 percentage points), it has risen by 2 percentage points since that date to reach 16.3% in 2017. Finally, repair maintenance costs stagnate in 2017 to 7.5% of the total.

AUTOMOTIVE PRICE INDEXES

In 2017, the new car price index rose 1%, in line with inflation. This rise, which comes after a slight fall in prices in 2016, can partly be explained by the tightening of the ecological malus, which remained unchanged in 2016, while the bonuses, like in 2016, were revised downwards.

In 2017, the increase in oil prices led to a sharp rebound in fuel prices, which rose by 9.5% after falling by 19% between 2012 and 2016. The real price index, deflated by the general consumer price index, rose by 8.4% in 2017, after a 21% drop over the 2012-2016 period.

The price index for spare parts, accessories and vehicle repair and maintenance increased by 1.4% in 2017, following a 0.4% increase in 2016. As in 2015 and 2016, the hourly cost of labour for car repairs grew faster (+1.7%) than the other components of the index, tyre prices and vehicle accessories, which fell by 1.2% and 2.3%.

+9.5%

Increase of the price of fuel in 2017

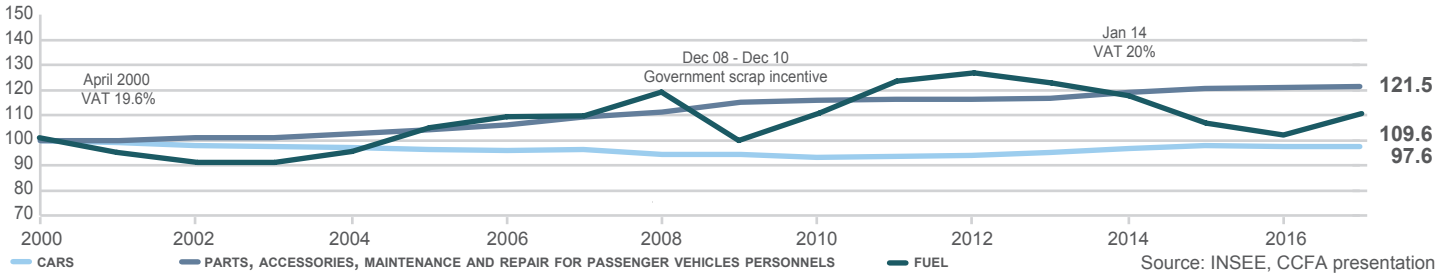
► YEAR ON YEAR AUTOMOTIVE PRICE CHANGES

	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Fuel prices
2015	0.0%	1.1%	1.5%	-9.8%
2016	0.2%	-0.3%	0.4%	-4.5%
2017	1.0%	1.0%	1.4%	9.5%

Sources: MTES/SDES, INSEE, CCFA calculations

Base 100 in 2000

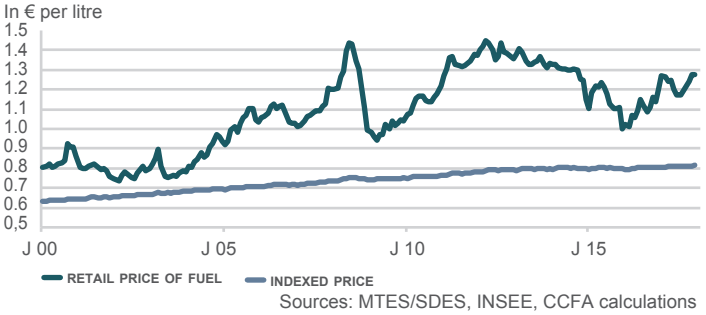
NEW PASSENGER CAR, FUEL, PARTS, ACCESSORIES, MAINTENANCE AND REPAIR PRICE INDEXES



Source: INSEE, CCFA presentation

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

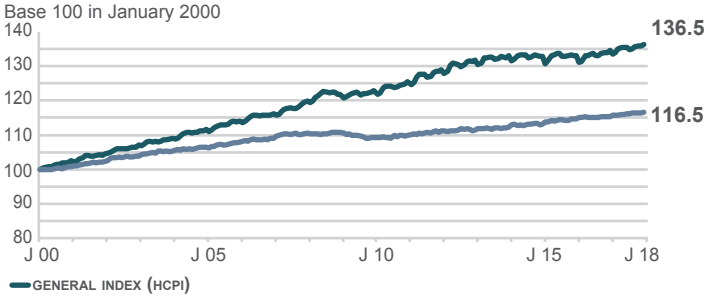
In € per litre



Sources: MTES/SDES, INSEE, CCFA calculations

HARMONIZED PRICE INDICES FOR THE EURO ZONE (17 COUNTRIES)

Base 100 in January 2000



Source: Eurostat

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 indexes have been corrected by the general consumer price index in the above graph.

Between 1992 and 2010, 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 tightening of the ecological bonus-malus scales, the implementation of new standards that increase the cost of pollution control and the introduction of new elements to improve road safety have contributed to price growth since 2011.

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 (19 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 2017, the general price index was up 33% compared to 2000, whilst the price index for the purchase of new and second-hand cars was only up 16%.

CONSUMER SPENDING ON PRIVATE VEHICLES

9.2%

Share of vehicle purchases as a percentage of total household spending for 2017

In 2017, households' gross disposable income increased 2.6% in value (after a 1.7% increase in 2016). At the same time, the price of final consumer spending increased strongly (+1.3% compared to -0.1% in 2016), mainly due to the rebound in hydrocarbon prices. The buying power of disposable income therefore slowed in 2017 (+1.3% after +1.8% in 2016) and the household consumer spending decelerates significantly in volume (+1% after +2.1% in 2016).

Vehicle purchases remained buoyant in 2017 (+4.2%) even though their growth slowed slightly compared to 2016 (+7.1%). It is mainly spending on new cars that is growing less rapidly, from +6.4% to +2.4% in 2017, to reach €26.6 billion, i.e. €3.5 billion more than in 2014. Second-hand cars are still growing at a steady pace (+7.8% in 2017 compared to 8.5% in 2016) and now stand at €14.9 billion.

The share of vehicle purchases in household consumption rose to 2.9% in 2017, from a low of 2.6% in 2014, but remains well below the level observed in 1990 (4.5%). This strong erosion was to the detriment of the new vehicle, while the share of the second-hand vehicles progressed slightly.

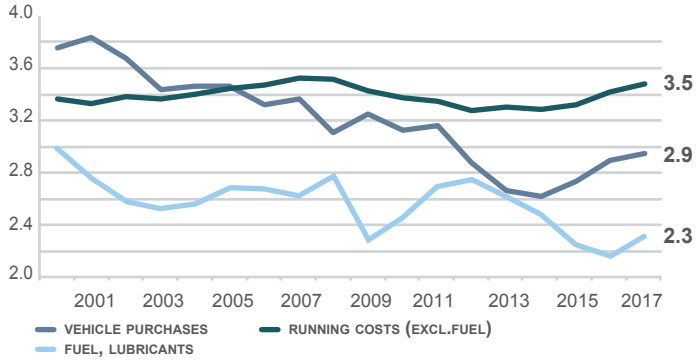
In 2017, households' fuel expenditure rebounded strongly (+9.8%), in line with the price increase, to reach €36.9 billion

► HOUSEHOLD CONSUMER SPENDING ON TRANSPORT (AMOUNT AND % OF TOTAL HOUSEHOLDS SPENDING)

	Units	2000		2010		2016 (1)		2017 (1)		change 2017/2016
VEHICLE PURCHASES	**€ billion**	**37.5**	**3.8%**	**44.2**	**3.1%**	**45.1**	**2.9%**	**46.9**	**2.9%**	**+4.2%**
New and second-hand cars (including tax on registration certificates)		33.7	3.4%	39.1	2.8%	39.8	2.6%	41.5	2.6%	+4.2%
of which new cars		24.5	2.4%	28.3	2.0%	26.0	1.7%	26.6	1.7%	+2.3%
of which used cars		9.2	0.9%	10.9	0.8%	13.8	0.9%	14.9	0.9%	+7.8%
Caravans, motorcycles, bicycles		3.8	0.4%	5.0	0.4%	5.2	0.3%	5.4	0.3%	+3.6%
RUNNING COSTS	**€ billion**	**63.5**	**6.4%**	**82.5**	**5.8%**	**86.9**	**5.6%**	**92.3**	**5.8%**	**+6.3%**
Maintenance, repairs, spare parts and accessories		24.3	2.4%	34.2	2.4%	37.3	2.4%	39.1	2.5%	+4.7%
of which automotive equipment manufacturing		11.1	1.1%	16.9	1.2%	19.0	1.2%	20.0	1.3%	+5.2%
of which automotive service		9.2	0.9%	11.9	0.8%	13.0	0.8%	13.6	0.9%	+5.2%
Fuel and lubricants		29.9	3.0%	34.8	2.5%	33.6	2.2%	36.9	2.3%	+9.8%
Tolls, parking fees, rental, driving lessons		9.3	0.9%	13.5	1.0%	15.9	1.0%	16.3	1.0%	+2.8%
INSURANCE	**€ billion**	**3.9**	**0.4%**	**6.1**	**0.4%**	**7.5**	**0.5%**	**7.7**	**0.5%**	**+2.4%**
TOTAL CONSUMER SPENDING ON CARS AND MOTORCYCLES	**€ billion**	**105.0**	**10.5%**	**132.8**	**9.4%**	**139.4**	**8.9%**	**147.0**	**9.2%**	**+5.4%**
Public transport	€ billion	15.3	1.5%	24.1	1.7%	27.6	1.8%	29.3	1.8%	+6.3%
CONSUMER SPENDING	**€ billion**	**1,000**	**100%**	**1,415**	**100%**	**1,558**	**100%**	**1,593**	**100%**	**+2.2%**
Number of households (metropolitan France)	thousands	24,140		27,113		28,538		28,776		+0.8%
Spending on passenger cars per household	euros	4,348		4,897		4,886		5,108		+4.5%
Spending on passenger cars per vehicle-owning household	euros	5,414		5,864		5,894		6,161		+4.5%

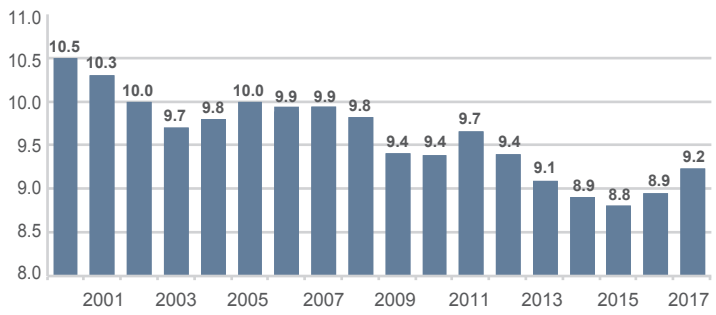
AUTOMOTIVE BUDGETARY COEFFICIENTS FROM 2000 TO 2017

As a % of total consumer spending



TOTAL VEHICLE RELATED EXPENDITURE

As a % of total households spending



(1) These are provisional data and can be readjusted for three years. Source: INSEE - Household consumer spending, 2017 - base 2014

According to national statistics – based on different fundamentals than those used for the Family budget survey (see page 58) – households in 2017 spent €147 billion (+5.4%) 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 9.2% in 2017.

As part of this consumption group, the 'vehicle purchase item', which now includes the tax on registration certificates, 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 2.9% in 2017 compared to 4.6% in 1990. Purchases of new passenger cars account for only 64% of overall vehicle purchases, compared to 82% 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 2.5%.

Expenditure on tolls, parking, rental and driving schools was up 2.8% to €16.3 billion in 2017.

AUTOMOBILE FINANCING

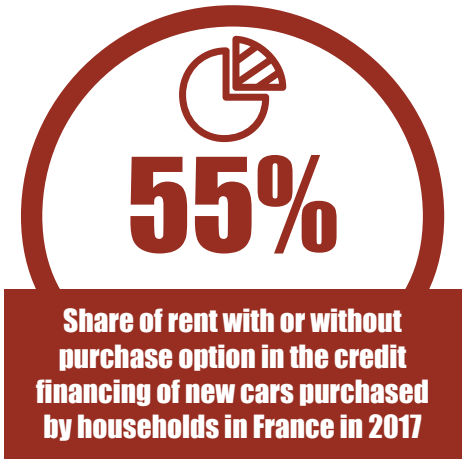
In 2017, consumer credit rose for the third year in a row, driven by low interest rates and the good performance of car purchases. More than 60% of new cars purchased by households are paid on credit, more than half of which are financed by leasing.

The financing arrangements for new car purchases by individuals have changed significantly over the last four years, favouring rental arrangements to the detriment of conventional credit (or specific car loans). Since 2013, the number of credits allocated to the purchase of a new vehicle has decreased by 31% while the rental formulas have increased by 175%.

Thus, in vehicle credit, rental has become the dominant form of financing (55% of credit) ahead of specific car loans (37%) and personal loans (32%). Within the rental bracket, rent-to-buy is highly dominant (94% of rental financing) whilst rent without option to buy remained marginal.

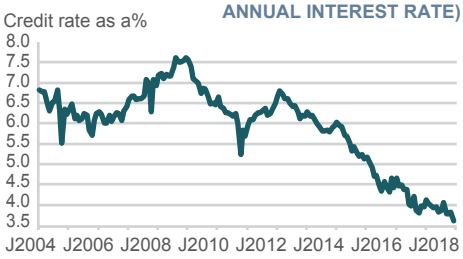
For second-hand cars purchased by households, the cash purchase remained the main form of financing (almost 60%). The older the car and the younger the driver, the more it was used. However, the use of conventional credit for second-hand car purchases rose (+15% between 2013 and 2017).

The financing of business equipment in new vehicles (passenger cars, light commercial vehicles and heavy trucks) remained dynamic in 2017 with a number of funding applications (641,000) up 7% compared to 2016. Since 2013, rental without option to buy, dominated by the long term rental, grew by 34% compared to 24% for rent-to-buy. It now represents 60% of companies financing compared to 37% for the rent-to-buy.

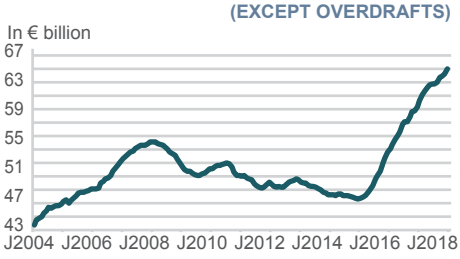


Share of rent with or without purchase option in the credit financing of new cars purchased by households in France in 2017

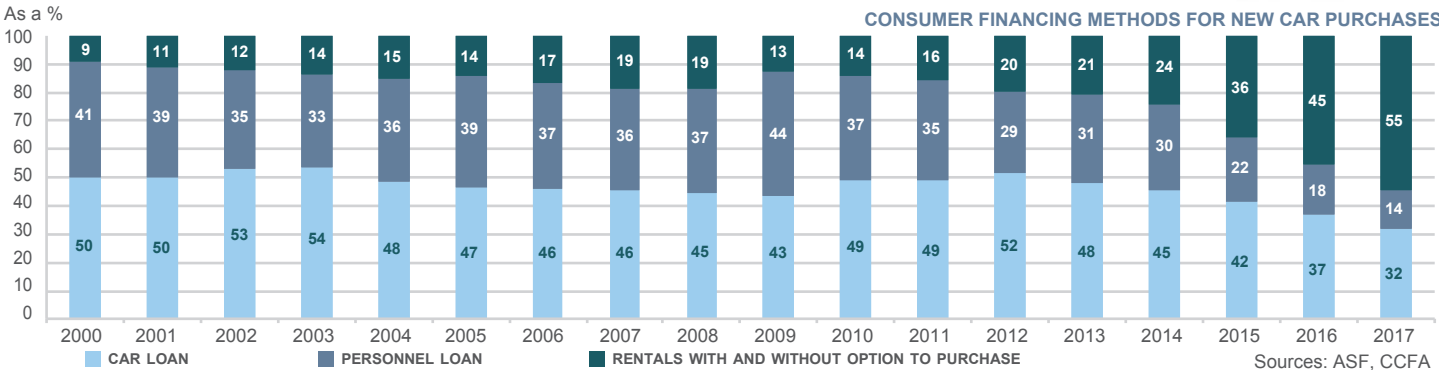
INTEREST RATES OF NEW CONSUMER LOANS TO INDIVIDUALS (NOT INCLUDING OVERDRAFTS, ANNUAL INTEREST RATE)



TOTAL AMOUNTSOVER TWELVE MONTHS OF NEW CONSUMER LOANS TO INDIVIDUALS (EXCEPT OVERDRAFTS)



CONSUMER FINANCING METHODS FOR NEW CAR PURCHASES



Sources: ASF, CCFA

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:

• Personal or bank loans granted by a bank or credit institution. The borrower is free to use his credit as he sees fit.

• Specific car loan or conventional credit; it is provided by financial companies, subsidiaries of manufacturers and importers, or by independent finance companies belonging to manufacturers and finance or banking subsidiaries or groups. It is used for a specific purchase.

• Rentals with option to purchase, also known as lease with promise of sale or leasing; it is a consumer credit that allows the disposal of a car against the payment of monthly fees during the lease period, which can be up to eighty-four months, or seven years; the purchase option may be exercised during the lease or at the end of the lease.

• Rentals without option to purchase includes financial leasing and long-term leasing. These are operations without possibility for the tenant to become owner at the end of the contract.

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.

Having fallen between 2008 and 2014, the total number of new loans for private household consumption continued to progress with the steady decline in interest rates. After a 15% rise in 2015 and 12% in 2016, it rose another 9% in 2017 to reach a record level.

Using these forms of lending, the financing of new passenger cars by private individuals was particularly buoyant in 2017. The number of credit applications for the purchase of a new vehicle increased +7%. The increase in the number of rentals with or without option of purchase applications increased again strongly in 2017 (respectively +23% and +31% compared to 2016) to the detriment of conventional loans, which fell 11%.

The renewal of vehicle stocks and fleet managers' recent interest in SUVs contributed to companies' high demand for vehicles. Companies vehicle purchases were still particularly buoyant in 2017 and the number of funding applications reached 641,000. In addition, the Syndicat National des Loueurs de Voitures en Longue Durée (the national syndicate of long-term rental companies – SNLVLD) reports that the number of vehicle launches light vehicles in long-term rental grew by 4.8% in 2017 to reach a historic level of 508,648 vehicles.

CAR AND MOTORCYCLE SALES AND REPAIRS

Trade in automotive vehicles in 2017 generated €92 billion turnover, up 5.9%, after having increased by 7.3% in 2016. Since 2013, the turnover grew by 25% to €18 billion. The recovery of new passenger car and light commercial vehicle registrations, which has been observed for the last 4 years, and sales, which are well oriented in the premium and luxury segments in 2016 and 2017, explain these good results.

The vehicle maintenance and repair business, constantly in decline since 2009 (-2% per year between 2009 and 2015), recovered strongly in 2016 (+3.9%) and 2017 (+4.4%), reporting turnover of €22 billion. The sector reaped the benefits of an aging vehicle stock (9 years in 2017 compared to 8.2 in 2010), linked to the downward trend in kilometres driven and the increasing reliability of cars.

Retail sales of automotive equipment also benefited from this trend and jumped 9.8% in 2017, following a 3.4% increase in 2016.

According to INSEE-Esane, between 2012 and 2015, margins (gross operating margin/ value added at factor cost) on motor vehicles were 9% on average and 17% for motor vehicle maintenance and servicing. The investment rate (tangible investment / value added excluding tax) was 10% for each of these sectors over the same period.

The 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-brand retail.

In 2016, the 10 biggest groups sold more than 350,000 NV, i.e. 15% of sales of NVs, for a turnover of €10.9 billion excluding VAT. The 100 biggest groups have crossed the symbolic threshold of one million new vehicles sold, , i.e. 49% of total sales, for a turnover of €35.9 billion excluding VAT.

► 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

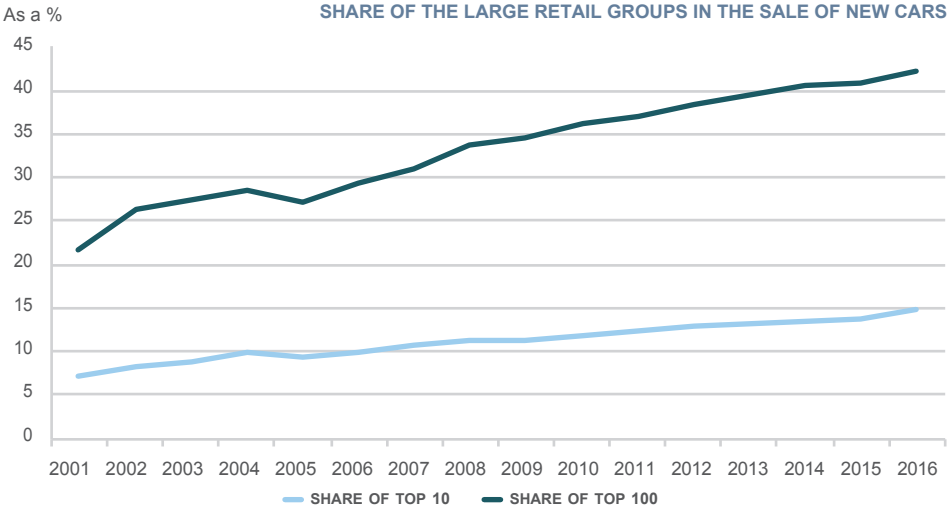
► REVENUE FROM CARS AND MOTORCYCLES SALES AND REPAIRS

(IN CURRENT € BILLION, INCLUDING VAT)

Activity	2010	2011	2012	2013	2014	2015	2016	2017 (p)	Change 2017-2016
Motor vehicle sales	77.0	80.9	75.9	73.8	75.5	81.0	86.9	92.0	5.9%
Automotive maintenance and repairs	20.9	20.8	20.6	20.5	20.5	20.4	21.2	22.1	4.4%
Retail sales of automotive equipment	6.7	7.4	7.9	8.1	8.0	7.7	7.9	8.7	9.8%
Motorcycle sales and repairs	4.1	4.1	3.8	3.7	3.8	3.7	3.8	4.0	4.2%
Retail fuel sales	14.6	16.3	18.3	17.6	16.8	15.1	14.5	15.5	7.0%
TOTAL	**123.3**	**129.6**	**126.4**	**123.7**	**124.6**	**127.8**	**134.3**	**142.3**	**6.0%**

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

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



Source: Argus

The automobile requires 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. According to the KANTAR TNS PARC AUTO survey, a car in use has an average of two maintenance-repair operations per year.

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.

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. In terms of automobile repairs, there are also independent networks (in 2015: 14,400 automotive repair mechanics, 1,250 autocentres and 870 quick-repair centres).

€92 BILLION

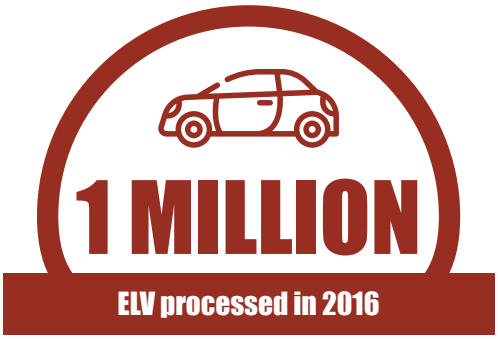
Net turnover, in 2017, new record year, of automotive sales and repairs in France, according to INSEE

CIRCULAR ECONOMY

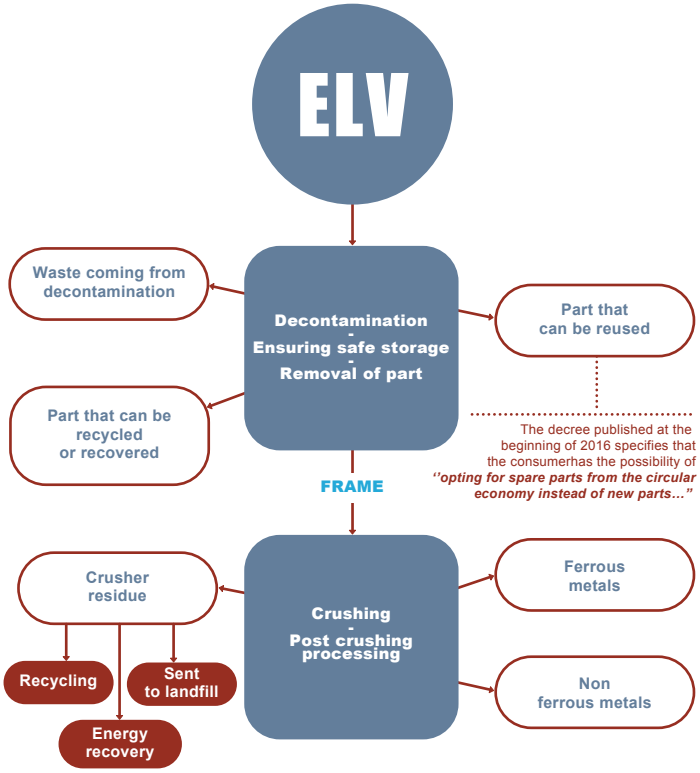
According to Ademe, the circular economy is defined as an economic system of trade and production which, at every stage of the product cycle life (goods and services), seeks to increase the efficiency of the use of resources and reduce environmental impact.

The circular economy in the automotive market concerns vehicles (private vehicles and vans in particular) and consumables (tyres, oils, batteries, etc.).

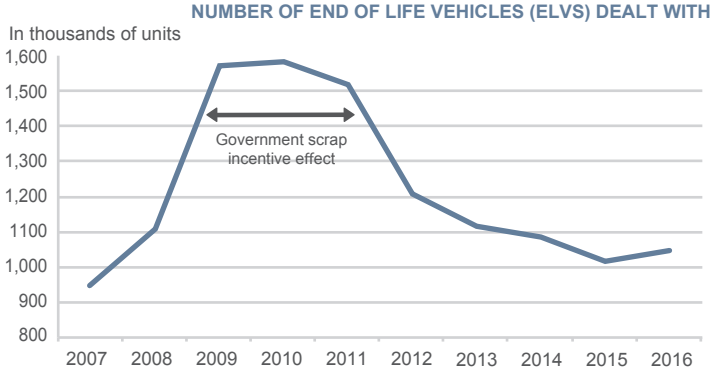
An End-of Life Vehicle (ELV) is transferred by the last owner to a third party for destruction. Around 1 million ELVs were processed by the accredited channels in 2016, compared to 1.5 million between 2009 and 2011 (the scrappage bonus scheme) and less than 1 million in 2007. Ademe measures the re-use and recycling rate of ELVs which has progressed by around 13 percentage points since 2010. This ratio is the sum of re-use and recycling and energy recovery.



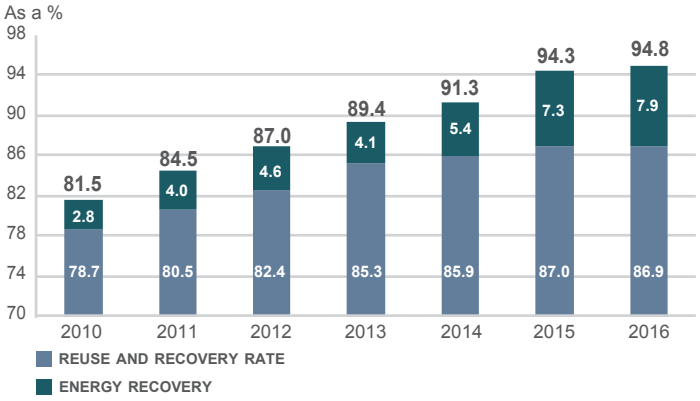
►SIMPLIFIED CHART OF PROCESSING OF AN ELV



NUMBER OF END OF LIFE VEHICLES (ELVS) DEALT WITH



ELV REUSE AND RECOVERY RATE



Source: ADEME

In France, around 1 million vehicles were processed by the end-of-life vehicle channel in 2016 in around 1,700 approved centres, called 'ELV centres'. Their average age was 18 years in 2016.

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 September 18, 2000 directive: 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 (source: Ademe).

Some vehicle consumables (oils, batteries, etc.) are also recycled during the service life of the vehicle. In addition, manufacturers plan to use an increasing share of recycled materials, including some plastics such as polypropylene.

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.

In 2016, the collection of accumulators (batteries designed to power the starter motor, lighting or the ignition system) reached the lowest level since 2009, i.e. 168,000 tonnes (-8% compared to 2015). The recyclability of lead accumulators is 81%.

Collection of car tyres (light vehicles and heavy vehicles) totalled 452,000 tonnes in 2016, up 10%. The collection rate reached 100% thanks to a rise of 4 points. The re-use rate of tyres was 94%. Around 46% of tyres were used for energy in 2016 (substitute fuel in cement works for example), 25% for granulation (for sports pitches, urban furniture) and 18% re-injected (14% for second hand sale and 4% for remoulding), 9% to public works.

Retreading is a technique allowing a used tyre to be fitted with a new rolling strip. Between 2013 and 2016, retreading of heavy goods vehicles tyres fell by half, in a context where imports, particularly from Asia, progressed by more than 20%.

CIRCULAR ECONOMY

The energy transition law in favour of green growth of August 17, 2015 seeks to promote the market for parts from the circular economy by requiring maintenance and repair professionals to inform consumers of the possibility of opting for spare parts from the circular economy instead of new parts, in certain categories.

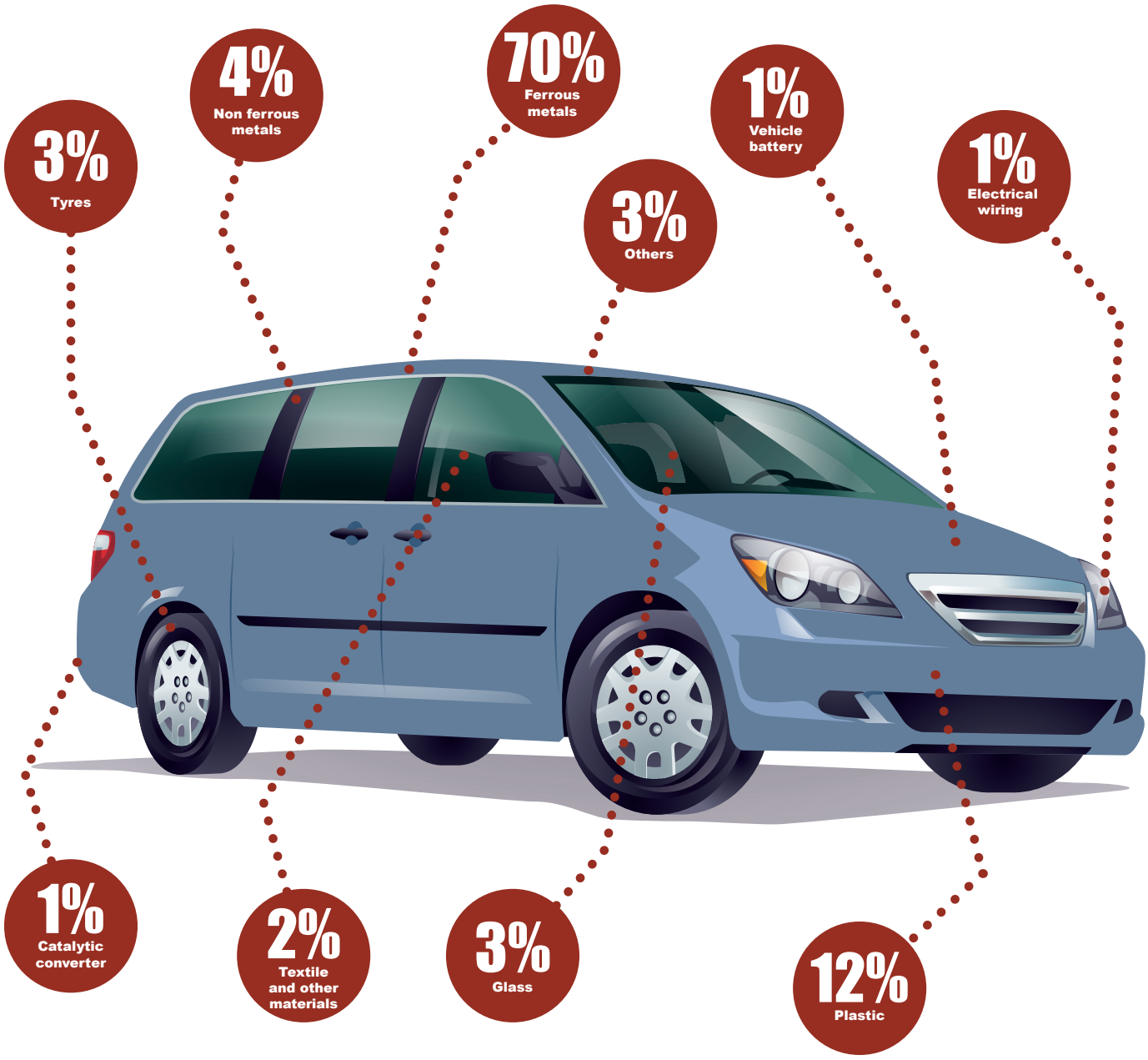
The May 30, 2016 decree specifies that parts from the circular economy are components and elements sold by approved ELV centres and components and elements reconditioned by the manufacturer (the manufacturer, for example), according to a precise specification, either in the manufacturer's factories or in a controlled workshop, branded with the 'reconditioned' label (decree of October 4, 1978).

Vehicles are launched by producers (manufacturers and importers) via a dealership network. At the end of the vehicle's service life, it has to be handed over to an approved ELV centre to be processed according to a precise specification, according to health and environment regulations. The centre is responsible for depolluting parts (removal of fluids – fuel oil, brake fluid, air conditioning, etc. –, batteries and securing pyrotechnic devices), dismantling them for second-hand sale or recycling, and sending the stripped vehicle to one of the 60 car crushers (2016 data, Ademe), responsible for separating the remaining components from the body for re-use. The latter, when sorted, can be used again to make other products (recycling). If the components are not reused or recycled, they can be used for energy purposes (heating, cogeneration).

94.8%

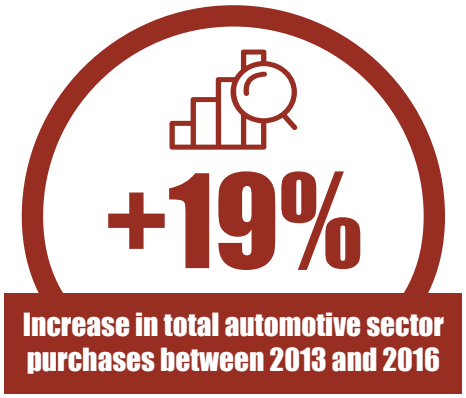
Re-use and reinjection rate within the automotive sector in 2016

► COMPOSITION OF AN END OF LIFE VEHICLE IN 2014



Source: ADEME

PRODUCTION OF THE AUTOMOTIVE INDUSTRY AND ITS ECONOMIC IMPACT



Production in the automotive field was €60 billion in 2016, i.e. a rise of 6% compared to the previous year. It is 16% above its 2013 level (€51 billion), last year of decline of the European market.

According to the new 2014 base, when research and development expenditure are now included in the gross fixed capital formation (GFCF), total purchases (or intermediary consumption), including the branch itself, represents more than three times its added value (AV). In 2016, this was €46 billion, which benefitted numerous sectors of the economy because of its stability.

Since 2010, AV has settled at around €13 billion, a level close to the mid-2000s. In 2016, it was almost stable after a rise of 5% the previous year.

As a guarantee of future production in a highly capitalistic industry, the investment rate (the GFCF/AV ratio) has been maintained at a high level over this period (see graph on page 30) during which European markets are getting closer to their current level, whilst the margin rate (the ratio between the gross operating margin and AV) rose for the third year in a row.

► ANALYSE DE LA PANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION (AS A % OF TOTAL PURCHASES)

		2000	2005	2010	2014	2015	2016 (1)
PURCHASES FROM OTHER INDUSTRIES	%	**71.7**	**76.3**	**75.6**	**73.3**	**72.4**	**71.6**
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	19.0	18.6	18.7
manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	3.5	3.3	3.5
manufacture of electrical equipment	%	3.1	3.4	3.5	3.4	3.4	3.4
manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	12.0	11.8	11.8
Other industries (including coking and refining)	%	35.8	39.8	39.7	37.9	37.4	36.7
metallurgy and metalworking	%	16.0	16.7	17.5	16.6	16.2	15.8
manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	9.5	9.6	9.6
other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.2	4.3	4.4
chemical industry	%	2.6	2.8	3.0	2.9	2.8	2.7
manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.9	1.8	1.8	1.8	1.8
wood, paper and printing industries	%	1.4	1.4	1.6	1.4	1.4	1.3
Extraction, energy and water industries	%	1.6	1.5	2.0	2.1	2.0	1.9
electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	1.2	1.2	1.2
water, sanitation, waste management and decontamination	%	0.7	0.7	0.8	0.8	0.8	0.7
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	1.1	1.1	1.1
Transport and storage	%	1.2	1.3	1.5	1.5	1.5	1.5
Information and communication	%	0.4	0.4	0.5	0.4	0.4	0.4
Financial and insurance services	%	0.8	0.7	0.9	1.1	1.1	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	7.3	7.5	7.6
legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.1	2.2	2.1
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	2.7	2.9	3.0	3.2
administrative and support services	%	3.4	3.1	0.0	0.0	0.0	0.0
Other commercial sector industries	%	2.3	2.1	2.1	2.5	2.3	2.4
All commercial sector purchases	%	13.4	13.6	13.4	14.0	14.1	14.0
PURCHASES WITHIN THE INDUSTRY	%	**28.3**	**23.7**	**24.4**	**26.7**	**27.6**	**28.4**
Total industry production at base prices	Current € billion	70.3	75.6	58.3	52.9	56.5	59.6
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	43.9	40.3	43.2	46.3
As a % of production at base prices	%	81.2	82.7	75.4	76.2	76.6	77.7
Value added by the industry	Current € billion	13.2	13.0	14.4	12.6	13.2	13.3
As a % of production at base prices	%	18.8	17.3	24.6	23.8	23.4	22.3
Gross operating surplus (GOS)	Current € billion	-	-	-	4.9	5.7	5.9
As a % of value added (margin rate)	%	-	-	-	39.1	43.0	44.4

(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. Since 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 2014 excl. years before 2010: base 2010)

Total purchases by the automotive branch, representing more than three quarters of production, can be broken down as follows: a little under 28% for the branch itself and the remaining 72% for other branches.

Purchases to "other industries" accounted for 37% of all purchases, amongst which metallurgy and metal product manufacturing, which remain the leading suppliers (16% of total purchases, slight but steady decline).

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

From a 2014 base, when research and development expenditure was first accounted for in the GFCF, the automotive industry dedicated 14% of its spending to the tertiary sector, compared to 13% 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

MAJOR CLIENT

The French automotive industry is one of the three biggest industrial clients of numerous economic sectors such as plastics, industrial rubber and the mechanical industry

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

The development of French manufacturing has a pull effect on equipment manufacturers and other suppliers from sectors such as plastics, industrial rubber, foundry, industrial metal services, etc.

In the 2018-2022 strategic contract for the automotive sector (see page 32), the number of employees is estimated at 400,000 and the turnover at €155 billion.

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

► WORKFORCE OF THE AUTOMOTIVE INDUSTRY BY ACTIVITY
(IN THOUSANDS OF "FULL-TIME EQUIVALENTS")

Activity	Employees
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
Body builders or developers	19
Production of electrical equipment	18
Chemicals	16
Production of glass products	5
Textiles	2
Refined oil products	1
Production leather items	0

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

► SALES, VALUE ADDED AND EXPORT RATE OF THE AUTOMOTIVE INDUSTRY

	Sales before tax (in € billion)	Added value (in € billion)	Export rate (%)
Core (1)	91	12	56
Periphery (2)	52	12	35
Automotive branch	143	24	43
Ratio (branch/core)	1.6	2	-
Manufacturing industry	900	215	34
Weight of the automotive branch in the manufacturing industry	16%	11%	-

(1) Auto manufacturers, equipment manufacturers and bodybuilders.
(2) Metal products, rubber products, metallurgy, IT products, mechanical parts, glass products, textiles, etc.
Sources: DGE, 2012 survey of companies in the automotive industry; Insee Esane 2011; DGE calculations

A Direction Générale des Enterprises survey published in 2015 estimates that the industrial automobile sector (excluding research and development, and other services) employs 441,000 people "full-time equivalent", of which 211,000 in the core and 230,000 in the periphery (see definitions above). It assesses the turnover of the entire sector at more than €140 billion and its added value at more than €20 billion. Also, the export rate from the sector is greater than that of the manufacturing industry as a whole (43% compared to 34%. Within the auto sector, this ratio is higher for the core (56%) than for the periphery (35%).

According to FIEV (vehicle equipment manufacturers' federation), headcount of equipment manufacturers in 2017 was 70,000 for €18.7 billion turnover. Equipment manufacturers have two types of market: initial assembly, whereby equipment is delivered to the assembly line, and secondary assembly or replacement parts. The initial assembly turnover represents more than 80% for the total.

Over recent years, externalisation has resulted in an increasing use of suppliers, which services represent a high and growing proportion of the overall cost of manufacturing a vehicle (around 80% according to FIEV).

In 2016, amongst the other automotive suppliers, nearly one fifth of work in the plastics and electronic equipment sectors were for the automotive industry. Also, 10% of mechanical industries' domestic market was for the automotive industry. For forges and foundries, the total was 50%. This rate was 70% in the polymer and rubber sectors. Moreover, according to the Observatoire de l'Intérim (temporary work observatory), the automotive industry (excluding suppliers) accounted for more than 4% of total employment volumes in 2015 (in full-time equivalent).

The French automotive industry continues to rely on its French industrial base. 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 represented nearly 40% of its turnover over recent years. To express the total industrial value of the automotive sector, we would have to add the French automotive industry's purchases from other sectors such as steel (the automotive sector represents 25% of the tonnage), chemicals (10% for all transport materials) and energy (cf. page 66).

EMPLOYMENT

8%

French people in employment working in the automotive industry (direct and indirect jobs)

In broader terms, 2.2 million people worked in activities linked to the automotive industry in 2017, i.e. 8% of the working population.

In the strictest sense, the automotive industry employed 213,000 people, i.e. around 7% of salaried jobs across industry (including extractive industries, agrofoods and industrial companies).

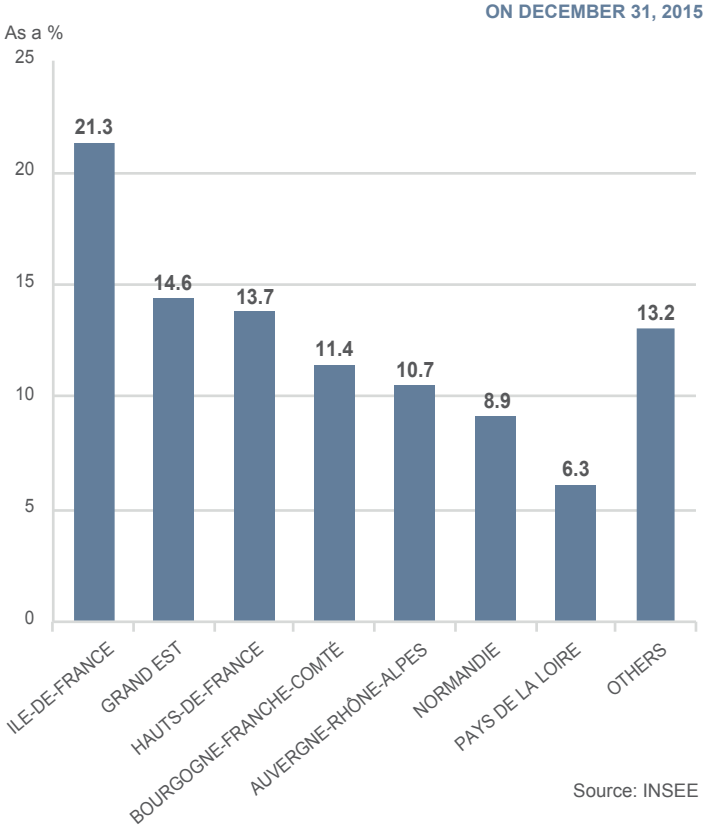
The impact of the crisis and the lack of competition severely affected industrial automotive activities, including upstream. However, it fades with the rise of the market. Concerning use, activities are by nature less sensitive because of their links with the automobile stock which continues to progress, nevertheless, the number of jobs has slightly decreased with the crisis, but in recent years a stage seems to have been reached.

► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2016 (IN THOUSANDS OF PEOPLE)

	2017
Production operations	**510**
Raw materials and services	**297**
Manufacturing and energy sector	160
Services	137
Automotive industry	**213**
Automotive manufacturing	112
Equipements, accessories	79
Bodywork, trailers, caravans	22
Use automobiles	**530**
Sales, repairs, automotive equipment sales, vehicle inspections, short-term rentals, breakers and recycling (1)	400
Insurance, experts, financing, long-term rental, etc.	92
Others (fuel retailing, self-employed, etc.)	29
Motor sport, media, publishing, other	9
Transports	**1,150**
Road transport (passengers and freight, outsourced and in-house), related services	1 006
Police, health, education, non-commercial administration	33
Road building and maintenance	111
Total jobs related to the automotive industry	**2,190**

Sources: CCFA, DGE, INSEE, SDES, FNTP, URF

GEOGRAPHIC BREAKDOWN OF AUTOMOTIVE INDUSTRY EMPLOYEES ON DECEMBER 31, 2015



Source: INSEE

The automotive industry, one of the main contributors to industrial production in France, generated 510,000 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 temporary workers employed – in full time equivalent (FTE) – averaged around 21,000 people between 2011 and 2015. Also, further to the change in nomenclature (see pages 88 and 89), 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 energy industries' purchases. Vehicle use accounted for 530,000 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).

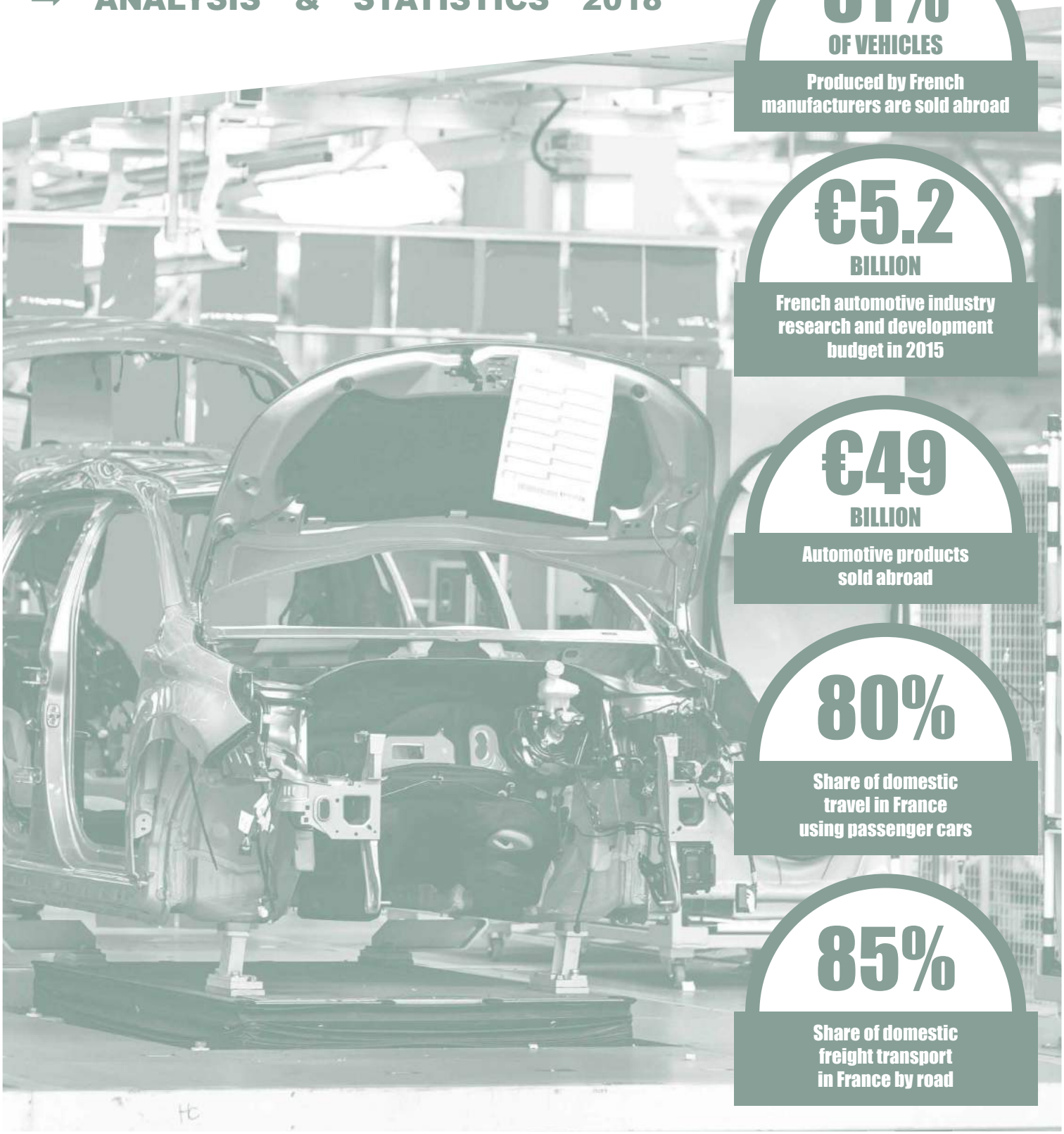
Finally, road transport (passenger and merchandise) and the associated infrastructure employed nearly 1.2 million people. As for transport activities, which affect for-hire and own-account transport, they have recovered pre-crisis momentum and the volume of jobs has increased significantly in 2017. On the infrastructure side, budget constraints of public authorities, which have reduced their road expenditures by 25% for three years, have impacted activity and employment.

According to INSEE data, on December 31, 2015, Ile-de-France accounted for 21% of jobs in the automotive industry (automakers, equipment manufacturers and body builders). The other leading automotive industry regions were Grand Est (15%), Hauts-de-France (14%), Bourgogne-Franche-Comté and Auvergne-Rhône-Alpes (11% each), Normandie (9%) and Pays de la Loire (6 %).

THE FRENCH AUTOMOTIVE INDUSTRY

→ ANALYSIS & STATISTICS 2018

CCFA



7.8
MILLION VEHICLES
Produced by French manufacturers worldwide

81%
OF VEHICLES
Produced by French manufacturers are sold abroad

€5.2
BILLION
French automotive industry research and development budget in 2015

€49
BILLION
Automotive products sold abroad

80%
Share of domestic travel in France using passenger cars

85%
Share of domestic freight transport in France by road

WORLD PRODUCTION

The production of each country corresponds to national declarations. Double counts are eliminated in the totals of the geographical areas.

► PASSENGER CARS (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
EUROPE	17,407,047	17,585,503	17,330,380	17,460,101	18,048,921	18,545,798	19,054,909	19,627,929
Western Europe	14,778,879	14,217,571	12,110,446	11,441,467	11,895,029	12,636,580	13,058,080	13,116,884
Germany	5,131,918	5,350,187	5,552,409	5,439,904	5,604,026	5,708,138	5,746,808	5,645,581
Belgium	912,233	895,109	528,996	465,504	481,636	369,172	354,003	332,979
Spain	2,366,359	2,098,168	1,913,513	1,754,668	1,898,342	2,218,980	2,354,117	2,291,492
France	2,879,810	3,112,961	1,924,171	1,458,220	1,499,464	1,555,000	1,636,000	1,753,000
Italy	1,422,284	725,528	573,169	388,465	401,317	663,139	712,971	742,642
The Netherlands	215,085	115,121	48,025	n/a	29,178	57,019	87,609	155,000
Portugal	178,509	137,602	114,563	109,698	117,744	115,468	99,200	126,426
United Kingdom	1,641,452	1,596,356	1,270,444	1,509,762	1,528,148	1,587,677	1,722,698	1,671,166
Sweden	259,959	288,659	177,084	161,080	154,174	188,987	205,374	226,000
Central and Eastern Europe	2,330,692	2,914,269	4,616,540	5,385,030	5,420,453	5,118,191	5,045,941	5,368,139
Turkey	297,476	453,663	603,394	633,604	733,439	791,027	950,888	1,142,906
AMERICA	10,022,089	8,795,982	8,228,067	10,394,353	9,986,532	9,394,539	8,778,776	8,190,677
NAFTA	8,371,806	6,523,591	5,084,330	7,106,013	7,082,340	7,019,427	6,712,992	5,682,703
Canada	1,550,500	1,356,271	967,077	965,191	913,533	888,565	803,230	749,458
USA	5,542,217	4,321,272	2,731,105	4,368,835	4,253,098	4,162,808	3,916,584	3,033,216
Mexico	1,279,089	846,048	1,386,148	1,771,987	1,915,709	1,968,054	1,993,178	1,900,029
South America	1,650,283	2,272,391	3,143,737	3,288,340	2,904,192	2,375,112	2,065,784	2,507,974
Argentina	238,921	182,761	508,401	506,539	363,711	308,756	241,315	203,700
Brazil (1)	1,351,998	2,011,817	2,584,690	2,722,979	2,502,293	2,017,639	1,778,464	2,269,468
ASIA-OCEANIA	13,573,073	20,249,215	32,408,358	37,192,510	39,246,258	40,125,960	43,884,300	45,015,022
China	605,000	3,941,767	13,897,083	18,084,169	19,928,505	21,143,351	24,420,744	24,806,687
South Korea	2,602,008	3,357,094	3,866,206	4,122,604	4,124,116	4,135,108	3,859,991	3,735,399
India	517,957	1,264,111	2,831,542	3,155,694	3,162,372	3,408,849	3,707,348	3,952,550
Japan	8,359,434	9,016,735	8,310,362	8,189,323	8,277,070	7,830,722	7,873,886	8,347,836
AFRICA	213,444	319,598	356,872	403,821	483,206	604,130	673,685	706,296
South Africa	230,577	324,875	295,394	265,257	277,491	341,025	335,539	321,358
TOTAL	41,215,653	46,950,298	58,323,677	65,450,785	67,764,917	68,670,427	72,391,670	73,539,924

► COMMERCIAL VEHICLES (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
EUROPE	2,783,468	3,132,236	2,529,925	2,411,036	2,380,686	2,672,648	2,434,598	2,571,856
Western Europe	2,326,653	2,246,450	1,686,875	1,498,118	1,588,914	1,794,888	1,571,867	1,616,288
Germany	394,697	407,523	353,576	278,318	303,522	325,226	n/a	n/a
Belgium	121,061	31,406	26,306	38,000	35,195	40,081	45,424	44,023
Spain	666,515	654,332	474,387	408,670	504,636	514,221	531,805	556,843
France	468,551	436,047	305,250	282,000	322,000	417,000	454,279	479,000
Italy	316,031	312,824	265,017	269,741	296,547	351,084	390,334	399,568
The Netherlands (2)	52,234	65,627	46,107	29,183	2,232	2,252	2,280	2,280
Portugal	68,215	83,458	44,166	44,318	43,765	41,158	43,896	49,118
United Kingdom	172,442	206,753	123,019	88,110	70,731	94,479	93,924	78,219
Sweden	41,384	50,570	40,000	45,897	n/a	n/a	n/a	n/a
Central and Eastern Europe	323,203	459,997	351,887	420,988	354,766	309,991	327,692	402,743
Turkey	133,471	425,789	491,163	491,930	437,006	567,769	535,039	552,825
AMERICA	9,761,798	10,488,678	8,119,880	10,687,053	11,235,931	11,567,600	12,042,894	12,467,014
NAFTA	9,325,214	9,795,192	7,069,234	9,395,102	10,340,526	10,935,086	11,438,330	11,775,486
Canada	1,411,136	1,331,621	1,101,112	1,414,643	1,480,621	1,394,742	1,567,426	1,450,331
USA	7,257,640	7,625,381	5,011,988	6,697,597	7,407,604	7,943,180	8,263,717	8,156,769
Mexico	656,438	838,190	956,134	1,282,862	1,452,301	1,597,164	1,607,187	2,168,386
South America	436,584	693,486	1,050,646	1,291,951	895,405	632,514	604,564	691,528
Argentina	100,711	136,994	208,139	284,468	253,618	217,901	231,461	268,458
Brazil (1)	329,519	519,023	797,038	989,401	644,093	411,782	377,892	430,204
ASIA-OCEANIA	4,497,938	5,878,721	8,600,629	8,654,614	8,212,631	7,863,313	7,962,121	8,585,574
China	1,464,000	1,775,852	4,367,678	4,032,656	3,803,095	3,423,899	3,698,050	4,208,747
South Korea	512,990	342,256	405,535	398,825	400,816	420,849	368,518	379,514
India	283,403	374,563	725,531	742,731	682,485	751,736	811,993	830,346
Japan	1,781,362	1,782,924	1,318,558	1,440,858	1,497,595	1,447,516	1,330,927	1,345,910
AFRICA	115,305	199,195	158,204	221,834	236,402	232,291	229,883	224,987
South Africa	126,787	200,352	176,655	280,656	288,592	274,633	263,465	268,593
TOTAL	17,158,509	19,698,830	19,408,638	21,974,537	22,065,650	22,335,852	22,669,496	23,849,431

(1) As of 2010, Brazilian production does not include CKDs.
(2) Production in the Netherlands does not include DAF since 2012 and does not include Ginaf and Scania since 2014.
Sources: OICA, CCFA

WORLD MOTOR VEHICLE PRODUCTION BY MANUFACTURER AND REGION IN 2017

► IN THOUSANDS

Manufacturers/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	3,752	1,531	13,819	1,392	5	314	5,383	1,647	27,841
BMW	405	0	1,650	0	0	0	397	53	2,506
FCA	2,325	560	1,321	329	0	0	32	34	4,601
DAIMLER AG (light vehicles)	287	1	1,685	2	0	0	457	117	2,549
PSA	1	144	2,601	22	5	50	382	444	3,650
RENAULT	1	390	1,827	871	0	264	75	725	4,154
VOLKSWAGEN (light vehicles)	732	435	4,735	166	0	0	4,041	273	10,382
American manufacturers	6,473	847	1,582	462	0	519	5,100	923	15,906
FORD	3,041	323	1,101	393	0	0	923	607	6,387
GM	3,270	524	422	69	0	519	4,176	316	9,298
NAVISTAR	68	0	0	0	0	0	0	0	68
PACCAR	94	0	59	0	0	0	0	0	153
Japanese manufacturers	6,103	413	1,415	382	9,584	122	4,498	6,761	29,278
HONDA	1,851	115	164	29	818	0	1,442	818	5,237
ISUZU	0	0	0	0	234	0	0	379	612
MAZDA	186	0	0	0	971	0	315	136	1,608
MITSUBISHI	0	0	0	0	580	0	0	631	1,210
NISSAN	1,760	47	599	38	1,020	122	1,506	677	5,769
SUBARU	363	0	0	0	710	0	0	0	1,073
SUZUKI	0	0	185	0	988	0	92	2,038	3,302
TOYOTA	1,942	250	468	315	4,265	0	1,143	2,083	10,466
Korean manufacturers	844	183	697	461	0	3,174	1,183	678	7,218
Hyundai-Kia	844	183	697	461	0	3,174	1,183	678	7,218
Chinese manufacturers	0	0	612	0	0	0	4,206	0	4,817
GEELY	0	0	612	0	0	0	1,339	0	1,950
SAIC	0	0	0	0	0	0	2,867	0	2,867
Indian manufacturers	0	0	532	0	0	0	0	400	932
TATA	0	0	532	0	0	0	0	400	932
ALL MANUFACTURERS QUOTED ABOVE	17,172	2,973	18,657	2,695	9,589	4,131	20,369	10,409	85,994

► AS A % OF TOTAL PRODUCTION

Manufacturers/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	13%	5%	50%	5%	0%	1%	19%	6%	100%
BMW	16%		66%				16%	2%	100%
FCA	51%	12%	29%	7%			1%	1%	100%
DAIMLER AG	11%		66%				18%	5%	100%
PSA		4%	71%	1%	0%		10%	12%	100%
RENAULT		9%	44%	21%		6%		17%	100%
VOLKSWAGEN	7%	4%	46%	2%			39%	3%	100%
American manufacturers	41%	5%	10%	3%	0%	3%	32%	6%	100%
FORD	48%	5%	17%	6%			14%	9%	100%
GM	35%	6%	5%	1%		6%	45%	3%	100%
NAVISTAR	100%								100%
PACCAR	61%		39%						100%
Japanese manufacturers	21%	1%	5%	1%	33%	0%	15%	23%	100%
FUJI	34%				66%				100%
HONDA	35%	2%	3%	1%	16%		28%	16%	100%
ISUZU					38%		0%	62%	100%
MAZDA	12%	0%			60%		20%	8%	100%
MITSUBISHI	0%	0%			48%			52%	100%
NISSAN	31%	1%	10%	1%	18%		26%	12%	100%
SUZUKI		0%	6%		30%		3%	62%	100%
TOYOTA	19%	2%	4%	3%	41%		11%	20%	100%
Korean manufacturers	12%	3%	10%	6%	0%	44%	16%	9%	100%
Hyundai-Kia	12%	3%	10%	6%		44%	16%	9%	100%
Chinese manufacturers	0%	0%	13%	0%	0%	0%	87%	0%	100%
GEELY			31%				69%	0%	100%
SAIC							100%		100%
Indian manufacturers	0%	0%	57%	0%	0%	0%	0%	43%	100%
TATA			57%			0%		43%	100%
ALL MANUFACTURERS QUOTED ABOVE	20%	3%	22%	3%	11%	5%	24%	12%	100%

Sources: OICA, CCFA estimates July 2018

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	3,378,343	3,319,259	2,916,259	2,952,431	3,036,773	3,206,042	3,351,607	3,442,100
Belgium	515,204	480,088	547,340	486,065	482,939	501,066	539,519	546,533
Spain	1,381,515	1,528,877	982,015	722,689	890,125	1,094,077	1,147,007	1,235,327
France	2,133,884	2,067,789	2,251,669	1,790,456	1,795,885	1,917,226	2,015,177	2,109,890
Italy	2,415,600	2,237,272	1,961,580	1,304,648	1,360,578	1,575,737	1,824,968	1,969,140
The Netherlands	597,640	465,160	482,531	417,036	387,553	449,350	382,825	414,599
Poland	-	-	315,855	289,913	327,709	354,975	416,123	485,199
United Kingdom	2,221,670	2,439,717	2,030,846	2,264,737	2,476,435	2,633,503	2,692,786	2,539,297
European Union (15 countries)	14,312,087	14,111,682	12,559,450	11,097,843	11,692,967	12,772,785	13,481,105	13,824,142
Europe (17 countries, 18 since 2015)	14,725,982	14,486,530	12,981,443	11,547,879	12,139,111	13,261,258	13,971,468	14,318,192
Central and Eastern Europe	2,551,000	3,368,221	3,515,830	4,387,120	4,005,631	3,149,305	3,320,351	3,619,153
Russia	-	-	1,912,794	2,649,181	2,333,067	1,282,740	1,239,680	1,393,400
Turkey	456,696	438,597	509,784	664,655	587,331	725,596	756,938	722,876
Canada	849,132	842,322	694,349	755,615	760,449	712,322	661,088	639,272
USA	8,846,625	7,667,066	5,635,432	7,585,341	7,689,110	7,516,826	6,872,729	6,096,111
Mexico	603,010	714,047	503,748	698,217	745,250	892,194	1,065,912	1,016,880
Argentina	224,950	290,648	489,304	684,379	432,696	480,952	525,757	662,980
Brazil	1,188,818	1,440,696	2,856,540	3,040,783	2,794,687	2,123,009	1,676,722	1,844,394
China	-	-	13,757,794	17,927,730	19,707,677	21,210,339	24,376,902	24,961,948
South Korea	1,057,620	944,451	1,237,482	1,243,868	1,359,834	1,533,670	1,533,813	1,495,468
India	-	--	2,387,197	2,553,979	2,570,736	2,772,270	2,966,637	3,227,701
Indonesia	-	-	541,475	880,032	863,268	755,566	834,920	824,901
Iran	-	-	1,410,403	691,709	1,106,700	1,055,400	1,320,300	1,592,282
Japan	4,259,771	4,748,482	4,203,181	4,562,282	4,699,591	4,215,889	4,146,459	4,391,100
Malaysia	-	-	543,594	576,657	588,348	591,275	514,545	519,690
Thailand	-	-	346,644	663,746	411,402	356,063	328,053	401,537
Australia	-	-	592,122	899,965	883,949	924,154	927,274	915,219
South Africa	-	-	337,130	450,561	439,264	412,670	361,289	369,599
Total	38,689,767	44,015,119	55,602,157	63,421,088	65,698,868	66,325,833	69,506,882	70,849,466

► NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	314,804	295,627	282,157	305,287	319,945	333,783	357,260	369,146
Belgium	66,125	75,083	60,157	61,074	62,316	70,458	78,335	87,579
Spain	335,684	430,611	132,104	100,261	139,657	182,982	200,337	215,763
France	477,204	480,122	457,215	416,917	415,042	427,866	463,295	495,052
Italy	268,057	246,894	202,573	116,166	132,430	150,342	225,324	221,263
The Netherlands	114,354	80,771	59,781	64,399	62,777	71,828	86,585	93,772
Poland	-	-	49,356	63,284	64,767	77,464	88,427	90,945
United Kingdom	301,523	388,410	262,730	330,976	366,590	427,903	430,969	415,885
European Union (15 countries)	2,245,881	2,305,341	1,646,742	1,561,706	1,690,915	1,882,620	2,089,507	2,157,824
Europe (17 countries, 18 since 2015)	2,310,844	2,374,724	1,711,882	1,635,430	1,763,448	1,962,508	2,173,752	2,245,638
Central and Eastern Europe	579,060	847,773	595,752	764,958	668,830	662,918	669,258	733,042
Russia	-	-	194,341	349,469	259,329	158,183	164,784	208,870
Turkey	199,825	319,940	251,129	228,469	220,155	285,598	250,919	257,518
Canada	736,951	787,820	889,039	1,024,908	1,129,938	1,227,195	1,322,657	1,437,728
USA	8,965,048	9,777,263	6,136,787	8,298,102	9,154,354	10,328,798	10,993,044	11,487,731
Mexico	302,944	452,600	344,606	402,325	431,055	497,280	581,811	553,884
Argentina	81,995	112,042	163,098	279,538	181,152	163,069	183,725	237,423
Brazil	302,288	273,948	658,524	726,587	703,325	445,967	373,599	394,521
China	-	-	4,304,142	4,056,349	3,791,324	3,451,263	3,651,273	4,160,583
South Korea	372,840	244,332	273,891	299,696	302,034	300,116	289,228	303,328
India	-	-	653,193	687,323	606,269	652,566	702,640	789,838
Indonesia	-	-	223,235	349,779	332,141	275,856	213,215	235,993
Iran	-	-	232,440	113,041	180,900	166,600	128,200	126,283
Japan	1,703,114	1,103,552	752,967	813,231	863,297	830,621	823,801	847,788
Malaysia	-	-	61,562	79,136	78,139	75,402	65,579	71,406
Thailand	-	-	453,713	666,926	470,430	443,569	440,735	471,969
Australia	-	-	443,452	236,262	229,281	231,254	250,859	273,458
South Africa	-	-	155,777	200,184	205,240	205,079	186,117	189,589
Total	18,723,143	21,945,086	19,392,043	22,171,600	22,625,420	23,380,189	24,398,752	25,954,924

Sources: CCFA, OICA since 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)

	2000	2005	2010	2013	2014	2015	2016	2017
FRENCH GROUPS								
Citroën+DS	453,604	546,021	586,769	-	-	-	-	-
Peugeot	593,349	805,490	622,644	-	-	-	-	-
PSA group	1,046,953	1,351,511	1,209,413	932,595	936,425	1,012,098	940,081	957,442
Renault	601,495	966,687	812,306	-	-	-	-	-
Dacia	-	9,824	132,548	-	-	-	-	-
Renault Samsung Motors	-	86	24,141	-	-	-	-	-
Renault group	601,495	976,597	968,995	915,527	898,864	1,054,351	1,039,526	1,068,797
Total diesel (1)	1,648,448	2,328,108	2,178,408	1,848,122	1,835,289	2,066,449	1,979,607	2,026,239
Total petrol + diesel + others	4,598,617	5,177,852	5,610,340	4,794,079	4,920,471	5,182,320	5,782,453	6,883,000
Diesel share	35.8%	45.0%	38.8%	38.6%	37.3%	39.9%	34.2%	29.4%
GERMANY								
Mercedes	278,772	365,403	363,443	400,324	412,462	420,050	-	-
Opel	288,651	361,112	236,982	143,919	157,576	114,241	-	-
Volkswagen-Audi-Seat	847,652	1,112,321	1,095,790	1,210,951	1,289,215	1,344,161	-	-
Ford	179,130	372,133	347,553	206,654	216,980	272,502	-	-
BMW	194,794	345,998	448,604	522,549	519,080	547,713	-	-
Total diesel	1,788,999	2,556,967	2,502,419	2,514,363	2,635,285	2,744,586	2,681,647	2,352,091
Total petrol + diesel + others	5,131,918	5,344,098	5,552,330	5,439,904	5,604,026	5,708,138	5,746,808	5,645,584
Diesel share	34.9%	47.8%	45.1%	46.2%	47.0%	48.1%	46.7%	46.7%
SPAIN								
Total diesel	681,262	481,923	1,000,000	885,850	1,004,877	1,217,898	1,171,691	948,425
Total petrol + diesel	2,445,421	2,182,176	1,913,513	1,719,700	1,871,985	2,202,348	2,313,409	2,243,202
Diesel share	27.9%	22.1%	52.3%	51.5%	53.7%	55.3%	50.6%	42.3%
ITALY								
Alfa Romeo	77,532	92,589	60,095	39,249	32,493	30,437	50,692	57,397
Fiat	223,889	267,801	138,598	60,206	69,632	115,418	113,226	107,247
Lancia	40,891	37,932	40,759	6,339	1,745	-	-	-
Jeep	-	-	-	-	18,593	49,767	63,927	59,149
Others	0	164	1,449	-	-	5,410	9,300	9,222
Total diesel	342,312	398,486	240,901	105,794	122,463	201,032	237,145	233,015
Total petrol + diesel + others	1,422,243	725,528	573,169	388,465	401,317	663,139	712,971	742,642
Diesel share	24.1%	54.9%	42.0%	27.2%	30.5%	30.3%	33.3%	31.4%
UNITED KINGDOM								
Honda	596	46,823	35,908	54,800	51,728	62,773	-	-
Jaguar-Land Rover	69,775	126,758	137,824	212,041	213,349	246,542	-	-
Mini	0	15,656	34,752	29,529	31,280	39,437	-	-
Nissan	54,396	43,307	173,050	201,379	233,884	254,800	-	-
Opel	125,880	77,225	35,206	42908	25205	9008	-	-
Peugeot	37,432	56,431	0	0	0	0	-	-
Toyota	38,931	90,045	55,599	49,468	44,879	49,624	-	-
Others	57,413	8,352	1,814	924	1,376	1,171	-	-
Total diesel	384,423	464,597	474,153	591,049	601,701	663,355	-	-
Total petrol + diesel	1,641,317	1,594,101	1,274,070	1,439,290	1,439,258	1,489,372	-	-
Diesel share	23.4%	29.1%	37.2%	41.1%	41.8%	44.5%	-	-

(1) Including others.
Source: CCFA

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY GROUP IN THE EUROPEAN UNION (1) + EFTA (2)

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

	2005 (3)	2010	2012	2013	2014	2015	2016	2017
PSA GROUP	2,111	1,849	1,471	1,345	1,395	1,480	1,472	1,886
	13.6%	13.4%	11.7%	10.9%	10.7%	10.4%	9.7%	12.1%
RENAULT GROUP	1,635	1,416	1,057	1,092	1,234	1,350	1,511	1,607
	10.5%	10.2%	8.4%	8.9%	9.5%	9.5%	10.0%	10.6%
FCA group	1,085	1,080	801	741	766	871	993	1,046
	7.0%	7.8%	6.4%	6.0%	5.9%	6.1%	6.6%	6.7%
Ford group	1,269	1,128	949	919	960	1,031	1,048	1,043
	8.2%	8.2%	7.6%	7.5%	7.4%	7.3%	6.9%	6.7%
General Motors	1,590	1,196	1,011	968	923	943	994	600
	10.2%	8.6%	8.1%	7.9%	7.1%	6.6%	6.6%	3.8%
Volkswagen group	3,041	2,984	3,114	3,090	3,307	3,516	3,638	3,712
	19.5%	21.6%	24.8%	25.1%	25.5%	24.8%	24.1%	23.8%
Daimler	830	676	667	689	714	839	953	1,011
	5.3%	4.9%	5.3%	5.6%	5.5%	5.9%	6.3%	6.5%
BMW group	772	753	801	795	833	936	1,031	1,043
	5.0%	5.4%	6.4%	6.5%	6.4%	6.6%	6.8%	6.7%
Nissan	361	407	436	424	481	560	561	575
	2.3%	2.9%	3.5%	3.4%	3.7%	3.9%	3.7%	3.7%
Toyota-Lexus-Daihatsu	852	629	548	543	563	603	649	730
	5.5%	4.5%	4.4%	4.4%	4.3%	4.3%	4.3%	4.7%
Other Japanese brands	911	718	537	558	604	695	754	766
	5.8%	5.2%	4.3%	4.5%	4.7%	4.9%	5.0%	4.9%
Hyundai-Kia	569	614	773	767	773	854	937	985
	3.7%	4.4%	6.2%	6.2%	6.0%	6.0%	6.2%	6.3%
Volvo	249	231	231	231	255	285	290	301
	1.6%	1.7%	1.8%	1.9%	2.0%	2.0%	1.9%	1.9%
Tata group	128	100	128	139	146	179	232	237
	0.8%	0.7%	1.0%	1.1%	1.1%	1.3%	1.5%	1.5%
Other brands (including MG-Rover, Saab)	168	53	23	20	32	46	55	67
	1.1%	0.4%	0.2%	0.2%	0.2%	0.3%	0.4%	0.4%
TOTAL EU + EFTA	15,572	13,832	12,546	12,322	12,987	14,189	15,118	15,609
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-5.0%	-8.0%	-1.8%	5.4%	9.3%	6.7%	3.4%

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

	2005 (3)	2010	2012	2013	2014	2015	2016	2017
PSA GROUP	389	344	307	303	330	354	380	461
	18.1%	21.9%	20.8%	20.7%	20.3%	19.5%	18.9%	22.1%
RENAULT GROUP	331	266	240	233	258	299	328	337
	15.4%	17.0%	16.3%	15.9%	15.9%	16.5%	16.3%	16.1%
FCA group	284	233	197	195	207	229	270	265
	13.2%	14.9%	13.4%	13.3%	12.8%	12.7%	13.4%	12.7%
Ford group	235	171	164	171	215	268	319	331
	10.9%	10.9%	11.1%	11.7%	13.2%	14.8%	15.8%	15.9%
General Motors	153	78	76	75	84	104	106	58
	7.1%	5.0%	5.2%	5.1%	5.2%	5.7%	5.3%	2.8%
Volkswagen group	212	185	213	208	225	218	243	250
	9.9%	11.8%	14.4%	14.2%	13.9%	12.0%	12.1%	12.0%
Daimler	166	140	140	148	159	172	186	198
	7.7%	8.9%	9.5%	10.1%	9.8%	9.5%	9.2%	9.5%
Nissan	103	43	48	45	47	50	66	68
	4.8%	2.7%	3.3%	3.1%	2.9%	2.7%	3.3%	3.3%
Toyota-Lexus-Daihatsu	65	39	34	31	38	41	40	52
	3.0%	2.5%	2.3%	2.1%	2.3%	2.3%	2.0%	2.5%
Other Japanese brands	81	38	25	27	30	37	41	40
	3.8%	2.4%	1.7%	1.9%	1.9%	2.0%	2.1%	1.9%
Hyundai-Kia	52	6	4	4	3	4	7	6
	2.4%	0.4%	0.3%	0.2%	0.2%	0.2%	0.4%	0.3%
Other brands (including MG-Rover, Saab)	78	27	29	27	30	35	26	22
	3.6%	1.7%	1.9%	1.8%	1.9%	1.9%	1.3%	1.0%
TOTAL EU + EFTA	2,149	1,569	1,476	1,467	1,627	1,813	2,011	2,089
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		8.8%	-12.6%	-0.6%	10.9%	-9.8%	10.9%	3.8%

(1) For the scope of the new EU member states, see page 77.
(2) EFTA (European Free Trade Association): Iceland (included since 2015) + Norway + Switzerland.
(3) Not including Bulgaria in 2005. In 2006, 135,500 light commercial vehicles, of which no French brand, are included in passenger cars in Spain.
Automobile manufacturers include the following brands:
PSA group = Peugeot + Citroën + DS + Opel/Vauxhall (since August 1, 2017).
Renault group = Renault + Dacia+Lada (since January 1, 2017).
Fiat Chrysler Automobiles = Alfa Romeo + Fiat + Iveco + Lancia + Maseratti + Ferrari + Chrysler + Jeep + Dodge.
Ford group = Ford Europe + Ford USA + others Ford.
General Motors = Opel/Vauxhall (until July 31, 2017) + GM Daewoo+ Chevrolet + Pontiac + others.
Volkswagen group = Volkswagen + Audi + Porsche + Seat + Skoda + Bentley + Lamborghini + Bugatti + MAN + Scania.
Daimler = Mercedes-Benz + Smart + FUSO + others.
BMW group = BMW + Mini + Rolls-Royce.
Other Japanese brands: Mazda, Mitsubishi, Subaru, Suzuki, etc.
Tata group = Jaguar + Land-Rover + Tata.
The scope of the groups reflects their situation as at 01/01/2018.

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION, SWITZERLAND AND NORWAY BY COUNTRY AND BY GROUP IN 2017 (SEE NOTE PAGE 74) (IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	Total	PSA group (1)	Citroën and DS (2)	Peugeot	Renault group	Renault	Fiat group (including Chrysler)	Volkswagen group	Ford group	BMW-Mini	Daimler	Japanese brands	Korean brands
Germany	3,441	224	56	71	199	136	108	1,251	247	312	365	330	176
	100%	6.5%	1.6%	2.1%	5.8%	4.0%	3.1%	36.3%	7.2%	9.1%	10.6%	9.6%	5.1%
Austria	353	27	8	12	29	20	22	120	21	22	20	43	29
	100%	7.8%	2.2%	3.3%	8.2%	5.6%	6.1%	33.8%	5.9%	6.1%	5.5%	12.1%	8.3%
Belgium	547	81	27	42	70	51	22	114	24	50	39	58	34
	100%	14.8%	4.9%	7.7%	12.8%	9.3%	4.1%	20.9%	4.5%	9.1%	7.2%	10.7%	6.1%
Denmark	222	40	13	22	18	15	3	55	12	7	10	46	18
	100%	18.2%	5.9%	10.0%	8.1%	6.5%	1.4%	24.9%	5.6%	3.0%	4.5%	20.7%	8.1%
Spain	1,235	183	68	88	148	102	67	266	62	61	58	183	118
	100%	14.8%	5.5%	7.1%	12.0%	8.2%	5.5%	21.6%	5.1%	4.9%	4.7%	14.8%	9.6%
Finland	119	6	1	2	6	5	1	32	8	5	7	28	10
	100%	5.2%	1.1%	2.0%	5.3%	3.9%	1.2%	27.3%	7.1%	4.5%	5.5%	24.0%	8.1%
France	2,111	617	223	367	534	417	89	262	84	88	76	216	67
	100%	29.2%	10.6%	17.4%	25.3%	19.7%	4.2%	12.4%	4.0%	4.2%	3.6%	10.2%	3.2%
Greece	88	13	4	7	4	4	8	15	4	5	5	24	5
	100%	14.6%	4.7%	7.4%	4.9%	4.0%	9.1%	17.0%	4.4%	5.4%	5.1%	26.8%	6.1%
Ireland	131	6	1	4	12	8	1	32	12	5	5	30	19
	100%	4.4%	1.0%	3.0%	9.1%	6.3%	0.7%	24.2%	9.3%	4.0%	3.7%	22.6%	14.6%
Italy	1,971	217	81	104	192	134	561	258	134	86	93	212	109
	100%	11.0%	4.1%	5.3%	9.7%	6.8%	28.5%	13.1%	6.8%	4.3%	4.7%	10.8%	5.5%
Luxembourg	53	6	2	3	5	4	3	15	2	6	5	4	3
	100%	10.9%	3.5%	5.7%	9.2%	7.7%	5.1%	28.2%	4.5%	11.2%	9.3%	7.9%	4.9%
The Netherlands	414	59	15	31	45	41	14	84	24	25	18	65	37
	100%	14.3%	3.7%	7.5%	10.9%	9.8%	3.4%	20.4%	5.8%	6.0%	4.2%	15.7%	9.0%
Portugal	222	37	11	21	37	30	13	37	9	17	19	29	9
	100%	16.7%	5.1%	9.5%	16.5%	13.6%	6.0%	16.6%	3.9%	7.8%	8.7%	13.0%	4.0%
United Kingdom	2,541	214	61	82	94	69	63	535	287	244	191	421	190
	100%	8.4%	2.4%	3.2%	3.7%	2.7%	2.5%	21.1%	11.3%	9.6%	7.5%	16.6%	7.5%
Sweden	379	21	6	12	21	16	9	103	12	24	20	55	32
	100%	5.5%	1.5%	3.3%	5.5%	4.2%	2.3%	27.2%	3.1%	6.5%	5.2%	14.6%	8.3%
European Union (15 countries)	13,827	1,751	577	868	1,414	1,050	984	3,181	944	956	929	1,745	856
	100%	12.7%	4.2%	6.3%	10.2%	7.6%	7.1%	23.0%	6.8%	6.9%	6.7%	12.6%	6.2%
Iceland	21	1	0	0	2	1	1	3	1	0	1	9	4
	100%	2.9%	1.0%	1.9%	7.6%	4.6%	2.4%	12.4%	4.4%	1.5%	2.4%	41.4%	20.5%
Norway	159	9	2	5	4	4	0	41	7	14	11	41	8
	100%	5.7%	1.3%	3.3%	2.3%	2.2%	0.3%	25.6%	4.3%	8.9%	6.8%	26.1%	5.3%
Switzerland	312	24	8	10	22	14	19	93	14	30	28	46	13
	100%	7.6%	2.5%	3.3%	7.2%	4.4%	5.9%	29.7%	4.4%	9.7%	9.1%	14.6%	4.2%
Europe (18 countries) (3)	14,319	1,785	587	884	1,442	1,068	1,004	3,317	965	1,000	969	1,841	882
	100%	12.5%	4.1%	6.2%	10.1%	7.5%	7.0%	23.2%	6.7%	7.0%	6.8%	12.9%	6.2%
Bulgaria	33	3	0	2	8	4	1	7	2	1	0	6	2
	100%	8.9%	1.3%	5.8%	23.4%	12.7%	2.6%	22.6%	5.8%	3.4%	1.4%	19.6%	7.0%
Croatia	51	5	2	2	7	5	2	15	4	1	1	8	4
	100%	9.0%	3.6%	4.1%	13.5%	9.1%	3.6%	29.4%	7.0%	2.9%	2.9%	15.0%	7.9%
Estonia	26	2	1	1	3	2	0	6	1	1	1	8	3
	100%	9.3%	3.6%	4.2%	12.2%	8.4%	1.3%	24.3%	2.2%	2.0%	2.0%	30.7%	11.2%
Hungary	116	7	1	2	13	6	4	23	11	3	4	33	8
	100%	6.4%	0.9%	1.5%	11.2%	4.9%	3.6%	20.2%	9.8%	2.5%	3.3%	28.5%	7.2%
Latvia	17	2	0	1	1	0	0	4	1	1	0	5	2
	100%	9.7%	2.3%	5.1%	5.2%	2.5%	1.6%	23.7%	6.9%	3.2%	2.6%	29.5%	10.7%
Lithuania	26	1	0	1	2	1	6	6	1	1	0	6	2
	100%	4.4%	1.0%	2.1%	6.8%	4.6%	23.4%	24.7%	2.7%	2.7%	1.7%	22.8%	6.3%
Poland	488	38	10	14	50	28	19	138	29	18	17	103	44
	100%	7.9%	2.1%	2.8%	10.2%	5.7%	3.8%	28.2%	6.0%	3.6%	3.5%	21.2%	8.9%
Czech Rep.	272	17	6	9	26	11	4	123	17	8	9	27	31
	100%	6.4%	2.1%	3.2%	9.5%	4.1%	1.6%	45.1%	6.1%	3.0%	3.1%	10.0%	11.3%
Romania	105	6	1	2	38	8	2	21	8	3	4	12	7
	100%	5.8%	1.0%	1.8%	35.9%	7.3%	1.9%	20.3%	7.7%	2.6%	4.0%	11.2%	6.7%
Slovakia	96	10	4	5	9	4	2	31	2	4	4	16	14
	100%	10.9%	3.7%	5.3%	9.0%	4.4%	2.1%	32.5%	2.5%	3.9%	3.7%	16.2%	14.6%
Slovenia	63	8	3	3	10	8	3	21	2	2	1	7	4
	100%	13.1%	4.9%	5.4%	16.6%	13.0%	4.2%	32.9%	3.7%	3.9%	2.3%	11.2%	6.6%
11 new EU members	1,291	101	28	41	165	77	43	396	78	42	42	231	120
	100%	7.8%	2.2%	3.2%	12.8%	6.0%	3.3%	30.6%	6.0%	3.3%	3.3%	17.9%	9.3%
Europe (29 countries)	15,609	1,885	615	925	1,607	1,146	1,046	3,712	1,043	1,043	1,011	2,071	1,002
	100%	12.1%	3.9%	5.9%	10.3%	7.3%	6.7%	23.8%	6.7%	6.7%	6.5%	13.3%	6.4%

(1) Opel is included in PSA group since August 1, 2017. Thus, registrations of this brand are presented from August 1, 2017 to December 12, 2017.
(2) i.e. respectively 569,446 units for Citroën and 45,868 for DS in EU-29.
(3) Europe (18 countries): EU (15 countries) and EFTA (Iceland, Norway and Switzerland).

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY GROUP 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 since 2004.

	2000	2005	2010	2013	2014	2015	2016	2017
PSA GROUP	1,930	2,012	1,776	1,282	1,332	1,423	1,410	1,785
	13.1%	13.8%	13.7%	11.1%	11.0%	10.8%	10.1%	12.5%
RENAULT GROUP	1,559	1,442	1,305	1,005	1,128	1,230	1,369	1,442
	10.6%	9.9%	10.1%	8.7%	9.3%	9.3%	9.8%	10.1%
FCA	1,575	951	1,035	716	740	841	959	1,004
	10.7%	6.5%	8.0%	6.2%	6.1%	6.4%	6.9%	7.0%
Ford group	1,248	1,210	1,063	873	902	966	975	965
	8.5%	8.3%	8.2%	7.6%	7.5%	7.3%	7.0%	6.7%
General Motors	1,720	1,539	1,119	906	860	878	919	554
	11.7%	10.6%	8.6%	7.9%	7.1%	6.7%	6.6%	3.9%
Volkswagen group	2,776	2,743	2,757	2,862	3,032	3,202	3,277	3,317
	18.8%	18.9%	21.3%	24.8%	25.1%	24.3%	23.5%	23.2%
Daimler	811	819	662	672	694	815	919	969
	5.5%	5.6%	5.1%	5.8%	5.7%	6.2%	6.6%	6.8%
BMW group	499	761	735	775	808	906	995	1,000
	3.4%	5.2%	5.7%	6.7%	6.7%	6.9%	7.1%	7.0%
Nissan	392	342	384	400	453	524	527	538
	2.7%	2.4%	3.0%	3.5%	3.7%	4.0%	3.8%	3.8%
Toyota-Lexus-Daihatsu	576	793	582	497	506	539	572	632
	3.9%	5.5%	4.5%	4.3%	4.2%	4.1%	4.1%	4.4%
Other Japanese brands	701	820	651	504	542	624	666	671
	4.8%	5.6%	5.0%	4.4%	4.5%	4.7%	4.8%	4.7%
Hyundai-Kia	303	530	539	679	686	760	829	865
	2.1%	3.6%	4.2%	5.9%	5.7%	5.8%	5.9%	6.0%
Volvo	230	243	222	221	245	274	276	286
	1.6%	1.7%	1.7%	1.9%	2.0%	2.1%	2.0%	2.0%
Tata group	112	125	97	135	142	174	226	230
	0.8%	0.9%	0.7%	1.2%	1.2%	1.3%	1.6%	1.6%
Other brands (including MG-Rover, Saab)	304	207	47	18	32	43	50	62
	2.1%	1.4%	0.4%	0.2%	0.3%	0.3%	0.4%	0.4%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	14,738	14,536	12,975	11,545	12,102	13,198	13,970	14,319
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	-2.1%	-1.4%	-5.0%	-1.9%	4.8%	9.1%	5.8%	2.5%

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE (1)
(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2000	2005	2010	2013	2014	2015	2016	2017
PSA GROUP	349	370	326	281	307	329	352	430
	18.1%	18.4%	22.1%	20.6%	20.4%	19.6%	18.9%	22.3%
RENAULT GROUP	272	296	251	215	237	274	300	307
	14.1%	14.7%	17.0%	15.8%	15.7%	16.3%	16.1%	15.9%
FCA	275	256	214	174	184	201	238	234
	14.2%	12.8%	14.5%	12.8%	12.2%	12.0%	12.8%	12.1%
Ford group	180	225	161	161	200	251	299	311
	9.3%	11.2%	10.9%	11.8%	13.3%	15.0%	16.1%	16.1%
General Motors	92	146	75	72	79	96	99	54
	4.8%	7.3%	5.1%	5.3%	5.2%	5.7%	5.3%	2.8%
Volkswagen group	202	189	170	194	210	202	227	233
	10.5%	9.4%	11.6%	14.2%	13.9%	12.1%	12.2%	12.0%
Daimler	178	152	133	140	150	164	177	189
	9.2%	7.6%	9.0%	10.3%	9.9%	9.8%	9.5%	9.8%
Nissan	100	101	41	43	45	48	63	65
	5.2%	5.1%	2.8%	3.2%	3.0%	2.9%	3.4%	3.4%
Toyota-Lexus-Daihatsu	69	62	37	28	35	38	36	46
	3.6%	3.1%	2.5%	2.1%	2.3%	2.3%	1.9%	2.4%
Other Japanese brands	102	85	36	25	28	35	38	38
	5.3%	4.2%	2.4%	1.9%	1.9%	2.1%	2.1%	1.9%
Hyundai-Kia	44	48	5	3	3	4	6	6
	2.3%	2.4%	0.4%	0.2%	0.2%	0.2%	0.3%	0.3%
Other brands	69	76	26	26	29	34	25	21
	3.6%	3.8%	1.8%	1.9%	1.9%	2.0%	1.4%	1.1%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	1,931	2,004	1,475	1,364	1,506	1,674	1,860	1,932
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	5.6%	3.8%	11.1%	-0.8%	10.4%	11.2%	11.1%	3.9%

(1) Including Iceland since 2015
The scope of the groups reflects their situation as at 01/01/2018 (see page 74).

REGISTRATIONS

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

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

	2005 (2)	2010	2012	2013	2014	2015	2016	2017
PSA GROUP	99	73	64	63	63	57	61	101
	9.5%	8.5%	8.2%	8.1%	7.1%	5.7%	5.3%	7.8%
RENAULT GROUP	193	112	90	87	106	120	141	165
	18.7%	13.0%	11.5%	11.3%	11.9%	12.1%	12.3%	12.8%
FCA group	50	45	30	25	26	30	34	43
	4.8%	5.3%	3.9%	3.2%	3.0%	3.0%	3.0%	3.3%
Ford group	59	65	48	46	58	65	73	78
	5.7%	7.5%	6.2%	6.0%	6.6%	6.6%	6.3%	6.0%
General Motors	132	76	67	61	63	64	75	46
	12.7%	8.9%	8.5%	7.9%	7.2%	6.5%	6.5%	3.6%
Volkswagen group	257	226	227	228	273	314	361	396
	24.8%	26.4%	28.9%	29.4%	30.9%	31.7%	31.4%	30.6%
Daimler	11	13	14	17	20	24	35	42
	1.1%	1.6%	1.8%	2.2%	2.2%	2.5%	3.0%	3.3%
BMW group	11	17	21	21	24	30	37	42
	1.0%	2.0%	2.7%	2.7%	2.7%	3.0%	3.2%	3.3%
Nissan	19	23	28	24	28	36	34	38
	1.8%	2.6%	3.6%	3.1%	3.1%	3.6%	3.0%	2.9%
Toyota-Lexus-Daihatsu	60	47	41	47	57	65	77	98
	5.8%	5.5%	5.2%	6.0%	6.5%	6.5%	6.7%	7.6%
Other Japanese brands	91	67	50	53	61	71	89	95
	8.7%	7.9%	6.4%	6.9%	6.9%	7.2%	7.7%	7.4%
Hyundai-Kia	39	75	86	89	88	95	108	120
	3.8%	8.7%	10.9%	11.4%	9.9%	9.5%	9.4%	9.3%
Volvo	7	9	9	9	10	12	14	15
	0.6%	1.1%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%
Tata group	2	3	3	4	4	4	6	7
	0.2%	0.3%	0.4%	0.5%	0.4%	0.5%	0.5%	0.5%
Other brands (including MG-Rover, Saab)	7	6	5	1	3	3	5	6
	0.7%	0.7%	0.6%	0.2%	0.3%	0.3%	0.4%	0.4%
TOTAL NEW EU MEMBER STATES	1,035	857	783	777	885	991	1,148	1,291
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-4.8%	-6.9%	-0.8%	13.9%	12.0%	15.9%	12.4%

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

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

	2005 (2)	2010	2012	2013	2014	2015	2016	2017
PSA GROUP	20	18	20	22	23	26	27	31
	13.6%	19.5%	20.0%	21.2%	19.3%	18.4%	18.1%	19.9%
RENAULT GROUP	35	15	16	18	21	26	29	30
	24.4%	16.3%	16.3%	17.1%	17.8%	18.4%	19.0%	19.3%
FCA group	21	19	20	21	23	28	32	31
	14.7%	19.8%	19.6%	20.1%	19.6%	20.4%	21.1%	20.0%
Ford group	14	10	10	10	14	18	20	20
	9.8%	10.1%	10.1%	10.2%	11.5%	12.8%	13.2%	13.0%
General Motors	8	3	3	3	5	8	7	4
	5.2%	3.2%	3.3%	3.4%	4.5%	5.8%	4.6%	2.7%
Volkswagen group	21	14	16	14	15	16	15	17
	14.7%	14.9%	15.5%	13.6%	13.1%	11.6%	10.1%	10.9%
Daimler	10	7	7	7	8	9	10	10
	6.8%	7.9%	7.1%	7.2%	6.7%	6.4%	6.6%	6.6%
Nissan	2	2	2	2	2	2	3	3
	1.4%	2.5%	2.2%	1.9%	1.5%	1.2%	2.0%	1.8%
Toyota-Lexus-Daihatsu	2	2	3	3	3	3	4	6
	1.6%	2.2%	3.0%	2.8%	2.8%	2.2%	2.7%	3.7%
Other Japanese brands	3	2	2	2	2	2	3	2
	2.3%	2.1%	1.7%	1.7%	1.8%	1.7%	1.7%	1.2%
Hyundai-Kia	5	1	0	0	1	1	1	1
	3.2%	0.7%	0.2%	0.1%	0.4%	0.4%	0.4%	0.4%
Other brands (y compris MG-Rover, Saab)	4	1	1	1	1	1	1	1
	2.5%	0.8%	1.0%	0.8%	0.9%	0.8%	0.6%	0.5%
TOTAL NEW EU MEMBER STATES	145	95	100	103	118	139	151	156
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Year-on-year change		-17.5%	-7.3%	2.5%	14.8%	17.5%	8.9%	3.4%

(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 01/01/2018 (see page 74).

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	3,378,343	3,318,259	2,916,259	2,952,431	3,036,835	3,206,042	3,351,607	3,441,261
Austria	309,427	307,915	328,563	319,035	303,318	308,555	329,604	353,320
Belgium	515,204	480,088	547,340	486,065	482,939	501,066	539,519	546,558
Denmark	112,688	146,881	153,583	181,896	188,612	206,999	222,895	221,591
Spain	1,381,515	1,528,877	982,015	722,689	855,308	1,034,232	1,147,009	1,234,931
Finland	134,646	147,949	107,346	103,314	106,259	108,844	118,912	118,529
France	2,133,884	2,117,561	2,251,669	1,790,456	1,795,885	1,917,226	2,015,177	2,110,748
Greece	290,222	269,728	141,501	58,696	71,222	75,804	78,873	88,083
Ireland	230,989	171,741	88,445	74,364	96,284	124,804	146,649	131,356
Italy	2,415,600	2,237,272	1,961,578	1,304,573	1,360,452	1,575,614	1,825,608	1,970,387
Luxembourg	41,896	48,517	49,726	46,624	49,793	46,473	50,561	52,775
Norway	97,376	109,907	127,754	142,151	144,202	150,686	154,603	158,650
The Netherlands	597,640	465,160	482,527	416,733	387,571	448,925	382,514	414,538
Portugal	257,834	206,488	223,464	105,921	142,826	178,503	207,330	222,129
United Kingdom	2,221,670	2,439,717	2,030,846	2,264,737	2,476,435	2,633,503	2,692,786	2,540,617
Sweden	290,529	274,301	289,684	269,558	303,948	345,108	372,318	379,393
Switzerland	316,519	264,941	292,453	305,928	300,110	321,669	315,295	311,996
European Union (1)	14,312,087	14,161,454	12,554,546	11,097,092	11,657,687	12,711,698	13,481,362	13,826,216
Total Europe (17 then 18 countries) (2)	14,725,982	14,536,302	12,974,753	11,545,171	12,101,999	13,198,061	13,969,733	14,318,186

(1) European Union: 9 countries in 1980, 10 in 1985, 12 from 1990 to 1994, 15 since 1995.
(2) Including Iceland since 2015.

► NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE (IN UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	1,046,485	1,466,296	1,593,173	1,199,729	1,146,658	1,097,124	1,050,418	998,116
	49.0%	69.2%	70.8%	67.0%	63.8%	57.2%	52.1%	47.3%
Austria	2,006	4,189	5,661	33,993	45,383	47,792	42,991	39,022
	0.7%	1.6%	4.0%	57.9%	63.7%	63.0%	54.5%	44.3%
Belgium	23,259	36,953	55,016	53,838	70,463	88,618	102,610	85,675
	10.1%	21.5%	62.2%	72.4%	73.2%	71.0%	70.0%	65.2%
Denmark	812,203	1,308,548	901,310	703,122	747,024	872,493	1,040,194	1,109,181
	33.6%	58.5%	45.9%	53.9%	54.9%	55.4%	57.0%	56.3%
Spain	21,110	36,561	37,403	34,230	35,825	32,694	32,661	28,474
	50.4%	75.4%	75.2%	73.4%	71.9%	70.4%	64.6%	54.0%
Finland	8,761	43,146	95,733	74,693	70,190	61,482	47,622	36,613
	9.0%	39.3%	74.9%	52.5%	48.7%	40.8%	30.8%	23.1%
France	134,426	123,990	98,477	103,518	105,013	129,804	72,526	72,639
	22.5%	26.7%	20.4%	24.8%	27.1%	28.9%	19.0%	17.5%
Greece	62,417	131,731	149,046	76,575	102,044	121,650	135,103	136,218
	24.2%	63.8%	66.7%	72.3%	71.2%	68.2%	65.2%	61.3%
Ireland	313,149	897,887	936,448	1,127,758	1,240,858	1,275,411	1,285,383	1,067,489
	14.1%	36.8%	46.1%	49.8%	50.1%	48.4%	47.7%	42.0%
Italy	18,325	26,527	147,802	165,717	179,090	198,956	191,510	183,723
	6.3%	9.7%	51.0%	61.5%	58.9%	57.7%	51.4%	48.4%
Luxembourg	29,466	75,247	88,760	113,255	111,073	124,898	124,204	113,007
	9.3%	28.4%	30.4%	37.0%	37.0%	38.8%	39.4%	36.2%
Norway	4,726,461	7,198,347	6,723,487	6,158,484	6,441,303	6,821,827	6,907,793	6,349,987
	32.1%	49.5%	51.8%	53.3%	53.2%	51.7%	49.4%	44.3%
The Netherlands	+10.7%	+2.2%	+6.9%	-5.2%	+4.6%	+5.9%	+1.3%	-8.1%
	22,5%	26.7%	20.4%	24.8%	27.1%	28.9%	19.0%	17.5%
Portugal	62 417	131 731	149 046	76 575	102 044	121 650	135 103	136 218
	24.2%	63.8%	66.7%	72.3%	71.2%	68.2%	65.2%	61.3%
United Kingdom	313 149	897 887	936 448	1 127 758	1 240 858	1 275 411	1 285 383	1 067 489
	14.1%	36.8%	46.1%	49.8%	50.1%	48.4%	47.7%	42.0%
Sweden	18,325	26,527	147,802	165,717	179,090	198,956	191,510	183,723
	6.3%	9.7%	51.0%	61.5%	58,9%	57,7%	51,4%	48.4%
Switzetrland	29,466	75,247	88,760	113,255	111,073	124,898	124,204	113 007
	9.3%	28.4%	30.4%	37.0%	37.0%	38.8%	39.4%	36.2%
Total Europe (17 then 18 countries) (1)	4,726,461	7,198,347	6,723,487	6,158,484	6,441,303	6,821,827	6 907,793	6,349,987
Diesel share in Europe	32.1%	49.5%	51.8%	53.3%	53.2%	51.7%	49.4%	44.3%
Year-on-year change	+10.7%	+2.2%	+6;9%	-5.2%	+4.6%	+5.9%	+1.3%	-8.1%

(1) Including Iceland since 2015.

REGISTRATIONS

► NEW HYBRID OR ELECTRIC PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE (IN UNITS AND AS A % OF TOTAL REGISTRATIONS)

	POWER	2005	2010	2013	2014	2015	2016	2017
Germany	electric	0	160	5,800	8,262	12,319	11,163	24,294
		0.0%	0.0%	0.2%	0.3%	0.4%	0.3%	0.7%
	hybrid	3,559	10,174	25,330	26,476	32,714	47,055	83,373
		0.1%	0.3%	0.9%	0.9%	1.0%	1.4%	2.4%
Austria	electric	0	112	654	1,281	1,677	3,829	5,433
		0.0%	0.0%	0.2%	0.4%	0.5%	1.2%	1.5%
	hybrid	460	1,248	2,595	2,360	3,514	4,711	8,296
		0.1%	0.4%	0.8%	0.8%	1.1%	1.4%	2.3%
Belgium	electric	0	47	500	1,165	1,358	2,048	2,712
		0.0%	0.0%	0.1%	0.2%	0.3%	0.4%	0.5%
	hybrid	471	4,073	6,283	8,350	10,711	16,892	24,273
		0.1%	0.7%	1.3%	1.7%	2.1%	3.1%	4.4%
Denmark	electric	2	50	533	1,637	4,468	1,320	692
		0.0%	0.0%	0.3%	0.9%	2.2%	0.6%	0.3%
	hybrid	5	148	1,099	1,233	2,657	6,243	8,192
		0.0%	0.1%	0.6%	0.7%	1.3%	2.8%	3.7%
Spain	electric	0	69	811	1,076	1,461	2,143	4,106
		0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.3%
	hybrid	908	6,253	10,152	12,458	20,547	27,688	58,353
		0.1%	0.6%	1.4%	1.5%	2.0%	2.4%	4.7%
France	electric	6	184	8,779	10,561	17,268	21,751	24,910
		0.0%	0.0%	0.5%	0.6%	0.9%	1.1%	1.2%
	hybrid	2,857	9,655	46,745	43,143	61,619	58,385	81,548
		0.1%	0.4%	2.6%	2.4%	3.2%	2.9%	3.9%
Italy	electric	28	112	864	1,100	1,452	1,377	1,965
		0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%
	hybrid	1,132	4,841	15,156	21,488	26,262	38,868	66,337
		0.1%	0.2%	1.2%	1.6%	1.7%	2.1%	3.4%
Norway	electric	7	355	7,882	18,090	25,779	24,222	33,025
		0.0%	0.3%	5.5%	12.5%	17.1%	15.7%	20.8%
	hybrid	337	3,144	9,827	10,774	15,704	38,154	49,786
		0.3%	2.5%	6.9%	7.5%	10.4%	24.7%	31.4%
The Netherlands	electric	0	96	2,618	2,913	3,204	3,988	7,961
		0.0%	0.0%	0.6%	0.8%	0.7%	1.0%	1.9%
	hybrid	2,940	16,099	43,639	26,749	56,261	30,020	20,655
		0.6%	3.3%	10.5%	6.9%	12.5%	7.8%	5.0%
United Kingdom	electric	0	167	2,512	6,697	9,934	10,264	13,597
		0.0%	0.0%	0.1%	0.3%	0.4%	0.4%	0.5%
	hybrid	5,766	22,148	30,203	45,148	64,692	79,506	106,328
		0.2%	1.1%	1.3%	1.8%	2.5%	3.0%	4.2%
Sweden	electric	1	9	435	1,240	2,880	2,945	4,217
		0.0%	0.0%	0.2%	0.4%	0.8%	0.8%	1.1%
	hybrid	1,947	3,628	5,823	10,421	14,478	23,896	34,647
		0.7%	1.3%	2.2%	3.4%	4.2%	6.4%	9.1%
Switzerland	electric	13	199	1,177	1,804	3,777	3,372	4,726
		0.0%	0.1%	0.4%	0.6%	1.2%	1.1%	1.5%
	hybrid	1,413	4,210	7,225	6,949	8,400	10,494	11,717
		0.5%	1.4%	2.4%	2.3%	2.6%	3.3%	3.8%
Western Europe (including countries not presented) (1)	electric	57	1,611	32,990	56,778	87,206	90,181	131,100
		0.0%	0.0%	0.3%	0.5%	0.7%	0.6%	0.9%
	hybrid	23,210	90,198	208,934	222,109	333,028	404,241	583,264
		0.2%	0.7%	1.8%	1.8%	2.5%	2.9%	4.1%

(1) Including Iceland since 2015.

REGISTRATIONS

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

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	212,290	202,372	202,446	217,966	236,422	243,305	263,495	275,050
Austria	27,243	28,878	28,130	30,849	31,320	33,013	36,104	40,348
Belgium	54,090	62,672	56,006	56,734	56,886	65,179	72,421	80,933
Denmark	33,092	58,076	16,848	24,532	29,133	33,177	37,493	37,081
Spain	299,246	387,203	116,770	85,855	114,247	155,400	172,796	199,565
Finland	15,056	16,211	11,550	11,194	11,359	11,986	14,181	16,054
France	414,966	420,065	417,612	367,331	372,074	379,428	410,102	438,654
Greece	23,008	23,374	10,935	3,534	5,066	5,756	5,767	6,769
Ireland	41,474	37,073	10,486	11,016	16,752	23,837	28,203	24,207
Italy	225,517	207,067	177,887	101,858	119,460	134,265	201,146	194,817
Luxembourg	3,083	3,064	3,291	3,325	3,600	4,016	4,614	4,908
Norway	31,627	37,021	30,422	32,293	30,717	34,394	37,180	37,453
The Netherlands	96,570	66,232	49,863	50,756	51,929	57,921	70,654	73,636
Portugal	152,836	66,774	45,756	18,222	26,290	30,996	35,007	38,715
United Kingdom	245,163	330,436	231,539	278,957	329,761	380,996	383,193	369,788
Sweden	31,854	35,098	38,543	37,690	42,223	45,124	52,002	55,640
Switzerland	24,121	22,428	26,507	31,938	31,688	34,297	34,066	36,890
European Union (1)	1,875,488	1,944,595	1,417,662	1,299,819	1,446,522	1,605,761	1,788,972	1,858,337
Total Europe (17 then 18 countries) (2)	1,931,236	2,004,044	1,474,591	1,364,050	1,508,927	1,674,452	1,860,218	1,932,680

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

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	96,830	88,364	75,014	82,233	81,057	85,002	87,695	88,071
Austria	8,508	8,235	5,138	7,320	6,706	7,151	7,829	8,041
Belgium	11,061	11,657	7,133	7,400	7,638	8,188	9,497	9,952
Denmark	4,597	5,902	2,682	4,233	3,628	4,687	5,033	4,950
Spain	33,700	39,753	13,215	12,900	15,896	22,043	24,340	24,286
Finland	3,072	3,492	2,368	3,076	2,168	2,400	2,924	3,182
France	57,918	55,281	34,221	43,265	37,559	41,714	47,134	50,419
Greece	1,633	1,589	1,081	317	335	439	276	426
Ireland	4,666	4,621	1,011	1,553	1,743	1,867	2,511	2,275
Italy	38,388	35,313	17,532	13,324	11,952	15,020	23,548	23,936
Luxembourg	1,451	1,394	803	966	1,020	1,089	1,232	1,234
Norway	3,564	4,952	3,126	4,688	4,657	4,366	5,060	5,097
The Netherlands	16,835	13,405	9,390	13,057	10,195	13,547	15,148	14,491
Portugal	7,403	4,588	3,116	2,201	3,071	3,956	4,783	5,155
United Kingdom	51,864	53,344	27,988	49,796	35,033	44,364	46,715	45,501
Sweden	5,549	5,688	4,605	4,698	5,089	5,289	6,340	6,662
Switzerland	4,733	3,817	3,388	3,503	4,426	4,079	4,165	4,605
European Union (1)	343,475	332,626	205,297	246,339	223,090	256,755	285,005	288,581
Total Europe (17 then 18 countries) (2)	351,772	341,395	211,811	254,530	232,173	265,383	294,512	298,674

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

	2000	2005	2010	2013	2014	2015	2016	2017
Germany	5,684	4,891	4,697	5,088	5,034	5,476	6,070	6,026
Austria	706	565	733	688	871	878	1,008	1,215
Belgium	974	754	909	626	982	778	593	715
Denmark	419	315	450	288	330	269	202	298
Spain	2,738	3,655	2,119	1,506	1,830	2,537	3,202	3,448
Finland		252	300	225	436	330	407	347
France	4,320	4,776	5,382	6,321	5,409	6,724	6,059	5,979
Greece	374	575	325	25	43	44	91	67
Ireland	121	271	47	163	206	313	362	339
Italy	4,152	4,514	3,931	2,401	1,800	2,163	2,509	2,944
Luxembourg	108	147	173	167	156	247	196	235
Norway	427	708	1,052	910	697	660	1,148	723
The Netherlands	949	1,134	524	587	649	332	817	871
Portugal	806	620	418	155	170	199	278	300
United Kingdom	4,496	4,630	3,203	3,648	3,373	3,931	4,245	3,706
Sweden	1,071	1,021	1,302	1,080	1,207	1,172	1,158	1,141
Switzerland	491	457	476	534	568	689	607	641
European Union (1)	26,918	28,120	24,513	22,968	22,496	25,393	27,197	27,631
Total Europe (17 then 18 countries) (2)	27,836	29,285	26,041	24,412	23,761	26,776	29,055	29,032

(1) European Union: 9 countries in 1980, 10 in 1985, 12 from 1990 to 1994, 15 since 1995.
(2) Including Iceland since 2015.

REGISTRATIONS

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

	2000	2005	2010	2013	2014	2015	2016	2017
Bulgaria	-	-	15,646	20,718	21,186	24,256	28,216	32,902
Croatia	62,009	70,541	38,587	27,802	33,962	35,715	44,106	50,769
Estonia	10,600	19,640	10,295	19,694	21,135	21,033	22,997	25,618
Hungary	133,233	198,982	43,476	56,139	67,476	77,171	96,555	116,265
Latvia	7,300	16,602	6,365	10,636	12,452	13,766	16,357	16,698
Lithuania	6,158	10,467	7,970	12,163	14,461	17,071	20,284	25,836
Poland	478,752	235,522	333,490	288,998	325,371	352,378	418,033	487,593
Czech Republic	148,592	151,699	169,580	164,746	192,314	230,857	259,693	271,595
Romania	64,432	215,554	106,333	57,710	70,172	81,162	94,919	105,083
Slovakia	55,090	57,125	64,033	66,000	72,252	77,979	88,165	96,105
Slovenia	67,665	59,324	61,142	51,585	53,959	59,664	58,963	62,522
Total new EU member states (1)	907,400	749,361	818,330	776,191	884,740	991,052	1,148,288	1,290,986

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

	2000	2005	2010	2013	2014	2015	2016	2017
Bulgaria	-	-	3,211	3,346	4,208	4,875	4,321	5,157
Croatia	3,360	7,671	2,845	5,309	5,240	6,909	8,359	8,535
Estonia	1,500	2,944	1,406	2,943	3,296	3,962	4,423	4,834
Hungary	26,686	20,479	9,337	11,573	16,066	17,719	21,545	20,200
Latvia	900	1,753	649	2,380	2,688	2,473	2,324	2,337
Lithuania	1,270	3,371	1,044	1,967	2,160	2,533	3,003	3,410
Poland	33,653	35,985	42,852	42,532	47,643	55,207	57,135	59,057
Czech Republic	14,786	16,024	11,318	11,768	13,346	17,595	19,472	19,529
Romania	14,789	35,842	10,404	10,046	11,399	13,471	15,269	16,898
Slovakia	5,812	14,428	6,953	5,094	5,661	7,321	7,499	7,584
Slovenia	6,274	6,897	4,744	6,072	6,373	6,686	7,782	8,742
Total new EU member states (1)	90,900	101,881	91,918	103,030	118,080	138,751	151,132	156,283

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

	2000	2005	2010	2013	2014	2015	2016	2017
Bulgaria	-	-	18,857	24,064	25,394	29,131	32,537	38,059
Croatia	65,369	78,212	41,432	33,111	39,202	42,624	52,465	59,304
Estonia	12,100	22,584	11,701	22,637	24,431	24,995	27,420	30,452
Hungary	159,919	219,461	52,813	67,712	83,542	94,890	118,100	136,465
Latvia	8,200	18,355	7,014	13,016	15,140	16,239	18,681	19,035
Lithuania	7,428	13,838	9,014	14,130	16,621	19,604	23,287	29,246
Poland	512,405	271,507	376,342	331,530	373,014	407,585	475,168	546,650
Czech Republic	163,378	167,723	180,898	176,514	205,660	248,452	279,165	291,124
Romania	79,221	251,396	116,737	67,756	81,571	94,633	110,188	121,981
Slovakia	60,902	71,553	70,986	71,094	77,913	85,300	95,664	103,689
Slovenia	73,939	66,221	65,886	57,657	60,332	66,350	66,745	71,264
Total new EU member states (1)	998,300	851,242	910,248	879,221	1,002,820	1,129,803	1,299,420	1,447,269

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

	2000	2005	2010	2013	2014	2015	2016	2017
Bulgaria (2)			1,000	1,300	1,300	1,500	1,700	1,900
Croatia	612	1,463	599	708	994	1,044	1,464	1,479
Estonia	400	927	502	1,034	910	934	979	1,207
Hungary	2,900	4,400	2,408	5,263	5,177	6,045	5714	6238
Latvia	1,000	1,284	520	1,323	954	1,372	1663	1670
Lithuania	1,000	2,297	1,355	3,456	2,373	3,633	6055	7205
Poland	7,464	11,079	11,611	19,748	17,884	23,226	27300	28329
Czech Republic	6,400	8,200	5,750	8,787	10,199	12,416	12629	10725
Romania	3,113	5,019	2,686	3,491	4,168	6,485	8260	6360
Slovakia	1,796	3,754	2,870	4,131	4,063	4,637	4783	4588
Slovenia	1,876	1,635	985	1,255	1,607	2,025	2,537	2,521
Total new EU member states (1)	22,800	33,500	29,700	50,500	49,600	63,300	73,000	72,300

(1) New EU member states: 8 countries in 2000; 10 countries between 2006 and 2012; 11 countries since 2013.
(2) CCFA estimates.

WORLD PRODUCTION BY FRENCH GROUPS

► WORLD VEHICLE PRODUCTION BY BRAND (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	1,168,470	1,379,082	1,452,847	1,261,890	1,176,273	1,153,855	1,135,894	1,054,146
DS	-	-	-	-	115,835	103,342	85,218	51,473
Peugeot	1,708,968	1,996,284	2,152,331	1,552,416	1,602,350	1,702,393	1,915,220	2,126,674
Opel	-	-	-	-	-	-	-	400,324
Others	-	-	-	19,587	22,670	22,191	16,527	17,125
PSA group	2,877,438	3,375,366	3,605,178	2,833,893	2,917,128	2,981,781	3,152,859	3,649,742
Renault	2,356,616	2,326,359	2,099,027	2,128,489	2,091,282	2,255,701	2,664,073	2,792,190
Alpine	-	-	-	-	-	-	-	117
Dacia	55,183	172,021	341,090	443,879	517,537	570,533	612,728	690,170
Renault Samsung Motors	14,517	118,438	276,169	132,307	153,150	206,418	234,147	264,020
Lada	-		-	-	-	-	-	407,092
Renault group (1)	2,426,316	2,616,818	2,716,286	2,704,675	2,761,969	3,032,652	3,510,948	4,153,589
C.B.M.	-	-	-	-	-	-	-	-
Renault Trucks (2)	96,040	63,961	31,874	n/a	n/a	n/a	n/a	n/a
of which Mack Trucks	34,562	-	-	-	-	-	-	-
Etalmobil (Sovam)	44	27	0	0	0	0	0	0
Unic	-	-	-	-	-	-	-	-
Heuliez (3)	391	-	-	-	-	-	-	-
Irisbus-Renault (3)	2,547	-	-	-	-	-	-	-
TOTAL (4)	5,402,776	6,056,172	6,353,338	5,538,568	5,679,097	6,014,433	6,663,807	7,794,624

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

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	192,238	205,376	180,462	169,728	177,494	185,969	195,360	204,000
Peugeot	186,917	187,300	210,252	198,577	195,048	208,075	217,665	230,862
Opel	-	-	-	-	-	-	-	35,635
Others	-	-	-	19,587	22,670	22,191	16,527	17,125
PSA group	379,155	392,676	390,714	387,892	395,212	416,235	429,552	487,622
Renault	312,801	401,785	302,706	335,987	341,427	387,670	420,564	397,037
Dacia	12,580	19,871	17,704	20,610	21,987	28,208	31,238	34,484
Renault group (1)	325,381	421,656	320,410	356,597	363,414	415,878	451,802	431,521
C.B.M.	-	-	-	-	-	-	-	-
Renault Trucks (2)	96,040	63,961	31,874	n/a	n/a	n/a	n/a	n/a
of which Mack Trucks	34,562	-	-	-	-	-	-	-
Etalmobil (Sovam)	44	27	0	0	0	0	0	0
Unic	-	-	-	-	-	-	-	-
Heuliez (3)	391	-	-	-	-	-	-	-
Irisbus-Renault (3)	2,547	-	-	-	-	-	-	-
TOTAL (4)	803,558	878,320	742,998	744,654	758,626	832,113	881,354	910,440

► VEHICLE PRODUCTION IN FRANCE BY FRENCH AND FOREIGN MANUFACTURERS (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
FOREIGN MANUFACTURERS								
Bugatti	-	5	0	-	-	-	-	-
Fiat	10,377	8,304	888	-	-	-	-	-
Heuliez-Opel	-	37,390	0	0	0	0	0	0
Lancia	2,265	5,713	1,561	-	-	-	-	-
Smart	101,365	77,015	97,373	98,239	87,195	93,357	90,725	84,368
Toyota	0	180,643	158,512	192,166	226,208	228,033	237,851	233,506
Passenger cars	114,007	309,070	258,334	290,405	313,403	321,390	328,576	317,874
Light commercial vehicles (Fiat)	39,428	20,680	19,450	-	-	-		
Heavy trucks (Scania)	10,710	9,391	9,594	n/a	n/a	n/a	n/a	n/a
Irisbus-Heuliez	-	291	451	n/a	n/a	n/a	n/a	n/a
Irisbus	-	2,869	2,473	n/a	n/a	n/a	n/a	n/a
Evobus	535	527	551	n/a	n/a	n/a	n/a	n/a
Coaches and buses	535	3,687	3,475	n/a	n/a	n/a	n/a	n/a
Total foreign manufacturers	164,680	342,828	290,853	n/a	n/a	n/a	n/a	n/a
FRENCH MANUFACTURERS								
Total French manufacturers (4)	3,183,681	3,206,180	1,938,528	1,445,489	1,502,806	1,656,470	1,753,473	1,907,845
FRENCH AND FOREIGN MANUFACTURERS								
Total all vehicles (4)	3,348,361	3,549,008	2,229,381	1,735,894	1,816,209	1,977,860	2,082,049	2,225,719

Source: CCFA

(1) In 1999, Renault took control of Dacia, and then in September 2000, of Samsung Motors. The Renault Trafic II was manufactured by IBC, a UK-based subsidiary of General Motors and by Nissan in Spain (until 2014). Since 2006, some of its production has been accounted for in private cars.
(2) Between 1990 and 2000, Mack was integrated in Renault VI. In 2001, the heavy trucks activity of Renault was combined with that of AB Volvo. Renault VI was renamed Renault Trucks.
(3) On January 1, 1999, Renault VI (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.
(4) Excluding double counts (see page 84).

WORLD PRODUCTION BY FRENCH GROUPS

► PASSENGER CAR PRODUCTION BY BRAND (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	976,232	1,173,706	1,272,385	972,073	998,779	967,886	940,534	850,146
DS	-	-	-	120,089	115,835	103,342	85,218	51,473
Peugeot	1,522,051	1,808,984	1,942,079	1,353,839	1,407,302	1,494,318	1,697,555	1,895,812
Opel	-	-	-	-	-	-	-	364,689
PSA group	2,498,283	2,982,690	3,214,464	2,446,001	2,521,916	2,565,546	2,723,307	3,162,120
Renault	2,043,815	1,924,574	1,796,321	1,792,337	1,749,855	1,868,031	2,243,509	2,395,149
Alpine	-	-	-	-	-	-	-	117
Dacia	42,603	152,150	323,386	423,269	495,550	542,325	581,490	655,686
Renault Samsung Motors	14,517	118,438	276,169	132,307	153,150	206,418	234,147	264,020
Lada	-	-	-	-	-	-	-	407,092
Renault group (1)	2,100,935	2,195,162	2,395,876	2,348,078	2,398,555	2,616,774	3,059,146	3,722,064
TOTAL	4,599,218	5,177,852	5,610,340	4,794,079	4,920,471	5,182,320	5,782,453	6,884,184
of which production in France	2,765,803	2,803,891	1,665,797	1,163,730	1,180,381	1,241,794	1,300,111	1,436,389
Citroën	504,323	605,988	468,398	236,463	220,516	204,040	186,831	55,047
DS	-	-	-	117,222	89,013	80,980	70,468	45,363
Peugeot	1,094,756	1,155,292	722,214	496,762	563,618	607,150	648,536	884,415
Opel	-	-	-	-	-	-	-	28,820
PSA group	1,599,079	1,761,280	1,190,612	850,447	873,147	892,170	905,835	1,013,645
Renault	1,166,724	1,042,611	475,185	313,283	307,234	349,624	394,276	422,627
Alpine	-	-	-	-	-	-	-	117
Renault group (1)	1,166,724	1,042,611	475,185	313,199	307,234	349,624	394,276	422,744

(1) See notes page 82.

► PASSENGER CAR PRODUCTION BY MODEL IN 2017 (IN UNITS)

Brands/models	World production	Production in France	Production outside France
PSA group	3,162,120	1,013,645	2,148,475
Citroën	850,146	55,047	795,099
C-ZERO	1,167	0	1,167
C1	54,415	0	54,415
C3, C3 Aircross	337,013	2,403	334,610
C4, C4 Aircross	235,255	35,339	199,916
E-MEHARI	81	81	0
C-ELYSEE	86,467	0	86,467
C5, C5 Aircross	36,317	3,462	32,855
C6	6,064	0	6,064
NEMO	871	0	871
BERLINGO	78,698	0	78,698
SPACETOURER	13,764	13,762	2
Others	34	0	34
DS	51,473	45,363	6,110
DS3	28,542	28,542	
DS4	11,644	10,449	1,195
DS5	7,307	5,368	1,939
DS6	2,976	0	2,976
DS7	1,004	1,004	0
Peugeot	1,895,812	884,415	1,011,397
ION	868	0	868
108	54,512	0	54,512
206	176,572	0	176,572
208	311,083	192,686	118,397
2008	232,871	198,307	34,564
301	63,797		63,797
308	226,516	172,076	54,440
3008	230,612	212,592	18,020
5008	89,550	65,693	23,857
405	266,645	0	266,645
408	72,073	0	72,073
4008	53,030	0	53,030
508	21,213	20,565	648
BIPPER	1,207	0	1,207
PARTNER	71,113	0	71,113
TRAVELLER	14,963	14,960	3
Others	9,187	7,536	1,651

Brands/models	World production	Production in France	Production outside France
Opel	364,689	28,820	335,869
CORSA, ADAM, COMBO, MOKKA, CROSSLAND	188,594	0	188,594
ASTRA, ZAFIRA	94,705	0	94,705
CASCADA, INSIGNIA,	45,335	0	45,335
GRANDLAND	28,820	28,820	0
Others	7,235		7,235
Renault group	3,722,064	422,744	3,299,320
Renault	2,395,149	422,627	1,972,522
TWINGO	82,639	0	82,639
CLIO	437,119	67,529	369,590
KWID	141,346	0	141,346
KADJAR	152,758	0	152,758
CAPTUR	321,507	0	321,507
ZOE	29,670	29,670	0
LOGAN / SANDERO	408,288	0	408,288
DUSTER	156,130	0	156,130
MEGANE	276,529	109,197	167,332
FLUENCE	55,883	0	55,883
KOLEOS	47,832	0	47,832
TALISMAN	29,536	29,536	0
ESPACE	18,202	18,202	0
KANGOO	66,509	63,472	3,037
Others	171,201	105,021	66,180
Alpine	117	117	0
ALPINE	117	117	
Dacia	655,686	0	655,686
LOGAN / SANDERO	351,315	0	351,315
DUSTER	205,565	0	205,565
DOKKER	57,345	0	57,345
LODGY	41,461	0	41,461
Renault Samsung Motors	264,020	0	264,020
ROGUE	122,437	0	122,437
SM3 / FLUENCE	7,603	0	7,603
SM5 / LATITUDE	7,071	0	7,071
QM5 (KOLEOS)	72,049	0	72,049
SM6	48,537	0	48,537
SM7	6,323	0	6,323
Lada	407,092	0	407,092
GRANDA, KALINA, LARGUS, VESTA	282,938	0	282,938
PRIORA, 4X4	54,690	0	54,690
Others	69,464	0	69,464
Total	6,884,184	1,436,389	5,447,795

Renault also produced 3,367 Twizy at its Valladolid plant (Spain).
Source: CCFA

WORLD PRODUCTION BY FRENCH GROUPS

► LIGHT COMMERCIAL VEHICLE (UP TO 5T) PRODUCTION BY BRAND (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	192,238	205,376	180,462	169,728	177,494	185,969	195,360	204,000
Peugeot	186,917	187,300	210,252	198,577	195,048	208,075	217,665	230,862
Opel	-	-	-	-	-	-	-	35,635
Others	-	-	-	19,587	22,670	22,191	16,527	17,125
PSA group (1)	379,155	392,676	390,714	387,892	395,212	416,235	429,552	487,622
Renault (2)	312,801	401,785	302,706	335,987	341,427	387,670	420,564	397,041
Dacia	12,580	19,871	17,704	20,610	21,987	28,208	31,238	34,484
Renault group (1)	325,381	421,656	320,410	356,597	363,414	415,878	451,802	431,525
Renault Trucks (1)	8,321	9,460	0	0	0	0	0	0
Others	42	24	0	0	0	0	0	0
TOTAL (3)	712,899	823,816	711,124	744,489	758,626	832,113	881,354	910,440
of which production in France (3)	370,538	361,521	243,029	281,759	322,425	414,676	453,362	471,456
Citroën	53,561	58,223	42,882	38,793	40,680	41,471	45,752	40,876
Peugeot	67,629	68,166	38,514	30,656	33,201	39,058	40,320	58,073
Opel	-	-	-	-	-	-	-	8,707
Autres	-	-	-	19,587	22,670	22,191	16,527	16,747
PSA group (1)	121,190	126,389	81,396	89,036	96,551	102,720	102,599	124,403
Renault	240,985	225,648	161,633	192,723	225,874	311,956	350,763	355,760
Renault group (1)	240,985	225,648	161,633	192,723	225,874	311,956	350,763	355,760
Renault Trucks (1)	8,321	9,460	0	0	0	0	0	0
Others	42	24	0	0	0	0	0	0

(1) See notes page 74.
(2) Since 2006, some Renault Trafic II vehicles are classified as passenger cars.
(3) Excluding Opel's double count production in 2017.

► LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2017 (IN UNITS)

Brand/model	World production	Production in France	Production outside France
PSA group	487,622	124,403	363,219
Citroën	204,000	40,876	163,124
C3	8,934	416	8,518
C4	2,966	2,636	330
NEMO	5,695	0	5,695
BERLINGO	87,255	0	87,255
JUMPY	38,333	37,824	509
JUMPER	60,817	0	60,817
Peugeot	230,862	58,073	172,789
208	14,664	9,921	4,743
308	3,979	3,979	0
BIPPER	6,639	0	6,639
PARTNER	92,951	0	92,951
EXPERT	44,696	44,173	523
BOXER	67,933	0	67,933
Opel	35,635	8,707	26,928
CORSA	952	0	952
ASTRA	42	0	42
COMBO	5,865	0	5,865
MOVANO	8,189	8,189	0
VIVARO	20,587	518	20,069
Others	17,125	16,747	378
Renault group	431,525	355,760	75,765
Renault	397,041	355,760	41,281
KANGOO	126,400	100,767	25,633
LOGAN	3,657	0	3,657
TRAFIC	127,218	127,218	0
MASTER	136,288	127,771	8,517
Others	3,478	4	3,474
Dacia	34,484	0	34,484
DOKKER	34,484	0	34,484
TOTAL (1)	901,733	471,456	438,984

(1) Excluding Opel's double count production in 2017.
Source: CCFA

WORLD PRODUCTION BY FRENCH GROUPS

► HEAVY TRUCK (OVER 5T) PRODUCTION BY BRAND (IN UNITS)

	2000	2010	2012 (1)	2013	2014	2015	2016	2017
Renault Trucks (1)	87,719	31,874	38,231	32,295	25,702	31,598	31,933	34,026
of which Mack Trucks	34,562							
Others	2	0	0	0	0	0	0	0
TOTAL	87,721	31,874	38,231	32,295	25,702	31,598	31,933	34,026
of which production in France	44,402	29,702	-	-	-	-	-	-
Renault Trucks	44,400	29,702	-	-	-	-	-	-
Others	2	0	-	-	-	-	-	-

(1) The perimeter of heavy trucks carries on invoices of 7 tonnes and more since 2012.

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

	2000	2010	2012	2013	2014	2015	2016	2017
Renault Trucks	-	-	-	-	-	-	-	-
C.B.M.	-	-	-	-	-	-	-	-
Heuliez (1)	391	-	-	-	-	-	-	-
Irisbus-Renault (1)	2,547	-	-	-	-	-	-	-
TOTAL	2,938	-	-	-	-	-	-	-
of which production in France	2,938	-	-	-	-	-	-	-
Renault Trucks	-	-	-	-	-	-	-	-
Heuliez (1)	391	-	-	-	-	-	-	-
Irisbus-Renault (1)	2,547	-	-	-	-	-	-	-

(1) On January 1, 1999, Renault VI (Renault Trucks) sold its coach and bus business to Irisbus, part of Iveco.

► HEAVY TRUCK INVOICES BY RENAULT TRUCKS (IN UNITS)

	2012	2013	2014	2015	2016	2017
TOTAL	52,172	43,956	38,648	46,973	47,983	49,930
16t and more	30,771	25,302	21,266	26,111	25,976	28,327
7 to <16t	7,460	6,993	4,436	5,487	5,957	5,699
<7t	13,941	11,661	12,946	15,375	16,050	15,904

► RENAULT TRUCKS RANGE

Weight	Models
16t and more	T, K, C, D, D Wide
7 to <16t	D
<7t	Master, Maxity

Source: CCFA

WORLD PRODUCTION BY FRENCH GROUPS

► COMMERCIAL VEHICLE PODUCTION (INCLUDING COACHES AND BUSES) BY WEIGHT AND ENGINE TYPE (IN UNITS)

		2000	2005	2010	2013	2014	2015	2016	2017 (1)
Less than 3.5t		577,926	670,654	531,452	543,866	544,739	588,686	619,851	642,355
	P	55,883	39,019	61,998	61,407	52,488	46,973	54,803	86,109
	D	521,229	631,499	469,178	476,896	486,431	537,345	558,175	549,195
	E	814	136	276	5,563	5,820	4,368	6,873	7,051
From 3.5t to less than 5.1t		134,973	153,162	179,672	200,788	213,887	243,427	261,503	268,085
	P	1,724	719	0	0	0	0	0	0
	D	133,249	152,443	179,672	200,788	213,887	243,427	261,503	268,085
	E	-	-	-	-	-	-	-	-
From 5.1t to 12t	D	13,593	11,820	2,453	n/a	n/a	n/a	n/a	n/a
From 12t to 16t	D	5,009	5,685	3,066	n/a	n/a	n/a	n/a	n/a
From 16t to 20t	D	7,304	7,115	4,484	n/a	n/a	n/a	n/a	n/a
More than 20t	D	6,255	9,647	5,543	n/a	n/a	n/a	n/a	n/a
Tractors	D	20,998	20,237	16,328	n/a	n/a	n/a	n/a	n/a
Coaches - Buses		2,938	-	-	-	-	-	-	-
	D	2,606	-	-	-	-	-	-	-
	G	332	-	-	-	-	-	-	-
	E	-	-	-	-	-	-	-	-
Total petrol		57,607	39,738	61,998	61,407	52,488	46,973	54,803	86,109
Total diesel		710,243	838,446	680,724	n/a	n/a	n/a	n/a	n/a
Total electric		814	136	276	5,563	5,820	4,368	6,873	7,051
Total NGV ou LPG		332	-	-	-	-	-	-	-
TOTAL		768,996	878,320	742,998	n/a	n/a	n/a	n/a	n/a

P: Petrol. D: Diesel. E: Electric. G: NGV or LPG.
(1) Excluding Opel's double count production in 2017.

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

	2000	2005	2010	2013	2014	2015	2016	2017
Cars derivatives								
Citroën	29,449	26,227	14,972	13,590	13,072	11,715	13,905	11,900
Peugeot	41,451	38,133	33,403	22,650	18,720	19,122	19,073	18,643
Opel	-	-	-	-	-	-	-	6,859
PSA group	70,900	64,360	48,375	36,240	31,792	30,837	32,978	37,402
Renault-Dacia	60,320	55,009	48,167	34,325	37,810	40,158	35,984	3,657
Total	131,220	119,369	96,542	70,565	69,602	70,995	68,962	41,059
Small vans								
Citroën	100,832	97,954	98,042	88,466	89,765	90,957	91,048	92,950
Peugeot	70,443	70,480	97,608	96,754	93,909	95,144	96,641	99,590
Opel	-	-	-	-	-	-	-	0
PSA group	171,275	168,434	195,650	185,220	183,674	186,101	187,689	192,540
Renault-Dacia	147,670	118,404	97,142	137,447	109,070	117,863	124,282	126,400
Total	318,945	286,838	292,792	322,667	292,744	303,964	311,971	318,940
Vans								
Citroën	61,957	81,195	67,448	67,672	74,657	83,297	90,407	99,150
Peugeot	75,023	78,687	79,241	79,173	82,419	93,809	101,951	112,629
Opel (1)	-	-	-	-	-	-	-	28,776
Others	-	-	-	19,587	22,670	22,191	16,527	17,125
PSA group	136,980	159,882	146,689	166,432	179,746	199,297	208,885	257,680
Renault	104,811	228,372	148,404	157,682	189,314	224,799	259,484	263,506
Renault Trucks	8,321	9,460	0	0	0	0	0	0
Sovam-Etalmobil	42	24	0	0	0	0	0	0
Total (1)	250,154	397,738	295,093	324,114	369,060	424,096	468,369	512,479
4WD								
Peugeot	-	-	-	-	-	-	-	-
Pick-ups, small vans, others								
Renault-Dacia-Samsung	12,580	19,871	26,697	27,308	27,220	33,058	32,052	37,962

(1) Excluding Opel's double count production in 2017.
Source: CCFA

DELIVERIES BY FRENCH MANUFACTURERS OUTSIDE FRANCE

Since 2005, Dacia's exports are included in the scope of consolidation. It is the case as well for Renault Trafic's exports since 2006, and Renault Samsung Motors' in 2007 (180,973 passenger cars). Also certain exports are sent to regions and not specific countries. Lada is included in Renault group since January 1, 2017; Opel is included in PSA group since August 1, 2017.

► NEW PASSENGER CAR DELIVERIES BY DESTINATION (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Europe (1)	2,636,150	2,835,899	2,331,256	2,007,183	2,233,561	2,384,342	2,597,262	3,353,245
European Union (2)	2,261,904	2,424,350	1,893,455	1,469,718	1,659,147	1,871,647	2,068,564	2,489,355
Germany	337,743	365,860	299,072	237,280	266,233	266,587	339,993	461,107
Austria	41,510	48,779	50,767	42,564	41,119	41,349	45,844	56,045
Belgium-Luxembourg	172,806	171,552	182,241	149,689	142,305	146,015	151,959	172,589
Denmark	30,239	34,477	27,801	39,950	46,744	49,204	56,683	55,913
Spain	556,934	577,439	302,663	203,460	259,366	310,876	348,207	400,650
Greece	54,270	32,681	10,744	6,039	9,015	12,132	13,350	13,658
Italy	353,616	377,100	317,851	222,666	254,347	304,829	362,678	449,591
The Netherlands	120,438	99,707	108,951	87,484	95,028	106,236	90,353	109,383
Portugal	68,375	66,524	58,750	29,262	41,692	54,165	66,261	75,075
United Kingdom	432,507	413,743	280,244	243,338	275,266	294,142	290,542	316,137
Sweden	31,473	43,062	16,691	23,680	28,570	32,650	37,692	40,759
12 then 13 new EU member states (3)	-	276,433	176,330	159,864	185,575	170,849	184,142	357,494
CEEC/CIS (3)	164,814	214,335	206,868	288,395	375,470	258,054	262,982	569,893
Hungary	23,887	26,926	6,156	9,599	10,725	11,031	14,585	21,486
Poland	59,093	47,521	53,521	46,709	52,141	50,485	62,874	90,486
Romania	7,520	122,930	41,804	29,677	37,989	45,361	49,786	59,706
Russia	6,042	42,637	158,018	243,839	354,701	272,461	182,432	519,984
Switzerland	45,654	41,231	50,740	38,722	37,530	43,545	41,337	43,394
Turkey	148,264	142,160	168,456	201,600	152,800	211,096	224,379	250,603
Africa	69,865	103,130	171,484	257,752	230,637	241,078	196,459	197,313
South Africa	13,913	32,941	14,711	21,661	13,933	23,223	16,835	12,836
Maghreb	37,236	42,881	139,790	211,448	186,116	184,708	152,016	63,039
Nigeria	8,860	6,159	210	1,049	1,244	301	171	489
America	230,270	314,505	559,780	703,734	458,990	426,937	490,120	552,775
Argentina	97,605	70,099	149,746	243,448	122,434	122,408	177,049	208,607
Brazil	80,205	144,030	320,930	349,337	274,577	210,638	186,229	204,726
Colombia	16,659	36,499	6,329	2,383	49,331	50,819	51,825	42,000
Mexico	1,408	39,871	24,822	10,454	8,382	10,685	7,626	12,863
Asia (1)	166,261	512,772	1,201,459	833,072	1,001,386	1,070,526	1,422,282	1,535,988
Japan	15,976	16,323	12,346	13,180	12,687	25,072	18,016	19,291
China	54,334	143,756	392,569	587,311	766,683	756,268	635,296	459,825
Iran	45,722	304,326	516,121	28,547	27,913	38,176	340,139	600,958
India	-	-	4,488	64,368	44,849	50,877	132,235	128,365
South Korea	-	-	157,824	63,711	114,027	90,056	251,102	134,242
Pacific	9,984	16,698	14,079	16,827	16,793	17,929	11,188	22,099
Australia	2,765	11,872	9,761	11,827	11,933	13,435	6,805	15,639
TOTAL	3,174,447	3,841,448	4,306,065	3,842,199	3,961,884	4,159,198	4,735,057	5,695,129

► NEW COMMERCIAL VEHICLE DELIVERIES BY DESTINATION (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Europe (1)	379,289	401,860	357,998	368,180	434,133	456,712	513,113	571,410
European Union (2)	312,421	326,077	312,293	321,887	384,461	418,876	476,550	524,665
Germany	50,081	40,760	46,406	67,191	82,541	90,020	99,293	112,336
Austria	4,697	6,206	6,797	6,873	6,711	7,585	8,259	10,441
Belgium-Luxembourg	22,857	24,827	29,330	32,353	27,736	29,267	42,443	48,768
Spain	57,516	71,185	28,263	26,866	29,591	38,386	40,887	46,465
Italy	35,910	29,706	39,690	35,519	45,236	34,656	52,716	54,582
The Netherlands	23,087	11,630	13,848	13,822	14,273	15,904	22,367	23,711
Portugal	34,551	25,410	18,557	9,663	13,238	15,539	18,484	20,097
United Kingdom	55,647	64,554	60,997	70,458	97,429	101,797	94,776	102,984
12 then 13 new EU member states (3)		51,099	33,784	40,842	49,636	55,213	85,750	71,801
CEEC/CIS (3)	25,100	46,685	16,121	18,814	20,937	29,981	22,716	32,318
Poland	5,624	9,039	14,258	15,429	17,487	13,563	20,223	26,483
Switzerland	4,293	5,934	8,500	8,266	7,944	7,855	7,725	8,557
Africa	16,074	22,597	27,769	41,457	40,132	27,611	24,601	15,388
Maghreb	13,509	18,345	24,690	37,558	36,911	26,466	21,779	13,685
America	36,682	33,328	85,810	109,866	75,224	61,943	63,191	64,842
Asia (1)	8,260	11,781	5,632	5,562	6,634	9,512	9,018	11,200
Pacific	1,797	1,967	2,208	4,069	4,547	6,064	6,386	5,979
TOTAL	444,516	474,532	480,430	530,355	571,759	563,013	617,832	670,038

(1) Since 2004, exports to Cyprus are included in Europe, rather than Asia.
(2) European Union: 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 10 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.

PHYSICAL AND FINANCIAL DATA FROM THE AUTOMOTIVE MANUFACTURING INDUSTRY

Physical and financial data derive from annual enterprise surveys (EAE) on the automotive 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.

	Units	2000	2005	2010	2013	2014	2015	2016 (1)	2017 (1)
PHYSICAL DATA									
Employees (2)	units	190,830	185,061						
Employees on 12/31 (excluding temporary staff)				137,527	130,480	122,585	118,952	114,000	112,000
Production in France (only light vehicles since 2012)	thousands	3,348	3,549	2,229	1,736	1,816	1,978	2,082	2,226
Production per employee	units	17.5	19.2	16.2	13.3	14.8	16.6	18.3	19.9
FINANCIAL DATA									
Net sales	€ million	73,684	86,944	78,969	77,075	76,420	83,969	88,000	97,000
Export sales	€ million	42,290	51,988	45,526	45,487	47,288	54,290	57,000	63,000
Exports as a % of total sales	%	57.4%	59.8%	57.6%	59.0%	61.9%	64.7%	64.8%	64.9%
Added value before tax	€ million	13,282	14,481	10,112	8,288	9,643	11,332	12,000	12,900
Added value / sales	%	18.0%	16.7%	12.8%	10.8%	12.6%	13.5%	13.6%	13.3%
Added value per employee	€ thousand	70	78	74	64	79	95	105	115
Social costs	€ million	2,153	2,546	2,302	2,176	2,030	2,072		
Social costs per employee	€ thousand	11.3	13.8	16.7	16.7	16.6	17.4		
Wages and salaries	€ million	5,093	6,216	5,696	5,696	5,355	5,186		
Wages and salaries per employee	€ thousand	26.7	33.6	41.4	43.7	43.7	43.6		
Personnel costs	€ million	7,246	8,761	7,999	7,872	7,384	7,258		
Personnel costs per employee	€ thousand	38.0	47.3	58.2	60.3	60.2	61.0		
Personnel costs / added value	%	54.6%	60.5%	79.1%	95.0%	76.6%	64.0%		
Gross operating surplus	€ million	5,201	4,613	1,340	-378	1,502	3,293		
Gross operating surplus / added value	%	39.2%	31.9%	13.3%	-4.6%	15.6%	29.1%		
Interest expense	€ million	1,178	900	2,862	2,058	3,104	2,337		
Interest expense / added value	%	8.9%	6.2%	28.3%	24.8%	32.2%	20.6%		
Interest income	€ million	2,508	2,029	2,191	2,251	3,102	2,523		
Interest income / added value	%	18.9%	14.0%	21.7%	27.2%	32.2%	22.3%		
Net interest income	€ million	1,330	1,128	-671	193	-3	186		
Net interest income / added value	%	10.0%	7.8%	-6.6%	2.3%	0.0%	1.6%		
Cash flow	€ million	5,499	4,236	1,078	-310	2,954	3,291		
Cash flow / added value	%	41.4%	29.3%	10.7%	-3.7%	30.6%	29.0%		
Net income (loss)	€ million	2,851	1,086	293	nd	-12.1	1,244		
Net income / sales	%	3.9%	1.2%	0.4%	nd	0.0%	1.5%		
Capital expenditure	€ million	3,807	3,214						
Gross fixed investments exclusive of contributions	€ million			2,078	1,913	1,850	1,959	2,100	2,100
Capital expenditure / sales	%	5.2%	3.7%	2.6%	2.5%	2.4%	2.3%	2.4%	2.2%
Capital expenditure / added value	%	28.7%	22.2%	20.6%	23.1%	19.2%	17.3%	17.5%	16.3%

(1) CCFA estimates based on industry data and INSEE
(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 FROM THE AUTOMOTIVE EQUIPMENT INDUSTRY

The physical and financial data in the table below are taken from surveys (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 standardised 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.

	Units	2000	2005	2010	2013	2014	2015	2016 (1)	2017 (1)
PHYSICAL DATA									
No. of companies (>20 employees up to 2007)	units	243	204	639	624	764	611		
Employees (2)	units	94,171	85,928						
Employees on 12/31 (excluding temporary staff)				61,759	86,624	84,271	81,309	79,000	79,000
FINANCIAL DATA									
Sales before tax	€ million	17,766	19,889	16,056	20,356	20,793	22,157	24,000	26,000
Export sales	€ million	7,512	8,291	7,865	10,057	9,837	11,159		
Exports as a % of total sales	%	42.3%	41.7%	49.0%					
Exports as a % of production (source: FIEV)				51%	55%	54%	55%	54%	54%
Added value before tax	€ million	4,643	4,869	3,885	5,187	5,324	5,664	6,000	6,400
Added value / sales before tax	%	26.1%	24.5%	24.2%	25.5%	25.6%	25.6%	25.0%	24.6%
Added value per employee before tax	€ thousand	49	57	63	60	63	70	76	81
Social costs	€ million	902	1,009	937	1,389	1,360	1,357		
Social costs per employee	€ thousand	9.6	11.7	15.2	16.0	16.1	16.7		
Wages and salaries	€ million	2,213	2,374	2,302	3,232	3,249	3,186		
Wages and salaries per employee	€ thousand	23.5	27.6	37.3	37.3	38.5	39.2		
Personnel costs	€ million	3,115	3,383	3,239	4,621	4,608	4,543		
Personnel costs per employee	€ thousand	33.1	39.4	52.4	53.3	54.7	55.9		
Personnel costs / added value	%	67.1%	69.5%	83.4%	89.1%	86.6%	80.2%		
Gross operating surplus	€ million	1,206	1,121	412	247	409	818		
Gross operating surplus / added value	%	26.0%	23.0%	10.6%	4.8%	7.7%	14.4%		
Interest expense	€ million	440	253	177	339	250	301		
Interest expense / added value	%	9.5%	5.2%	4.6%	6.5%	4.7%	5.3%		
Interest income	€ million	337	285	217	355	295	661		
Interest income / added value	%	7.3%	5.9%	5.6%	6.8%	5.5%	11.7%		
Net interest income	€ million	-103	32	40	15	46	360		
Net interest income / added value	%	-2.2%	0.7%	1.0%	0.3%	0.9%	6.4%		
Cash flow	€ million	889	834	341	345	434	1,188		
Cash flow / added value	%	19.2%	17.1%	8.8%	6.7%	8.2%	21.0%		
Net income (loss)	€ million	-92	83	-17	-154	-84	702		
Net income / sales	%	-0.5%	0.4%	-0.1%	-0.8%	-0.4%	3.2%		
Capital expenditure	€ million	1,024	687						
Gross fixed investments exclusive of contributions	€ million			413	708	663	856		
Capital expenditure / sales	%	5.8%	3.5%	2.6%	3.5%	3.2%	3.9%		
Capital expenditure / added value	%	22.0%	14.1%	10.6%	13.7%	12.4%	15.1%		

(1) CCFA and FIEV estimates based on industry data and INSEE.
(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 (IN UNITS)

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

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	261,508	271,273	301,607	194,728	199,382	201,065	195,011	201,373
DS	-	-	26,539	43,589	31,746	30,257	28,081	21,323
Opel (1)	-	-	-	-	-	-		27,016
Peugeot	397,547	362,157	400,663	289,587	305,014	327,393	335,881	366,872
Alpine	-	-	-	-	-	-		7
Dacia	-	-	104,641	89,844	102,516	97,441	110,529	117,865
Renault	602,415	524,415	497,820	337,608	353,890	382,504	407,930	416,577
Bolloré	-	-	0	658	1,170	1,191	944	56
Others France	63	148	54	249	52	50	51	101
French groups	1,261,533	1,157,993	1,331,324	956,263	993,770	1,039,901	1,078,427	1,151,190
Alfa Romeo	12,774	13,845	13,033	8,047	7,608	6,353	7,334	9,208
Audi	34,937	44,283	50,936	59,147	56,395	58,734	64,686	65,690
BMW	31,576	40,462	46,074	46,742	47,682	53,558	60,521	61,309
Fiat	95,983	46,154	72,717	47,683	45,737	54,443	62,544	68,196
Ford	117,061	103,587	114,810	76,470	75,089	80,729	79,173	- 84,382
Honda	8,716	8,879	11,251	8,846	7,091	7,325	9,143	8,491
Hyundai	11,019	27,389	18,785	25,738	17,165	23,968	28,043	29,570
Infiniti	-	-	267	197	669	1,139	3,295	1,985
Jaguar	1,939	2,112	1,126	879	715	1,530	3,738	3,541
Jeep	3,001	3,522	1,177	1,327	2,783	8,585	9,983	10,892
Kia	2,631	18,067	24,056	33,503	28,186	29,146	33,684	37,235
Lada	1,867	1,671	346	59	9	3	2	0
Lancia	5,864	4,414	3,368	4,812	6,105	1,469	185	34
Land Rover	7,570	6,932	2,735	6,716	6,794	8,846	10,388	9,079
Lexus	-	-	1,921	2,960	3,486	4,457	5,100	5,390
Mazda	6,366	11,437	10,232	6,272	6,062	8,418	10,320	11,778
Mercedes	43,389	54,628	45,612	46,966	49,148	55,376	62,060	68,007
Mini	-	12,613	18,007	19,099	18,277	22,512	25,176	26,431
Mitsubishi	5,575	6,752	3,514	3,448	3,496	3,936	2,922	2,378
Nissan	31,330	40,806	54,084	62,983	68,072	74,102	69,072	71,492
Opel (1)	133,576	106,454	94,877	59,620	61,246	64,170	68,280	45,548
Porsche	825	2,375	2,073	2,813	3,449	4,943	5,396	5,457
Rover	13,474	1,980	0	0	0	0	0	0
Saab	3,265	2,701	574	7	0	0	0	0
Seat	40,562	32,738	30,645	22,039	21,090	22,009	21,648	24,714
Skoda	11,570	15,042	18,533	19,341	20,412	21,759	23,620	26,799
Smart	6,645	12,646	6,408	5,267	4,149	8,107	8,980	8,162
Ssangyong	19	3,969	451	209	344	636	963	669
Subaru	2,312	1,462	1,146	928	731	841	851	721
Suzuki	11,355	21,110	22,070	15,485	15,835	18,506	20,528	25,043
Tesla	-	-	11	38	328	708	944	1,368
Toyota	43,698	87,406	65,390	71,693	66,774	71,755	77,696	88,662
Volkswagen	152,868	135,975	146,538	141,427	139,554	144,103	143,101	139,360
Volvo	6,777	11,089	11,841	11,024	12,459	13,876	15,599	16,219
TOTAL FOREIGN (2)	872,351	909,796	920,345	834,193	802,115	877,325	936,750	959,558
TOTAL ALL CATEGORIES	2,133,884	2,067,789	2,251,669	1,790,456	1,795,885	1,917,226	2,015,177	2,110,748
of which Temporary Transit	-	-	39,011	34,205	30,648	31,665	31,448	31,762
FRENCH GROUPS AS A %	59.1%	56.0%	59.1%	53.4%	55.3%	54.2%	53.5%	54.5%
TOTAL FOREIGN AS A %	40.9%	44.0%	40.9%	46.6%	44.7%	45.8%	46.5%	45.5%

(1) Opel is included in PSA group since August 1, 2017. Thus, its registrations are included in PSA group from 08/01/2017 to 12/31/2017.
(2) Including others.

► USED PASSENGER CAR REGISTRATIONS (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
TOTAL ALL CATEGORIES	5,082,122	5,383,361	5,386,007	5,317,717	5,446,131	5,562,082	5,643,348	5,678,598
Used/new ratio	2.4	2.6	2.4	3.0	3.0	2.9	2.8	2.7

► USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
TOTAL ALL CATEGORIES	651,033	718,948	806,398	750,371	772,709	789,073	806,052	798,347
Used/new ratio	1.6	1.7	1.9	2.0	2.1	2.1	2.0	1.8

REGISTRATIONS

► NEW DIESEL PASSENGER CAR REGISTRATIONS BY BRAND (IN UNITS)

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

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	138,628	182,569	228,977	144,873	134,756	113,446	93,165	85,109
DS	-	-	14,864	29,082	21,190	15,281	13,157	9,031
Peugeot	206,153	258,712	307,518	203,291	214,419	190,548	176,231	178,061
Opel (1)	-	-	-	-	-	-	-	9,126
Dacia	-	-	53,737	58,334	64,895	54,326	48,735	51,174
Renault	257,909	357,094	352,530	236,972	224,489	233,998	233,354	220,723
FRENCH GROUPS (2)	602,711	798,437	957,626	672,552	659,749	607,599	564,642	553,224
Alfa Romeo	7,444	27,196	8,432	5,145	4,273	2,995	3,307	4,726
Audi	25,901	76,476	45,201	48,513	45,192	44,445	46,529	41,495
BMW-Mini	21,065	4,470	50,906	54,094	53,289	57,145	60,739	54,330
Chrysler-Dodge-Jeep	4,161	22,129	2,863	1,203	2,462	7,183	7,345	7,969
Fiat-Lancia	38,337	27,196	28,240	15,686	13,199	16,935	18,384	18,066
Ford	58,896	76,476	89,334	44,174	40,861	41,986	39,398	38,902
Honda	413	4,470	5,029	5,051	4,111	4,364	4,709	3,205
Hyundai	5,510	22,129	13,174	18,472	10,592	15,069	16,572	13,230
Kia	1,200	10,597	15,428	19,948	17,327	15,870	17,322	16,548
Land Rover	5,656	6,560	2,637	6,524	6,473	8,192	9,879	8,731
Mazda	3,204	6,061	6,768	5,221	4,792	4,802	4,466	4,353
Mercedes	30,007	44,079	41,460	41,355	43,542	47,646	50,748	53,274
Mitsubishi	3,227	4,793	3,102	2,828	1,953	2,053	1,905	1,062
Nissan-Infiniti	15,533	23,454	35,092	47,899	48,843	46,879	44,310	43,815
Opel (1)	63,726	75,944	63,751	32,343	31,738	29,335	27,444	16,232
Rover	7,480	1,482	0	0	0	0	0	0
Seat	27,861	26,378	25,462	14,467	11,696	10,683	8,478	7,456
Skoda	7,741	12,381	14,781	12,601	13,870	12,930	12,773	13,908
Suzuki	3,165	11,969	9,263	4,649	3,947	4,359	4,038	2,448
Toyota-Lexus	12,282	54,560	35,744	23,546	20,332	17,879	11,141	6,582
Volkswagen	89,487	106,909	118,702	99,149	91,387	80,893	75,422	68,608
Volvo	4,786	10,247	11,614	10,332	11,545	12,747	13,541	13,602
TOTAL FOREIGN (2)	443,774	630,600	635,547	527,177	486,909	489,525	485,776	444,892
TOTAL ALL CATEGORIES	1,046,485	1,429,037	1,593,173	1,199,729	1,146,658	1,097,124	1,050,418	998,116
of which Temporary Transit	-	37,259	34,432	31,988	27,127	27,141	22,887	20,180
% diesel	49.0%	69.1%	70.8%	67.0%	63.8%	57.2%	52.1%	47.3%
FRENCH GROUPS AS A %	57.6%	55.9%	60.1%	56.1%	57.5%	55.4%	53.8%	55.4%
TOTAL FOREIGN AS A %	42.4%	44.1%	39.9%	43.9%	42.5%	44.6%	46.2%	44.6%

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

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	77,048	73,166	70,579	61,601	63,233	59,295	62,418	68,979
DS	-	-	259	730	625	489	485	259
Opel (1)	-	-	-	-	-	-	-	3,232
Peugeot	74,950	73,778	72,228	60,469	59,197	59,649	65,771	73,628
Dacia	-	-	5,434	3,959	3,377	2,594	1,582	1,492
Renault	139,752	140,059	135,591	116,282	117,823	124,634	131,742	137,927
Others France	40	10,076	528	807	953	905	1,348	896
FRENCH GROUPS	291,790	297,079	284,619	243,848	245,208	247,566	263,346	286,413
Fiat	25,253	12,497	34,659	33,021	30,757	32,071	36,626	36,693
Ford	18,110	19,695	20,437	16,929	20,273	22,534	25,567	28,810
Hyundai	588	1,380	237	299	194	195	256	227
Isuzu	108	1,370	1,961	2,167	1,960	2,024	2,030	1,858
Iveco	16,534	15,721	11,610	10,837	11,555	11,414	13,519	14,356
Land Rover	1,857	1,256	1,550	1,516	1,796	2,591	776	463
Mazda	916	635	482	60	63	58	73	76
Mercedes	23,139	18,973	19,051	18,024	17,710	18,643	19,767	19,890
Mitsubishi	3,392	1,350	2,639	1,625	1,341	1,836	1,998	1,858
Nissan	5,197	9,746	7,307	8,761	8,617	7,260	10,121	10,111
Opel (1)	7,561	12,617	7,195	5,404	5,545	6,782	6,992	4,339
Toyota	1,771	2,587	4,013	3,932	4,669	5,210	5,322	6,927
Volkswagen	13,819	10,043	13,249	15,563	17,552	16,375	18,359	21,080
TOTAL FOREIGN (2)	123,176	122,986	132,993	123,483	126,866	131,860	146,756	152,241
TOTAL ALL CATEGORIES	414,966	420,065	417,612	367,331	372,074	379,426	410,102	438,654
FRENCH GROUPS AS A %	70.3%	70.7%	68.2%	66.4%	65.9%	65.2%	64.2%	65.3%
TOTAL FOREIGN AS A %	29.7%	29.3%	31.8%	33.6%	34.1%	34.8%	35.8%	34.7%

(1) Opel is included in PSA group since August 1, 2017. Thus, its registrations are included in PSA group from 08/01/2017 to 12/31/2017.
(2) Including others.

REGISTRATIONS

► NEW PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY BRAND (IN UNITS)

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

	2000	2005	2010	2013	2014	2015	2016	2017
Citroën	338,556	344,439	372,186	256,329	262,615	260,360	257,429	270,352
DS	-	-	26,798	44,319	32,371	30,746	28,566	21,582
Opel (1)	-	-	-	-	-	-	-	30,248
Peugeot	472,497	435,935	472,891	350,056	364,211	387,042	401,652	440,500
Alpine	-	-	-	-	-	-	-	7
Dacia	-	-	110,075	93,803	105,893	100,035	112,111	119,357
Renault	742,167	664,474	633,411	453,890	471,713	507,138	539,672	554,504
FRENCH GROUPS	1,553,323	1,455,072	1,615,943	1,200,111	1,238,978	1,287,467	1,341,773	1,437,603
Fiat	121,236	58,651	107,376	80,704	76,494	86,514	99,170	104,889
Ford	135,171	123,282	135,247	93,399	95,362	103,263	104,740	113,192
Land Rover	9,427	8,188	4,285	8,232	8,590	11,437	11,164	9,542
Mercedes	66,528	73,601	64,663	64,990	66,858	73,086	81,827	87,897
Nissan-Infiniti	36,527	50,552	61,658	71,941	77,358	76,001	82,488	81,603
Opel (1)	141,137	119,071	102,072	65,024	66,791	70,952	75,272	49,887
Rover	13,564	1,982	0	0	0	0	0	0
Seat	42,230	33,024	31,080	22,039	21,090	22,009	21,648	24,714
Toyota-Lexus	45,469	89,993	71,324	74,968	74,929	81,422	88,118	100,979
Volkswagen	166,687	146,018	159,787	156,990	157,106	160,478	161,460	160,440
TOTAL FOREIGN	995,527	1,032,782	1,053,338	957,676	928,981	1,009,185	1,083,506	1,111,799
TOTAL ALL CATEGORIES	2,548,850	2,487,854	2,669,281	2,157,787	2,167,959	2,296,652	2,425,279	2,549,402
TOTAL FRANCE AS A %	60.9%	58.5%	60.5%	55.6%	57.1%	56.1%	55.3%	56.4%
TOTAL FOREIGN AS A %	39.1%	41.5%	39.5%	44.4%	42.9%	43.9%	44.7%	43.6%

(1) Opel is included in PSA group since August 1, 2017. Thus, its registrations are included in PSA group from 08/01/2017 to 12/31/2017.

► NEW HEAVY TRUCK (OVER 5T) REGISTRATIONS BY BRAND (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
Renault Trucks	20,818	18,339	10,908	12,069	10,367	11,568	12,531	13,954
FRENCH GROUPS	20,992	18,465	10,964	12,105	10,423	11,584	12,553	13,963
DAF	4,365	6,321	4,464	5,388	4,193	4,723	5,815	6,118
Iveco	6,998	5,901	4,003	4,449	4,354	4,783	5,293	5,417
MAN	3,498	4,545	2,729	4,145	3,811	4,581	4,910	5,058
Mercedes	9,976	9,325	5,229	7,766	5,911	6,128	7,089	7,526
Scania	4,963	4,417	2,553	3,499	3,626	4,359	5,219	5,512
Volvo	6,739	5,870	3,938	5,507	4,912	5,219	5,789	6,321
TOTAL FOREIGN	36,924	36,819	23,257	31,160	27,136	30,132	34,582	36,465
TOTAL ALL CATEGORIES	57,916	55,284	34,221	43,265	37,559	41,716	47,135	50,428
TOTAL FRANCE AS A %	36.2%	33.4%	32.0%	28.0%	27.8%	27.8%	26.6%	27.7%
TOTAL FOREIGN AS A %	63.8%	66.6%	68.0%	72.0%	72.2%	72.2%	73.4%	72.3%

► USED HEAVY TRUCK (OVER 5T) REGISTRATIONS (IN UNITS)

	2000	2005	2010	2013	2014	2015	2016	2017
TOTAL	59,056	55,975	55,591	51,418	47,227	47,336	51,231	53,275
Used/new ratio	1.0	1.0	1.6	1.2	1.3	1.1	1.1	1.1

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

	2000	2005	2010	2013	2014	2015	2016	2017
Renault	1,633	-	-	-	-	-	-	-
Others France	367	-	-	-	-	-	-	-
Kässbohrer-Setra	261	-	-	-	-	-	-	-
Mercedes	602	-	-	-	-	-	-	-
TOTAL	4,320	-	-	-	-	-	-	-
Iveco Bus group (1)	-	2,459	2,412	2,902	2,483	3,197	2,917	2,419
Evobus group (2)	-	888	1,433	1,933	1,964	2,050	1,646	1,672
VGF group (3)	-	404	559	323	247	589	465	458
Bova	-	198	116	28	1	0	0	0
Temsa	-	301	309	229	121	146	158	235
Van Hool	230	238	169	138	93	98	126	108
Yutong				23	82	96	118	127
Others	-	237	384	745	418	548	629	960
TOTAL	-	4,773	5,382	6,321	5,409	6,724	6,059	5,979

(1) Iveco Bus group: Iveco and Iveco Bus, Irisbus, Heuliez.
(2) Evobus: Kässbohrer-Setra and Mercedes.
(3) VGF: MAN and Neoplan, Scania since 2015.

VEHICLE OWNERSHIP

► MOTORISATION RATE (INTERNATIONAL COMPARISONS)

NUMBER OF CARS AND COMMERCIAL VEHICLES PER 1,000 INHABITANTS ON DECEMBER 31

	1985	1995	2005	2015
European Union 28 countries	-	-	530	582
European Union 15 countries (1)	380	473	580	602
13 new EU member states	-	-	345	500
Germany	450	529	597	593
Belgium	363	463	527	569
Spain	276	430	580	595
France	446	520	591	598
Italy	412	541	666	706
United Kingdom	379	474	571	587
Sweden	400	445	514	540
Poland	117	229	388	628
Turkey	27	65	124	195
Canada	559	562	585	646
USA	708	759	803	821
South Korea	25	177	328	417
Japan	375	527	592	609
Argentina	173	167	181	316
Brazil	86	89	124	206
China	3	8	24	118
India	3	6	9	22

(1) Since 1995, the European Union includes 15 countries.
Sources: CCFA estimates, then OICA since 2005

► TOTAL VEHICLES IN USE (IN THOUSANDS) (ON JANUARY 1, 2018)

	All fuels	Diesel	Others (1)
Passenger cars			
5 HP and less	14,964	8,038	6,926
From 6 HP to 10 HP	16,038	10,928	5,110
11 HP and more	1,698	845	853
Total passenger cars	32,700	19,811	12,889
Light commercial vehicles (LCV)			
Less than 2.5t	3,589	3,334	255
From 2.5t to 3.5t	2,566	2,556	10
From 3.6t to 5t	16	15	1
Total LCV up to 5t	6,171	5,905	266
Total passenger cars and LCVs	38,871	25,716	13,155
Heavy trucks over 5t			
Rigids			
From 5t to less than 12t	70	70	-
From 12t to less than 16t	41	41	-
From 16t to less than 20t	106	106	-
20t and more	116	116	-
Total rigids	333	333	-
Tractors	207	207	-
Total heavy trucks (2)	540	538	2
Coaches and buses	92	89	3
Total commercial vehicles over 5t	631	626	5
Total commercial vehicles all weights	6,802	6,531	271
Total all vehicles	39,502	26,342	13,160

(1) Mainly gasoline and electric for light vehicles, NGV for heavy trucks, electric and NGV for coaches and buses.
(2) The diesel distinction is possible only for the total heavy trucks.
Source: CCFA estimates

► VEHICLE OWNERSHIP

	unité	2000	2005	2010	2013	2014	2015	2016	2017 (1)
Households without a vehicle	%	19.7%	18.8%	16.5%	16.9%	17.2%	17.1%	16.6%	16.1%
Households with a vehicle	%	80.3%	81.2%	83.5%	83.1%	82.8%	82.9%	83.4%	83.9%
Households with one vehicle	%	50.7%	46.4%	47.6%	48.3%	48.8%	48.4%	48.0%	47.5%
Households with two vehicles	%	25.4%	29.4%	30.7%	29.9%	28.9%	29.4%	30.3%	31.1%
Households with three or more vehicles	%	4.2%	5.4%	5.2%	5.0%	5.1%	5.1%	5.2%	5.3%
Average age of the vehicle	year	7.25	7.71	8.0	8.6	8.7	8.9	9.0	9.1
Average ownership period	year	4.43	4.73	5.0	5.3	5.4	5.5	5.6	5.6
Used passenger cars	%	56.1	59.9	58.9	59.0	58.5	58.5	58.7	58.7
Total average kilometers	km	13,670	12,960	12,240	11,750	11,540	11,710	12,020	11,950
Gasoline average kilometers	km	11,690	10,090	8,440	7,860	7,930	8,030	8,160	8,440
Diesel average kilometers	km	18,240	16,330	14,720	14,130	13,740	13,990	14,540	14,340
Domestic passenger road transportation									
By passenger car	billions of passengers-km	697.6	717.2	709.8	712.9	720.9	736.5	754.3	757.3
By coach-bus	billions of passengers-km	49.7	50.3	54.4	56.1	57.6	58.5	58.9	58.1
Total traffic	billions of passengers-km	845.0	871.7	879.5	889.2	897.7	915.0	932.6	941.7
Road transport as a % of total traffic	%	88.4	88.0	86.9	86.5	86.7	86.9	87.3	87.3
Annual change									
By passenger car	%	-0.0	-0.1	+0.8	+0.3	+1.1	+2.2	+2.4	+0.4
By coach-bus	%	+2.7	+0.4	+1.9	+1.1	+2.7	+1.6	+0.7	-0.1

(1) Provisional.
Sources: KANTAR TNS PARC AUTO and MTES/SDES

► TOTAL VEHICLES IN USE ON JANUARY 1 (IN THOUSANDS)

	2000	2005	2010	2014	2015	2016	2017	2018
Passenger cars								
Up to 5 HP	10,572	12,040	12,946	13,948	14,210	14,475	14,769	14,964
From 6 to 10 HP	15,723	16,519	16,583	16,115	15,990	15,901	15,953	16,038
10 HP and more	1,186	1,341	1,521	1,588	1,600	1,624	1,668	1,698
TOTAL VP	27,480	29,900	31,050	31,650	31,800	32,000	32,390	32,700
Including diesel (1)	9,261	13,590	17,458	19,645	19,836	19,900	19,938	19,811
Commercial vehicles								
Up to 3.5t	4,974	5,489	5,750	5,915	5,965	6,014	6,084	6,155
From 3.5t to 5t	12	12	10	15	15	16	16	16
From 5t to 20t	287	274	250	235	233	227	221	217
20t and more	46	68	91	102	106	106	110	116
Tractors	210	215	202	195	200	199	206	207
Total LCV (excluding coaches and buses)	5,529	6,057	6,303	6,462	6,608	6,562	6,637	6,710
Including diesel (1)	4,202	5,030	5,632	6,091	6,280	6,355	6,377	6,443
Coaches - Buses	80	82	85	88	89	90	91	92
Total all vehicles	33,090	36,039	37,438	38,200	38,408	38,652	39,118	39,502
Including diesel (1)	13,543	18,700	23,172	25,821	26,116	26,255	26,403	26,342

(1) Including diesel hybrid.
Source: CCFA estimates

POLLUTANT EMISSIONS AND CO_2

► TOTAL AUTOMOBILE EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 ET 2017

	1990	2000	2005	2010	2015	2016	2017 (1)	Change 2017/1990	Change 2017/2016
ROAD POLLUTANTS (IN THOUSANDS OF TONNES)									
SO_2	143.4	23.0	4.2	0.8	0.8	0.8	0.8	-99%	0.3%
CO_2	5,887	2,593	1,466	729	376	349	323	-95%	-7.4%
NOx	1,222	927	746	583	506	486	465	-62%	-4.3%
COVNM	924	449	239	106	58	53	48	-95%	-10.2%
Lead (in tonnes)	3,901	48	47	50	52	53	53	-99%	0.3%
PM10: particles	58	52	38	31	19	17	15	-74%	-12.9%
OTHER ROAD EMISSIONS (IN MILLIONS OF TONNES)									
CO_2 net of CO_2 emissions of renewable energies	110	126	128	122	121	121	122	10%	0.4%
CO_2 from combustion of biomass	0	1	2	7	7	8	8	-	0.4%

(1) 2017 estimates.
Source: CITEPA/Secten data

► CO_2 EMISSIONS IN METROPOLITAN FRANCE BY BUSINESS SECTOR (IN MILLIONS OF TONNES OF CO_2)

	1990	2000	2005	2010	2015	2016	2017 (1)
Energy processing	69	64	67	59	40	43	47
Manufacturing industry	108	106	100	84	73	70	71
Waste management	1.9	1.4	1.3	1.3	1.3	1.3	1.3
Residential/Commercial	86	88	99	94	75	77	78
Agriculture/silviculture	12	13	12	12	12	12	12
Transports	117	134	135	128	127	127	128
of which road	110	126	128	122	121	121	122
of which other transports	6.9	7.8	6.9	6.2	5.9	6.0	6.0
TOTAL EXCLUDING LLUCF (2)	393	406	415	379	328	330	338
LLUCF (2)	-33	-31	-56	-46	-49	-44	-44
Total with LLUCF (2)	360	375	359	333	280	286	294

(1) 2017 estimates.
(2) LLUCF: Land Use, Land Use Change and Forestry.
Source: CITEPA/Secten data

► AVERAGE CO_2 EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE (IN GRAMS OF CO_2 PER KM)

	2000	2005	2010	2014	2015	2016	2017	2017/2000
FRANCE								
Gasoline	168	159	130	119	116	116	117	-51
Diesel	155	149	130	114	111	109	110	-45
TOTAL FRANCE	162	152	130	114	111	110	111	-51
EUROPEAN UNION								
Italy	161	149	134	119	115	114	113	-48
Spain	162	150	140	120	115	114	115	-47
United Kingdom	180	169	145	125	121	120	121	-59
Germany	179	170	152	132	128	126	127	-52
EU 15 COUNTRIES AVERAGE	171	161	141	122	119	118	119	-52

Source: ADEME (June 2018)

AUTOMOTIVE TAXES AND DUTIES

► ROAD FUEL CONSUMPTION, PRICES AND TAXES

	UNITS	2000	2005	2010	2013	2014	2015	2016	2017
Fuel consumption									
Regular petrol	millions of litres	-	-	-	-	-	-	-	-
Premium leaded - AVSR	millions de litres	3,924	433	-	-	-	-	-	-
Premium unleaded	millions de litres	14,329	14,097	9,501	6 650	6,397	6,292	6,297	6,201
Premium unleaded 95-E10	millions de litres	-	-	1,379	2,714	2,971	3,198	3,465	3,938
% of total petrol	%	-	-	12.7	29.0	31.7	33.6	35.5	38.8
Total petrol	millions de litres	18,253	14,529	10,880	9,363	9,368	9,510	9,762	10,139
Diesel	millions de litres	32,373	36,744	39,749	40,559	40,718	41,187	41,156	41,054
TOTAL ROAD FUEL	millions de litres	50,627	51,273	50,629	49,922	50,086	50,697	50,918	51,193

Source: CPDP

	UNITS	2000	2005	2010	2013	2014	2015	2016	2017
Retail prices of fuel (annual average)									
Regular petrol inc. VAT	euros/litre	-	-	-	-	-	-	-	-
Tax as a %	%	-	-	-	-	-	-	-	-
Premium leaded - AVSR	euros/litre	1,.7	1.27	-	-	-	-	-	-
Tax as a %	%	71	67	-	-	-	-	-	-
Premium unleaded 98	euros/litre	1.11	1.20	1.38	1.59	1.54	1.42	1.36	1.44
Tax as a %	%	69	65	60	55	56	61	64	62
Petrol	euros/litre	1.12	1.18	1.35	1.54	1.48	1.35	1.30	1.38
Tax as a %	%	69	67	61	56	58	63	66	59
Diesel	euros/litre	0.85	1.02	1.15	1.35	1.29	1.15	1.11	1.23
Tax as a %	%	62	57	54	49	51	59	63	61

Source: DGEC

► AUTOMOTIVE TAXES AND DUTIES (IN € MILLION)

	2000	2005	2010	2013	2014	2015	2016	2017
Tax on road-use oil products (including VAT)	30,630	32,205	32,324	35,891	35,782	36,294	36,412	39,239
Tax on vehicle registration certificates	1,373	1,623	1,917	2,039	2,071	2,086	2,188	2,245
Automotive insurance tax	3,429	4,057	4,126	4,468	4,588	4,662	4,730	4,842
Road tax	539	145	0	0	0	0	0	0
Tax on company cars	644	867	992	876	827	753	692	638
Tax based on number of axles	223	205	168	171	170	169	167	100
Fixed rate police and traffic fines, sentence fines	720	1,266	1,255	1,666	1,579	1,596	1,858	1,850 (3)
Driver's license tax	14	4	1	1	3	4	4	
Regional development tax	442	499	539	538	571	555	512	516
Government royalty	132	154	186	300	314	326	331	351
General tax on polluting activities (TGAP) (1)		20	500	800	700	600	600	600
VAT on spending to acquire vehicles (passenger cars)	6,232	7,238	7,780	7,003	7,319	8,108	8,826	-
VAT on repairs, maintenance, MOTs and driving licences	4,059	4,783	5,603	5,788	5,885	6,076	6,322	-
Automotive taxes and duties (including VAT)	50,438	55,071	57,401	61,555	61,823	63,244	64,658	-
of which specific automotive taxation	-	37,200	37,300	37,800	37,600	40,800	42,900	-
of which tax on fuels: TICPE and VAT on TICPE	-	28,900	28,200	28,400	28,200	31,500	33,491	35,477
ADDITIONAL INFORMATION (in € million)								
Freeway tolls (excl. VAT)	4,457	6,410	8,110	8,780	9,120	9,390	9,830	10,170
Freeway tolls (incl. VAT)	5,330	7,666	9,700	10,501	10,944	11,268	11,796	12,204
Total expense by the APUs (2) for the road	-	15,800	17,200	18,100	16,300	15,100	13,300	-

(1) According to agrofuels rate.
(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) Estimation.
Sources: Internal Revenue, CCFA, URF, MTES/SDES, French National Transport Accounting Commission

USEFUL ADDRESSES

► FRENCH AUTOMOTIVE MANUFACTURERS

PSA Group
7, rue Henri Ste Claire Deville - 92563 Rueil-Malmaison
Tel.: 01 55 94 81 00
www.groupe-psa.fr

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 69 09 60 00
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)
8, rue de l'Hôtel de Ville
92200 Neuilly-sur-Seine
Tel.: 01 80 21 08 00
www.afgnv.info

Fédération Française de Carrosserie Industries et Services (FFC)
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
92300 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 41 44 94 30
www.pfa-auto.fr

Syndicat National des Loueurs de Véhicules en Longue Durée (SNLVLD)
Immeuble Arc en Ciel
Bâtiment B
17, rue de la Vanne
92120 Montrouge
Tel.: 01 85 65 11 25
www.snlvld.com

Syndicat des Véhicules de Loisirs (UNI VDL)
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 43 59 00 13
Fax: 01 45 63 84 41
www.oica.net

► AUTOMOTIVE ASSOCIATIONS IN FRANCE

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

ACA - Automobile Club Association
Head office: 38, avenue du Rhin CS 80049
67027 Strasbourg Cedex
Tel.: 09 70 40 11 11
Parisian office: 9 rue d'Artois
75008 Paris
Tel.: 01 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)
22, avenue Jean Aicard
75011 Paris
Tel.: 01 53 25 00 60
www.avere-france.org

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

ID4CAR
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 Énergies nouvelles (IFPEN)
1 & 4, avenue de Bois Préau
92852 Rueil Malmaison Cedex
Tel.: 01 47 52 60 00
Fax: 01 47 52 70 00
www.ifpenergiesnouvelles.fr

Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
IFSTTAR Head office
Département Economie et Sociologie des Transports (DEST)
14-20, Boulevard Newton
Cité Descartes, Champs sur Marne
77447 Marne la vallée Cedex 2
Tel.: 01 81 66 80 00
www.ifsttar.fr

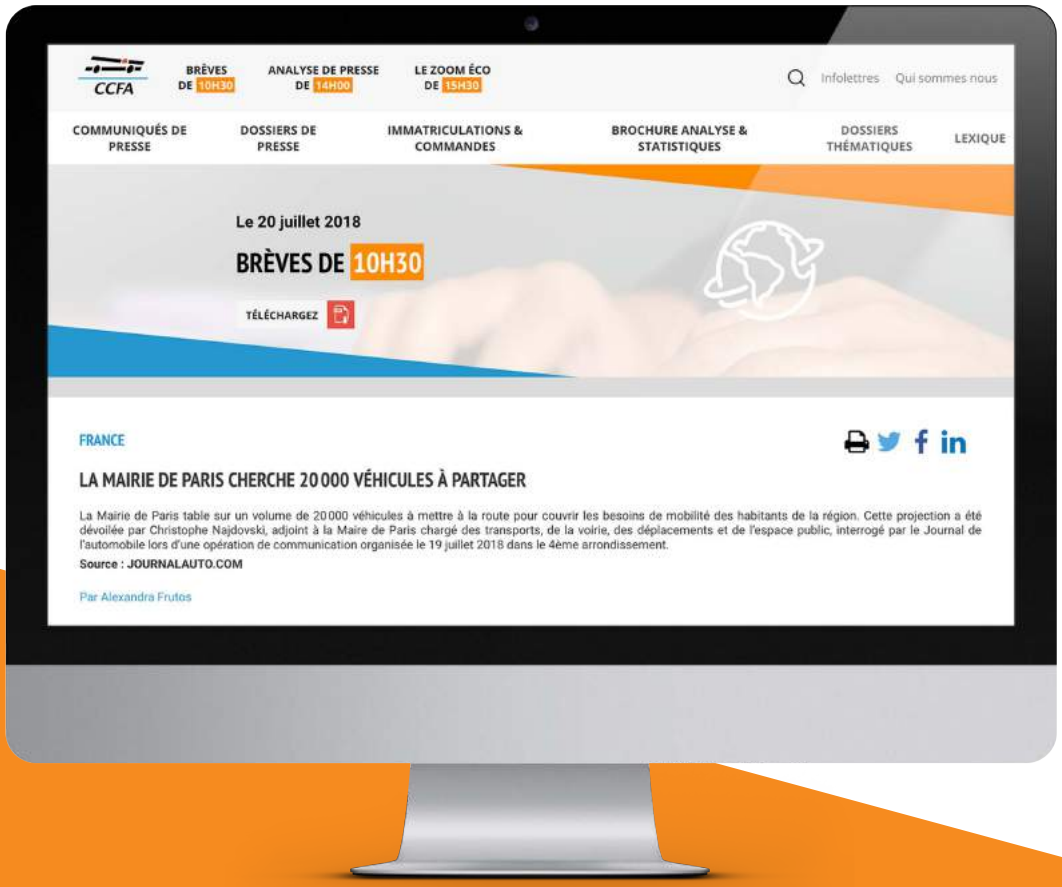
CARA
c/o CCI de Lyon
Place de la Bourse
69289 Lyon Cedex 02
Tel.: 04 72 40 57 00
Fax: 04 72 40 58 60
www.cara.eu

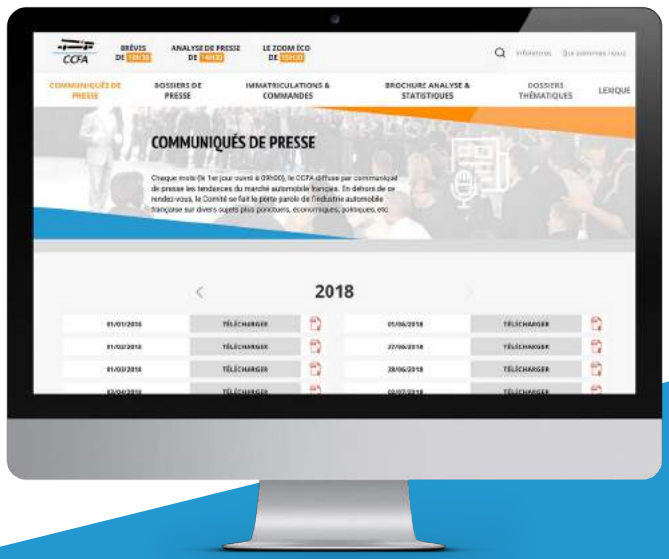
Pôle Mov'eo
Haute-Normandie Head office
Technopôle du Madrillet
Avenue Galilée BP 20060
76801 Saint Etienne du Rouvray Cedex
Tel.: 02 32 91 54 50
www.pole-moveo.org

Pôle Véhicule du Futur
Head office: Etupes
Centre d'affaires Technoland
15, rue Armand Japy - 25461 Etupes Cedex
General secretary: Mulhouse
Technopole de Mulhouse - BP 2118
40, rue Marc Seguin
68060 Mulhouse Cedex
Tel.: 03 89 32 76 44
Fax: 03 89 32 76 45
www.vehiculedufutur.com

THE CCFA WEBSITE BRINGS DAILY INFORMATION ON THE AUTOMOTIVE WORLD

WWW.CCFA.FR





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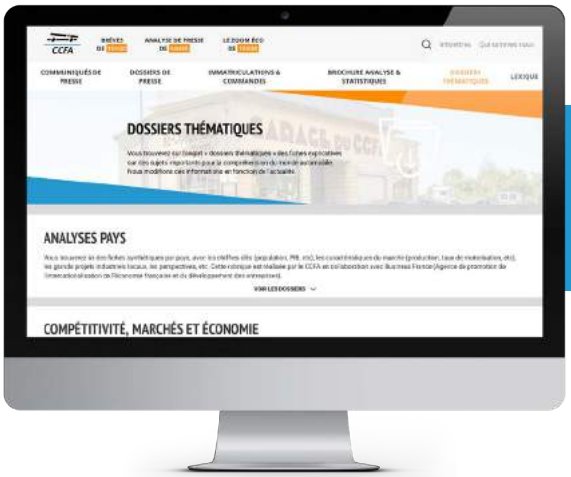

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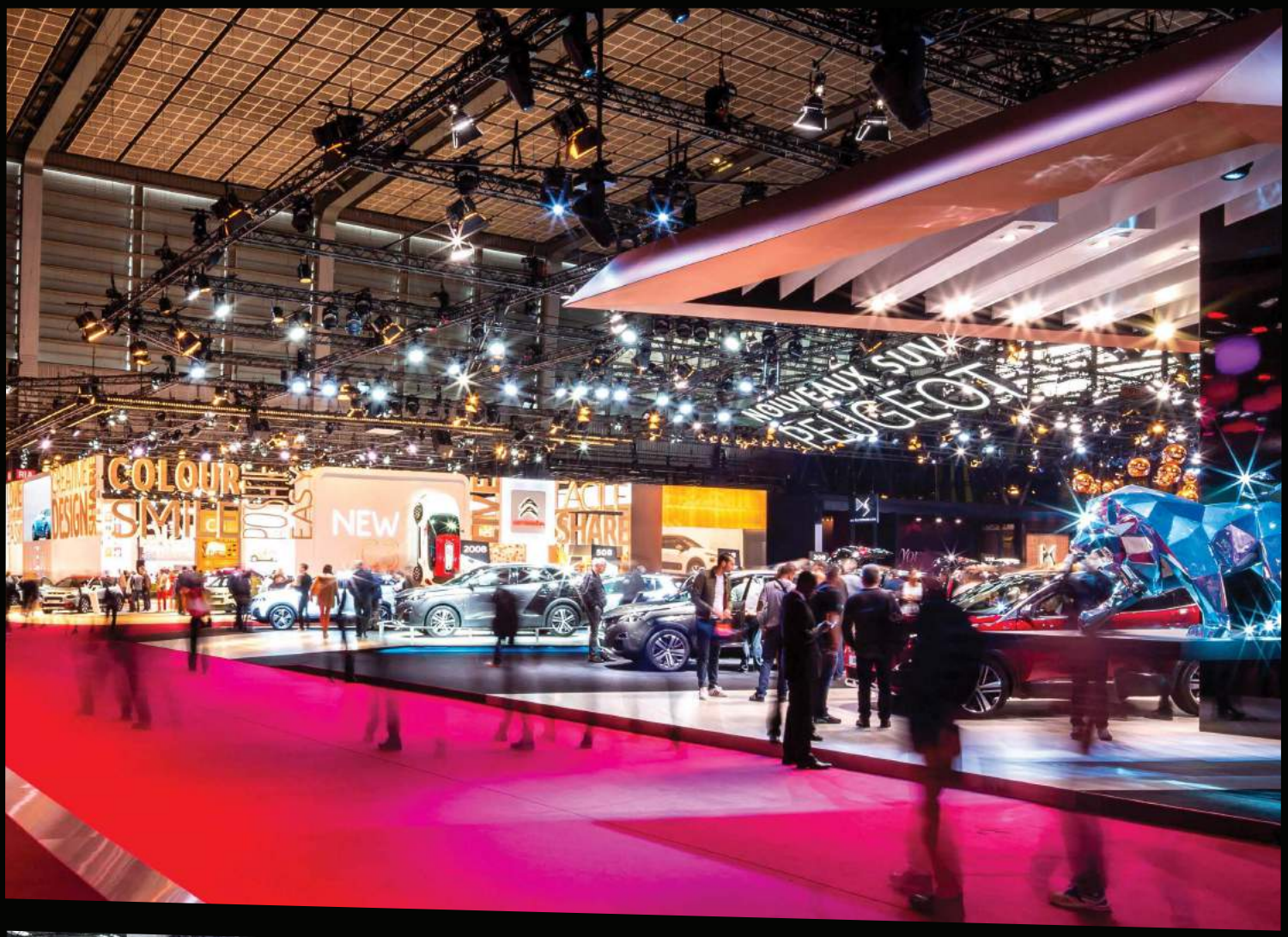
THE LEXICON TAKES UP ALL THE AUTOMOTIVE TERMINOLOGY



MONDIAL

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Boris-Yvan DASSIE www.dbyphotographie.com