

# THE FRENCH AUTOMOTIVE INDUSTRY



→ ANALYSIS & STATISTICS  
2020 EDITION

**7.3**  
MILLION VEHICLES

produced by French manufacturers  
worldwide

**79%**  
OF VEHICLES

produced by French manufacturers  
are sold abroad

**€6.8**  
BILLION

French automotive industry  
research and development  
budget in 2018

**€50**  
BILLION

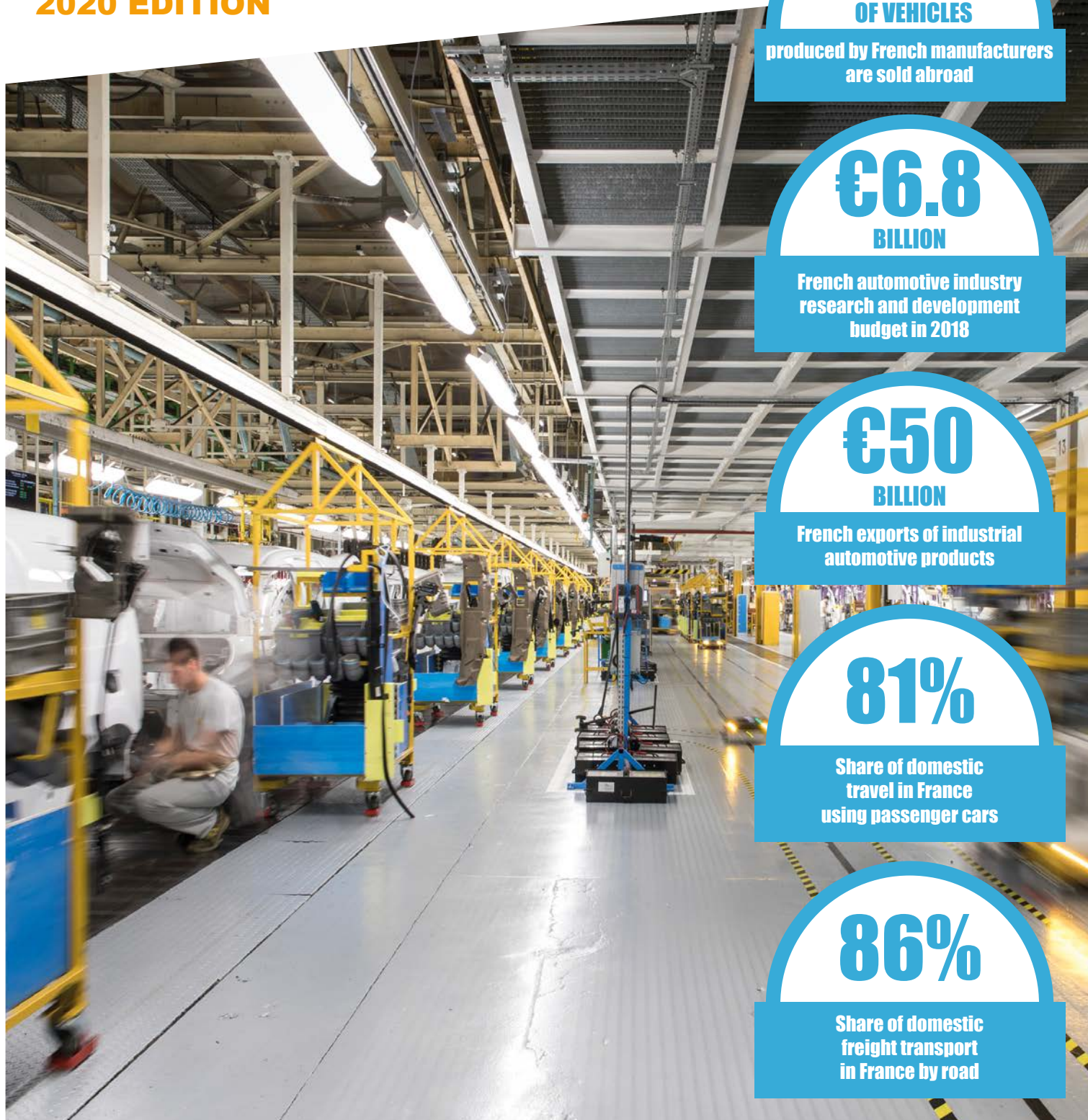
French exports of industrial  
automotive products

**81%**

Share of domestic  
travel in France  
using passenger cars

**86%**

Share of domestic  
freight transport  
in France by road



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## A WORD FROM THE PRESIDENT



### 2019, 2020, 2021: not an easy editorial...

Writing an editorial in 2021 for the year 2019 shows just how crazy 2020 was! We were unable to publish our Analysis and Statistics brochure in the first half of the year, since a lot of the data were not available. We really hope 2021 will be different.

In 2019, the world automotive markets contracted to 91 million vehicles, a drop of 4.5%, after eight consecutive years of growth. This decline is explained by sales slowing in Asia, which began in 2018 (-1.4%) and accelerated in 2019 (-7.6%). And even though sales held up in Europe (+0.4%), particularly in Western Europe (+1.0%), it was not enough to offset the fall in the American and Asian markets.

The French groups, with 28% of the European light vehicle market, have a solid anchorage to cope with fluctuations in emerging markets. Nevertheless, the slowdown in global automotive markets is affecting the production of French groups compared with the record level reached in 2018. French manufacturers produced 7.3 million cars in 2019, or more than 8% of world car production.

For 2020, the Covid-19 crisis is having a profound effect on the world market, which is expected to fall by 15%, with the European market suffering a 25% drop, more marked than in North America or Asia, helped by the more limited downturn in China. Like the European market, the French market, the leading outlet for French groups, is also falling.

In this context, French groups' worldwide sales will fall very significantly, despite the specific strategies deployed by manufacturers to deal with this situation, adjusting, for example, the pace of previous plans linked to the three expected disruptions:

- The energy transition has accelerated, with the development of sales of electric and rechargeable hybrid vehicles, which, thanks to a broader range of products, made strong inroads in 2020. However, they need to keep pace with that industry

and customers; the market level must remain high to ensure decent fleet renewal.

- The digital transition continues to rely on connectivity, now a basic requirement in almost all manufacturers' new models. Autonomous vehicle projects have taken on a different pace, with R&D budget moderation due to the crisis.

- The service transition has been even more deeply affected by the health crisis. Carpooling and car-sharing are directly affected, presaging slower emergence.

More than ever, we are in a period of major investments. Manufacturers have to invest, not only to satisfy customers and comply with environmental and other regulatory standards, but also to cope with digital and service-sector transitions. Between 2015 and 2018, total R&D spending increased by 25% to almost €7 billion.

The challenge can be met if French groups' competitiveness is not too seriously affected by their national roots. Importantly, despite the government's efforts with the CICE benefit and production taxation assistance, competitiveness has continued to deteriorate. In this context, the threats to the research tax credit (CIR) are to be taken seriously, because dropping it would inevitably lead to a significant contraction in the R&D ecosystem of France's automotive industry.

2019, 2020... and what does 2021 have in store for us? French manufacturers are equipped to take their place in the market for passenger cars, light commercial vehicles and industrial vehicles. The formidable technical and environmental challenges are difficult but not unattainable, provided that the public authorities tread carefully around the issues of ecological transition and loosen the fiscal straitjacket that is so detrimental to French industry's competitiveness.

*Enjoy the read!*

**Thierry COGNET**



## 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). It has a subsidiary AAA DATA.

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 sector (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, Industries et Services - French Bodybuilding, Industry and Services Federation, FIEEC, Fédération des Industries Electriques, Electroniques et Communication -

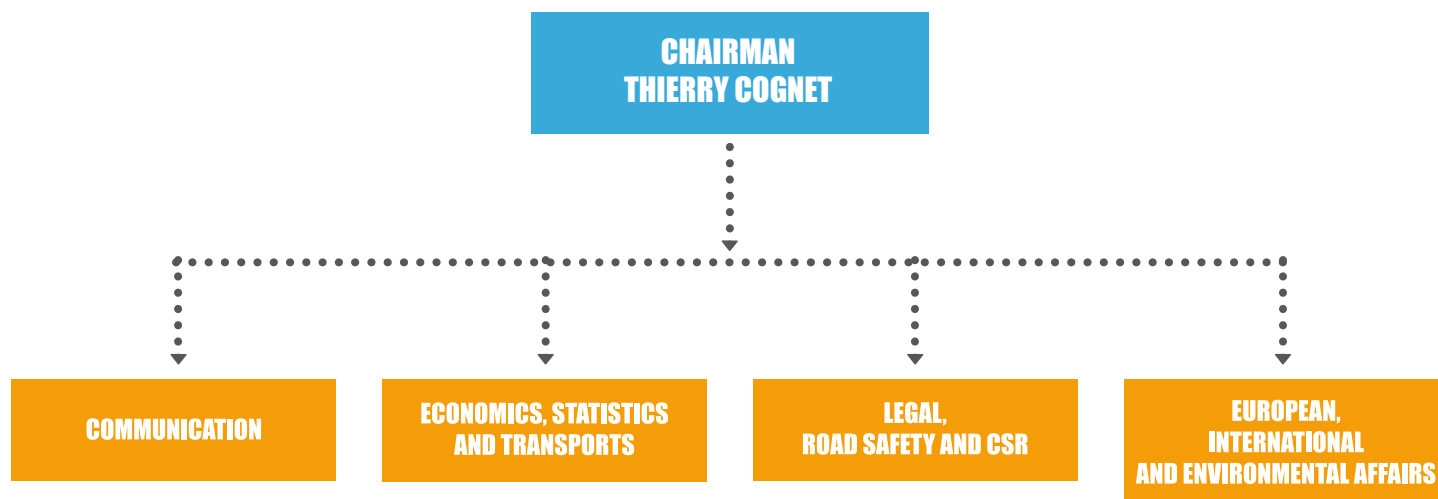
Electrical, Electronic and Communications Industry Federation, FIM, Fédération des Industries Mécaniques - Mechanical Industry Federation, GPA, Groupement Plasturgie Automobile - Automotive Plastics Group, SNCP, Syndicat National du Caoutchouc et des Polymères - National Union of Polymers and Rubber Industries, etc.). In 2009, during the crisis, French automobile manufacturers and their suppliers established the PFA, Automotive Industry and Mobilities, which has the task of contributing to reinforcing the French automotive sector. 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 sector, planning ahead for employment and skill requirements, expressing joint positions for the sector, coordination and organisation of professional shows and communications throughout the sector.

Foreign brands are represented by the International Association of the Automobile and the Motorcycle (CSIAM – Chambre Syndicale

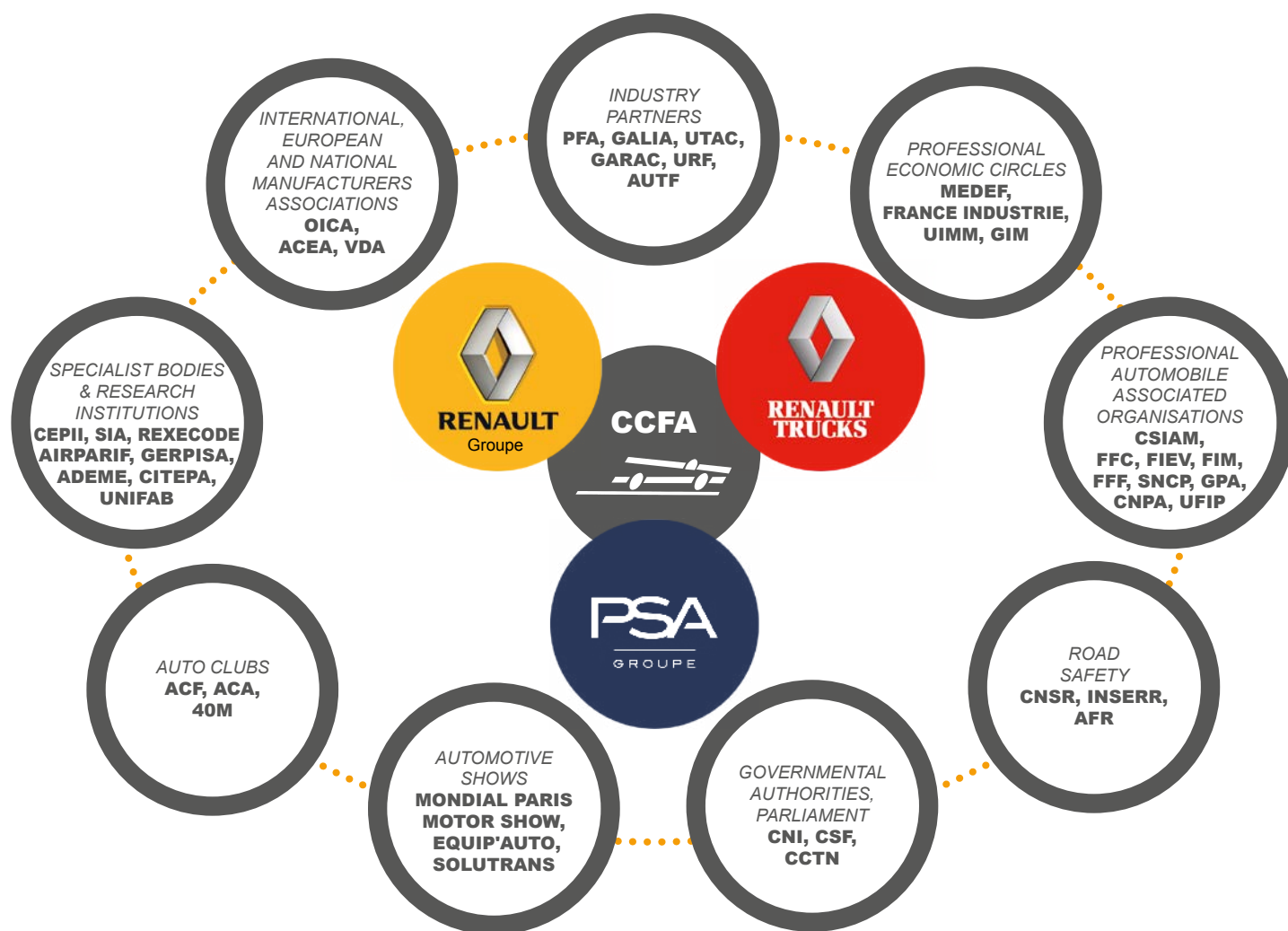
Internationale de l'Automobile et du Motocycle).

CCFA is associated with Brussels-based ACEA (Association des Constructeurs Européens d'Automobiles), the European Automobile Manufacturers' Association.

CCFA is also a member of the International Organisation of Motor Vehicle Manufacturers (OICA – Organisation Internationale des Constructeurs de l'Automobile), which brings together national associations representing the sector from around the world.



## 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** : École 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'Études Prospectives et d'Informations Internationales  
**SIA** : Société des Ingénieurs de l'Automobile  
**AIRPARIF** : Association de surveillance de la qualité de l'air en Ile-de-France  
**GERPISA** : Groupe d'Études et de Recherches 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'Études de la Pollution Atmosphérique

**REXECODE** : Centre 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

### ► PROFESSIONAL ECONOMIC CIRCLES

**MEDEF** : Mouvement des Entreprises de France (Employers' association)  
**FRANCE INDUSTRIE** : Représentation de l'Industrie en France (Industry representation in France)  
**UIMM** : Union des Industries et Métiers de la Métallurgie (Metallurgy employers' association)  
**GIM** : Groupe des Industries Métallurgiques de la Région

Parisienne (Paris region metallurgical industries group)

### ► PROFESSIONAL AUTOMOBILE ASSOCIATED ORGANISATIONS

**CSIAM** : Chambre Syndicale Internationale de l'Automobile et du Motocycle  
**FFC** : Fédération Française de la Carrosserie  
**FIEV** : Fédération des Industries d'Équipements pour Véhicules (French Automotive Equipment Industries Association)  
**FIM** : Fédération des Industries Mécaniques (Federation of Mechanical Industries)  
**SNCP** : Syndicat National du Caoutchouc et des Polymères (National Union of Rubber and Polymer Workers)  
**GPA** : Groupement Plasturgie Automobile (Automotive Plastic Converters Association)  
**CNPA** : Conseil National des Professions de l'Automobile (National Council of Automotive Professions)  
**UFIP** : Union Française des Industries Pétrolières (French Association of Petroleum Industry)

### ► 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

## A SLOWDOWN IN THE GLOBAL AUTOMOTIVE MARKETS AFFECTING THE PRODUCTION OF FRENCH GROUPS COMPARED TO THE RECORD LEVEL REACHED IN 2018

The European markets, which had fallen to very low levels during the financial crisis, are continuing their recovery begun in 2014, enabling French groups to maintain their positions. By 2018, French groups had gained nearly 4 points in market share in Europe, notably thanks to their broader market scope. In 2019, the ruddy health of the French

market and their success in the light commercial vehicle market in Europe outside France saw them consolidate their market share at a high level.

Outside Europe, automotive markets suffered from the economic slowdown, declining in 2019, particularly in Asia and America. Against

this backdrop, French groups saw a fall in their deliveries outside Europe for the second year running, as well as a decline in worldwide production.

### ► KEY DATA (IN THOUSANDS)

	1997	2007	2018	2019	Change 2019/2018	Change 2019/2007
<b>World production of French groups</b>	<b>4,046</b>	<b>6,188</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
Passenger cars	3,472	5,301	6,912	6,246	-9.6%	17.8%
Light commercial vehicles	507	830	1,052	1,025	-2.6%	23.5%
All light vehicles	3,979	6,131	7,965	7,271	-8.7%	18.6%
Heavy trucks (at constant scope)	36	58	n/a	n/a	n/a	n/a
<b>Production of French groups in France</b>	<b>2,525</b>	<b>2,573</b>	<b>1,937</b>	<b>1,885</b>	<b>-2.7%</b>	<b>-26.7%</b>
Passenger cars	2,235	2,165	1,441	1,375	-4.5%	-36.5%
Light commercial vehicles	258	352	496	510	2.7%	44.7%
All light vehicles	2,493	2,518	1,937	1,885	-2.7%	-25.1%
Heavy trucks	30	55	n/a	n/a	n/a	n/a
<b>Vehicles deliveries outside France</b>	<b>2,822</b>	<b>4,697</b>	<b>6,399</b>	<b>5,765</b>	<b>-9.9%</b>	<b>22.7%</b>
Passenger cars	2,526	4,110	5,303	4,674	-11.9%	13.7%
Light commercial vehicles	276	549	1,073	1,064	-0.9%	93.7%
All light vehicles	2,802	4,659	6,376	5,738	-10.0%	23.2%
Heavy trucks	20	38	22	27	24.0%	-27.1%
<b>Vehicles deliveries outside Europe (17 countries)</b>	<b>659</b>	<b>2,110</b>	<b>3,349</b>	<b>2,742</b>	<b>-18.1%</b>	<b>29.9%</b>
Passenger cars	563	1,914	2,773	2,194	-20.9%	14.6%
Light commercial vehicles	88	178	565	532	-5.9%	198.7%
All light vehicles	651	2,092	3,338	2,726	-18.4%	30.3%
Heavy trucks	8	18	11	17	53.9%	-7.4%
<b>Vehicles registrations in France</b>	<b>2,068</b>	<b>2,629</b>	<b>2,693</b>	<b>2,756</b>	<b>2.3%</b>	<b>4.8%</b>
Passenger cars	1,713	2,110	2,173	2,214	1.9%	5.0%
Light commercial vehicles	313	461	459	480	4.5%	4.0%
All light vehicles	2,026	2,571	2,633	2,694	2.3%	4.8%
Heavy trucks	39.3	52.5	54.3	55.2	1.7%	5.1%
Coaches and buses	3.1	5.5	5.8	6.4	9.8%	16.9%
<b>Registrations in Europe (17 countries) of vehicles from French groups</b>	<b>3,300</b>	<b>3,906</b>	<b>4,612</b>	<b>4,613</b>	<b>0.0%</b>	<b>18.1%</b>
Passenger cars	2,841	3,181	3,777	3,738	-1.0%	17.5%
Light commercial vehicles	432	690	808	849	5.0%	23.0%
All light vehicles	3,273	3,871	4,585	4,587	0.0%	18.5%
Heavy trucks	27	35	26	26	-1.6%	-25.4%

In 2019, global production of light vehicles by French groups fell by 8.7% after reaching a record level in 2018. This decline occurred against the backdrop of a global economic slowdown that led to a sharp drop in global automotive markets (-4.5% in 2019). French manufacturers have managed to limit the decline in their sales thanks to the resilience of the French market and despite the downturn in southern European markets, where they have a strong presence. They continued to increase their investments (+11% in 2019) in order to meet the many challenges facing the automotive industry: the competitiveness of the industrial apparatus, the internationalisation of markets and production, environmental protection and the development of digital and new mobility services.

In France, the automotive market remained dynamic in 2019, supported in particular by aid for

vehicle renewal (conversion bonuses). Road traffic, on the one hand, has grown at a slower pace in recent years. With higher fuel prices and record traffic levels, registered in France passenger car traffic has even declined over the past two years. On the other hand, light commercial vehicle traffic remains buoyant (+1.5% in 2019). Automotive spending increased by 2.2% in 2019 and now represents 9.6% of total household spending. However, the share of the budget devoted to new vehicle purchases continues to decline in favour of second-hand vehicles, whose registrations increased sharply in 2019 (+2.8%, compared with 1.9% for new vehicles).



## FRENCH GROUPS OCCUPY 28% OF THE EUROPEAN LIGHT VEHICLE MARKET AND HAVE A SOLID ANCHORAGE TO COPE WITH FLUCTUATIONS IN EMERGING MARKETS

French groups had an 8% share in global vehicle production in 2019, down 0.4 point compared with 2018, but up 1.7 point compared with 2014.

	Units	2018	2019	Change 2019/2018
<b>Market share of French groups (new light vehicles)</b>				
In France	%	58.8%	58.5%	-0.3 point
In Europe (17 countries) excluding France	%	22.4%	22.1%	-0.3 point
In Europe (17 countries)	%	28.3%	28.1%	-0.2 point
<b>Market share of French brands (new heavy trucks)</b>				
In Europe (17 countries)	%	8.6%	8.3%	-0.3 point
<b>French groups' share in world production (PSA and Renault Groups)</b>				
Passenger cars	%	9.7%	9.3%	-0.4 point
Commercial vehicles	%	4.3%	4.3%	0.0 point
Total	%	8.3%	8.0%	-0.4 point
<b>French automobile international trade</b>				
Exports	€ billions	52.9	51.7	- 2.2%
Imports	€ billions	65.0	66.7	+ 2.7%
Balance	€ billions	-12.1	-15.0	+ 24.4%
<b>Automotive industry contribution to foreign trade goods balance</b>				
Exports	%	10.8%	10.2%	-0.6 point
Imports	%	11.8%	11.8%	0.0 point
<b>World key figures for french manufacturers (PSA and Renault Groups)</b>				
Sales	€ billions	131.4	130.3	- 0.9%
Capital expenditure	€ billions	5.1	5.7	+ 10.8%
Number of employees	thousands of people	394	388	- 1.4%
<b>Jobs related to the automotive industry in France</b>				
Automotive industry	thousands of people	205	224	-
As a share of industry	%	7% (1)	7% (1)	-
Total jobs (directly and indirectly related)	thousands of people	2,200	2,216	-
As a % of the employed working population	%	8%	8%	-

(1) 2017 figure.

In Western Europe, new vehicle markets progressed slightly in 2019, with the downturn in the southern European markets, detracting somewhat from the good performance of the German and French markets. Thus, in a context of continuing intense competition, the market share of French groups remained stable in 2019, after increasing in 2018 thanks to new brands coming onto the market. The weight of European sales in the overall sales of the French groups will not last in the long term, due to the differences in car density between this mature zone and the emerging countries.

In Eastern Europe, markets have progressed in the member countries of the European Union and the French groups, which are well established industrially (Poland, Czech Republic, Romania, Slovakia, Slovenia), are consolidating their commercial outlets at elevated levels. In Russia, the market declined sharply, but French groups' sales increased slightly.

The weight of the Chinese market and its rate of variation explain the changes in the Asian market as a whole, which fell back in 2019 for the second

year running, after an extended period of growth. After rising steadily since 2013, French groups' Asian sales (500,000 vehicles) fell sharply in 2019 (-51%), following the halt in deliveries to Iran and the sharp fall in the Chinese market.

In Latin America, markets declined in 2019, except in Brazil and Colombia. Sales by French manufacturers to this zone fell accordingly (-7%), with the exception of Brazil and Colombia, where they increased by 8% and 14% respectively.

Finally, in 2019, French groups' sales in Africa declined in a stable market. In the Maghreb, where they are industrially present, market shares were consolidated.

In the emerging countries, where sales should eventually grow, the French groups continue to develop both commercially and industrially, with or without local partnerships, in order to satisfy the needs of motorisation. In particular, efforts continue in Asia (PSA, with its partners in China and India, as well as Renault in these same countries) and in various countries in Africa.



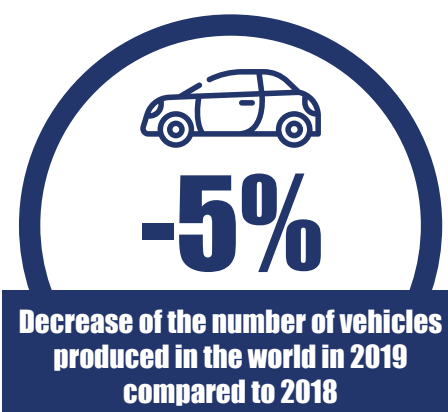
## WORLD VEHICLE PRODUCTION

In 2019, global vehicle production fell 5.3% to a little bit more than 5 million vehicles. It fell in Europe (-4.4%), America (-3.6%) and Asia (-6.4%). It was growing continuously after the fall of 2009 until 2017, then returned in 2019 to the level close to that observed in 2015, to a little bit more than 91 million units.

Global production of vehicles amounted to approximately 50 million units in 1990, then to nearly 60 million in 2000. It exceeded the threshold of 70 million vehicles before the crisis, before falling in 2009. It increased again until 2017 when production peaked at 97.1 million units. Between 2000 and 2017, the annual growth rate averaged +3%.

In mature areas, the level of production observed in 2019 compared to the pre-crisis period (2007) is mixed, with similar levels in Western Europe, North America and Japan, and even South Korea.

Nevertheless, in emerging zones and countries, including Asia, which is the current automotive expansion pole, production remains much higher than in the pre-crisis period. In 2019 it was up 137% compared to 2017 in Asia excluding Japan-South Korea, up 30% in Central and Eastern Europe, up 25% in South America and Mexico.



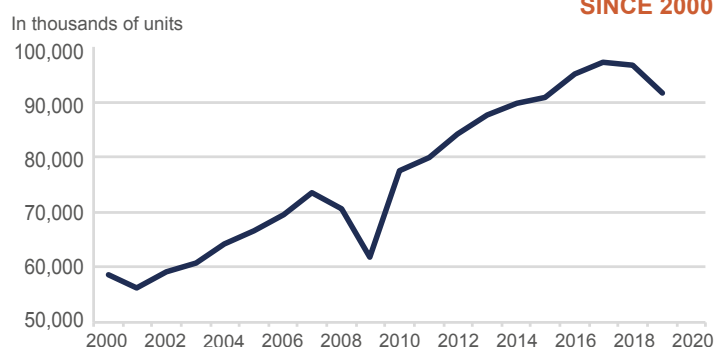
In thousands	2018	2019	Change %
<b>EUROPE</b>	<b>22,264</b>	<b>21,285</b>	<b>-4.4</b>
Western Europe	14,261	13,337	-6.5
Germany	5,120	4,661	-9.0
Belgium	308	286	-7.4
Spain	2,820	2,822	0.1
France	2,270	2,175	-4.2
Italy	1,062	915	-13.8
The Netherlands	214	176	-17.7
United Kingdom	1,604	1,381	-13.9
Sweden	291	279	-4.1
<b>Central and Eastern Europe</b>	<b>5,237</b>	<b>5,223</b>	<b>-0.3</b>
Russia	1,769	1,720	-2.8
Turkey	1,550	1,461	-5.7
<b>America</b>	<b>20,848</b>	<b>20,103</b>	<b>-3.6</b>
NAFTA (1)	17,424	16,783	-3.7
South America	3,423	3,319	-3.0
<b>Asia-Oceania</b>	<b>52,657</b>	<b>49,267</b>	<b>-6.4</b>
ASEAN (2)	4,575	4,382	-4.2
China	27,809	25,721	-7.5
South Korea	4,029	3,951	-1.9
India	5,143	4,516	-12.2
Japan	9,729	9,684	-0.5
<b>AFRICA</b>	<b>1,102</b>	<b>1,105</b>	<b>0.3</b>
<b>TOTAL</b>	<b>96,871</b>	<b>91,760</b>	<b>-5.3</b>

(1) NAFTA: Canada, USA, Mexico.

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

Sources: OICA - CCFA estimates March 2020

### CHANGES IN WORLD VEHICLE PRODUCTION SINCE 2000



In Western Europe, production fell 6.5% in 2019 compared to the previous year, with significant declines in the major countries: Germany (-9% after three consecutive years of decline), United Kingdom (-14%), Italy (-14%). It fell more moderately in France (-4%) and remained stable at high level in Spain and Eastern Europe.

In America, production is falling by more than 3%, whether in North America or South America. It also fell in Mexico (-3%), which was the dynamic zone of North America.

As for Asia-Oceania, which accounts for more than half of world production, production trends are more mixed. The decline is more moderate in

mature countries (Japan and South Korea) than in new areas (ASEAN, Iran, India, etc.). In China, which constitutes half of the region's production, it fell for the second year in a row. After declining 4% in 2018, vehicle production in China is down 7.5% in 2019.



## WORLD VEHICLE PRODUCTION

Between 2010 and 2018, the automotive industry remained broadly dynamic globally. Vehicle production rose 25% to 19 million units. Only South America and South Korea were an exception with a drop of productions over the same period.

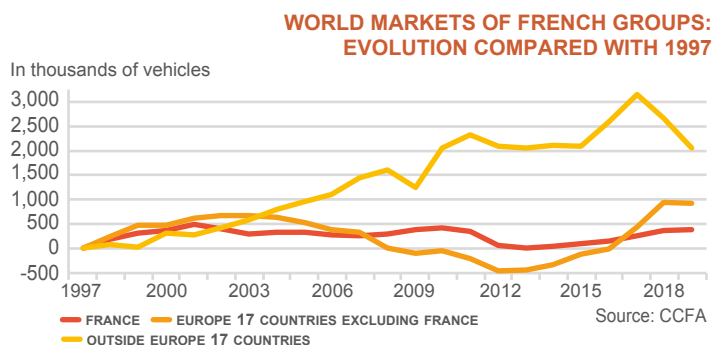
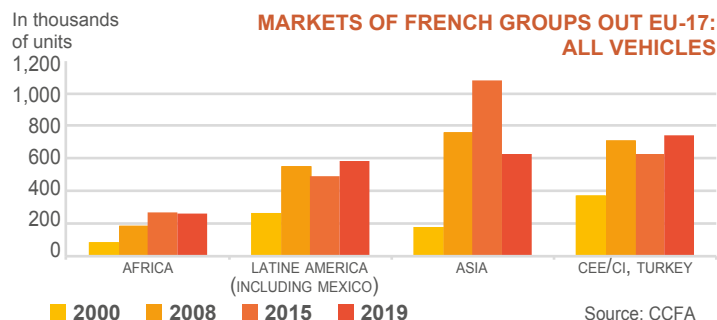
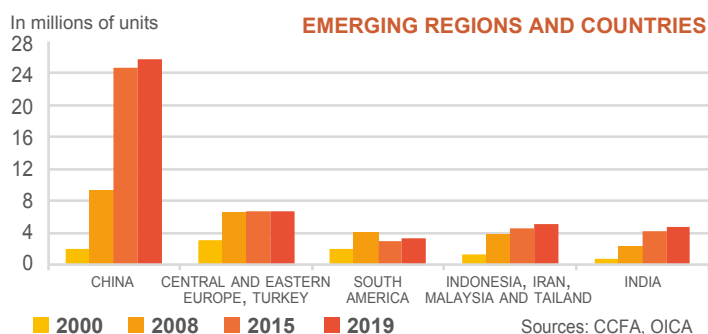
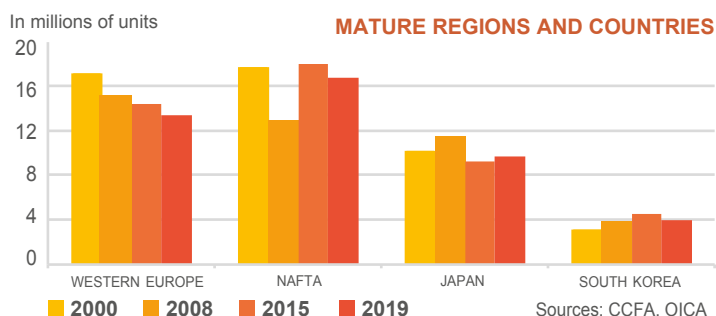
In 2019, the international context marked by political and economic uncertainties weighed on trade and global growth. The automotive industry was hit by this slowdown, and global vehicle production fell 5.3% from 2018, a loss of 5 million vehicles. All areas saw their production drop in 2019, but since 2010 they have experienced contrasting trends.

In mature regions or countries, production grew by more than 5 million vehicles between 2010 and 2018, reaching a level of 45 million units. Within these zones, production in North America increased by 5.3 million units (+43%), mainly thanks to Mexico. In Western Europe, it increased by 410,000 vehicles (+3%). Japan's production was slightly up (+1% compared to 2010). However, South Korea decreased by 6%. In 2019, production in mature countries fell by 3.7%, a loss of 1.7 million vehicles. Western Europe suffered the most with a 6.5% drop. In 2019, mature areas accounted for 44% of world production, compared to 51% in 2010.

In emerging regions or countries, production increased by 12.9 million vehicles between 2010 and 2018 (+35%) but fell more sharply in 2019 than in mature regions (-5%). Within these areas, China experienced the strongest increase (+9.5 million vehicles), but lost 2 million units in 2019 and now accounts for 28% of world production, compared to 24% in 2010. Central and Eastern Europe and Turkey also made strong progress between 2010 and 2018 (+30%, +1.9 million units), but stagnated in 2019 and represent 9% of global production. Indian production increased by more than 30% over the same period (+1.6 million units and a share of 5%), but fell by 9% in 2019. Finally, Indonesia, Iran, Malaysia and Thailand grew by 660,000 units between 2010 and 2018 and stagnated in 2019 at 5% of world production (compared to 6% in 2010). South America is the

only area to experience a decline in production over the same period (-820,000 vehicles and a market share of over 3%, compared to 6% in 2010).

In Central and Eastern Europe (6.1 million units), the dynamism observed in the new Member States of the European Union contrasts with the severe decline in recent years in Russia, with 1.7 million vehicles produced in 2019 (-23% compared to its 2012 high point).



In this context of economic slowdown and fall in global production, French groups experienced a drop in their deliveries outside Europe for the second consecutive year. Over two years, the decline is over 30%, while deliveries to Europe 17 countries excluding France have more than doubled. The integrations of Lada into the Renault group on January 1, 2017, then of Jinbei and Huasong on January 1, 2018 and finally of Opel within the PSA group since August 1, 2017 have a major impact on delivery volumes. Since 2010, deliveries have increased overall except in Asia

(-580,000 units) due to the difficulties on China's and Iran's markets. They are almost stable in Latin America including Mexico (-64,000 units). Deliveries are up in Central and Eastern European countries and Turkey (+352,000 units) and Africa (+58,000 units). In Europe, deliveries to Spain and Italy continued to grow (+172,000 and +204,000 units respectively since 2010), following the fall due to the crisis.

# 52 %

Share of emerging regions and countries in global vehicle production

## WORLD RANKING OF AUTOMOBILE MANUFACTURERS



8%

**Market share of French groups  
in global vehicles production  
in 2019**

The top 10 manufacturers, including the French groups Renault and PSA, accounted for 70% of world production. The French manufacturers together produced a little bit more than 7 million vehicles and respectively occupy the ninth and tenth ranks.

In 2019, French groups maintained their position in a global slowdown context. They took advantage of the pursuit of the European market growth and their external growth marked in 2018 by the integration of Jinbei/Huasong into the Renault Group on January 1, 2018 and Opel in the PSA Group in full year. The output of French manufacturers accounted for 8.3% of world production, 9.3% for passenger cars, a level well above that observed in 2013 and 2014 (6%).

Car manufacturers have become highly internationalised since 2000 and continue to develop their industrial sites outside of their area of origin. European, American, Japanese and Korean manufacturers produced between 60% and 70% in their area in 2000; currently the ratio oscillates in a range of 30 to 50%. Japanese manufacturers were the most internationalised (they only made one third of their production in Japan), followed by Korean manufacturers (44% in Korea). Even manufacturers in emerging countries, such as Geely or Tata, made a very large part of their production outside their country of origin (respectively 31% and 57% in 2017).

### ► WORLD VEHICLES PRODUCTION IN 2019 (1) (IN THOUSANDS)

Rank	GROUP	2018	2019	% Change
1	VOLKSWAGEN	11,018	10,823	-1.8
2	TOYOTA	10,567	10,725	1.5
3	GM (2)	8,384	7,332	-12.5
4	HYUNDAI-KIA	7,275	7,200	-1.0
5	FORD (2)	5,982	5,386	-10.0
6	HONDA	5,357	5,171	-3.5
7	NISSAN	5,654	4,958	-12.3
8	FCA	4,842	4,600	-5.0
9	<b>RENAULT</b>	<b>4,120</b>	<b>3,862</b>	<b>-6.3</b>
10	<b>PSA</b>	<b>3,868</b>	<b>3,436</b>	<b>-11.2</b>
11	DAIMLER AG	3,352	3,295	-1.7
12	SUZUKI	3,437	3,056	-11.1
13	BMW	2,542	2,564	0.9
14	SAIC	2,848	2,529	-11.2
15	GEELY	2,177	2,178	0.0
16	MAZDA	1,597	1,488	-6.8
17	MITSUBISHI	1,271	1,441	13.4
18	DONGFENG MOTOR	1,122	1,297	15.6
19	TATA	1,221	1,274	4.3
20	CHANGAN	1,367	1,172	-14.3
21	GREAT WALL	1,027	1,087	5.8
22	SUBARU	1,019	987	-3.1
23	BAIC	1,022	953	-6.7
24	CHERY	612	659	7.6
25	ISUZU	626	648	3.5
37	<b>VOLVO-UD TRUCKS-RENAULT TRUCKS-MACK</b>	<b>235</b>	<b>243</b>	<b>3.2</b>

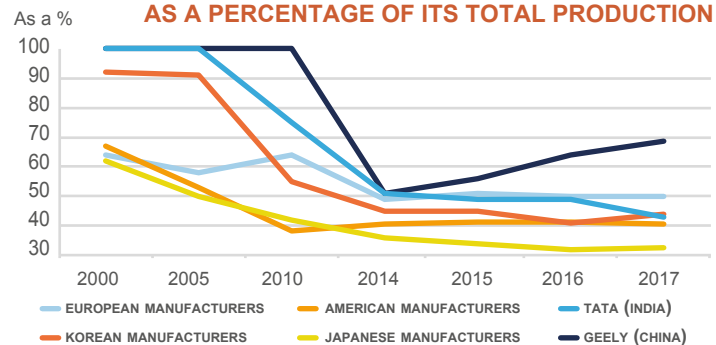
Note: The production of Chinese manufacturers does not include joint-ventures.

(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, annual reports, CCFA estimates

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



After a long period of growth, world production fell by 5.3% in 2019, after a decline of 1% in 2018, with an impact on most of the major automotive groups.

The Volkswagen group, which is very active in emerging countries, experienced a decline in production of 1.8% but retained its leading position in 2019. The Toyota group, one of the few to increase its production, also remains in second place. General Motors, still impacted by the evolution of its scope, now without Opel, fell back but remained in third position. Ford's production was severely affected by the decline in North America.

Japanese manufacturers are mostly affected by the decline in Asia. Only Hyundai-Kia managed to contain the drop, which remains limited to 1%, while Honda, Suzuki and Nissan are experiencing decreases of 3.5% to 12%.

As for the European groups, the situation is also contrasted, with manufacturers whose production fared better, such as Renault (-6.3%), or has even grown slightly, such as BMW (+0.9%). Conversely, other manufacturers, such as PSA, have sharply declined.

Manufacturers in emerging countries (China, India), such as Tata, Dongfeng or Great Wall

have managed to maintain increased production in 2019.

For heavy vehicle manufacturers, the global economic situation remained positive and the Volvo group (including Renault Trucks) increased by 3.5%.

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



**53%**

**Percentage of vehicles manufactured for export in Japan in 2019**

China, which has become the largest manufacturer in the world since 2010, produces mainly to satisfy its domestic market: imports and exports, with volumes around one million units in recent years, each represent 4% of production.

The European Union (28 countries) is the second largest producing area in the world, thanks to growth in the domestic market and dynamic exports (one-third of production).

In North America, including Mexico, production has declined since 2000 but remains at a high level. It

is destined for the local market and exports only represent 13% of production. Imports, on the other hand, amount to 30% of production.

In Japan, exports account for about 50% of production. Imports still account for around 6% of total registrations.

	European Union (1)		USA, Canada et Mexico (2)		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
2018	16,747	113	5,022	71	8,359	100
2019	15,828	107	4,357	61	8,329	100
IMPORTS (3)	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%
2018	3,721	22%	1,906	38%	308	4%
2019	4,316	27%	n/a	n/a	298	4%
EXPORTS (3)	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%
2018	5,427	32%	1,825	36%	4,358	52%
2019	5,319	34%	n/a	n/a	4,373	53%
LIGHT 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
2018	1,858	80	12,402	143	1,370	77
2019	1,880	81	12,427	143	1,356	76
IMPORTS (3)	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%
2018	460	25%	3 339	27%	1	0%
2019	493	26%	n/a	n/a	1	0%
EXPORTS (3)	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%
2018	462	25%	479	4%	460	34%
2019	471	25%	n/a	n/a	445	33%

(1) The number of countries included in the "European Union" corresponds to the number of member states in the year in question.

(2) Mexico is included since 2009.

(3) EU community trade is not included. Sources: OICA, Eurostat, CCFA since 1991, Ward's since 1999, 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%	n/a	-
2017	29,015	159	891	3%	1,247	4%
2018	27,809	152	1,041	4%	-	-
2019	25,721	141	n/a	-	-	-

Since 2000, the evolution of the automotive industry has been contrasted in the three major automotive industry zones.

In the European Union (28 countries), the growth in vehicle production was 9% compared to 2000 and 2018 (compared to approximately 15% between 2000 and 2007) and trade, which is already substantial, increased significantly. In 2019, despite a 5% drop in production, vehicle exports fell only by 2%.

In North America, production fell by 6% compared

to 2000. Imports, already very significant in 2000, increased by 67% between 2000 and 2018 and account for more than a third of production, both for passenger cars and light commercial vehicles. As for exports, in 2018 they represented only 13% of production (a third for the EU and half for Japan), with a very significant weight for passenger cars (31%, against 3% for light commercial vehicles).

Finally in Japan, vehicle production fell by 5% since 2000, but is above its 2010-2018 average, due to the dynamism of the domestic market

and exports. The latter had increased markedly, in line with the depreciation of the yen, and in 2008 exceeded the level of 2000 by 51%; in 2019, they were only 8% above their 2000 level, mainly due to the production of factories of Japanese manufacturers outside Japan.

In China, production increased by 41% between 2010 and 2018, and exports by 109%, but the latter only represent a small volume.

## WORLD VEHICLE MARKETS

In 2019, global automotive markets contracted to 91 million vehicles, a drop of 4.5% after eight consecutive years of increase. This decrease is explained by the decline in sales in Asia, which began in 2018 (-1.4%) and which accelerated in 2019 (-7.6%). Thus, even if sales are resilient in Europe (+0.4%) and particularly in Western Europe (+1.0%), this is not enough to offset the fall in the American (-2.5%) and Asian markets. Africa, which observed an 8% increase in registrations in 2018, also saw its market decline in 2019 (-4.2%).

Automotive markets are strongly correlated with economic situation, with cyclical phenomena thus mainly explaining their evolution. They are also characterised by short-term fluctuations of significant magnitude, be they renewal or first equipment.

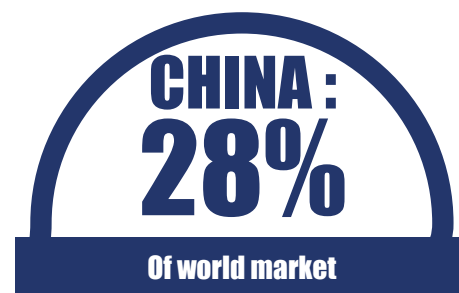
Since 2005, the global automotive market has grown by 39% and its center of gravity has shifted from Western Europe and North America, mature markets (56% of the global market in 2005 and 41% in 2019) to Asia.

This zone has experienced a triple-digit growth since 2005, in particular thanks to the explosion of sales in China and India, and now accounts for nearly 50% of global sales (compared to 31% in 2005). Conversely, the European market fell by 1% over the same period and only represents 23% of the total, against 32% in 2005. NAFTA, which weighed 31% of the world market, now represents 23% of sales.

In 2019, the Asia-Oceania zone lost 2 points of market share but it still represents 48% of global sales. China alone accounts for 28.2% of the total, followed by the United States (19.1%), Japan (5.7%), Germany (4.4%) and India (4.2%). These top five world markets represent 62% of the total. Europe is gaining 1 point in market share, but contrasting developments can be observed between Western Europe and Central and Eastern Europe.

While Western Europe is showing a very weak growth, the decline in the Eastern countries is mainly due to

the decline in the Russian market (-2.3%) while the new EU member countries are showing a 5% growth. Likewise, while sales fell in North America and even more sharply in Central and South America (-5.5%), some countries, such as Brazil, posted strong growth (+8.6% in Brazil).



	Passenger cars			Commercial vehicles			Total			Change 2019/2018
	2018	2019		2018	2019		2018	2019		
	thousands	thousands	%	thousands	thousands	%	thousands	thousands	%	%
EUROPE	17,910	17,973	27.9	2,715	2,733	10.2	20,625	20,706	22.7	+0.4
Western Europe	14,210	14,308	22.2	2,326	2,399	8.9	16,536	16,707	18.3	+1.0
Central and Eastern Europe	3,700	3,665	5.7	617	563	2.1	4,317	4,227	4.6	-2.1
AMERICA	10,563	9,540	14.8	15,397	15,769	58.7	25,960	25,309	27.8	-2.5
NAFTA (1)	6,752	5,973	9.3	14,455	14,842	55.3	21,207	20,816	22.8	-1.8
USA	5,304	4,715	7.3	12,398	12,765	47.5	17,701	17,480	19.2	-1.3
Central and South America	3,811	3,567	5.5	942	927	3.5	4,753	4,494	4.9	-5.5
ASIA-OCEANIA	39,284	35,960	55.9	8,363	8,043	30.0	47,647	44,003	48.3	-7.6
China	23,710	21,444	33.3	4,371	4,324	16.1	28,081	25,769	28.3	-8.2
South Korea	1,525	1,539	2.4	302	256	1.0	1,827	1,795	2.0	-1.8
India	3,395	2,962	4.6	1,005	855	3.2	4,400	3,817	4.2	-13.3
Japan	4,391	4,301	6.7	881	894	3.3	5,272	5,195	5.7	-1.5
ASEAN (2)	2,447	2,424	3.8	1,130	1,067	4.0	3,577	3,491	3.8	-2.4
OtherAsia-Oceania	3,816	3,290	5.1	674	647	2.4	4,490	3,937	4.3	-12.3
AFRICA	921	869	1.4	307	308	1.1	1,229	1,177	1.3	-4.2
TOTAL	68,678	64,342	100.0	26,783	26,854	100.0	95,461	91,196	100.0	-4.5
CHANGE 2019/2018	-6.3%			0.3%			-4.5%			

(1) NAFTA: Canada, USA and Mexico.

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

Source: OICA

Global automotive sales were strongly impacted in 2019 by the slowdown in growth in emerging countries and in particular in China and India. The Chinese market, which is the world's largest market with 28% of sales, fell for the second year in a row, after several years of strong growth. The market lost more than 2 million vehicles in 2019 and now stands at 26 million vehicles, down 8.2% from 2018. India has seen its automotive sales fell by more than 10% in 2019, which now places it in fifth place in the world behind Germany. In Japan and South Korea, the market fell by 1.5% and 1.8% respectively after a first decline observed in 2018.

In the United States, the market fell 1.3% to 17.5 million vehicles. This remains a high cycle level, 7 million units higher than that observed during the crisis in 2009 (10.6 million). The Mexican market continued to contract (-7.2%).

In Central and South America, only the Brazilian market, which continues to recover, is growing

(+8.6%) with 2.8 million units.

In Western Europe, the market, which has been growing since 2014, grew 1% in 2019 to 16.7 million vehicles. This level is high compared to the period after the crisis of 2008 or the bottom of the cycle in 2013, when sales were around 13 million. The situations are contrasted with increases in Germany (+5.1%), France (+2.3%) and Italy (+0.5%), and decreases in the United Kingdom (-2.4%) and Spain (-4%).

Central and Eastern Europe, which represents 4.5% of the global market, experienced a decline in 2019 (-2.1%), after a first decline in 2018 (-0.5%). The growth rate of the new Member States of the European Union continues to slow (+5%), after five years of strong growth. The Turkish market fell again sharply (-23%), after three years of decline. The Russian market is also declining, after rising 10% in 2018, and stands at 1.8 million units, far from its pre-crisis level (3.2 million vehicles).

In the Asia-Oceania zone, the market, excluding China, India and South Korea, has fluctuated around 12 million vehicles since 2012. Developments in 2019 were very mixed, with increases as in Vietnam (+13.9%) and decreases as in Thailand (-3.3%).

In South America, the market continued to recover (+5.3%) in 2018, supported by the dynamism of the Brazilian market (+13.6%) and other countries except Argentina (-10%).

In Africa, after a rebound in sales in 2018, the market contracted in 2019 (-4.2%) including Algeria (-1.8%), Morocco (-6.5%), Egypt (-7.8%) and South Africa (-2.8%), countries which had seen an increase in sales the previous year. Africa's market share in the world market remains extremely low at just 1.3%.



## VEHICLES IN USE IN THE WORLD

In 2015, the global vehicle fleet (passenger and commercial vehicles) was 1.3 billion units (of which almost 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).

Fleet 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 fleet 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.

Automobile density across the world was on average 182 vehicles per 1,000 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.

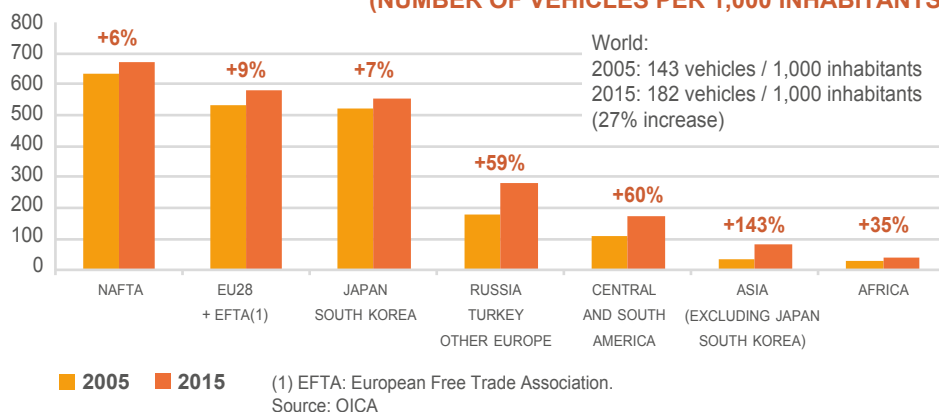
North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has shown strong vehicle fleet growth with an average rate of 6% per year since 2005, from 10 to 19 million units.



	Total		Change 2015/2014
	2014	2015	
	thou- sands	thou- sands	%
<b>EUROPE</b>	<b>380,136</b>	<b>387,519</b>	<b>+1.9</b>
Western Europe	246,641	250,037	+1.4
Central and Eastern Europe	133,496	137,482	+3.0
<b>AMERICA</b>	<b>403,022</b>	<b>413,725</b>	<b>+2.7</b>
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
<b>ASIA-OCEANIA</b>	<b>409,362</b>	<b>436,222</b>	<b>+6.6</b>
China	145,981	162,845	+11.6
South Korea	20,118	20,990	+4.3
India	26,510	28,860	+8.9
Japan	77,188	77,404	+0.3
ASEAN (2)	55,415	58,419	+5.4
Other Asia-Oceania	84,150	87,704	+4.2
<b>AFRICA</b>	<b>42,366</b>	<b>44,803</b>	<b>+5.8</b>
<b>TOTAL</b>	<b>1,234,887</b>	<b>1,282,270</b>	<b>+3.8</b>



### VEHICLE DENSITY BY REGION (NUMBER OF VEHICLES PER 1,000 INHABITANTS)



(1) NAFTA: Canada, USA and Mexico.

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

In 2015, the mature zones represented more than 50% of the global vehicle fleet 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 fleet, 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 fleet, 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 fleet), 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 fleet 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

In 2018, world trade in automotive products grew 5.5% according to the WTO. They now stand at \$1,547 billion, accounting for 8% of world merchandise exports and 12% of manufactured goods. This growth, slightly lower than that of 2017 (+7.4%), achieves an increase of 25% compared to before the crisis (2008).

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.

In 2018, the euro strengthened against the dollar while the Japanese yen was virtually unchanged. The Chinese yuan and the pound sterling strengthened slightly.

Faced with high-level markets in the European Union and NAFTA, the share of intraregional trade in global trade had stabilised around 60% from 2011 to 2016, before rising to 67% in 2017, a level close to that of 2009 (66%). In NAFTA and Europe (excluding CIS), this share rises to around 75%. In South America, this ratio, after two years around 75%, increases to 79%; it stood at more than 80% between 2011 and 2014. However, it reaches barely 30% for Asia-Oceania, which is very outward-oriented with national markets that are not as open (Japan, etc.).

Auto balances are positive in the European Union (+\$150 billion), Japan (+\$134 billion) and South Korea (+46 billion dollars). On the other hand, they are in deficit, at a record level in the United States (-\$169 billion) and in China (-\$26 billion).

The European Union (\$783 billion), NAFTA (\$320 billion), Japan (\$158 billion) and South Korea (\$63 billion) are major exporters. Chinese exports are growing in recent years, but are at a lower level (\$61 billion).

Without taking intra-zone trade into account, the European Union's imports exceeded those of China for the third consecutive year (102 vs 87 billion dollars in 2018), unlike in previous years. These imports remain, however, well below those of NAFTA, which amounted to \$186 billion.

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

Areas	World		
Countries	EXP.	IMP.	Balance
<b>USA</b>			
2010	99.7	189.8	-90.0
2015	129.5	292.9	-163.4
2018	135.5	314.8	-179.4
<b>CANADA</b>			
2010	50.1	59.6	-9.5
2015	61.8	68.1	-6.2
2018	60.8	76.0	-15.2
<b>EUROPEAN UNION (1)</b>			
2010	546.4	426.9	119.4
2015	655.1	497.5	157.6
2018	782.8	632.2	150.6
<b>JAPAN</b>			
2010	149.5	14.2	135.3
2015	136.8	19.4	117.3
2018	158.4	24.6	133.8
<b>SOUTH KOREA</b>			
2010	54.5	8.0	46.5
2015	70.9	15.1	55.8
2018	63.4	16.9	46.4
<b>CHINA (EXCLUDING HONG-KONG)</b>			
2010	28.0	53.0	-25.0
2015	49.5	73.0	-23.5
2018	60.7	86.8	-26.2
<b>BRAZIL</b>			
2010	12.6	17.7	-5.1
2015	9.9	14.2	-4.4
2018	13.0	14.6	-1.5

Source: WTO



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

	2005	2010	2016	2017
Intra Asia	24%	32%	30%	31%
Intra Europe	78%	73%	73%	72%
Intra North America	83%	76%	78%	77%
Intra Latin America	51%	79%	75%	79%

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

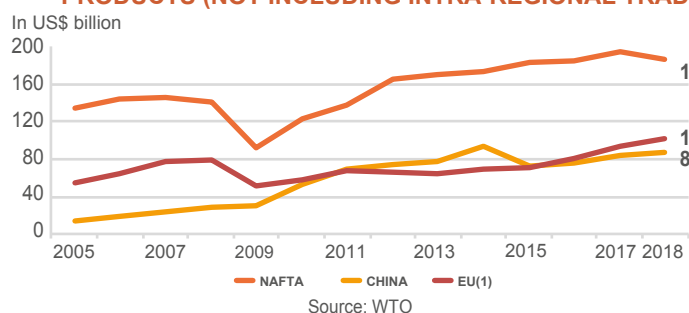
	Germany			France			Spain			Italy			United Kingdom		
2010	203,2	85,0	118,2	51,1	54,9	-3,8	44,8	31,6	13,1	29,8	40,3	-10,5	38,8	52,6	-13,9
2015	246,5	103,1	143,3	47,0	52,7	-5,7	53,6	41,4	12,2	36,2	35,5	0,7	51,4	76,7	-25,3
2018	267,0	131,2	135,8	59,4	71,7	-12,3	60,0	49,8	10,2	43,6	49,4	-5,8	56,3	72,8	-16,5

(1) For the comparisons, 27 countries have been included in the European Union from 2006 and 28 from 2014.

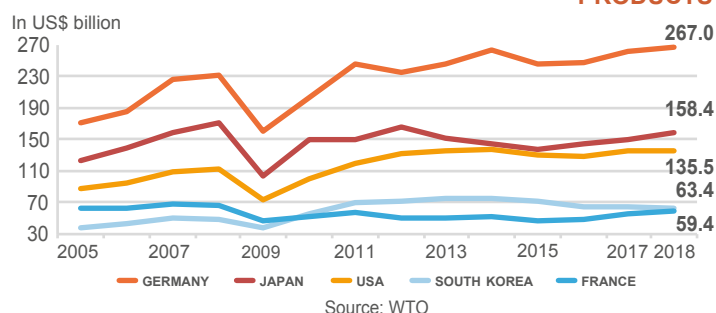
Sources: WTO

# WORLD TRADE IN AUTOMOTIVE PRODUCTS

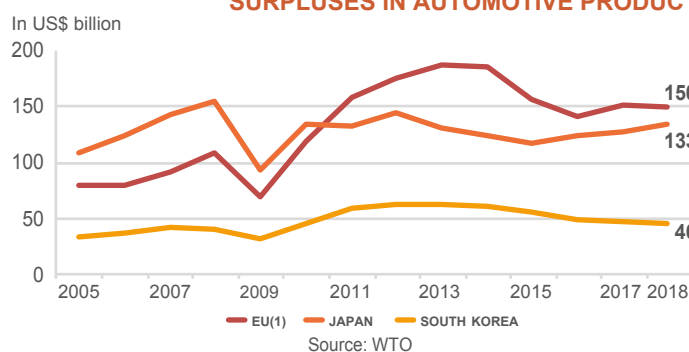
## IMPORTS FROM THE MAIN REGIONS FOR AUTOMOTIVE PRODUCTS (NOT INCLUDING INTRA-REGIONAL TRADE)



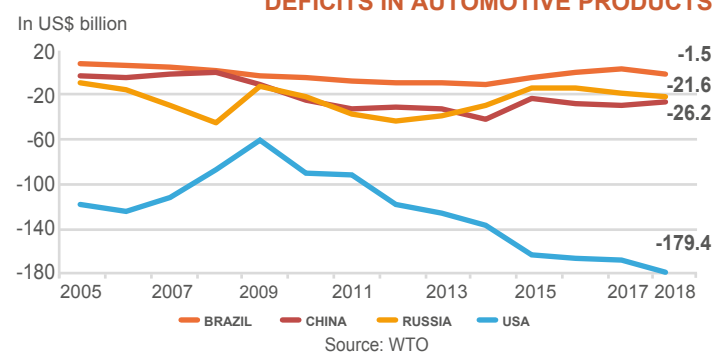
## MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



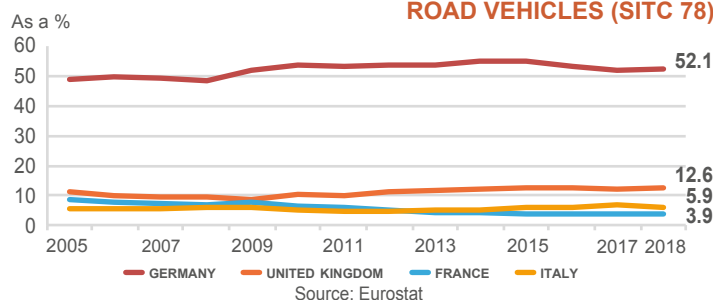
## SURPLUSES IN AUTOMOTIVE PRODUCTS



## DEFICITS IN AUTOMOTIVE PRODUCTS



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



# 4%

France's share of global automotive industry product trading in 2018

(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 2018, changes in sales in the automotive industry were very different between the countries-zones. South Korea, Japan and the European Union have seen their trade surpluses increase. South Korea's rose 38% to \$46 billion in 2018. Japan's rose from \$110 to \$134 (+22%), while that of the European Union rose 89%, from \$80 to \$150 billion. Conversely, the deficit of the United States increased further in 2018 and stands at -\$179 billion, compared to -\$118 billion in 2005.

In other areas, the trade balance in automotive products, which was positive, turned negative. In Canada, for example, the balance of \$9 billion in 2005 turned into a deficit of \$15 billion in 2018, in line with the place taken by Mexico in trade within NAFTA. Thus in Mexico, the trade surplus was multiplied by 7 between 2005 and 2018. In Brazil, the positive balance of \$7 billion in 2005 became negative from 2010, except in 2016 and 2017. Finally, China, which became the world's largest automotive market, increased its trade deficit tenfold, from -\$4 billion to -\$26 billion between 2005 and 2018. India's surplus fell from \$500 million in 2005 to nearly \$9 billion in 2018, following a six-fold increase in exports to more than \$15 billion.

In 2018, Germany, with \$267 billion, remained the leading exporter of automotive industry products with 18% of world exports. Second in the world, Japan exported \$158 billion, 61 of which went to North America (or 41% of its total exports,

compared to more than 50% in the early 2000s). Its exports to China fell between 2011 and 2018 to \$14 billion. They are to be compared to the \$19 billion going to the EU28.

Exports from the European Union 28 countries reached \$783 billion dollars, of which 68% were intra-community trade (74% in 2009). EU exports to China amounted to €41 billion. They reached \$10 billion to Russia, \$17 billion to Africa and \$13 billion to the Middle East. Based on Eurostat data, more than half of EU exports to non-EU are made by Germany (52% in 2018), ahead of the United Kingdom (13%), the Italy (6%), Spain and France (around 4%). The share of the six new entrants (Hungary, Poland, Romania, Slovakia and Slovenia) amounted to 9%. France accounted for nearly 4% of world exports of automotive products with \$59 billion (including intra-EU trade), against nearly 7.6% in 2004.

The decline in the UK domestic market has led to a decline in imports, but the automotive balance remains sharply negative in 2018, at \$16.5 billion, up from \$25 in 2015, which was a record level. After a very strong increase in trade between 2010 and 2015, exports have since increased by 9%, while imports decreased by 5%.

The United States remained the world's largest importer of automotive products, with \$315 billion; due in particular to the high level of its domestic market, its deficit in automotive products reached

a record level of \$179 billion in 2018. Chinese imports increased again in 2018 (+4% to \$87 billion). Since 2005, they have grown by 15% per year. In 2012, the origins of the latter were the EU28 (56% vs 42% in 2009), ahead of Japan (22% vs 36% in 2009), NAFTA (13%) and South Korea (7%). Reflecting the evolution of their oil resources, imports have grown strongly since 2005 in Russia, Saudi Arabia and the United Arab Emirates. In Russia, they increased almost fourfold between 2005 and 2013, then fell sharply between 2013 and 2016 (-60%) to start again in 2017 and 2018 and return to a level close to that of 2010 at \$25 billion. Finally in Australia, imports have almost doubled since 2005 to reach \$29 billion; this country has ceased to have light vehicle production sites since the end of 2017.

## NEW PASSENGER CAR REGISTRATIONS PER COUNTRY



**+24%**

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

The passenger car market in Western Europe (90% of the European market) amounted to 14.3 million units in 2019 (+0.7% compared to 2018). Since the low point in 2013, the market gained 2.7 million units, which gradually made up for the fall of the years of crisis (-3.3 million cars between 2007 and 2013). The current level nevertheless remains down 3.5% compared to the level observed in 2007.

The main markets for passenger cars in Western Europe are Germany (25.2% of the Western European market), followed by the United Kingdom (17.8%), France (16.2%), Italy (13.4%) and Spain (8.8%).

In 2019, the developments in these countries were contrasted. The United Kingdom suffered a decline (-2.4%) for the third consecutive year, after reaching a record level in 2016. Germany and France are still at the top of the cycle, above their levels of before the crisis and grew by 5% and 1.9% respectively in 2019.

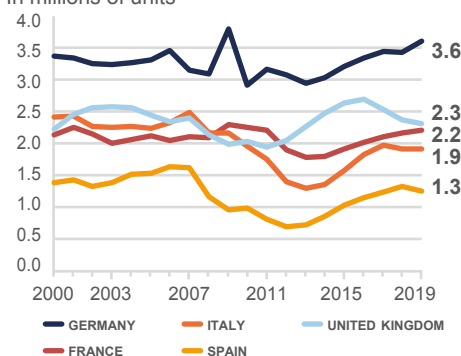
Conversely, the markets of Southern Europe (Italy, Spain, Greece, Portugal) fell in 2019. Italy posted an increase of only 0.3%, while the Spanish market (-4.8%) and the Portuguese market (-2%) are down after experiencing sustained growth in 2018. Thus, despite a growth of 60% since the low point in 2013, the markets of Southern Europe remain down 22% from their 2007 level.

### ► NEW PASSENGER CARS REGISTRATIONS IN EUROPE

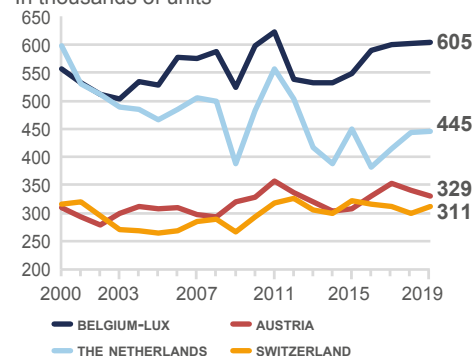
In millions of units



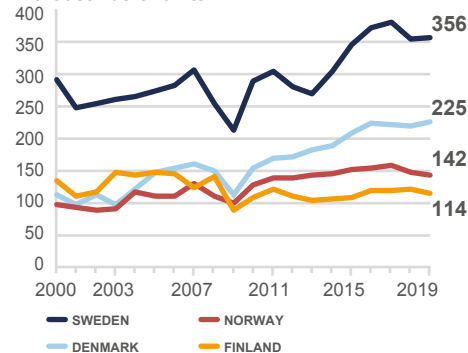
In millions of units



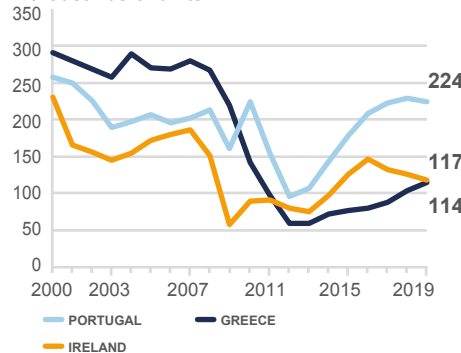
In thousands of units



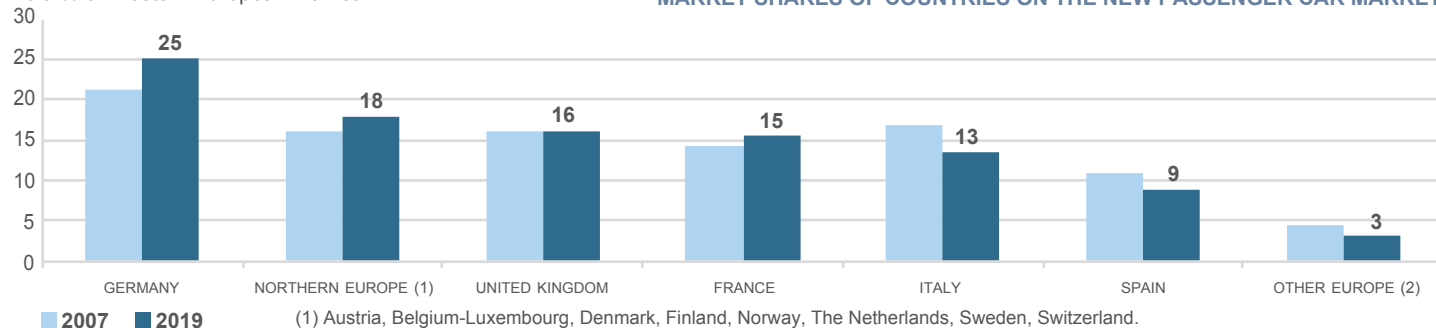
In thousands of units



In thousands of units



As a % of Western European market



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

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 experienced two strong crises: in 1993 (-16% or -2.2 million units) and from the end of

2008. The latter led to a fall in the market of 22% between 2007 and 2013 (-3.3 million units) with a contrasting impact depending on the geographic area. The group of countries comprising Northern Europe, Germany and the United Kingdom suffered a decline of only 5% during the crisis, while it reached more than 50% for Southern Europe (Spain, Italy, Portugal and Greece).

Today, the countries of the first group have caught up to their pre-crisis level while the countries of Southern Europe are still below this level. All in all, the Western European market is still down 3.5% compared to the level observed in 2007.

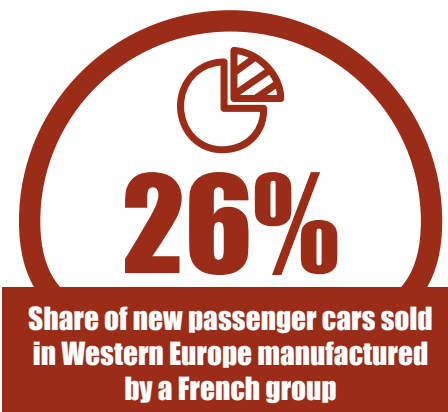


## NEW PASSENGER CAR REGISTRATIONS PER GROUP

In 2019, the market of French groups in the Western European market remained stable compared to 2018 and amounted to 26%.

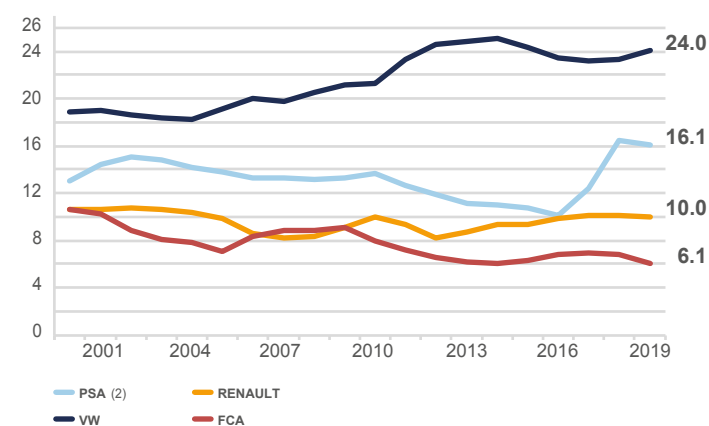
French groups rely on their different brands that complement each other. The Renault group is based on the Renault (6.9% market share) and Dacia brands (3.2%); the latter only represented 0.5% of the market in 2007. As for the PSA group, it now includes four brands: Peugeot (6.4%), Citroën (4.2%), Opel/Vauxhall (5.2%) and DS (0.3%).

Foreign groups are mainly represented by the Volkswagen group, which holds a 24% market share in 2019, and by five other large generalist groups and two groups specialising in higher ranges, each with a market share of between 6% and 7%.

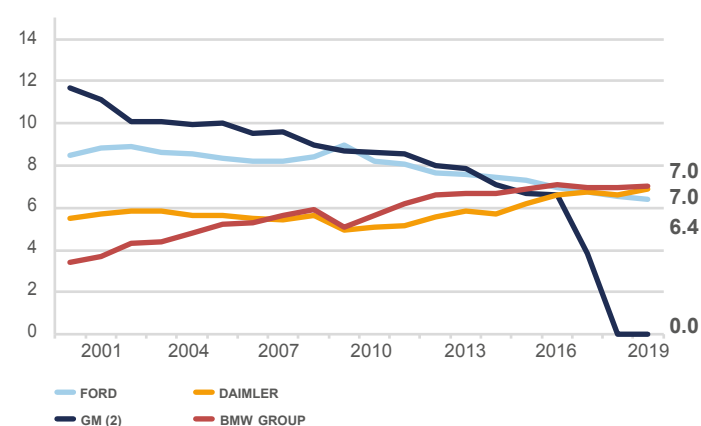


### ► MARKET SHARES OF GROUPS (1) IN WESTERN EUROPE (EU18)

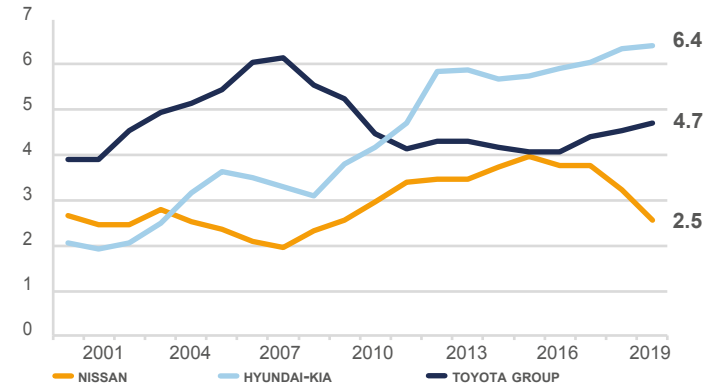
As a % of the total market



As a % of the total market



As a % of the total market



(1) The scope of the groups reflects their situation as at 01/01/2020.  
 (2) Opel is included in GM group until July 31, 2017 and PSA group since August 1, 2017.  
 See page 74 for groups definitions.  
 Source: CCFA



Market share of the French PSA and Renault groups (26% in total) fell slightly in 2019 but remained higher than that of 2007. It exceeded 25% between 2001 and 2003, a more favorable period when the French and Southern European markets weighed heavily. 45% of the Western European market, compared to 39% in 2019. The Opel brand, which joined the PSA group on August 1, 2017, confirms its market share above 5%. The market share of the Dacia brand is growing steadily each year and exceeds 3% in 2019, or a volume of more than 450,000 units. DS's market share is 0.3%.

Since 1995, the Volkswagen group (VW), with its four main brands, has consolidated its positions and reached 24% in 2019 after declining between 2014 and 2018. This level remains however slightly

below the record level of 2014.

The Fiat group, including the Chrysler group brands, represented 6.1% of the Western European market in 2019, compared to nearly 13% in 1997 and 15% in 1989. In 2019, the market share of the Fiat brand amounted to 4.2%.

The American Ford group has experienced a similar development to that of the Fiat group, halving its market share between the early 1990s and today to stand at 6.4% in 2019.

The German groups Daimler and BMW, specialists in premium ranges and corporate sales, are pursuing a strategy to expand their range and continue to gain market share. Daimler (Mercedes-Benz and smart), which has grown since 1997 as

a result of the diversification of its vehicle range, gained another 0.3 point of market share in 2019 to 6.9%. BMW, including the Mini brand, remained stable at 7%.

Toyota Group market share, which rose continuously from 1995 (3%) to 2007 (6%) fell to 4.1% in 2016. Since then, the market share has grown again and reached 4.7% in 2019.

The Hyundai-Kia group's market share, which was almost non-existent in 1990 (0.1%), has grown steadily over the past thirty years. From 2.1% in 2000 to 4.2% in 2010, its market share reached 6.4% in 2019.

## RANGE RANKING IN 2019



# 71 & 99

**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 (3008, 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, C4 Cactus, Nemo, Berlingo, E-Mehari	C4, C3 Air Cross, C5 Air Cross, Jumpy, SpaceTourer, Jumper	C-Elysée	
	DS	DS3, DS3 Crossback	DS4	DS5, DS7	
	PEUGEOT	108, 208, 2008, Partner, Rifter	308, 3008, 5008, Expert, Traveller, Boxer	508, 301	
	OPEL	Corsa, Adam, Combo, Karl, Mokka, Crossland, Grandland	Ampera, Ampera-E, Astra, Zafira, Movano	Cascada, Antara, Insignia, Vivaro	
RENAULT group	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE	Megane (including Scenic, Grand Scenic), Master	Trafic, Kadjar, Koleos	Espace, Talisman
	DACIA	Logan, Sandero, Duster, Dokker	Lodgy		
	ALPINE				A110
	LADA	Niva			
BMW group	BMW	i3	1, 2 Series, M2	4, X1, X2 Series	3, 5, 6, 7, 8, X3, X4, X5, X6, X7, Z4, i8, M3, M4, M5 Series
	MINI	Mini			
DAIMLER group	MERCEDES-BENZ	Citan	Classes A, B, CLA, Vito, Sprinter	GLA	C, E, G, S, SL, V, CLS, EQC, GLC, GLE, GLS, GT classes, G, SLC, SLK Series
	SMART	fortwo, forfour			
FIAT group	ALFA ROMEO	Mito	Giulietta		Giulia, 4C, Stelvio
	FIAT	Panda, 500, G.Punto, Punto, Fiorino, Doblo, Qubo	124 Spider, Ducato, Tipo	Talento	
	JEEP	Renegade		Wrangler, Compass, Cherokee	Grand Cherokee
	LANCIA	Ypsilon			
FORD EUROPE	FORD	Ka+, Fiesta, T. Courier, T. Connect, Ecosport	Focus, Kuga, Transit, Transit Custom	Mondeo	S-Max, Mustang, Galaxy, Edge
GEELY	VOLVO			V40, XC40	S60, S90, V60, V90, XC60, XC90
HONDA	HONDA	Jazz	Civic, HR-V	CR-V	
HYUNDAI KIA	HYUNDAI	I10, I20, IX20, Kona	I30, Elantra, H-1	I40, Santa Fe, Tucson, Ioniq	
	KIA	Picanto, Soul, Stonic, Venga	Carens, Cee-d, Ceed, Niro, Proceed, Rio, Xceed	Optima, Sportage, Stinger	Sorento
MAZDA	MAZDA	2, CX-3	3, MX5, CX-5	6, CX-30	
MITSUBISHI	MITSUBISHI	i-MiEV	ASX, Spacestar,	Outlander, ECL-Cross	Pajero
NISSAN	NISSAN	Micra, Juke	Leaf, Pulsar, NV200, NV300	Qashqai, X-Trail	370Z, T-R, NV400
SUBARU	SUBARU			Impreza, Legacy, Forester, Outback, Levorg	BRZ
SUZUKI	SUZUKI	Celerio, Ignis, Jimny, Swift, SX4, Vitara	Baleno	Grand Vitara	
TATA group	JAGUAR			E-Pace	F-Pace, F-Type, XE, XF, XJ, F-Type, I-Pace
	LAND ROVER			RR Evoque	Discovery, Discovery.Sp, Range Rover, Rangsport, RR-Velar
TESLA	TESLA				Model 3, Model S, Model X
TOYOTA	LEXUS		CT	UX	ES, GS, IS, LS, RX, NX, RC
	TOYOTA	Aygo, Yaris	Auris, Corolla, Proace	Avensis, Prius, CH-R, RAV4, Mirai	GT86, Land Cruiser, Camry, Supra
VOLKSWAGEN group	AUDI	A1, Q2	A3	A4, A5, TT, Q3	A6, A7, A8, Allroad, Q5, Q7, Q8, R8, E-Tron
	PORSCHE				911, 718 Boxster, Cayman, Macan, Cayenne, Panamera
	SEAT	Mii, Ibiza, Arona	Leon	Toledo, Ateca	Alhambra, Tarraco
	SKODA	Citigo	Fabia, Rapid, Kamiq, Scala	Octavia, Karoq	Superb, Kodiaq
	VOLKSWAGEN	Up!, Polo, Caddy, T-Cross, T-Roc	Golf, Touran, Crafter	Passat, Arteon, Tiguan, Transporter	Sharan, Touareg

## BREAKDOWN AND RANKING BY MODEL

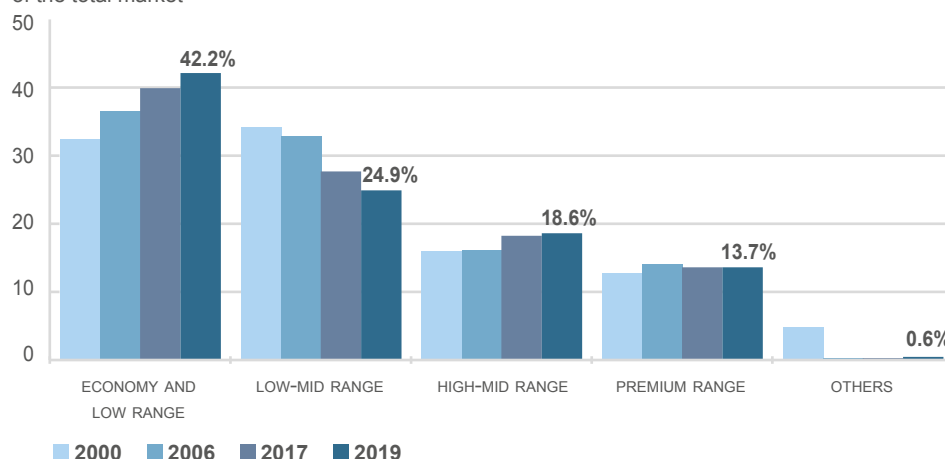
Of the 15 best-selling models in Western Europe in 2019, six belonged to a French group.

### ► RANGES AND BODY STYLES IN 2019 (AS A % OF NEW REGISTRATION BY COUNTRY)

	Economy and low range	Low-mid range	High-mid range	Premium range	Others	Sedans	Station wagons	Coupés	Convertibles	MPVs	Others
GERMANY	31.4%	28.4%	19.9%	18.9%	1.4%	34.5%	15.7%	3.1%	9.3%	32.9%	4.4%
AUSTRIA	37.8%	26.5%	20.8%	14.7%	0.1%	33.3%	13.3%	1.2%	10.7%	38.3%	3.2%
BELGIUM	38.4%	26.1%	21.5%	14.0%	0.0%	35.6%	11.8%	1.9%	8.9%	40.7%	1.1%
DENMARK	42.8%	25.6%	19.9%	11.6%	0.1%	48.7%	15.4%	1.0%	5.0%	28.9%	1.0%
SPAIN	42%	29%	21%	7%	0%	44%	5%	1%	4%	47%	0%
FINLAND	26%	30%	26%	17%	2%	38%	23%	0%	3%	33%	3%
FRANCE	56%	25%	13%	6%	0%	49%	4%	1%	6%	38%	1%
GREECE	62%	19%	15%	3%	0%	61%	1%	0%	1%	35%	2%
IRELAND	32%	26%	29%	12%	0%	45%	5%	1%	3%	47%	0%
ITALY	62%	17%	14%	6%	0%	47%	5%	1%	5%	42%	1%
LUXEMBOURG	31%	26%	20%	23%	0%	31%	12%	4%	7%	43%	3%
THE NETHERLANDS	44%	25%	14%	16%	0%	52%	12%	1%	2%	32%	2%
PORTUGAL	47%	28%	15%	9%	1%	46%	14%	2%	3%	32%	2%
UNITED KINGDOM	37%	23%	21%	18%	0%	45%	6%	3%	4%	42%	1%
SWEDEN	18%	23%	27%	32%	1%	29%	25%	1%	3%	40%	2%
EU 15	43%	25%	18%	13%	1%	42%	9%	2%	6%	38%	2%
ICELAND	31%	21%	31%	16%	1%	24%	3%	0%	2%	61%	10%
NORWAY	20%	24%	23%	33%	0%	43%	12%	0%	3%	40%	1%
SWITZERLAND	29%	22%	24%	24%	1%	31%	12%	3%	7%	44%	3%
ALL 18 COUNTRIES	42%	25%	19%	14%	1%	42%	9%	2%	6%	39%	2%

As a %  
of the total market

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



Source: CCFA

In 2019, the diversity of the offer remains very strong; the market shares of the top 15 vehicles sold in Western Europe amounted to 24%, against 30% in 2015 and 40% in 2000. On the lower ranges, the French groups, which offered eight models, now offer forty. Of the 5 best-selling lower-end models in Western Europe in 2019, 3 belong to a French group.

The economy and lower range dominates the West European market with 11 models in this category among the 15 best-selling models and 42.2% of registrations in 2019 (vs 40% in 2012), a figure that has been stable since 2014. On the other hand, the ratio of the lower mid-range, which is rich in sedans, fell by nearly 5 points over the same period, to stand at 24.9% in 2019. The upper ranges (upper-middle, upper and luxury) are up 4 points compared to 2014 and reached 32.4% of the market in 2019.

The share of sedans, still dominant, has declined since the recovery of the European market in 2014, in favour of the MPVs category. The latter benefits from a varied and growing offer in the particularly popular low range (Peugeot 2008,

Renault Captur, etc.). Of the top 15 models sold in Western Europe, five models belong to the MPVs category, which now accounts for 39% of the market, up from 21% in 2014.

Each European country kept its characteristics until 2008: Southern Europe favoured the low and low-mid ranges while Northern Europe always favoured higher ranges and station wagons. In 2009, the success of the low range and sedans, particularly in Germany and the United Kingdom, reduced the contrast between the different regions, but after the crisis these two countries regained their specificities. In these two countries, the market shares of the lower ranges remain 5 to 11 points below the European average, while those of the higher ranges remain above (39% compared to 32% on average in Europe).

# 11 OUT OF 15

Best-selling models in Western Europe in 2019 were in the economy and low range

### ► RANKING OF THE 25 LEADING MODELS IN 2019

Models	Units	Market share
VOLKSWAGEN GOLF	422,319	3.0%
RENAULT CLIO	291,853	2.0%
VOLKSWAGEN POLO	247,026	1.7%
VOLKSWAGEN TIGUAN	242,686	1.7%
FORD FIESTA	219,078	1.5%
PEUGEOT 208	216,007	1.5%
RENAULT CAPTUR	206,763	1.4%
OPEL CORSA	206,393	1.4%
FORD FOCUS	205,859	1.4%
CITROEN C3	202,355	1.4%
NISSAN QASHQAI	200,701	1.4%
DACIA SANDERO	198,663	1.4%
VOLKSWAGEN T-ROC	195,311	1.4%
TOYOTA YARIS	189,669	1.3%
FIAT 500	186,986	1.3%
PEUGEOT 3008	186,551	1.3%
FIAT PANDA	181,379	1.3%
DACIA DUSTER	177,686	1.2%
PEUGEOT 2008	157,917	1.1%
RENAULT MEGANE	155,600	1.1%
SKODA OCTAVIA	155,414	1.1%
FORD KUGA	149,198	1.0%
PEUGEOT 308	136,609	1.0%
MINI MINI	129,400	0.9%
SEAT LEON	126,105	0.9%

Source: CCFA

## TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS



# -18 POINTS

**Drop in the share of new cars fitted with diesel engines as a proportion of total registrations between 2016 and 2019**

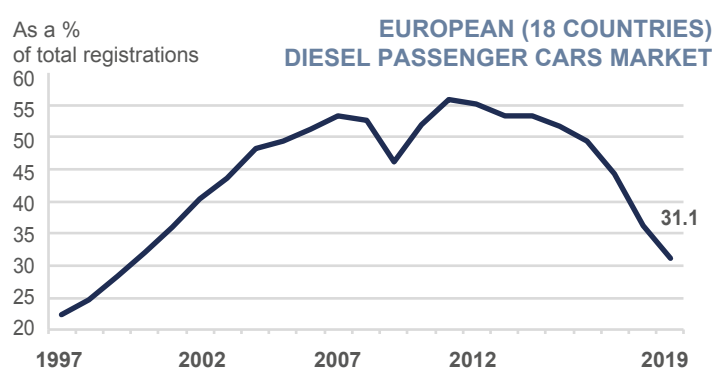
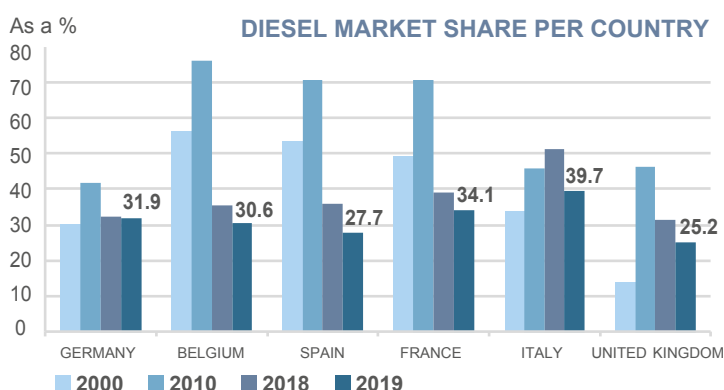
After increasing from 1997 to 2007, the share of new passenger cars equipped with a diesel engine in registrations in Western Europe hovered around 52% until 2016. Then, from 2017, it fell sharply and set up at 31.1% in 2019 (a drop of 18 points in three years and 25 points compared to the record level of 2011). France, Belgium and Spain, starting from diesel market share above 70% experienced the strongest declines over this period (-45 points). Conversely, Greece, starting from a very low level (10% in 2011), saw the diesel market share continue to increase until 2014. But, since that date, it has followed the same downward trend as in other countries.

On the European diesel car market, which counted 4.4 million units in 2019 (compared to 6.9 in 2016), the French groups market share amounted to 26%, a stable level compared to 2018 and comparable to that other energies.

Hybrid and electric powertrains, still emerging, continue to develop in Western European markets. The hybrid cars market share accelerated in 2019 (+2.2 points) to 7.5%, thanks to the contribution of the German, Dutch and English markets. The electric cars market share also increased in 2019 (+1 point) to 2.4%, thanks to significant sales growth in Germany, Spain and the United Kingdom.

### ► TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS IN EUROPE (18 COUNTRIES) IN 2019

	Average cylinder capacity	Average power	4WD	Diesel	Electric	Hybrid
	cc	kW	%	%	%	%
GERMANY	1,686	116	21.0	31.9	1.7	6.5
AUSTRIA	1,566	99	23.8	38.2	2.8	5.0
BELGIUM	1,493	96	0.1	30.6	1.6	6.2
DENMARK	1,467	94	6.4	26.0	2.5	7.7
SPAIN	1,468	93	7.7	27.7	0.8	9.0
FINLAND	1,554	104	20.0	18.6	1.7	18.3
FRANCE	1,405	88	6.7	34.1	1.9	5.7
GREECE	1,347	0	4.4	26.6	0.2	6.0
IRELAND	1,530	92	8.5	45.5	2.9	8.9
ITALY	1,439	83	11.6	39.7	0.6	6.0
LUXEMBOURG	1,790	127	23.7	41.8	1.8	5.9
THE NETHERLANDS	1,377	91	10.0	7.4	13.8	7.8
PORTUGAL	1,445	87	5.2	50.9	2.5	5.6
UNITED KINGDOM	1,610	110	18.0	25.2	1.6	8.6
SWEDEN	1,747	120	37.9	32.2	4.4	16.1
EUROPEAN UNION 15 COUNTRIES	1,543	101	14.6	31.4	2.0	7.2
ICELAND			25.1	30.0	7.7	19.3
NORWAY	1,828	119	48.1	16.0	42.4	26.5
SWITZERLAND	1,812	133	49.3	25.6	4.2	8.6
ALL 18 COUNTRIES	1550	102	15.7	31.1	2.4	7.5



Source: CCFA

In Europe, the engine sizes and average power of the car engines differ considerably from one country to another. They depend largely on the economic, tax and geographical conditions of each national market. Due to the minimisation of the engines (downsizing, identical power of the engine with a smaller cylinder capacity, boosting the petrol energy), the average capacity of new passenger cars in Europe decreased by 190 cc between 2007, high point, and 2019. On the other hand, the average power has increased by 12 kW since 2013 to reach 102 kW in 2019. The levels of these indicators are higher in Northern Europe.

The share of 4WD continuously increased since

2010; in 2019, it accounted for 15.7% of the Western European market, doubling its market share in ten years and a volume of 2.2 million units. The equipment rate varies widely according to national characteristics. In Switzerland, Austria and the Nordic countries, this share is higher to meet the demands of mountainous topography or weather conditions. It reaches almost 50% in Norway and Switzerland. In Germany, it is also higher than the European average with 21% market share, an increase of 13 points in ten years.

The diesel share is largely influenced by the regulations and taxation of each country. In

Europe, in a market which grew very slightly in 2019, sales of diesel cars fell by 14% and now account for 31.1% of total sales. The situation remains contrasted in terms of level and variation depending on the country. Portugal is now the only country in which more than half (50.9%) of new cars registered remain diesel cars. Spain, Italy, Ireland and Greece experienced the biggest drops in diesel market share in 2019 (-10 points as an average). In Italy, this sharp drop (-11 points) brought the rate below 40%, while in Ireland it remains around 45%. On the contrary, this rate practically stagnated in Germany, where it stands at 32%.



## PASSENGER CARS IN USE IN EUROPE

In Western Europe, an area of high auto density (from 436 passenger cars per 1000 inhabitants in Ireland to 645 in Italy), the fleet increased on average by 1.5% between 2014 and 2018. The strong contrast observed since 2013 between Northern Europe, dynamic, and Southern Europe, affected by the crisis, disappeared.

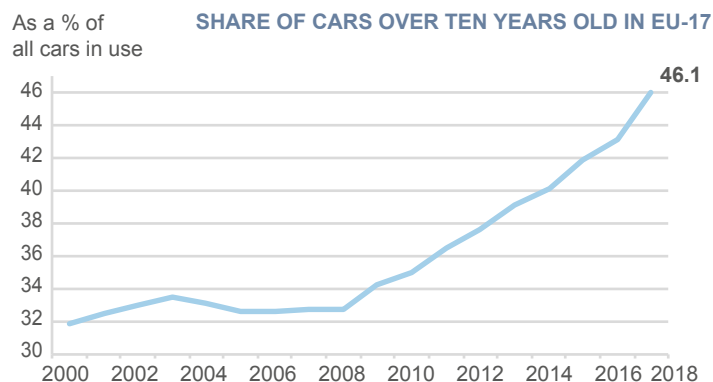
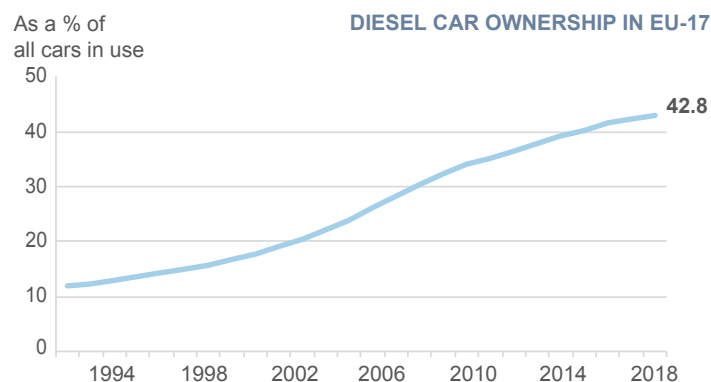
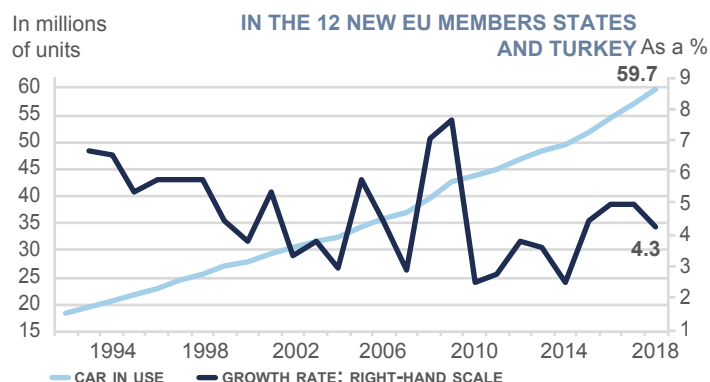
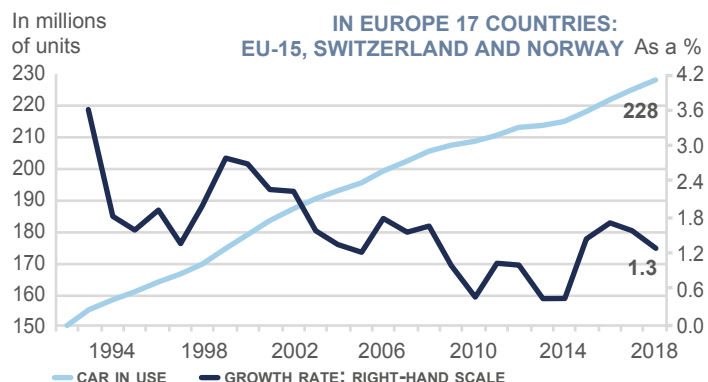
In the new EU member states and in Turkey, where car ownership is generally lower (from 153 in Turkey to 617 for Poland), the growth rate

of the fleet is more sustained. It averaged 4.8% between 2000 and 2009, then slowed between 2010 and 2014 with the economic and financial crisis. From 2015, the growth of the fleet becomes dynamic again and amounts to 4.7% on average. The demand at lower cost remains mainly satisfied by imports of used vehicles. In 2018, this zone now accounts for 21% of the European fleet against 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 46% in 2018. This high level can be explained by the low levels of new passenger cars registrations, especially in Southern Europe, where the share of cars over 10 years old exceeds 50% in Italy and 60% in Spain and Portugal. Among the new EU member states, 76% of the fleet is over 10 years old.

### ► PASSENGER CARS IN USE ON JANUARY 1 EACH YEAR

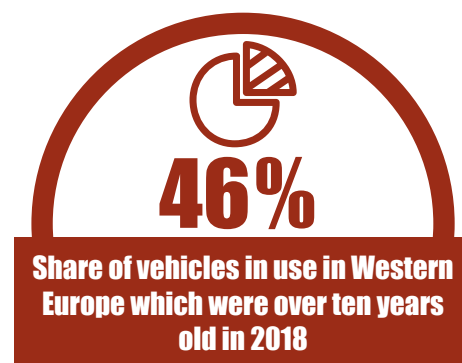


Sources: ACEA, professional organisations

As of January 1, 2018, the passenger car fleet in Western Europe (European Union 15 countries, Switzerland and Norway) amounted to 228 million. High levels of ownership and the crisis affected the fleet growth, which was on average 1.9% per year between 1992 and 2009. From 2009, this rate slowed down to 1.1% per year on average over the period 2009-2018. In 2018, the fleet increased in all European countries, except Greece, where it fell by 0.1%. In France, Italy and the United Kingdom, the fleet is growing less quickly than the European average.

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 43% on January 1, 2018. In six countries, this engine type remains the majority: Austria, Belgium, Spain, France, Ireland and Luxembourg. On the other hand, this share, although growing, is lower in Germany (32%), while it is close to the average in the United Kingdom (40%) and Italy (44%).

In the new EU member states and Turkey, the fleet grew by 20% over the period 2014-2018 (an average of 4.7% per year) but with contrasting trends depending on the country. In Slovenia, the fleet grew by only 10%, or barely more than in Spain (+9%), while in Turkey and Romania, it grew by 26% and 31% respectively over the same period. Within these new EU member states and Turkey, the share of diesel engines is 33% on average, up about one and a half points per year for several years.



## NEW LIGHT COMMERCIAL VEHICLES IN EUROPE



**41%**

**Share of French groups in sales of light commercial vehicles in Western Europe in 2019**

The Western European market for light commercial vehicles, badly affected by the 2009 crisis, hovered around 1.5 million units in the following years. From 2014, it has grown steadily (+3% in 2019). It has thus exceeded 2 million units (+50% since 2013), a volume almost identical to its record level in 2007.

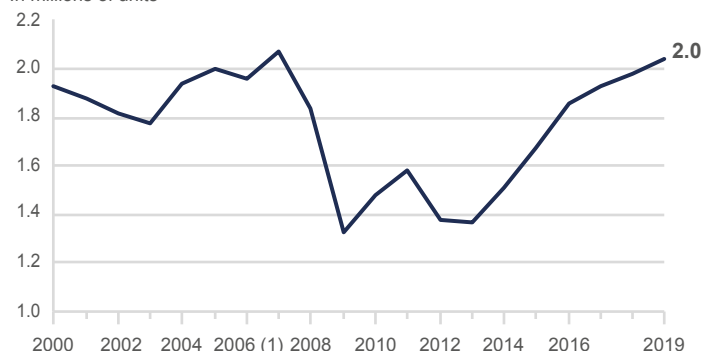
In 2019, Italy, Germany and France experienced growth in light commercial vehicle registrations above the European average. Germany and France, as well as the United Kingdom, have now exceeded their pre-crisis level, gaining over the period 2007-2019 respectively 82,000 units (+38%), 18,000 units (+4%) and 28,000 units (+8%). Conversely, although in very strong growth

since 2013, the markets of Italy and Spain remain below their pre-crisis level (-48,000 units for Italy and -60,000 for Spain compared to 2007).

In 2019, French groups sales in Europe increased by 5% to reach a market share of 41.4% (34% outside France), eight points higher than the level observed in 2007. This growth was driven in particular by market share gains in the United Kingdom (+2.4 points) and Italy (+1.1 point).

### LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (18 COUNTRIES)

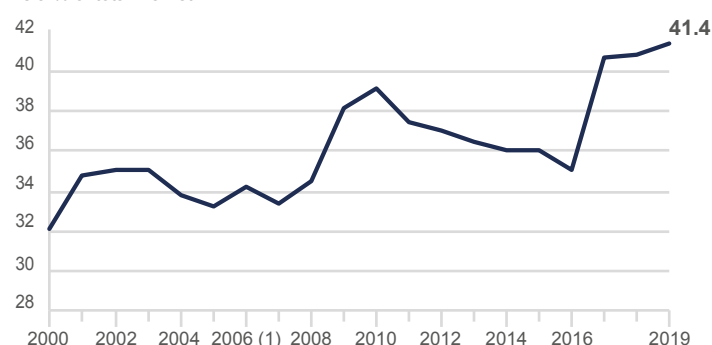
In millions of units



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

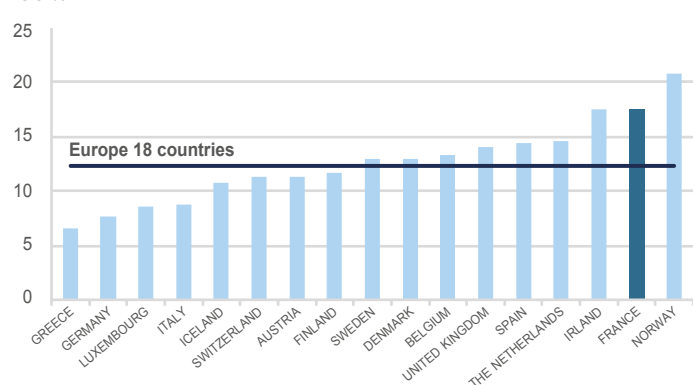
### FRENCH MARKET SHARE

As a % of total market



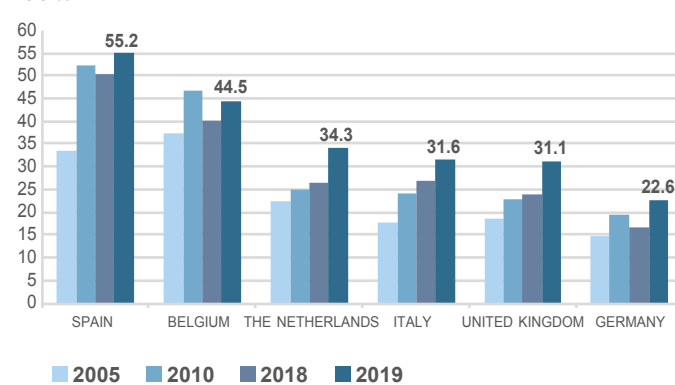
### SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2019

As a %



### MARKET SHARE OF FRENCH MANUFACTURERS IN MAJOR EUROPEAN COUNTRIES

As a %



Source: CCFA

The tax rules are not identical in all European countries, so the share of light commercial vehicles (commercial vehicles of less than 5.1t) in all light vehicles varies from 6.6% in Greece to 20.7% in Norway. It accounted for 12.2% as an average in Western Europe in 2019.

In terms of volume, France remains the leading European market, with 479,780 units, ahead of the United Kingdom (367,390 units), Germany (309,960 units), Spain (215,790 units) and Italy (188,590 units).

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. 2009 crisis had a substantial impact on the market, which had returned to its 1996 levels. Since 2014, this market has been growing steadily and French manufacturers have gained market share compared to 2007.

In the van segment, which accounts for nearly half of sales, the market shares of the French groups have been maintained, thanks to the success

of the Renault Trafic and Master, the Peugeot Boxer and the Citroën Jumper. In the small van segment (23% of sales), French manufacturers occupy the first three places in the ranking with the Renault Kangoo, the Peugeot Partner and the Citroën Berlingo. The Opel Combo is also in seventh position.

## HEAVY TRUCK MARKET AND PRODUCTION IN EUROPE

The western European market for commercial vehicles over 5.1 tonnes grew steadily in 2019 (+3%). It amounted to more than 310,000 units, against less than 210,000 in 2009. Since 2014, the market has grown steadily (+6.3%), a sign that the 2009 crisis is over. But unlike the 1993 crisis, when the market had returned to high levels five years later, the 2009 crisis seems to be leading to a new equilibrium, at a lower level.

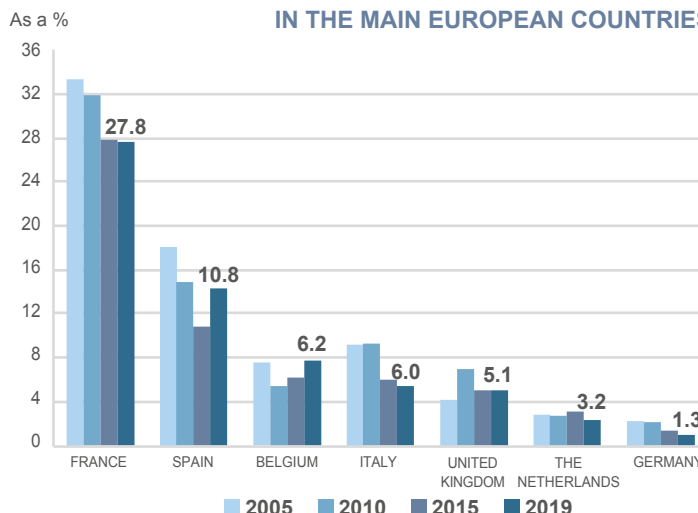
In France, on the other hand, where the market is one of the most dynamic in Europe (+8% as an average for 5 years), registrations exceeded their pre-crisis level in 2019 (55,250 units compared to 52,537 in 2007). The French market is historically the second largest European market behind Germany with 18% of volumes sold in Western Europe.



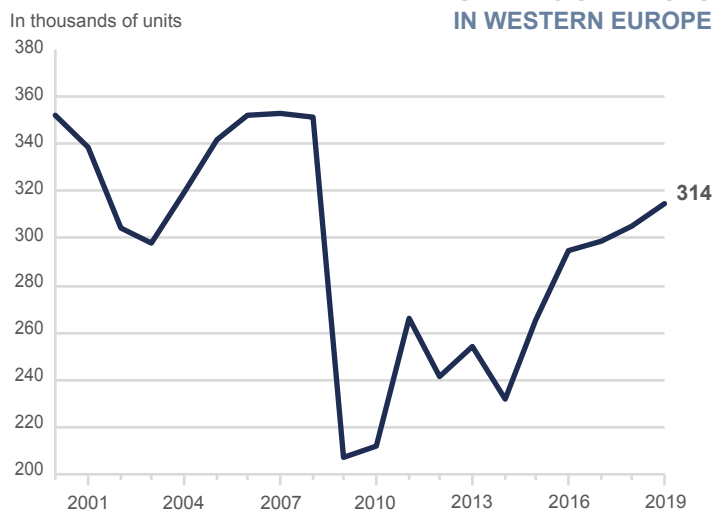
### ► HEAVY TRUCKS MARKET AND PRODUCTION IN WESTERN EUROPE (IN THOUSANDS OF UNITS)

	2010	2015	2018	2019	Change 2019/2018
<b>NEW HEAVY TRUCK REGISTRATIONS</b>					
<b>From 5.1t to 15.9 t</b>	54	48	55	57	5.0%
<b>16t and more</b>	159	217	251	257	2.6%
<b>TOTAL</b>	<b>212</b>	<b>265</b>	<b>305</b>	<b>314</b>	<b>3.0%</b>

### RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



### NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE



### RENAULT TRUCKS' MARKET SHARE IN WESTERN EUROPE



In Europe, the heavy truck market reached a record level in 2007; the recovery in investment and that of world trade since the second half of 2003 had boosted that recovery. However, it was strongly impacted by the financial and economic crisis in 2009.

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 2019, with 55,250 units, the French market nevertheless returned to its average level of 2006-2008.

The favourable trend for heavy trucks is slow and regular. Vehicles of 16 tonnes and more (rigids or tractors) represent more than 8 vehicles out of 10.

The share of commercial vehicles using alternative energy (gas, electric, hybrids) remains very low (around 1.6% of the market in Western Europe) but the energy transition is a growing concern for players in the sector (CO2 reduction objectives, city traffic restrictions and sustainable urban logistics).

In France, the NGV market continues to grow and represents 2.7% of registrations in 2019. The alternative energy range will soon be extended to electric vehicles, which will be very relevant to meeting environmental requirements in urban areas.

Renault Trucks' international development has been affected by the collapse of the Southern European markets, which accounted for more than a quarter of registrations in Western Europe in 2002, compared to 19% in 2019.

Renault Trucks' market share in Western Europe has been slowly rising since the low point in 2014 (7.6%) and stood at 8.3% in 2019. In France, the market share has been rising since 2016 and accounts for 27.7% in 2019. Outside Europe, Renault Trucks sells significant volumes in Africa (Maghreb) and the Middle East.

## FRENCH MANUFACTURERS IN THE NEW EU MEMBER STATES



# 27%

**New light vehicle market share of French groups in the major new EU member states**



### ► THE VEHICLES MARKET AND PRODUCTION IN THE NEW EUROPEAN UNION MEMBER STATES (IN THOUSANDS OF UNITS)

	2018	2019	Change
<b>VEHICLE PRODUCTION (1)</b>			
Passenger cars	4,131	4,150	0.4%
Light commercial vehicles	203	209	3.1%
Heavy vehicles			
<b>NEW VEHICLE REGISTRATIONS (2)</b>			
Passenger cars	1,397	1,479	5.9%
Light commercial vehicles	173	177	2.4%
Heavy vehicles (excluded coaches and buses)	74	68	-7.2%

(1) 6 countries.

(2) 11 countries, 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.

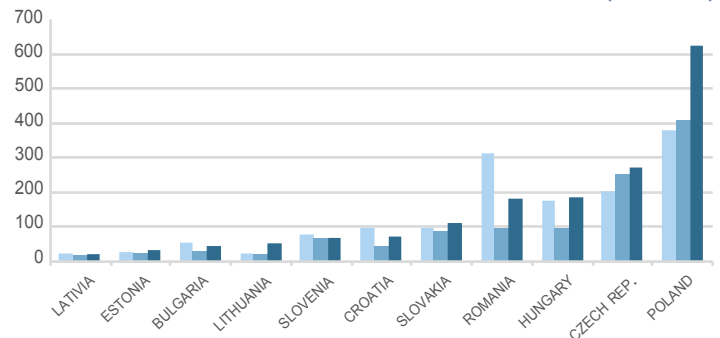
In 2019, passenger car registrations in the new member states of the European Union grew by 5.9%, a very strong growth, while that of Western European countries was almost zero (+0.7%). The light commercial vehicles market grew by 2.4% (compared to 2.9% in the 18 EU countries). That of commercial vehicles fell by 7.6% (vs. +3% in Western Europe).

Vehicle production in the new EU member states amounted to 4.3 million units in 2019 (+0.6% compared to 2018). New vehicle sales increased 4.9% to 1.7 million units and are now 10% above the level observed in 2007. The difference between production and sales of new vehicles is thus 2.6 million vehicles.

French groups have been commercially present in this area for many years and also have industrial sites: PSA in Slovakia, the Czech Republic (with Toyota in the latter country) and Poland (with the

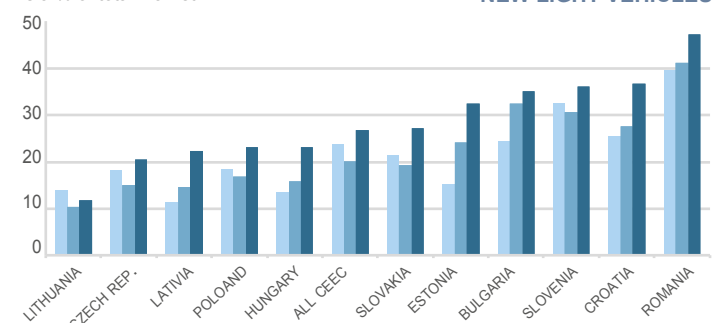
integration of Opel into the group August 1, 2017); Renault in Slovenia and Romania. All of these sites accounted for more than one million units in 2019. New vehicle registrations by French groups represented 416,000 units in 2019. The market should grow further, given the low car densities observed in these countries, compared to Western Europe.

In thousands of units **NEW LIGHT VEHICLE REGISTRATIONS (UP TO 5T)**



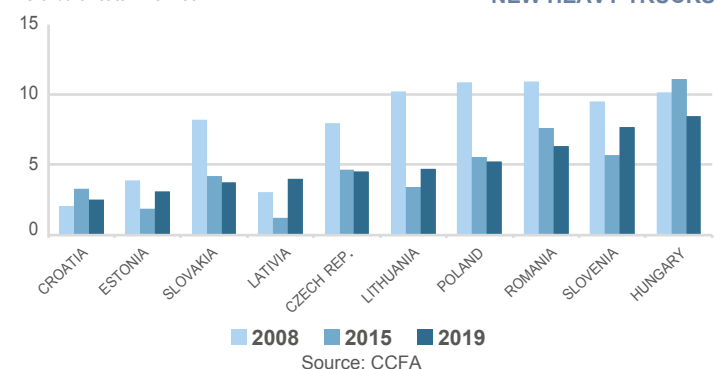
**FRENCH GROUPS MARKET SHARE: NEW LIGHT VEHICLES**

As a % of total market



**FRENCH GROUPS MARKET SHARE: NEW HEAVY TRUCKS**

As a % of total market



■ 2008 ■ 2015 ■ 2019  
Source: CCFA

In 2019, the passenger car market evolved in a contrasting manner depending on the country. Sales increased in most countries, very strongly in Hungary (+16%) and Romania (+23%), and more moderately (around 4%) in others. The Czech Republic and Slovenia are the only countries where sales fell (-4% and -8% respectively). Developments in the light commercial vehicle market range from -6% in Slovakia to +14.6% in Hungary.

The technical characteristics (cylinder capacity, power, body) of passenger cars registered in this zone are close to those of Western Europe with

the exception of those relating to the engine. The weight of diesel in registrations in new EU member states stood at 19% in 2019, 12 points less than in Western European countries. The share of electric and hybrid passenger cars in 2019 was 0.5% and 6.3% respectively (compared to 2.4% and 7.5% in Western Europe).



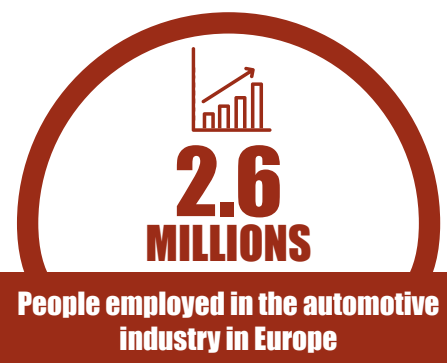
# THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2017, the European automotive industry employed 2.6 million people, 43% of whom in vehicle manufacture. In the 7 countries of Western Europe where the automotive industry is historically present, the sector's workforce fell sharply between 2005 and 2010 (-270,000 people), while it increased in the 6 new member states (+190,000). Then, thanks to the markets growth and the value maximisation of products manufactured in this zone, the workforce regained 170,000 people between 2010 and 2017, in particular thanks to Germany (+117,000 people), the United Kingdom (+18,000) and Spain (+17,000), without however returning to their 2005 level (-100,000). In Eastern Europe,

the increase in the workforce continued to reach +410,000 people over the period.

In 2019, the added value per person employed amounted to 84,000 euros as an average in Europe, compared to €51,000 in 2012. In France, it stood at €87,000 in 2019. The level of personnel costs per person employed is also higher than that of the European Union.

The weight of employers' social contributions in personnel costs was 29% in France, compared to 17% in Germany, the European average being 21%.

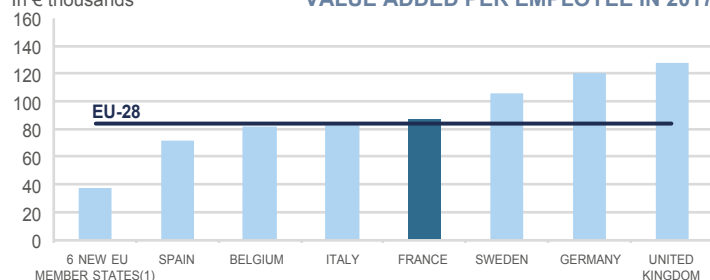


## ► THE AUTOMOTIVE INDUSTRY IN THE EU 28 IN 2017 (1)

	Units	European Union (28 countries)	Germany	France	United Kingdom	Spain	Italy	Sweden	Belgium	6 new EU member states (1)
<b>People employed</b>	<b>thousands</b>	<b>2,597</b>	<b>866</b>	<b>228</b>	<b>154</b>	<b>158</b>	<b>175</b>	<b>81</b>	<b>29</b>	<b>756</b>
of which automobile assembly	thousands	1,126	546	111	-	71	71	55	15	135
of which body and trailer manufacturers	thousands	164	46	21	18	10	11	4	5	26
of which automotive equipment manufacturing	thousands	1,307	274	96	-	77	93	21	9	594
<b>Sales</b>	<b>€ million</b>	<b>1,144,502</b>	<b>495,683</b>	<b>135,077</b>	<b>89,297</b>	<b>72,427</b>	<b>79,197</b>	<b>45,070</b>	<b>14,905</b>	<b>164,907</b>
<b>Production</b>	<b>€ million</b>	<b>943,184</b>	<b>391,800</b>	<b>94,460</b>	<b>77,997</b>	<b>66,478</b>	<b>62,678</b>	<b>34,213</b>	<b>14,206</b>	<b>158,573</b>
<b>Production/Sales</b>	<b>%</b>	<b>82.4</b>	<b>79.0</b>	<b>69.9</b>	<b>87.3</b>	<b>91.8</b>	<b>79.1</b>	<b>75.9</b>	<b>95.3</b>	<b>96.2</b>
<b>Value added (to factor costs)</b>	<b>€ million</b>	<b>217,821</b>	<b>104,418</b>	<b>19,865</b>	<b>19,781</b>	<b>11,264</b>	<b>14,453</b>	<b>8,531</b>	<b>2,384</b>	<b>28,130</b>
<b>Value added/production</b>	<b>%</b>	<b>23.1</b>	<b>26.7</b>	<b>21.0</b>	<b>25.4</b>	<b>16.9</b>	<b>23.1</b>	<b>24.9</b>	<b>16.8</b>	<b>17.7</b>
<b>Value added per employee</b>	€ thousand	83.9	120.5	87	128.2	71.4	82.6	105.7	81.6	37.2
	base 100: 6 new EU member states	225	324	234	344	192	222	284	219	100
<b>Purchases of goods and services</b>	<b>€ million</b>	<b>940,919</b>	<b>395,012</b>	<b>115,352</b>	<b>70,835</b>	<b>63,040</b>	<b>67,490</b>	<b>37,463</b>	<b>12,712</b>	<b>138,971</b>
<b>Purchases as a % of production</b>	<b>%</b>	<b>99.8</b>	<b>100.8</b>	<b>122.1</b>	<b>90.8</b>	<b>94.8</b>	<b>107.7</b>	<b>109.5</b>	<b>89.5</b>	<b>87.6</b>
<b>Staff expenditures</b>	<b>€ million</b>	<b>134,269</b>	<b>68,569</b>	<b>14,000</b>	<b>9,534</b>	<b>6,794</b>	<b>8,695</b>	<b>5,488</b>	<b>1,764</b>	<b>13,893</b>
<b>Expenses per employee</b>	€ thousand	51.7	79.1	61	61.8	43.1	49.7	68.0	60.4	18.4
	base 100: 6 new EU member states	281	430	334	336	234	270	370	329	100
<b>Gross operating surplus (GOS)</b>	<b>€ million</b>	<b>83,553</b>	<b>35,849</b>	<b>5,865</b>	<b>10,247</b>	<b>4,470</b>	<b>5,758</b>	<b>2,658</b>	<b>619</b>	<b>14,237</b>
<b>GOS/Value added</b>	<b>%</b>	<b>38.4</b>	<b>34.3</b>	<b>29.5</b>	<b>51.8</b>	<b>39.7</b>	<b>39.8</b>	<b>31.2</b>	<b>26.0</b>	<b>50.6</b>

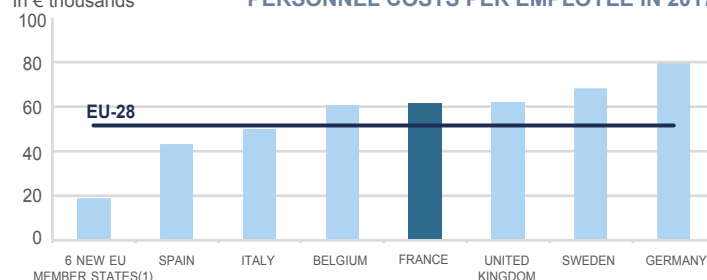
In € thousands

VALUE ADDED PER EMPLOYEE IN 2017



In € thousands

PERSONNEL COSTS PER EMPLOYEE IN 2017



(1) 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, 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 both at national level and at European level, both for the collection and the homogenisation of the data, do not allow us to have reliable figures after 2017.

In 2017, France represented 9% of the total workforce in the European Union automotive

industry. Germany accounted for 34% and Spain, Italy and the United Kingdom about 6% each. New member states, represented here by 6 countries (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia), represent an increasing share of the total workforce. They reached 29% in 2017.

The automotive industries remain very different 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 by the automotive industry in 2017. This share is 49% in France, 41% in Italy and 45% in Spain, while it is around 18% in the

six new member states.

According to ACEA, the ratio of auto industry jobs as a portion of the working population averaged 1% in the European Union in 2017 with disparities between the member countries. In Germany, Slovakia and the Czech Republic, this ratio is between 2 and 3%, against 0.5% in the United Kingdom and 0.7% in France and Italy. In Poland, the share of jobs in the automotive industry in the working population is very slightly above the European average at 1.1%. In addition to direct jobs, the automotive industry also generates indirect jobs which are estimated by ACEA to be one third of direct jobs.

# FRENCH AUTOMOBILE GROUPS IN 2019

## PSA group: [www.groupe-psa.com](http://www.groupe-psa.com)

In 2019, against a backdrop of a declining global market, PSA Group's sales totalled 3.5 million vehicles. In Europe, the group ranks top in the light commercial vehicle segment (25% of sales) and second in the passenger car segment. In other regions, the manufacturer's sales increased in India-Pacific and Eurasia, but fell sharply in Latin America and South-East Asia.

The international development strategy is essentially based on long-term, targeted cooperation with other manufacturers. In China, the group cooperates with Dongfeng Motor, with whom it is developing a strategic partnership. It continues to set up production or assembly plants, with further projects in markets with development potential (Turkey, Algeria, and India with CK Birla).

On December 17, 2019, Peugeot S.A. and Fiat Chrysler Automobiles N.V. signed a Combination Agreement committing to form the fourth largest automobile manufacturer in the world in volumes and third in turnover, with a view to a 50/50 merger of their activities.

The PSA Group has a workforce of more than 209,000 people worldwide, including 51,000 (excluding Faurecia) in France, spread over some 20 sites: assembly, engine production (Trémery) and powertrain plants; R&D centres (Vélizy), spare parts shops (Vesoul). Downstream development is taking place thanks to Distrigo and MisterAuto in the distribution of parts; as far as the automobile trade is concerned, its alliance with AramisAuto is increasing its presence on the second-hand market.

In the technological field, the group has set itself the goal of designing and developing cars that are more environmentally friendly, intelligent, connected and autonomous. The group has already launched 10 new rechargeable hybrid or all-electric models, designed to reach 100% of its electrified product range by 2025.

In 2019, the group invested €2.7bn in tangible investments and spent €2.8bn on research and development.

At the beginning of 2016, the manufacturer implemented a performance and profitable organic growth plan entitled "Push to pass" for the period 2016-2021, which has been updated for the 2019-

2021 period with Opel/Vauxhall. The objectives relate to increasing operating margin and revenue, product development, internationalisation of the group, expansion of activities in after-sales, used vehicles and mobility services (Free2Move).

## Renault group: [www.renault.com](http://www.renault.com)

In 2019, the Renault group held its position in a declining world market. Its sales increased in Europe, Russia, India and Brazil, but declined in other regions. In Europe, the Renault brand is still in second place on the light vehicle market. Dacia's worldwide sales grew by 5%.

The cooperation begun in 1999 with Nissan within the Alliance is optimised and extended over time with the integration of Mitsubishi in 2016. New synergies (industrial, electric vehicles, support functions, etc.) and new projects are being set up. The strategic partnership with AvtoVAZ (Lada) has reached a new stage with the integration of the Russian manufacturer into the Renault group. The Alliance 2022 Plan includes heightened cooperation with the setting up of a reference brand by zone (Renault for Europe, Nissan for China and Mitsubishi for South East Asia) and the acceleration of the sharing of platforms, engines and new technologies applying the leader/follower model.

The group's priorities in terms of innovation are electric, connected and autonomous vehicles and mobility services. It is also developing partnerships (universities, partner companies, etc.). In 2019, Renault brought hybrid motorisation (E-TECH) into its product range. This is part of the group's strategic plan, which calls for massive electrification of the range with 8 100%-electric models and 12 electrified models (hybrids and rechargeable hybrids). The Group is also experimenting with hydrogen technology in its LCV range with the Renault Kangoo Z.E. Hydrogen.

Renault Group employs more than 180,000 people worldwide, including 48,000 in France at some 15 sites: assembly plants, engine and powertrain production plants (Cléon, Le Mans); R&D centres (Guyancourt); head office, etc. Its downstream presence relies on Renault Retail Group which distributes new and used vehicles as well as parts.

In 2019, Renault Group invested €2.9bn in tangible investments and spent €2.7bn on research and development.

At the end of 2017, the group launched a new strategic plan: "Drive the future - 2017-2022". Its priorities are to increase competitiveness, strengthen its global presence through internationalisation, and build the mobility of tomorrow (electric, connected, autonomous, shared) by 2022. Quantified objectives relate in particular to increases in turnover and operating margin. Finally, to accelerate its development in new forms of mobility and forge strategic partnerships, the group created Renault M.A.I. (Mobility As an Industry) at the end of 2019.

## Renault Trucks : [www.renault-trucks.com](http://www.renault-trucks.com)

Renault Trucks maintained its volumes in a contrasted European market, with a very dynamic first half, then a downward second semester. Its market share in Western Europe hit 8.5% in 2019.

Renault Trucks assembles its truck models in France at its Bourg-en-Bresse and Blainville-sur-Orne plants. The manufacturer relies on partners for local assembly outside Western Europe, including Saudi Arabia.

As a part of the Volvo group which employs 100,000 people worldwide, Renault Trucks has 10,000 employees, 80% of whom work in France. In addition to complete vehicle assembly, Renault Trucks has engine assembly and stamping activities in Vénissieux, studies and research in Saint-Priest, on the outskirts of Lyon, and parts reconditioning in Limoges. In 2013, Renault Trucks completely renewed its range of trucks (T, C, K, D and D Wide), designed around robustness and reduced operating costs, notably through energy efficiency gains.

The manufacturer now offers a complete range of alternative energy vehicles (gas, biodiesel, electric) and a range of services (fleet management, maintenance and repair, financing and insurance) including fuel-saving solutions (Optifuel Solutions), one of the main cost items for operators, as well as predictive maintenance services (launch of Start & Drive Excellence Predict). Renault Trucks is developing its used vehicle sales activities, "reconditioned" in its factories and benefiting from a manufacturer's guarantee. In 2019, the manufacturer continued to market electric trucks from a starting point in 2018, and now offers a 100%-electric range from 3.1 to 26 tonnes.

	Units	PSA group	Renault group
Sales	€ million	74,731	55,537
Capital expenditures	€ million	2,765	2,936
Research and development expenditure	€ million	2,852	2,658
Net income	€ million	3,584	19
Employees worldwide (1)	no. of people	208,780	179,565
of which France	no. of people	68,000 (2) (152,662)	47,978 (73,087)

	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	58,943	17,768	2,163	-	-	52,132	3,405	-
Operating income	€ million	5,037	1,227		60		1,445	1,223	-
Capital expenditures (3)	€ million	2,765	-	-	-	-	2,926	10	-
Employees worldwide (1)	no. of people	114,320	93,699		761		175,862	3,703	-

(1) On December 31.

(2) 2018 data.

(3) The capital expenditure given for automotive activities are those for all industrial and commercial activities, excluding financing.

Sources: PSA and Renault Groups annual reports, press releases

**388,000  
PEOPLE**  
Worldwide employees  
of French groups

# FRENCH AUTOMOBILE GROUPS IN 2019

## EUROPE

### France

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

### Germany

- 18 Eisenach (Opel)
- 19 Rüsselsheim (Opel)

 PSA GROUP

 RENAULT GROUP

### Belarus

- 20 Minsk

### Spain

- 21 Barcelone
- 22 Palencia
- 23 Saragosse
- 24 Valladolid
- 25 Vigo
- 26 Madrid (Villaverde)

### Italy

- 27 Val di Sangro

### Poland

- 28 Gliwice (Opel)

### Portugal

- 29 Mangualde

### Czech Republic

- 30 Kolín (PSA-Toyota)

 RENAULT TRUCKS

 SEVELSUD

### Romania

- 31 Mioveni (Pitești)(Dacia)

### United Kingdom

- 32 Ellesmere Port (Opel)
- 33 Luton (Opel)

### Russia

- 34 Izhevsk (AvtoVAZ)
- 35 Kalouga (PSA-Mitsubishi)
- 36 Moscow
- 37 Togliatti (AvtoVAZ)

### Slovakia

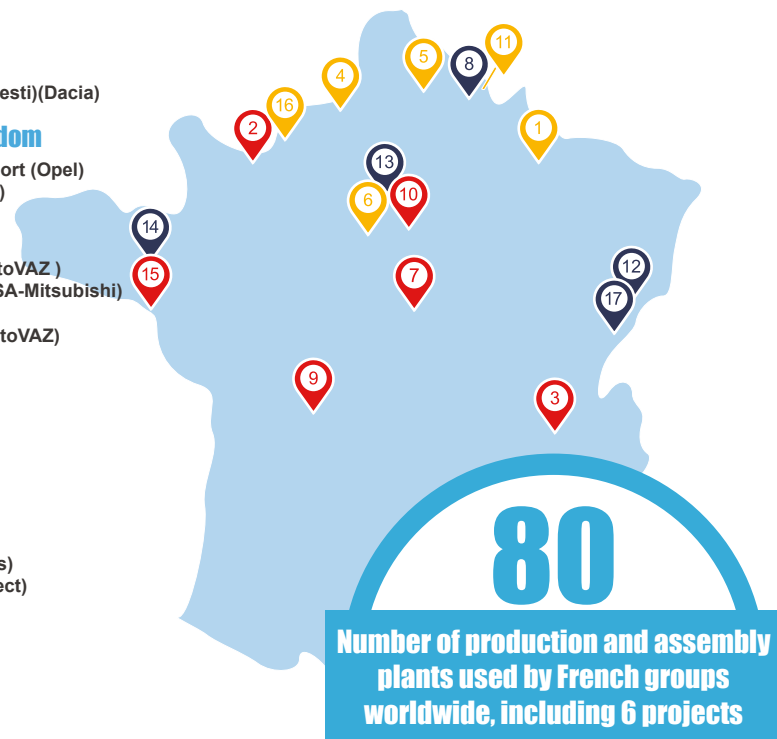
- 38 Trnava

### Slovenia

- 39 Novo Mesto

### Turkey

- 40 Bursa (Tofas)
- 41 Bursa (project)



## AMERICA

### Argentina

- 42 Buenos Aires
- 43 Cordoba (Santa Isabel)

### Brazil

- 44 Curitiba
- 45 Porto Real

### Colombia

- 46 Envigado (Medellin)

### United States

- 47 Orion (General Motors)

### Mexico

- 48 Cuernavaca (Nissan)

### Uruguay

- 49 Montevideo (Nordex)

## AFRICA

### Algeria

- 50 Oran (Oued Tlelat)
- 51 Oran (Tafraoui) (project)

### Saudi Arabia

- 53 KAEC

### Ethiopia

- 54 Wukro (MIE)

### Kenya

- 55 Thika (URYSIA)
- 56 CMC Motors (project)

### Morocco

- 57 Kenitra
- 58 Casablanca
- 59 Tanger

### Nigeria

- 60 Kaduna (PAN Nigéria Ltd)

### Tunisia

- 61 Tunis (STAFIM)

## ASIA

### China

- 62 Chengdu (DPCA)
- 63 Shenzhen (CAPSA)
- 64 Wuhan (DPCA)
- 65 Wuhan (DFPV2)
- 66 Wuhan (Dongfeng)
- 67 Shenyang (RBJAC)
- 68 Wuhan (DRAC)
- 69 Shiyan (eGT-NEV)

### South Korea

- 70 Changwon (General Motors)
- 71 Bupyeong (General Motors)
- 72 Busan (Renault Samsung Motors)

### India

- 73 Dehli (HMFCL) (project)
- 74 Chennai (Renault-Nissan)

### Indonesia

- 75 (Indomobil)

### Japan

- 76 Mizushima (Mitsubishi)

### Malaysia

- 77 Gurun
- 78 (Tan Chong Motors) (project)

### Pakistan

- 79 Karachi (Al-Futtaim) (project)

### Vietnam

- 80 Chu Lai (Thaco)

## WORLD PRODUCTION OF FRENCH GROUPS



**251  
MILLIONS**

**Vehicles produced by French  
automotive groups worldwide  
since 1898**

In 2019, global production of French groups fell by 9% to 7.3 million vehicles. Organic growth and extensive operations carried out in recent years by French groups (integration of Lada into the Renault group on January 1, 2017, of Jinbei and Huasong on January 1, 2018; integration of Opel into the PSA Group on August 1, 2017) strengthened their European presence, but the volatility of outlets outside Europe, on a global market that fell by 4.5%, affected their production in 2019. Since 1996, their production has nevertheless increased by 92%, ie an average annual growth by 3%, both thanks to the increase in outlets in Europe outside France, then, subsequently, in those outside Europe. The groups have notably developed their production capacities in the latter zone.

Passenger car production amounted to 6.2 million

units, a drop of 9.6% after a record level in 2018 (6.9 million units); that of light commercial vehicles stood at 1,025,000 units, down 2.6% from 2018, but this level remains higher than in 2017 (+86,000 units). Compared to 2007, before the crisis, production increased by 18% for passenger cars (+945,000 units), and it increased by 24% for commercial vehicles (+195,000 units).

The French groups have a great diversity of sites: the historical factories (Sochaux, Flins), recent factories in emerging countries (Tangier, Kenitra), large ones (Vigo, Pitesti), those producing only one type of model (Trnava, Novo Mesto) or a great diversity (Mulhouse, Togliatti), those of light commercial vehicles or their derivatives (Hordain, Batilly), those of partnership (Val di Sangro, Chennai) and those of small size.

### ► PRODUCTION OR ASSEMBLY SITES PER MODEL

PSA group	
Brands and models	Production or assembly sites in 2019
Peugeot: iOn / Citroën: C-ZERO	Mizushima (Japan) (Mitsubishi)
Peugeot: 108 / Citroën: C1	Kolin (Czech Republic) (TPCA)
Peugeot: 208	Poissy (France), Trnava (Slovakia), Morocco, Porto Real (Brazil), Buenos Aires (Argentina)
Citroën: C3, C3 Aircross, C3 Picasso DS: DS3, DS3 Crossback	Poissy (France), Trnava (Slovakia), Saragosse (Spain), Porto Real (Brazil)
Peugeot: 301 / Citroën: C-Elysée	Vigo (Spain), Wuhan (China) (DPCA)
Peugeot: 308, 308 S	Sochaux (France), Buenos Aires (Argentina), Wuhan (China) (DPCA)
Peugeot: 2008	Mulhouse (France), Porto Real (Brazil), Wuhan (China) (DPCA), Vigo (Spain)
Peugeot: 3008	Sochaux (France), Chengdu/Wuhan (China) (DPCA), Malaysia (Naza Automotive Manufacturing), Vietnam (THACO)
Peugeot: 4008	Chengdu/Wuhan (China) (DPCA), Malaysia (Naza Automotive Manufacturing)
Peugeot: 5008	Rennes (France), Chengdu/Wuhan (China) (DPCA), Malaysia (Naza Automotive Manufacturing), Vietnam (THACO)
Citroën: C4, C4 AIR-CROSS	Buenos Aires (Argentina), Kaluga (Russia) (PCMA), Wuhan (China) (DPCA), Shenzhen (China) (CAPSA)
Citroën: C4 Cactus, C4 Spacetourer	Madrid (Spain), Vigo (Spain), Porto Real (Brazil)
Citroën: C5, C5 Aircross / DS: DS5	Rennes-la-Janais (France), Wuhan (China) (DPCA), Shenzhen (China) (CAPSA)
Citroën: C6 / DS: DS6	Shenzhen (China) (CAPSA)
DS: DS7 Crossback	Mulhouse (France), Shenzhen (China) (CAPSA)
Peugeot: 408	Buenos Aires (Argentina), Kaluga (Russia) (PCMA), Wuhan (China) (DPCA), Vietnam (THACO)
Peugeot: 508	Mulhouse (France), Wuhan (China) (DPCA)
Peugeot: Partner, Rifter / Citroën: Berlingo / Opel: Combo	Vigo (Spain), Mangualde (Portugal), Buenos Aires (Argentina), Russia
Peugeot: Expert / Citroën: Jumpy	Hordain (France), Kaluga (Russia) (PCMA), Uruguay (CKD-Nordex), Luton (UK)
Peugeot: Traveller / Citroën: Spacetourer	Hordain (France), Kaluga (Russia) (PCMA), Luton (UK), Vietnam (THACO)
Peugeot: Boxer / Citroën: Jumper	Italy (Sevelsud)
Opel: Vivaro, Zafira Life	Luton (UK), Hordain (France)
Opel: Corsa, Adam	Eisenach (Germany), Saragosse (Spain)
Opel: Astra, Cascada	Gliwice (Poland), Ellesmere Port (UK)
Opel: Zafira, Insignia	Rüsselsheim (Germany)
Opel: Crossland	Saragosse (Spain)
Opel: Grandland	Sochaux (France), Eisenach (Germany)
Opel: Viva, Mokka, Karl	Changwon, Bupyeong (South Korea), Saragosse (Spain)
Opel: Ampera	Orion (USA)

Source: PSA group

RENAULT group	
Brands and models	Production or assembly sites in 2019
Alpine: A110	Dieppe (France)
Renault: Twingo 2, Twingo Electric	Novo Mesto (Slovenia)
Renault: Kwid	Chennai (India), Curitiba (Brazil), Shiyen (China)
Renault: Clio	Flins (France), Bursa (Turkey), Novo Mesto (Slovenia), Oran (Algeria)
Renault: ZOE	Flins (France)
Renault: Captur	Valladolid (Spain), Moscou (Russia), Curitiba (Brazil), Chennai (India)
Renault: Sandero, Logan	Oran (Algeria), Casablanca (Morocco), Cordoba (Argentina), Curitiba (Brazil), Envigado (Colombia), Togliatti (Russia) (AvtoVAZ), Pitesti (Romania)
Renault: Kadjar	Palencia (Spain), Wuhan (China) (DRAC)
Renault: Koleos	Busan (South Korea) (RSM), Wuhan (China) (DRAC)
Renault: Duster	Curitiba (Brazil), Envigado (Colombia), Chennai (India), Moscou (Russia), Pitesti (Romania)
Renault: Lodgy / Lodospace	Tanger (Morocco)
Renault: Tribler	Chennai (India)
Renault: Dokker	Cordoba (Argentina)
Renault: Arkana	Moscou (Russia), Chennai (India)
Renault: Mégane / Mégane 4 Sedan C	Palencia (Spain), Bursa (Turkey)
Renault: Scenic	Douai (France)
Renault: Espace	Douai (France)
Renault: Talisman	Douai (France)
Renault: Kangoo, Kangoo ZE	Maubeuge (France)
Renault: Master, Master ZE	Batilly (France), Curitiba (Brazil)
Renault: Trafic	Sandouville (France)
Dacia: Logan 2	Pitesti (Romania), Tanger (Morocco), Casablanca (Morocco), Oran (Algeria)
Dacia: Duster	Pitesti (Romania)
Dacia: Lodgy / Lodospace	Tanger (Morocco)
RSM: Fluence	Busan (South Korea)
RSM: Latitude	Busan (South Korea)
RSM: Koleos	Busan (South Korea)
RSM: Talisman	Busan (South Korea)
RSM: XM3 / SM7	Busan (South Korea)
RSM: Rogue (Nissan)	Busan (South Korea)
City K-ZE	Shiyen (China)
Lada: XRAY, Largus, Kalina, Granta, Granta Hatchback, Priora, 4X4	Togliatti (Russia) (AvtoVAZ)
Lada: Vesta	Izhevsk (Russia) (AvtoVAZ)

Source: Renault group

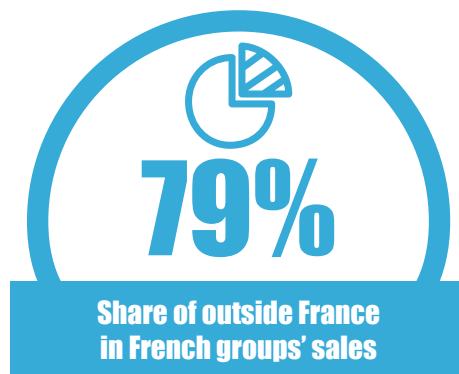


## MARKETS FOR NEW VEHICLES FROM FRENCH GROUPS

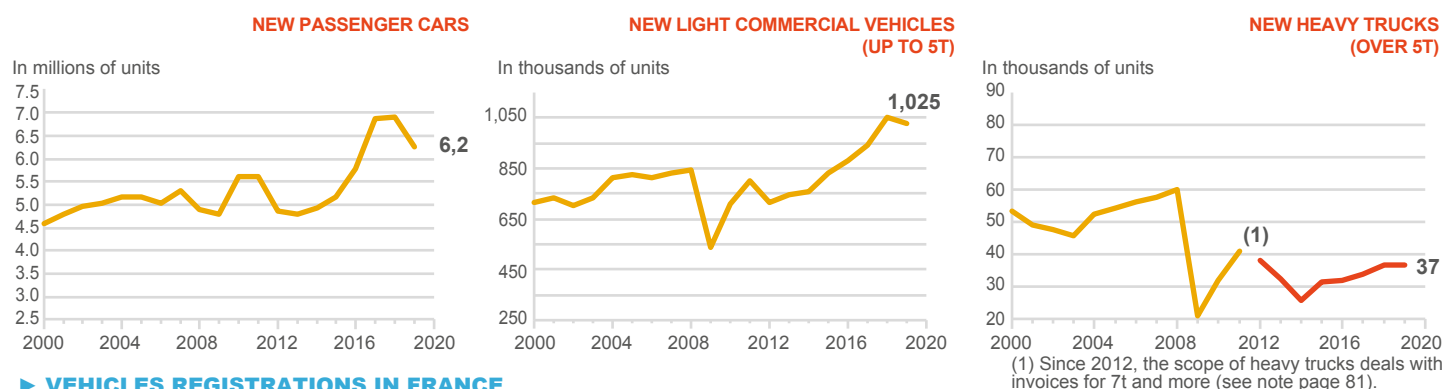
In 2019, French groups' sales outside France fell by two points in a global market down 4.5%. In recent years, the integration of Lada into the Renault group, on January 1, 2017, then of Jinbei and Huasong, on January 1, 2018, and finally of Opel within the PSA group since August 1, 2017, is reflected in by new sales volumes outside France, which offset declines observed in 2019, particularly in China and Latin America.

Sales in France have been growing steadily since 2012, but the French market is now around 20%. Thus, foreign markets now represent 80% of the outlets for French manufacturers, against two thirds in 2000 and less than 60% in 1990.

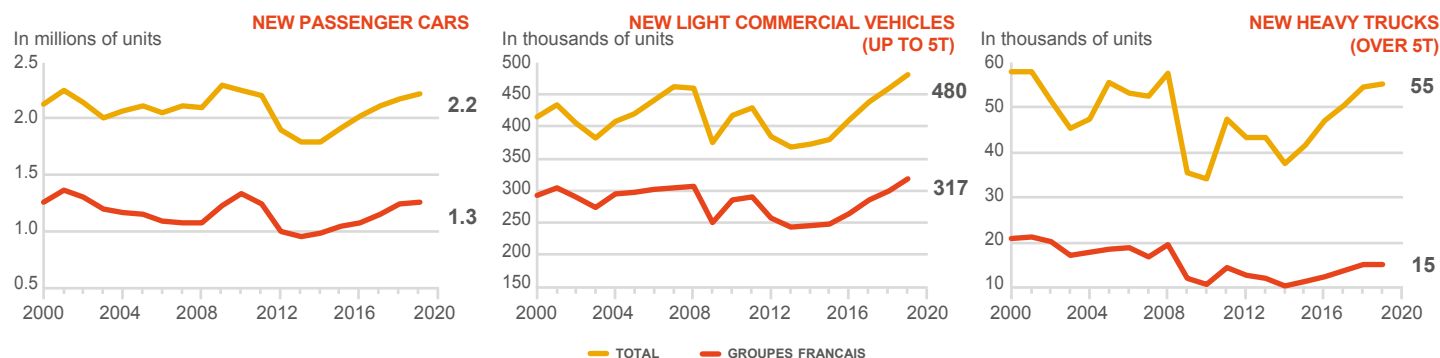
However, since 2018, the share of deliveries from French manufacturers to the European Union has again exceeded the 50% mark, a level it had not reached since 2009. In 2019, deliveries to the European Union (see page 87) represent 61% of French groups sales, against 54% in 2018 and 40% in 2012. The growing share of Europe in French groups sales since 2013, can be explained both by the partial recovery of the markets of Southern Europe, the integration of Opel but also by the fall of part of the world markets.



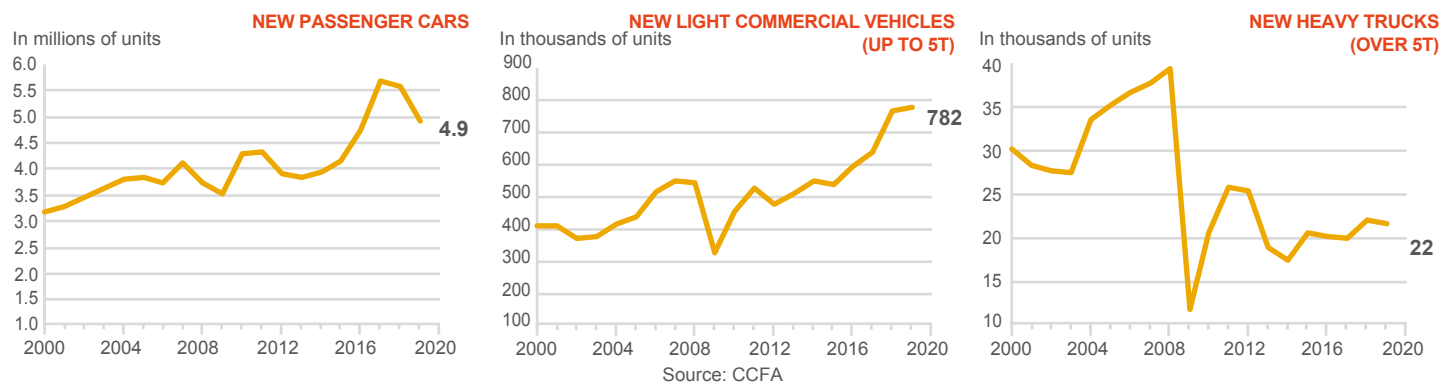
### ► WORLD PRODUCTION OF FRENCH GROUPS



### ► VEHICLES REGISTRATIONS IN FRANCE



### ► DELIVERIES BY FRENCH GROUP OUTSIDE FRANCE



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 2019, registrations in France reached 2.2 million units, while the world production of these

same manufacturers reached 6.2 million units.

From 2009 to 2015, the impact of the crisis in countries where French groups have a strong presence affected their deliveries of passenger cars outside France. In 2019, they fell 12% to 4.9 million units, but remained 28% higher than their low point in 2013. Those of light commercial vehicles held up well in 2019 with 782,000 units (+2% and +53%

compared to 2013). Finally, deliveries of industrial vehicles fell by 2% in 2019 (22,000 units), or 15% more than their low point in 2013.

## ECONOMIC RATIOS OF THE AUTOMOTIVE INDUSTRY IN FRANCE

# x2

**Doubling of value added per person employed in the automotive industry between 2012 and 2019**

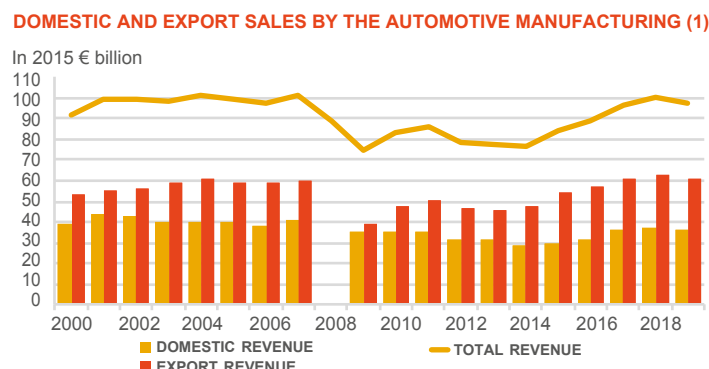
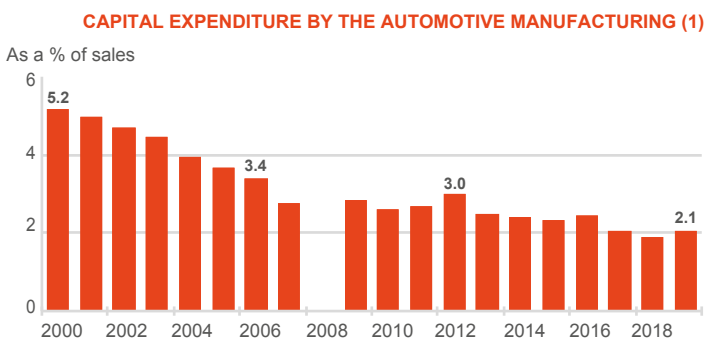
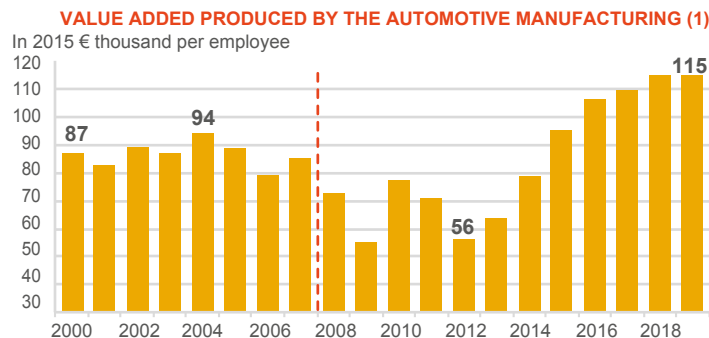
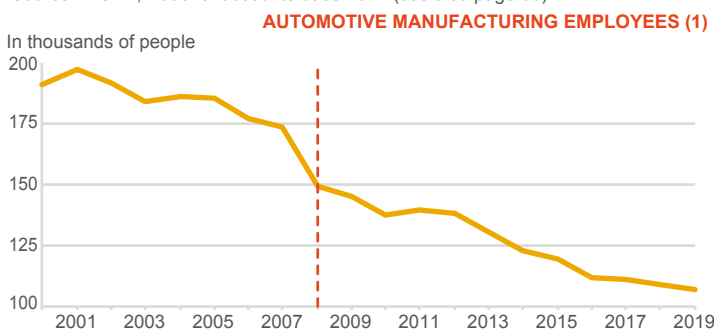
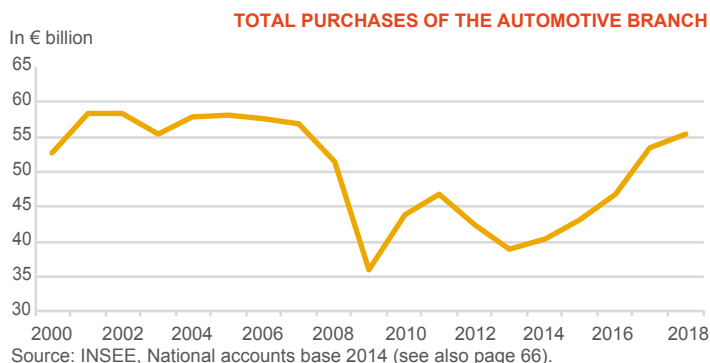
The automotive industry is distinguished by a high level of export turnover: around 63%, compared to 39% on average in the industry.

The value added per employee amounted to 120,000 euros in 2019, compared to 88,000 euros on average in the industry. Expressed in 2015 euros, it rose from 56,000 euros in 2012 to 115,000 in 2019 thanks to the growth of the European market and to the internal efforts of manufacturers in terms of productivity.

At the crossroads of many and various techniques,

the automobile requires significant investments: since the 2009 crisis, the automotive industry has devoted an average of 2.4% of its turnover to it each year. In 2017, tangible investments in the automotive industry represented 5% of total investments in industry (including mining, manufacturing, and water and energy production and distribution), up from 7% in 2009.

In addition, the automotive sector has a significant impact on other sectors, in particular through its purchases. The automotive sector's total purchases amounted to 55 billion euros, up 43% since 2013.



(1) CCFA estimates for 2018 and 2019 : see also pages 88 and 89.  
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).

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. In 2019, it more than doubled compared to the low point of 2012. So as to develop new models and optimise production capacities, automotive manufacturing has dedicated 2.4% on average of its turnover to its investments, around 2 billion euros per year. In addition to these tangible

investments, there are intangible investments which are not included in these figures (see page 34 on research and development expenses). The share of export turnover has grown steadily since 1990, when it reached 38%, now hovering around 63%, compared to around 39% for the manufacturing industry as a whole.

## THE AUTOMOTIVE INDUSTRY IN FRANCE'S REGIONS

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.

### ► AUTOMOTIVE RELATED 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 #33, May 2018
Nord Franche-Comté (Sochaux)	11,800	2,400	6,200	2007	Insee Franche-Comté - L'essentiel #113 - May 2009
South Alsace (Mulhouse) and Nord Franche-Comté	9,400	3,500	2,345	2007	Insee Alsace, Chiffres pour l'Alsace #2, March 2009
Hauts-de-France	56,000		n/a	2018	Horizon éco #290 - October 2019 (ARIA, I-Trans, CCI, Hauts-de-France region)
Seine Valley (1)	109,894		n/a	2017	Panorama of industry in the Seine Valley (INSEE dossier, Normandy November 2020)
Île-de-France	73,200		n/a	2018	IAU IdF - L'automobile en Île-de-France, may 2019
Centre	29,095		n/a	2013	L'industrie automobile en région Centre (December 2014, CENTRECO)

# 4.1

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

(1) The Seine Valley is made up of 9 departments: Manche, Calvados, Seine-Maritime, Val d'Oise, Eure, Seine-Saint-Denis, Paris, Yvelines and Hauts-de-Seine.

### ► VALUE ADDED 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

The automotive sector has powerful spillover effects on the rest of the economy. According to INSEE, one unit of value added in the automotive sector generates 4.1 units of value added in the national economy. Thus, the automotive industry has the largest multiplier of value added, after aircraft and space construction. In addition, an industrial site generates local economic activity that is not limited to its employees (direct employment). Indirect and induced jobs are also created, as shown by various INSEE works in the regions. Indirect jobs correspond to personnel employed by suppliers, subcontractors and service providers, while induced jobs are those necessary to satisfy the consumption of employees (direct and indirect) and their families.

The Institute of Urban Planning and Development of Île-de-France estimates that in 2018, the automotive sector in this region included around 73,000 employees in 1,600 establishments; 57% of the workforce works for bodybuilders, 13% for equipment manufacturers, 19% for industrial suppliers and 11% for technological services (design offices and IT Services and Engineering Company). In the Seine Valley, which brings together the departments of the west of Île-de-France and the Normandy departments on the coast or crossed by the Seine, there are 54,400 jobs directly linked to the automotive industry, including 42,530 in automobile manufacturing. The broader automotive sector, which includes manufacturing, trading and maintenance and repair activities, employs 110,000 people.

The automotive industry is also a structuring sector for the Hauts-de-France economy with 56,000 direct and indirect jobs, including 15,400 in automotive manufacturing, 15,000 in the manufacture of automotive equipment and 26,300 in the supply of materials, intermediate products

and services. Bourgogne-Franche-Comté, traditionally closely related to the automotive and metallurgical sectors, had 45,000 non-temporary employees in the automotive sector in 2015, including 14,570 in the automotive industry and 14,820 in the manufacture of automotive equipment. Despite the absence of large local manufacturers, the Center region has 29,000 jobs in the automotive sector where subcontractors, material suppliers and service providers revolve around world-class equipment manufacturers. In all of these regions, the number of such jobs has declined over the past 20 years. Between 2008 and 2015, the decrease is 24% on average in France.

The research and development activities of the entire automotive industry are located in Île-de-France (such as PSA in Vélizy and Renault in Guyancourt), but also in other regions. INSEE Nord-Pas-de-Calais-Picardie estimated that 12% (13% on average in France) of Domestic Research and Development Spending (DRDS) in the region were carried out by the automotive industry in 2013. In Bourgogne-Franche-Comté, in 2016, the automotive industry concentrated, according to INSEE, 70% of research and development spending by mid-size companies and large locally based companies.

In 2019, 11 Regional Associations of the Automobile Industry (ARIA), regional relays of the PFA, Automotive Industry and Mobilities, bring together companies (manufacturers, equipment suppliers and other suppliers) of the automotive sector in the region, with public authorities and educational and research institutions. Their missions are diverse: increasing competitiveness, improving industrial performance, access to new opportunities, emergence of new projects and also promoting the image of the sector in the

regions. They also cooperate with automotive competitiveness clusters, or even integrate them.

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

	2008	2015
Île-de-France	60,600	46,700
Auvergne-Rhône-Alpes	54,300	44,000
Grand Est	51,200	40,200
Hauts-de-France	45,400	32,900
Bourgogne-Franche-Comté	34,600	28,200
Normandie	27,600	20,100
Pays de la Loire	20,800	16,800
Nouvelle-Aquitaine	15,400	9,600
Bretagne	14,600	8,800
Centre-Val de Loire	13,000	8,200
Occitanie	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 #33

## COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

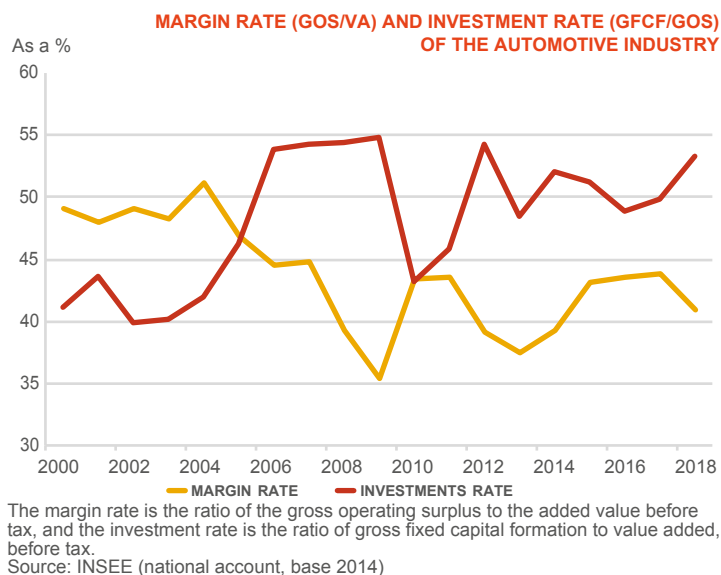
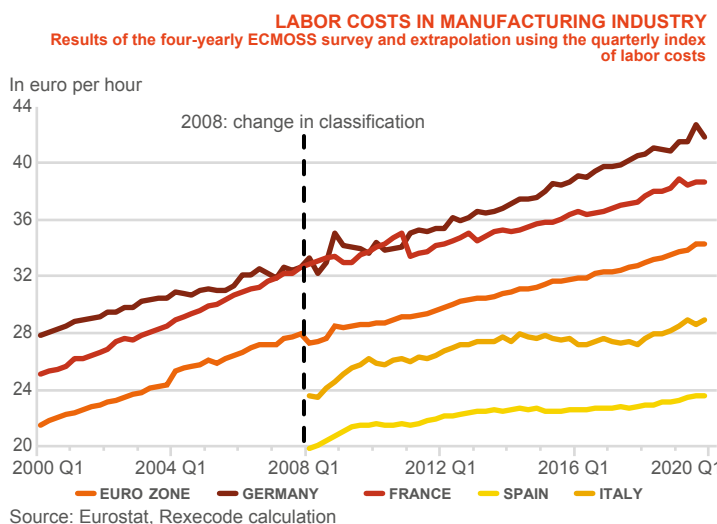
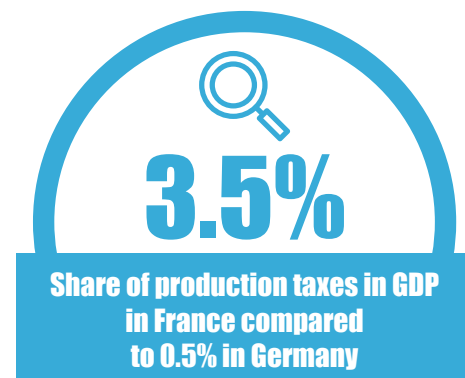
In a highly competitive global market, French groups must be competitive whilst addressing factors affecting the whole industry. The latter includes the scale of compulsory charges on the factors of production, exchange rates, and other, more automotive-sector-specific elements like the opening up of 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 energy transition, digital, 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 improve 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 given results, but the French industrial apparatus continues to show degraded economic competitiveness, particularly within its European environment.

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 France, they represent, in 2019, 3.5% of GDP, against 1.5% in Italy, 1% in Spain and 0.5% in Germany according to Eurostat. The CNI also estimates that more than 20% of the receipts of three (property contribution of companies - CFE, contribution on the added value of companies - CVAE, social solidarity contribution of companies - C3S) of the five main taxes on production come from the industry, which in 2018 represented 13% of the added value of the entire economy.

Industry is a sector highly exposed to international competition and its investment capacity helps to strengthen non-price competitiveness.



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.

The French automobile industry must ensure a performance comparable to that of its global competitors in order to continue to develop. Among the factors that affect the competitiveness of French industry are wage costs, which are particularly linked to the weight of social charges on the work factor. Between 2000 and 2009, wage costs in the manufacturing industry moved closer to German costs and away from average costs in the euro zone, which penalised the competitiveness of French manufacturers and their suppliers in France.

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 fell from 4% of gross wage in 2013 to 7% in 2017. From 2019, the CICE will be transformed into permanent relief from employers' social contributions. Nevertheless, the weight of social charges on the work factor

in France continues to be one of the highest in the European Union, including the euro zone. It is superior to those of the UK, Italy, Spain, and much more than those of Eastern Europe. Under these conditions, the production in France of vehicles in the lower range segment is no longer profitable. Other measures that may also relate to corporate tax charges should be taken to continue to bring the production conditions of the France site closer to those of the euro zone average.

Beyond the problems of the overall competitiveness of the economy or industry (wage, social and fiscal costs), there are also competitiveness factors specific to the French automobile industry, which result from both the characteristics of the good automotive industry and those of the global automotive industry.

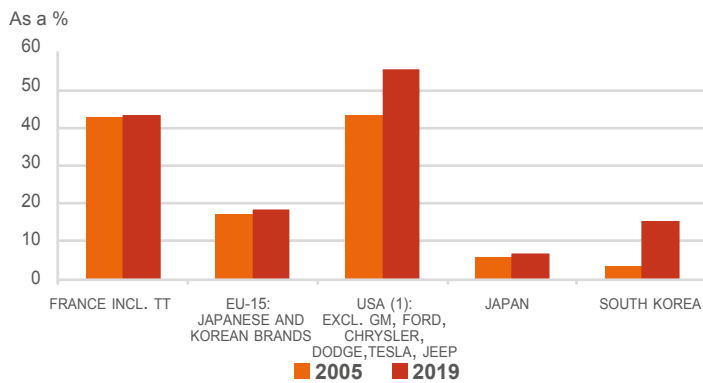
Exchange rate fluctuations can have a non-negligible impact on terms of trade because of the substantial and growing share of production outside the euro zone. However, the latter represented 55% of total foreign outlets in 2019, against 47% in 2002. In 2019, the euro remains on average at a lower level than between 2009 and 2014 against 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 "base 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

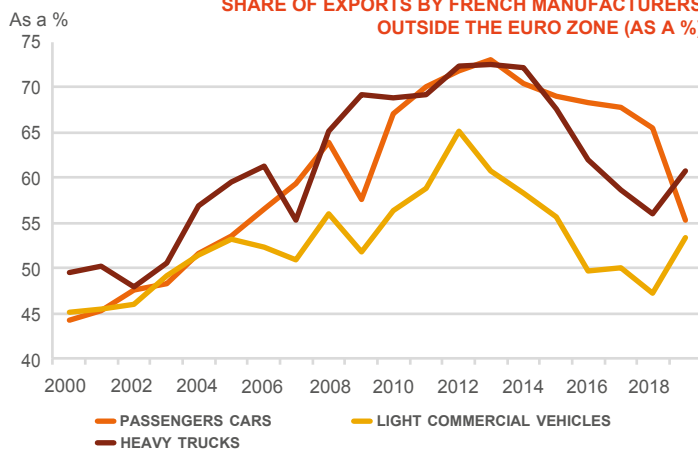
### SHARE OF FOREIGN BRANDS IN PASSENGER CAR MARKETS



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

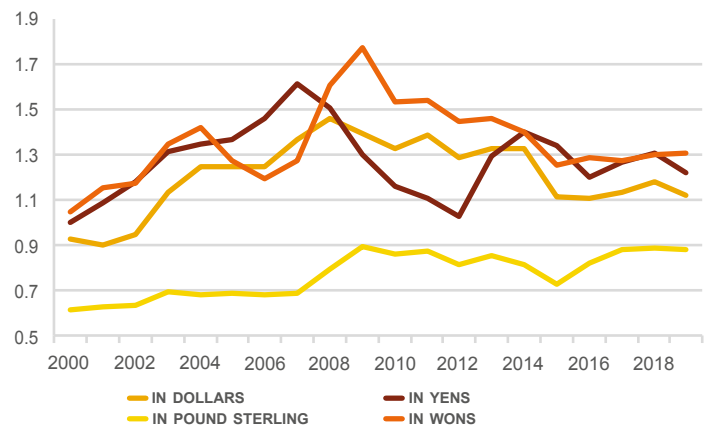


### SHARE OF EXPORTS BY FRENCH MANUFACTURERS OUTSIDE THE EURO ZONE (AS A %)



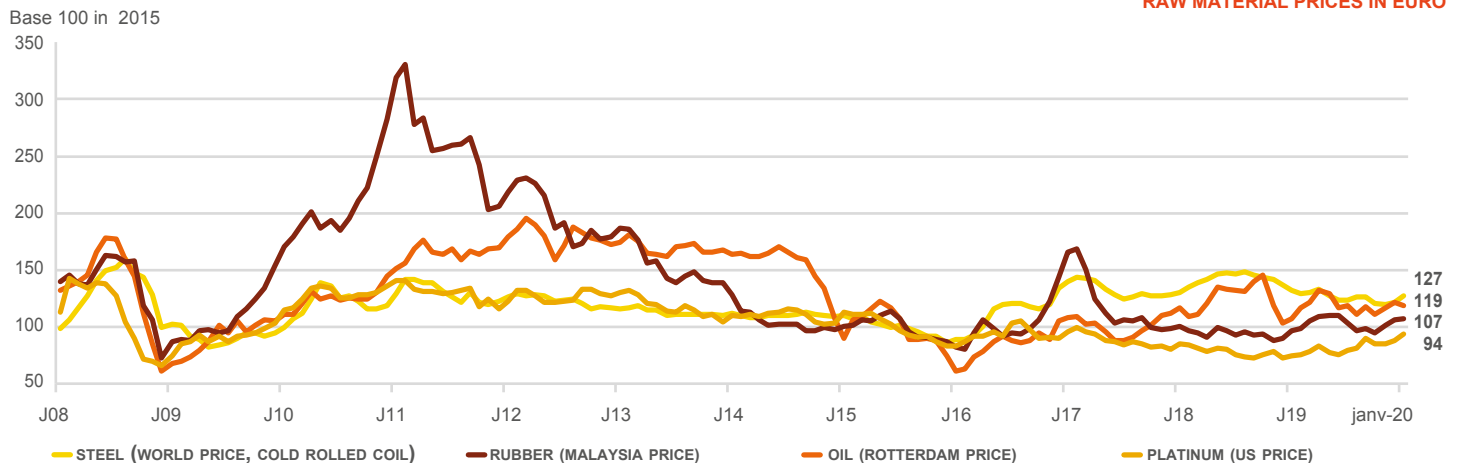
Source: CCFA

### EURO EXCHANGE RATE VARIATION: FOR 1 EURO



Source: BCE

### RAW MATERIAL PRICES IN EURO



Source: Rexecode

# 55%

Share of exports by French manufacturers outside the euro zone

Raw materials prices, which can impact the production costs of user companies, fluctuate significantly, even during the same year. Expressed in euros, the prices of raw materials had increased significantly from 2001 to 2012 but the repercussion of these in the final sales prices had proved difficult, in a context of intense competition and arbitrage in terms of consumption within households. Prices then hit a low point at the beginning of 2016 and then changed in a contrasting manner depending on the product and fluctuating strongly during the year. Steel and rubber saw their prices rise sharply in 2016 to

reach a peak in February 2017. But after that date, the price of rubber fell sharply, while that of steel remained at a high level, reaching a new peak in September 2018, to then decrease during the year 2019. Conversely, the price of platinum fell continuously until January 2019, to then increase regularly throughout the year. Finally, when it comes to the price of crude oil, its variations are much more erratic. After having fallen sharply at the end of 2018, it showed an upward trend during 2019. In January 2020, the price of the main raw materials used in the automotive industry remained at a level above the average for last five years.

## CONSOLIDATION OF THE AUTOMOTIVE INDUSTRY



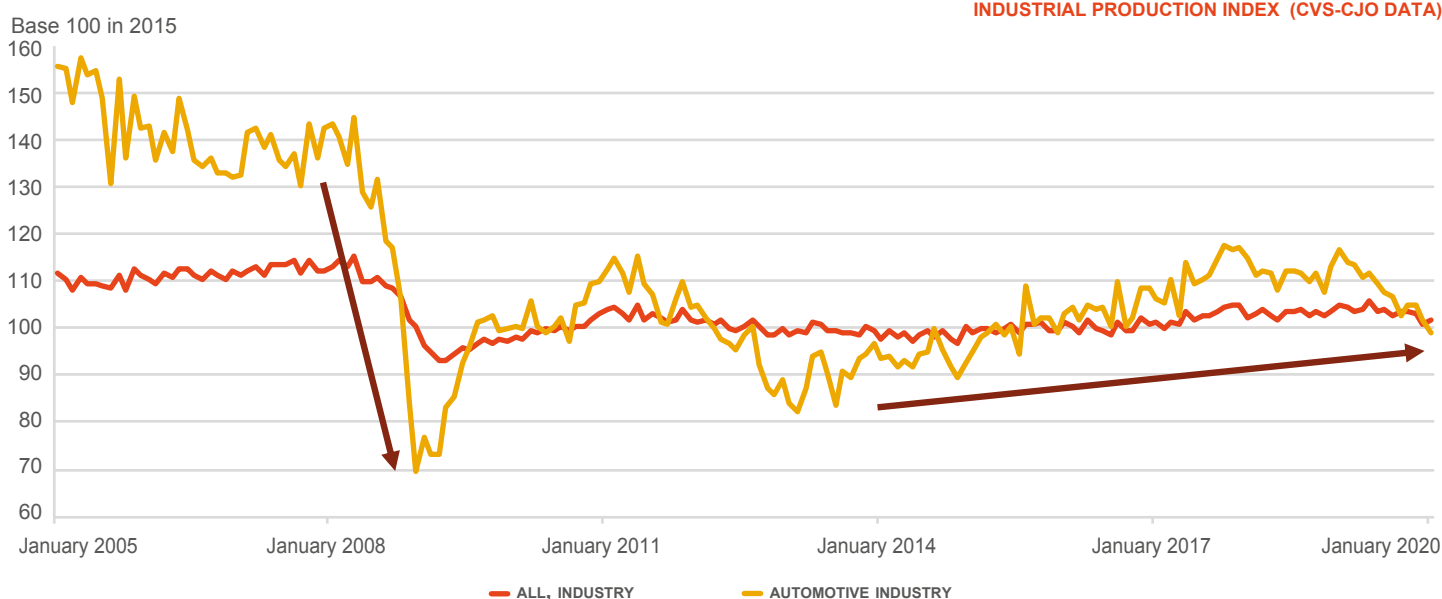
# 2018

**Signing of the 2018-2022  
sector contract**

The automotive industry has had to consolidate in the face of several types of events. The first was the 2009 crisis. Following wide fluctuations in the European automotive market, the industrial production index of the automotive industry in France, measured by the INSEE, fell sharply in 2008, from 143 in January to 70 in December. Then it rebounded in 2010-2011 and, after fluctuating around 93 until 2013, it progressed steadily to return above 100 from 2015.

The sector must now face three major disruptions (technological, digital and societal) which are leading to a profound reorganisation of the value chain. Companies must adapt to the reduction in their traditional opportunities related to combustion vehicles and invest in new products by training the workforce in future technologies.

In order to cope with the crisis in 2009, the automotive industry was structured. The "Plateforme de la Filière Automobile" (PFA) was set up by the French automotive groups and their suppliers brought together in the Automotive Suppliers Liaison Committee (CLIFA), in order to improve the efficiency of the automotive industry. It is now called PFA, "Filière Automobile et Mobilités". 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.



Source: 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, it has relied at the regional level on the Regional Associations of the Automobile Industry (ARIA). After an initial active phase, it was consolidated in 2012, notably around the Automotive Technical Committee (CTA) and its two councils, the Automotive Technical Standardisation Council (CSTA) and the Automotive Research Council (CRA). Five programs have been defined: 2L100 (car consuming 2L per 100 km), Autonomous Vehicle, VALdriv PLM (structuring and federating the digital transformation of the sector), FORCE (Optimised and Realistic Economic Carbon Fiber) and the Plant of the Future. In addition, the PFA works in partnership with the competitiveness clusters. It is also a stakeholder in automotive CSF. The PFA entered a new stage at the end of 2017. Its missions focus on fostering

innovation dynamics, promoting competitiveness throughout the sector, 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 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 May 2018, a new sector contract was signed for the period 2018-2022. It includes four structuring projects: being a player in the energy transition, creating the autonomous vehicle ecosystem and experimenting on a large scale to offer new mobility services, anticipating changes in skills and jobs needs, and strengthening the automotive industry competitiveness. In 2018, the CSF took particular action to deal with the industrial impacts of the sharp

decline in diesel in Europe or to facilitate and prepare for the emergence of electrified mobility in France.

In 2019, the sector is mobilising in several areas. In March, it launched with Bpifrance the first promotion of an automobile accelerator (Trajectoire PME-ETI). In April, the consortium gathered around the PFA was chosen by the government for an autonomous vehicle experimentation program. Finally in December, the online platform [www.monfuturjobauto.fr](http://www.monfuturjobauto.fr) was launched, developed by the sector with the support of the Investments for the Future Program (PIA) in order to promote professional mobility and the development of skills in the automotive sector.

## 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) and new mobility services. 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.

To meet research and development (R&D) funding needs, the public authorities have set up the Research Tax Credit (CIR), which makes it possible to fill the fiscal and social competitiveness deficit of France compared to other large countries in which automobile manufacturers are present, in particular through their R&D centres. The public authorities also provide sustainable support for the financing of structuring projects in the automotive industry. Since 2011, they have committed, through various mechanisms, 650 million euros for a total investment of 2 billion euros.

In addition, loans from the European Investment Bank (EIB) or support programs for R&D (current "horizon 2020" plan) of the European Union also

help to stimulate project financing.

Moreover, the large traditional countries of the automotive industry and those members of the BRIC's also strongly support their automotive industry, particularly in terms of R&D.



### ► INVESTMENT FUNDS

FSI and FMEA	Objectives and attributions
<b>The strategic investment fund (FSI) (created in November 2008) became 'Bpifrance Participations' in 2013 when Bpifrance was created.</b>	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
<b>Fund for the modernisation of automotive equipment manufacturers (FMEA) (created in January 2009 and which in January 2015 became the 'automotive future fund').</b>	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 million. Initial allocation of €600 million equally shared between PSA, Renault and FSI (now Bpifrance Participations).
Automotive future fund (FAA) (since January 2015)	Objectives and attributions
<b>Automotive future fund (FAA) Tier 1</b>	€600 m distributed equally between three subscribers (Bpifrance, Renault and PSA) to accompany Tier 1 supplier projects, investing amounts between €5 million and €60 million.
<b>Automotive future fund (FAA) Tier 2</b>	€50 m comprising five reference automotive equipment manufacturers (Bosch, Faurecia, Valeo, Hutchinson and Plastic Omnium) and FAA Tier1, specially dedicated to Tier 2 automotive suppliers, investing amounts between €1 million and €5 million.

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 million 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.

The public authorities also support the development of business R&D through the Research Tax Credit (CIR), a tax measure created in 1983, simplified and amplified by the 2008 Finance Act. In 2014, the manufacturing industry benefited from 59% of the total amount of the CIR (€3.4 billion). The automotive industry was the third industrial sector to benefit from the CIR, with 6% or €323 million.

Endowed with 57 billion euros, the Investments

for the Future Program (PIA) was set up by the State at the end of 2009 to finance innovative and promising investments in the regions, in order to strengthen productivity and increase the competitiveness of French companies. A program endowed with €1.2 billion and operated by ADEME is dedicated to "Vehicles and transport of the future" and aims to accelerate the marketing of innovative and ambitious solutions, in particular on energy transition issues.

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'. VEDECOM institute, 'the communicating decarbonated vehicle and its mobility' 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 year budget is around €30 million. 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 automobile manufacturers are also stakeholders in the "Institut de Recherche Technologique" (IRT) Jules Verne, based in Nantes. Created in 2012 as part of the PIA, its mission is to accelerate innovation and technological transfer to factories in 4 strategic industrial sectors linked to transport, including automotive. Its budget covers more than 180 million euros spread over 97 projects, including 10 launched in 2019. Its work in connection with the automotive sector focuses on the development of manufacturing processes for multi-material (composite-metal) parts and robotic solutions to develop the plant of the future.

# RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

## €6.8 BILLION

**Amount of internal and external research and development expenditure in the automotive sector in 2018**

In 2018, the automotive industry was the leading sector in terms of domestic research and development spending (DRDS) within companies in France, ahead of aeronautics and space construction and the pharmaceutical industry. This innovation expenditure amounted to €4.5 billion in 2018, or 13% of all BERD by companies. External research and development spending (ERDS) has doubled since 2015 and stands at €2.3 billion.

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 one third of the gross added value of the sector.

Manufacturers must invest not only to satisfy the customer and comply with regulatory standards,

especially with respect to the environment, but also to cope with the increasing development of digital towards the connected and autonomous vehicle and towards the mobility services. Since 2015, total R&D spending has increased by 25% and amounted to nearly 7 billion euros in 2018.

Cumulative over the past five years, the sector has invested more than €21.6 billion in domestic research and development spending. These expenses have a pull effect on its suppliers, such as plastics, electronics, etc. The automotive is ahead of the aerospace and then the pharmaceutical industry. It is also the first filer of patents.

In Europe, the automotive sector is also the one that spends the most on research and development with, according to ACEA figures, 57.4 billion euros spent in 2017, or 28% of total R&D expenditure.

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

	DRDS in 2018 (2)		ERDS (3) in 2018	
	in € millions	As a % of total	in € millions	As a % of total
Automotive industry	4,518	13%	2,256	16%
Aeronautics and space	3,452	10%	4,203	30%
Specialised, scientific and technical activities	3,093	9%	718	5%
Pharmaceutical industry	2,879	9%	2,548	18%
IT and information services	2,535	7%	222	2%
Chemical industry	1,870	6%	542	4%
Manufacture of measuring devices and instruments, testing and navigation, clocks	1,637	5%	230	2%
Components, electronic cards, computers, peripheral equipment	1,610	5%	159	1%
Publishing, audiovisual, and broadcasting	1,425	4%	236	2%
Manufacture of electrical equipment	1,257	4%	586	4%
Manufacture of machinery and equipment not included elsewhere	1,256	4%	224	2%
Manufacture of communications equipment	802	2%	135	1%
Other sectors	7,522	22%	1,973	14%
<b>TOTAL</b>	<b>33,853</b>	<b>100%</b>	<b>14,031</b>	<b>100%</b>

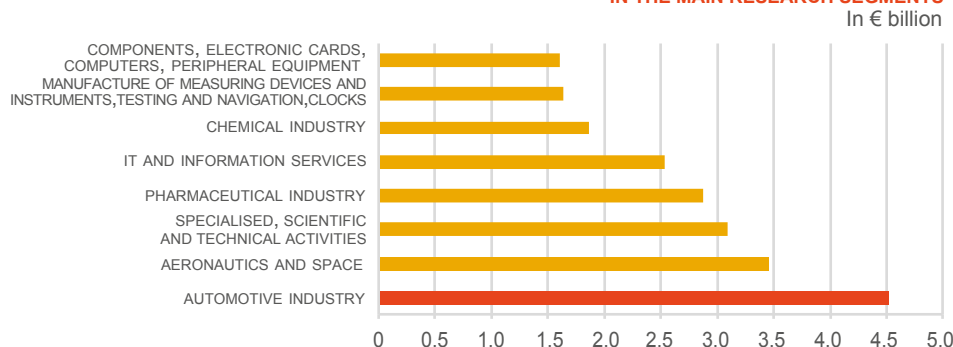
(1) Semi-final data.

(2) DRDS: Domestic Research and Development Spending.

(3) ERDS: External Research and Development Spending.

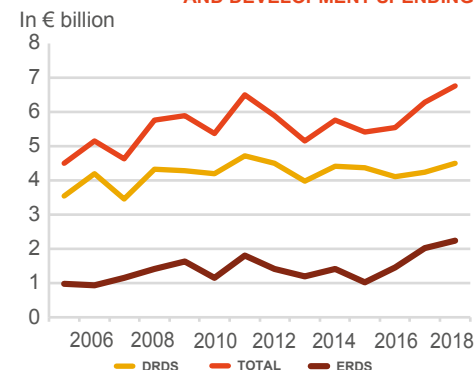
Source: Ministry of Higher Education, Research and Innovation (MESR DGESIP-DGRI SIES)

## TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2018 IN THE MAIN RESEARCH SEGMENTS



Source: Ministry of Higher Education, Research and Innovation (MESR DGESIP-DGRI SIES)

## AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



The research statistics study office (Ministry of Higher Education, Research and Innovation) conducts surveys on R&D spending by companies and the wider public sphere. From 2008, the data are disseminated in a new classification of economic activity. The total R&D budget breaks down into internal expenditure (DRDS), which corresponds to work carried out in France, regardless of the source of the funds, and external expenditure (ERDS), corresponding to R&D work entrusted to other companies or to public research

organisations or to public research organizations; some of the latter expenditure may be incurred abroad.

In 2017, 17% of DRDS in the automotive sector was triggered by subsidiaries of companies under foreign control (owning over 50% of their capital).

In 2018, companies in the automotive sector located in France employed 32,200 full-time equivalent people in R&D (including 20,400

researchers). These numbers were down 2% compared to 2003 but the number of researchers increased by 48% over the same period.

According to the national industrial property institute (INPI), in 2019 the PSA and Renault groups were in the top five in the list of patent applicants in 2019; four major automotive suppliers were also ranked in the top 20.



## AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

Initiated by the State and local authorities in 2005, the competitiveness clusters federate companies (large groups and SMEs/mid-cap companies), research units and training centres in collaborative project mode. Companies can belong to several poles with different specialties in order to obtain know-how (example: software skills for autonomous vehicles). The clusters also offer many services: economic intelligence, help with patenting, networking, etc.

Their role is to be a lever for the competitiveness of the French economy by emphasising its capacity for innovation and by encouraging anchoring and structuring in their territories. Several studies have shown their impact on companies' R&D spending: one euro of public subsidy received under this policy would have generated an average of 2.5 euros of additional R&D spending by beneficiary SMEs.

Phase IV of the poles policy was launched in 2019, with a requirement for excellence and a reinforced European ambition. The objectives of phase III are maintained (action focused on the products and services to be industrialised, taking into account economic opportunities and employment) but from now on, they must be more integrated into European innovation networks. Thus their size and their interest in merging and getting closer to other structures is important.

There are four automotive competitiveness clusters. They have developed their lines of work around innovation, skills, networking and bringing new solutions to market. They are associate members of the structure of the automotive industry: the PFA, Automotive Industry and Mobilities. In 2019, they joined forces to form the "auto and mobility" inter-hubs, a benchmark in Europe and internationally.



### ► AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

	Mov'eo	Vehicle of the Future	CARA	ID4CAR
<b>Number of companies with a business unit in a competitiveness cluster</b>	201	204	128	87
<b>of which SMEs</b>	149	135	71	57
<b>of which intermediate-sized enterprises</b>	25	47	34	22
<b>Employees of business units involved in the cluster (number of people) (1)</b>	28,028	47,686	20,355	18,375
<b>Number of members (2019)</b>	380	500	210	319
<b>Number of labeled projects since their creation (2019)</b>	405	469	270	278
<b>Number of projects funded since their creation (2019)</b>	230	227	159	-

(1) Information concerning employees is calculated on the basis of 2014 data.

Sources: DGE (annual survey with the clusters in 2015), Mov'eo, Vehicle of the Future, CARA, ID4CAR

In 2019, the automotive industry continued its research and development efforts through those clusters. Their action is transversal and includes car manufacturers, equipment manufacturers, innovative SMEs/intermediate-sized companies, research laboratories and training organisations, including universities.

The Mov'eo hub extends over the Île-de-France and Normandy regions. It is dedicated to the mobility of the future. The areas of research and development are: safety of road users, intelligent mobility solutions, innovative vehicles and energy storage, materials and systems, powertrains and energy management. In 2019, the cluster merged with the Normandy ARIA and the Automobility & Vehicles Network in Île-de-France (RAVI) to create Mobility Valley, a territory of European excellence where solutions are invented, developed, tested and industrialised to meet the challenges of future mobility.

The Vehicle of the Future cluster mobilises the historic automobile basins of Alsace and Franche-Comté. Its mission revolves around three themes: innovation, industrial excellence in the service of businesses and support for business growth. The cluster, in terms of innovation, is focused on automotive components, electric vehicles, hydrogen vehicles with the DINAMHySE plan in 2019 as part of the Grand Investment Plan,

recycling and mobility services. In June 2020, the Vehicle of the Future Pole completed the merger-absorption of the Champagne-Ardenne and Lorraine ARIA, PerfoEST (historically Alsace & Franche-Comté) ARIA having already joined the Pole in 2008. The objective of this merger is to consolidate the Automobile & Mobility sector over the entire territory of the Grand Est and Bourgogne-Franche-Comté Pole.

The ambition of the CARA cluster is to support changes in urban mobility and to represent and animate the automotive and industrial vehicles sector in the Auvergne-Rhône-Alpes region. At the end of 2017, the LUTB Transport & Mobility Systems competitiveness cluster 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, research centres. The activity revolves around five research programs: motorisation and driveline, safety and security, vehicle architecture, intelligent transport system, modelling and management of mobility. In this new phase, CARA aims to focus on experimentation, in real conditions, of innovation projects with the territories, and to accelerate support for European projects.

Located in the west of France (Brittany, Pays de la Loire), the ID4CAR cluster is focused on specific vehicles and sustainable mobility. The four

strategic areas of activity are: vehicle materials and architecture, embedded systems intelligence, innovative vehicles and uses, and digital mobility services and infrastructure. The cluster has also played the role of an ARIA on its geographical perimeter since the start of 2017. As part of phase IV of the competitiveness clusters, ID4CAR is extending by developing in New Aquitaine, in order to strengthen the hub territorial Great West.

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.

## FRENCH AUTOMOTIVE FOREIGN TRADE

The year 2019 was marked by political and economic uncertainties (protectionist tensions, Brexit, slowdown in China) which weighed on trade and global growth.

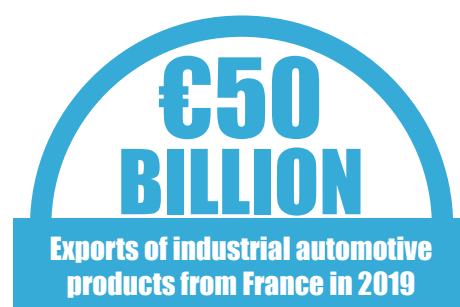
In this context, exports of automotive products from France fell by 2.1% in 2019 to reach €50 billion. This decline is mainly due to the sharp contraction in exports of parts and engines (-6.2%) and, to a lesser extent, to that of exports of new passenger cars (-0.9%). The automotive sector nevertheless remains the 2nd exporter behind aeronautics with 10% of total exports.

On the import side, they increased by 2.7% in 2019, in line with imports of new passenger cars (+6%) and industrial vehicles (+10%), while imports of parts and

engines fell by 2.5%. The historically surplus balance of the "parts and engines" item turned into a deficit in 2018 and this deficit increased further in 2019 (-€2.2 billion) with an even sharper decline in exports than in imports. Only engines maintained a surplus in 2019, thanks to the sharp drop in imports (-24%).

In total, the balance of the industrial automobile branch widened in 2019 to stand at -€15.1 billion.

France has historically had a surplus balance with the United Kingdom (+€1.6 billion) thanks in particular to parts and engines (+€0.9 billion) and this remains stable in 2019. The United Kingdom represents 8.5% of exports from the French industrial automotive sector and is the fifth destination country.



### ► FRENCH AUTOMOTIVE FOREIGN TRADE (IN € BILLION)

	New passenger cars	New light commercial vehicles	New heavy trucks	Parts and engines	Automotive industry sector	Used vehicles	Automotive sector	All products (1)	Share of the automotive
<b>EXPORTS (FOB)</b>									
2010	15.2	1.7	2.3	20.4	39.6	1.1	40.7	389.7	10.4%
2017	18.5	4.7	3.4	22.5	49.2	1.6	50.8	464.0	11.0%
2018	20.1	5.1	4.3	21.7	51.2	1.7	52.9	482.3	11.0%
2019	19.9	5.1	4.7	20.4	50.1	1.6	51.7	496.8	10.4%
Change 2019/2018 as a %	-0.9	+0.8	+9.2	-6.2	-2.1	-4.9	-2.2	+3.0	-
<b>IMPORTS (CIF)</b>									
2010	22.4	2.9	2.4	15.3	43.0	1.2	44.2	458.0	9.6%
2017	29.6	4.2	4.2	21.1	59.1	1.2	60.3	535.5	11.3%
2018	31.0	4.6	4.7	23.2	63.5	1.5	65.0	560.8	11.6%
2019	32.8	4.5	5.2	22.6	65.2	1.6	66.7	575.7	11.6%
Change 2019/2018 as a %	+6.0	-1.4	+10.0	-2.5	+2.7	+6.0	+2.7	+2.7	-
<b>BALANCES</b>									
2010	-7.1	-1.2	-0.1	+5.1	-3.4	-0.1	-3.5	-68.2	-
2017	-11.1	+0.6	-0.7	+1.4	-9.9	+0.4	-9.5	-71.5	-
2018	-10.9	+0.5	-0.4	-1.5	-12.3	+0.2	-12.1	-78.5	-
2019	-12.9	+0.6	-0.5	-2.2	-15.1	+0.0	-15.0	-78.9	-

### ► THE AUTOMOBILE EXCHANGES BETWEEN FRANCE AND THE UNITED KINGDOM IN 2019 (IN € BILLION)

	All vehicles	Parts and engines	Industrial automotive sector
EXPORTS (FOB)	2.6	1.7	4.3
IMPORTS (CIF)	1.9	0.7	2.7
Balance	+0.7	+0.9	+1.6

(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; fell by transaction value including freight and insurance up to the border of the importing country.

Sources: Customs data processed by CCFA

Automotive industry exports amounted to over 50 billion euros in the mid-2000s, before dropping to 34 billion in 2009 with the crisis. They then settled in a range between 39 and 45 billion euros, then grew steadily from 2014, to reach 51 billion euros in 2018. The year 2019 however marks an inflection point with a decline of 2.1%.

After 2009, exports of passenger cars varied between 13 and 16 billion, following in particular the weakness of Southern Europe markets where the French groups are strongly present. Then, from 2016, exports returned to strong growth thanks to the dynamism of the European market. They reached €20 billion in 2018 and remain

slightly below this level in 2019. Competitiveness difficulties and the crisis have changed production in France, which is moving towards passenger cars with higher added value, to the detriment of those of lower range.

After a sharp drop in 2009, exports of light commercial vehicles are growing continuously, thanks to the production of new vans in France and the development of production by French groups for economic partners. They now stand at €5.1 billion, a new record level. As for the exports of industrial vehicles, they have seen growth since 2013 and reached a record level of €4.7 billion in 2019. Imports of light commercial vehicles and

industrial vehicles again increased significantly in 2019, in line with the high levels of the French market.

Exports of parts and engines fell by 6.2% in 2019, while imports fell by 2.5%. The negative balance since 2018 increased further in 2019 (-€2.2 billion). This deterioration can also be explained in large part by the competitiveness difficulties of the French industry.

## FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automobile industry are generally European. In 2019, five Western European countries accounted for 63% of industrial automotive exports. In the top 10 customers of French automotive exports, there are also Eastern Europe emerging countries.

For new passenger cars, the opportunities are mainly the four other main markets of the European Union (Germany, Spain, Italy, United Kingdom) and Belgium. In 2019, Germany passed Belgium with exports valued at 3.6 billion euros, followed by Italy, Spain and the United Kingdom which occupies fifth place with 1.6 billion euros. Poland comes in sixth place with almost 600 million euros.

Light commercial vehicles are also mainly exported to these 5 countries. Germany leads with 1.2 billion

euros, ahead of Belgium (751 million euros) and the United Kingdom (572 million euros). Poland is in sixth place with 250 million euros and China is eighth with 134 million euros. In 2019, the export amount of light commercial vehicles reached a record level with 5.14 billion euros.

Exports of heavy trucks and coaches and buses have increased by 90% since 2010 with an increase in 2018 (+25%) and in 2019 (+9%). Exports to Germany increased by 100% and those to Spain and the United Kingdom more than doubled (+160% on average).

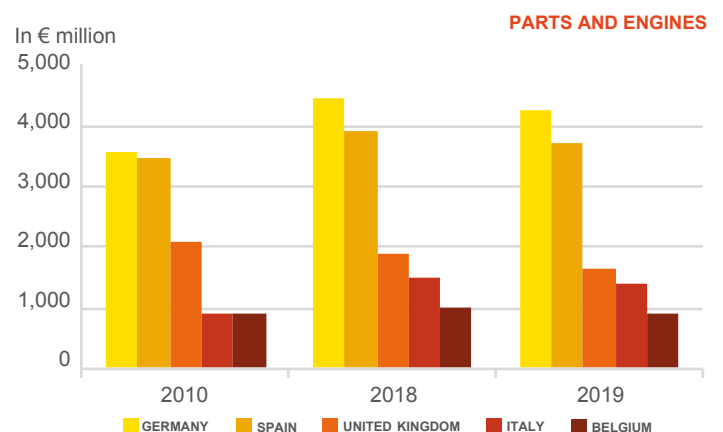
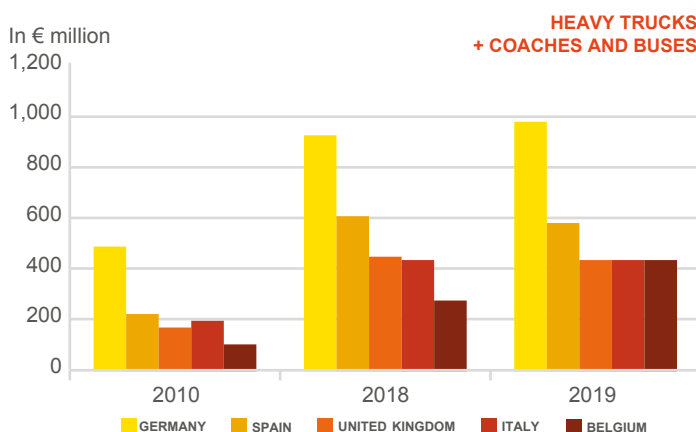
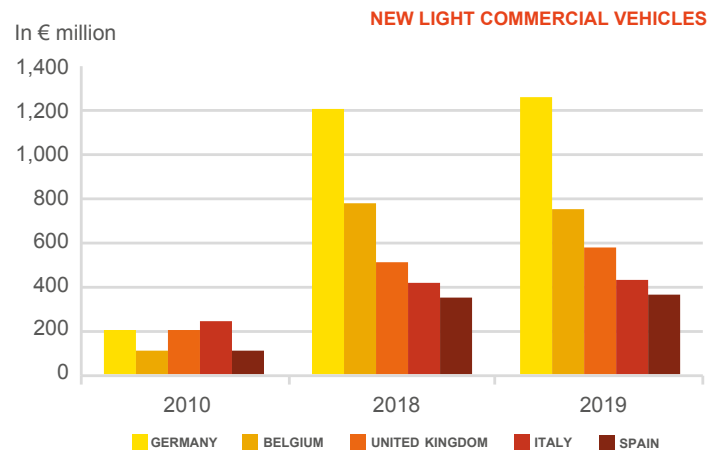
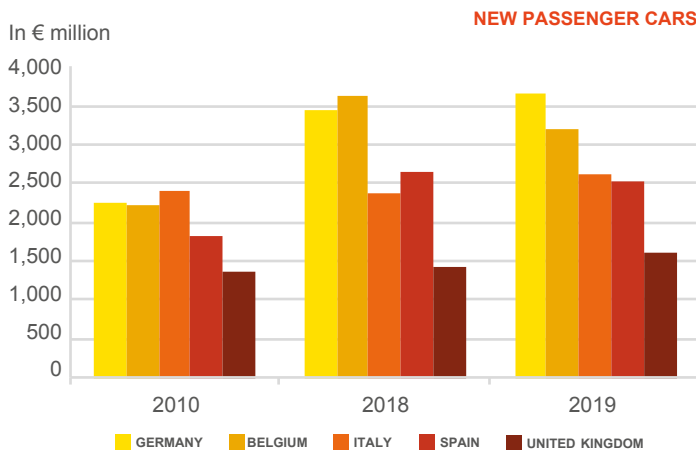
The top five destinations for parts and engines exports are also European. Germany leads with 4.3 billion euros, followed by Spain. To the United Kingdom, the third recipient country, exports fell by more than 10% for the second consecutive year, down 28% compared

to 2015. Exports to Italy rose sharply between 2010 and 2018 (+56%) but fell in 2019 (-6%).

On the import side, there is a greater diversity of supplier countries: mainly Western Europe but also Eastern Europe (including Turkey) and Japan. For light vehicles, Germany is the leading supplier (7.1 billion euros) followed by Spain. The United Kingdom (1.8 billion euros) and Japan (1.3 billion euros) are also important suppliers. For industrial vehicles, Germany leads the way with imports from this country amounting to 2 billion euros.



### ► LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE



Sources: Customs data processed by CCFA

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

Sales of new passenger cars equipped with a diesel engine continued to decline in 2019 (-10.6%) and represented 34% of the market (compared to 73% in 2012). Since 2012, the year when the diesel market share was the highest, volumes have fallen by 45% (-629,000 units). In Western Europe, the share of diesel passenger cars reached a record high (58%) in 2011. This ratio has fallen sharply since 2016 and reached 31% in 2019.

This evolution can be explained by objective factors: taxation less favourable towards diesel, higher prices for diesel engines due to changes in standards,

development of the offer of 3-cylinder petrol engines; but also by more subjective factors (Volkswagen problem in the United States, implementation of Crit'air stickers and Low Emission Zones in France, etc.).

Sales of hybrid and electric passenger cars, still emerging in France, continued to grow in 2019 to reach a market share of 5.7% (+0.8 point compared to 2018) and 1.9% (+0.5 point). In Western Europe, the market share of hybrid cars was 7.5% in 2019, that of electric cars 2.4% (see page 79). In contrast, in Eastern Europe, this share is lower with 6.3% and 0.5% of registrations respectively.

# -39 POINTS

**Declining share of new passenger cars with diesel engines registered in France compared to 2012**

### ► PASSENGER CARS BY ENERGY

	2000	2015	2016	2017	2018	2019	Change 2019/2018 as a %
<b>REGISTRATIONS</b>							
<b>Petrol</b>							
In units	-	741,215	884,619	1,006,091	1,191,145	1,290,268	+8.3
As a % of total registrations	51.0%	39%	44%	48%	55%	58%	-
<b>Diesel</b>							
In units	1,046,485	1,097,124	1,050,418	998,116	844,878	755,583	-10.6
As a % of total registrations	49.0%	57%	52%	47%	39%	34%	-
<b>Electric</b>							
In units	-	17,268	21,751	24,910	31,059	42,764	+37.7
As a % of total registrations	-	0.9%	1.1%	1.2%	1.4%	1.9%	-
<b>Hybrid</b>							
In units	-	61,619	58,389	81,559	106,369	125,435	+17.9
As a % of total registrations	-	3.2%	2.9%	3.9%	4.9%	5.7%	-
<b>including non rechargeable</b>							
In units	-	56,030	50,960	69,691	91,841	106,843	+16.3
As a % of total registrations	-	2.9%	2.5%	3.3%	4.2%	4.8%	-
<b>including rechargeable</b>							
In units	-	5,589	7,429	11,868	14,528	18,592	+28.0
As a % of total registrations	-	0.3%	0.4%	0.6%	0.7%	0.8%	-
<b>VEHICLES IN USE (1)</b>							
<b>Petrol</b>							
In thousands of units	18,080	13,316	13,665	14,185	14,756	15,354	+4.1
As a % of total stock	64.4%	35.5%	36.0%	37.0%	38.5%	40.2%	-
<b>Diesel</b>							
In thousands of units	9,980	23,900	24,008	23,899	23,263	22,500	-3.3
As a % of total stock	35.6%	63.8%	63.3%	62.3%	60.7%	58.9%	-
<b>Electric and rechargeable hybrids</b>							
In thousands of units	-	66	92	124	162	214	+32.1
As a % of total stock	-	0.2%	0.2%	0.3%	0.4%	0.6%	-

(1) Fleet as of December 31

Sources: CCFA, MTE/SDS (Ministry of Ecological Transition)

In 2019, France is still in third place in the European market for new diesel passenger cars, with 756,000 registrations, behind Germany (1.1 million units), Italy (760,000 units) and ahead of the United Kingdom (583,000 units). Elsewhere in Western Europe, the decline in diesel market share in the new car market accelerated to 30.8% in 2019, -5.4 points compared to 2018 and 31.1% including France.

Diesel market share is around 20 percentage points higher in registrations by "non-individuals" customers than in purchases by individuals. In 2019, the share of diesel among individuals was 22% on average against 44% for non-individuals. These figures are also observed in most Western Europe countries. The diesel engine is now preferred by car owners with significant annual mileage.

59% of the passenger cars in use in France on January 1, 2020 were equipped with a diesel engine. This ratio has fallen by more than 4 points since the high point in 2015. The electrified fleet is emerging but remains low with 214,000 cars on January 1, 2020.

In 2019, registrations of new hybrid passenger cars amounted to 125,435 units, an increase of 17.9% (+28% for plug-in hybrids). Those of new electric passenger cars grew by 37.7% to reach 42,764 units, which consolidates the French market in third place in European markets behind those of Germany and Norway. This growth was driven by the maintenance of the 6,000 euros bonus of for the purchase of an electric vehicle, supplemented by a super bonus in the context of the scrapping of an old vehicle, the two devices being able to go up to 11,000 euros. This aid is also part of the Automotive Sector Strategic Contract signed with

the public authorities and which sets a target of 1 million electrified vehicles and 100,000 charging points by 2022.

At the end of 2019, in France, there were 28,666 charging points in France (AVERE) for a fleet of 141,000 electric cars and 73,000 rechargeable hybrid cars (MTE/SDS).

The electrified vehicle market is also driven by the diversification of the offerings of manufacturers who had to expand their range before the implementation of monitoring of the CO<sub>2</sub> targets set at European level and the risk of penalties in the event of non-compliance. French groups have thus invested heavily to develop new electric products in 2019 (DS3 Crossback, Peugeot 208, new Renault Zoe) and to prepare hybrid versions for 2020.

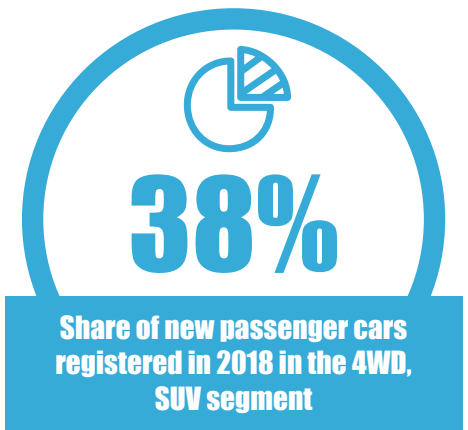


# NEW PASSENGER CAR REGISTRATIONS BY MODEL, RANGE AND BODY STYLE

In 2019, the 10 best-selling models in France belong to the lower economy range and the lower middle range, which represent 56.3% of the market share (compared to 42% in Western Europe). After having reached its peak in 2010 thanks to the bonus/penalty system and the scrapping premium, this range fell in 2011-2012. Then, the renewal of the cars of the economy range (108, C1, Twingo, ZOE), the success of the sales of the models of the existing lower range (208, C3, Clio, Sandero) and the development of the product offer in 4WD, SUV on this range (C4-Cactus, 2008, Captur, Duster) again stimulated the segment, which stabilised around 53% market share until 2017. In 2018 and 2019, its market share again rose sharply

(+3 points). The market shares of the other ranges continue to decline.

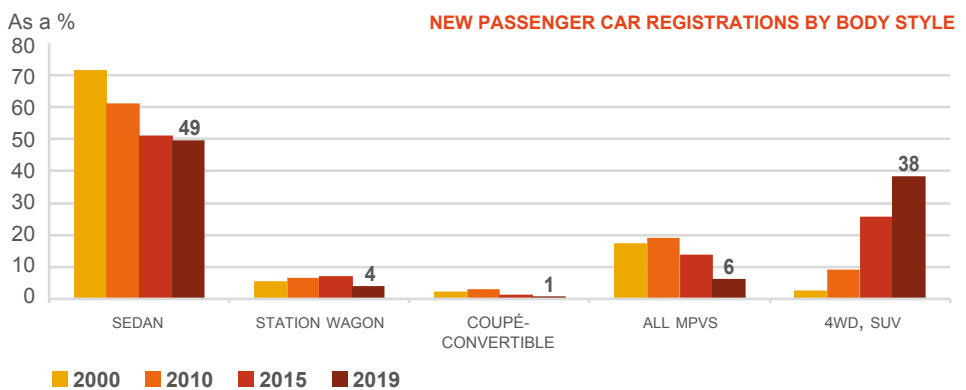
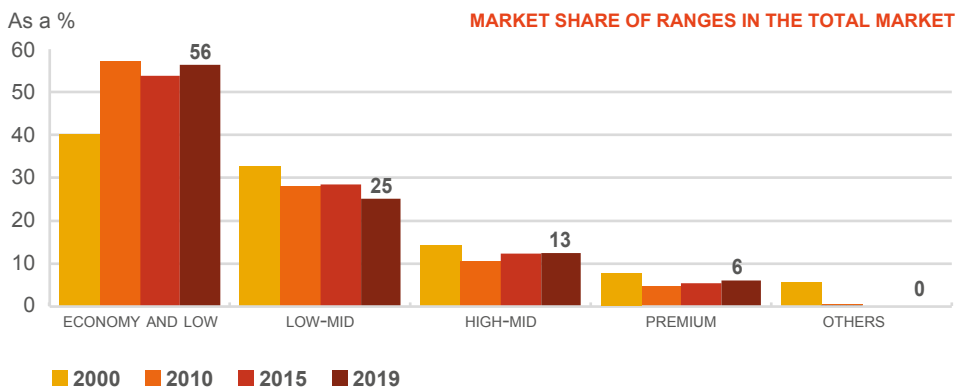
Sales by body type show that 4WD, SUV continued their strong growth (+29 market share points since 2010) thanks to the offer in the lower (Captur, 2008, Duster) and low-mid ranges (C3 Aircross, C5 Aircross, 3008, 5008, Kadjar) and represent, in 2019, 38.3% of sales. Sedans, down sharply (from 72% in 2000 to 51% in 2015), since 2017 represent less than half of sales (49.7% in 2019). Finally, over the same 2010-2019 period, the share of MPVs (-13 points to 6.4%), station wagons (-3 points to 4.2%) and coupés-convertible (-2 points to 1%) moved back.



## ► MAIN NEW PASSENGER CARS RANKINGS IN 2019

Rank	Brand	Model	% market
1	RENAULT	CLIO	5.9
2	PEUGEOT	208	4.8
3	CITROËN	C3	3.6
4	RENAULT	MEGANE	3.6
5	PEUGEOT	3008	3.3
6	RENAULT	CAPTUR	3.2
7	DACIA	SANDERO	3.1
8	PEUGEOT	2008	2.8
9	PEUGEOT	308	2.5
10	RENAULT	TWINGO	2.3
11	DACIA	DUSTER	2.2
12	CITROËN	C3 AIRCROSS	2.1
13	FIAT	500	2.0
14	TOYOTA	YARIS	1.9
15	VOLKSWAGEN	POLO	1.8
16	CITROËN	C5 AIRCROSS	1.6
17	RENAULT	KADJAR	1.3
18	PEUGEOT	5008	1.3
19	OPEL	CORSA	1.3
20	MINI	MINI	1.2
21	VOLKSWAGEN	TIGUAN	1.2
22	VOLKSWAGEN	GOLF	1.2
23	FORD	FIESTA	1.1
24	VOLKSWAGEN	T-ROC	1.0
25	PEUGEOT	108	1.0
26	CITROËN	C4 CACTUS	0.9
27	NISSAN	QASHQAI	0.9
28	MERCEDES-BENZ	CLASSE A	0.9
29	RENAULT	ZOE	0.8
30	CITROËN	C4	0.8

Source: CCFA



## ► NEW PASSENGER CARS REGISTRATIONS BY RANGE

Ranges	2000		2010		2017		2018		2019	
	units	%	units	%	units	%	units	%	units	%
Economy and low ranges	855,161	40.1	1,283,902	57.0	1,091,792	51.7	1,195,321	55.0	1,246,492	56.3
Low-mid range	695,146	32.6	627,694	27.9	601,368	28.5	582,054	26.8	557,062	25.2
High-mid range	303,028	14.2	234,664	10.4	278,439	13.2	275,894	12.7	277,185	12.5
Premium range	163,293	7.7	105,313	4.7	139,149	6.6	120,212	5.5	133,540	6.0
Others	117,256	5.5	96	0.0	0	0.0	0	0.0	0	0.0
<b>TOTAL</b>	<b>2,133,884</b>	<b>100.0</b>	<b>2,251,669</b>	<b>100.0</b>	<b>2,110,748</b>	<b>100.0</b>	<b>2,173,481</b>	<b>100.0</b>	<b>2,214,279</b>	<b>100.0</b>

## ► NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Bodies	2000		2010		2017		2018		2019	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	1,034,952	49.0	1,079,757	49.7	1,094,467	49.4
Station wagon	119,739	5.6	153,476	6.8	118,337	5.6	95,388	4.4	92,487	4.2
Coupé-Convertible	50,527	2.4	70,353	3.1	25,230	1.2	19,933	0.9	21,562	1.0
All MPVs	369,434	17.3	430,857	19.1	232,103	11.0	172,007	7.9	142,540	6.4
of which compact MPVs	241,190	11.3	233,363	10.4	146,825	7.0	111,038	5.1	84,954	3.8
4WD, SUV	57,116	2.7	205,106	9.1	680,792	32.3	788,187	36.3	847,850	38.3
Others	9,392	0.4	14,379	0.6	19,334	0.9	18,209	0.8	15,373	0.7
<b>TOTAL</b>	<b>2,133,884</b>	<b>100.0</b>	<b>2,251,669</b>	<b>100.0</b>	<b>2,110,748</b>	<b>100.0</b>	<b>2,173,481</b>	<b>100.0</b>	<b>2,214,279</b>	<b>100.0</b>

Source: CCFA

## USED PASSENGER CARS

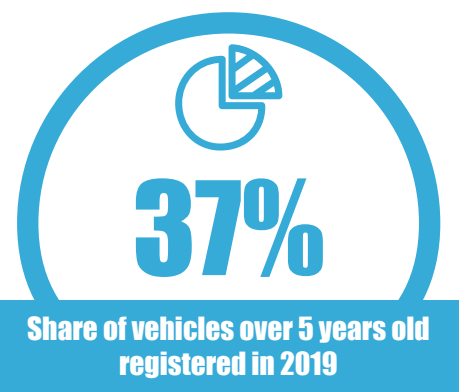
Used passenger car registrations have exceeded five million units per year since 2000. In 2019, they reached a record 5.8 million units, up 2.8% from 2018.

Every year, two to three used cars are traded for a new car. In 2018 and 2019, the used/new ratio decreased to 2.6, after having sharply increased until 2016. Around 15% of cars in use change hands each year, while this rate was closer to 20% in the 2000s.

In 2019, according to the Parc-Auto survey (page 45), households averaged nearly five and a half years of vehicle ownership (compared to five years in 2010 and four years in 1995).

In recent years, the incentives to renew the fleet contributed to the increase in the number of second-hand car registrations under the age of five (37% in 2019, compared to 32% in 2016) and to the decrease in those over 10 years (41% in 2019 compared to 44% in 2016).

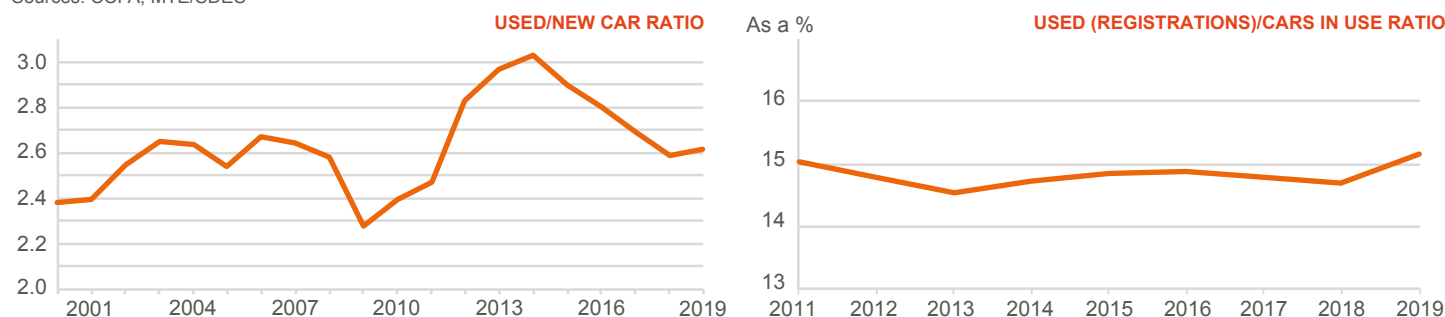
Diesel cars are the most numerous among used cars sold (3.5 million, 60.7% of sales) but their share in sales has declined steadily since 2016. This decline is more than 2 points in 2019, in particular due to their exit from the conversion bonus scheme from August 2019. Electric used cars are still very few in number, with a volume of 19,652 units in 2019 (0.2% of the market).



### ► USED PASSENGER CARS

	Units	2000	2005	2010	2017	2018	2019
<b>REGISTRATIONS</b>							
New passenger cars	thousands	2,134	2,118	2,252	2,111	2,173	2,214
Used cars	thousands	5,082	5,383	5,386	5,679	5,632	5,791
Used/new ratio		2.4	2.5	2.4	2.7	2.6	2.6
Cars less than 5 years old	% used	40	40	37	33	36	37
- Cars less than 1 year old	% used	12	10	8	9	10	10
- Cars less than 1 year old	% new	29	25	19	25	26	27
Cars more than 5 years old	% used	60	60	63	67	64	63
Cars 5 to 9 years old	% used	-	25	26	23	22	21
Cars 10 to 14 years old	% used	-	22	21	23	22	22
Cars 15 years old and more	% used	-	13	15	21	20	19
	% VO	-	55.7	66.1	64.6	62.8	60.7
CARS IN USE (ON 12/31)	thousands	28,825	-	-	38,371	38,336	38,215
USED (REGISTRATIONS) / CARS IN USE RATIO	%	17.6%	-	-	14.8%	14.7%	15.2%

Sources: CCFR, MTE/SDES



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, the remainder being transactions between individuals.

Between 5 and 6 million second-hand cars are traded per year. This market is subject to less fluctuations than the new car market. In 2019, demand for new cars continued to increase to reach 2.2 million units (+1.9% compared to 2018), and that for used cars rebounded (+2.8%) after a slight decrease in 2018. The used/new ratio therefore increases slightly in 2019. The demand for used vehicles is generally closer to the evolution of the fleet; it is less influenced by economic factors than the demand for new cars. It was nevertheless affected by measures to stimulate the new home market (bonus/penalty

system, conversion bonus, etc.).

The aging of the fleet and the development of multi-vehicle households resulted in an increase in the share of cars older than 5 years in second-hand transactions between 1990 and 2016 (68% in 2016, compared to 48% in 1990). However, over the past three years, incentives to renew the fleet have increased the share of used cars under 5 years old and lowered that of older vehicles. Indeed, the penetration of used cars aged 15 years and over, which had more than doubled since the beginning of the 2000s, especially after the crisis, has declined slightly over the past two years (-2 points) and stands at 19% in 2019.

Used cars less than a year old can be compared to the new market. In fact, these are often cars first registered by an automotive professional (demonstration car or rental car), then sold to individuals. From 2001 to 2009, the share of vehicles under one year of age in all used passenger car registrations fell steadily, before rising to around 8% between 2010-2016 (12% in

2001). In the years of the scrapping, the prices of new cars were indeed more competitive. Since then, they have grown each year, reaching 593,243 registrations in 2019, or more than 10% of used car registrations and 27% of the new market.

The share of diesel in used cars amounted to 60.7% in 2019, a decline of 6.6 points since 2015, thus reflecting the developments observed in the new market.

In 2019, according to the Parc-Auto survey (Kantar TNS), 58.2% of cars owned or made available to households were purchased second-hand, against 51% in 1991. For cars purchased in 2019, this share rose to 64%. When purchased, their average mileage was around 68,333 kilometres, and more than a quarter of used vehicles purchased by households had more than 100,000 kilometres on the clock.

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

Sales of new vehicles in the five overseas departments (Guadeloupe, Guyana, Martinique, Mayotte and Reunion) increased by only 1% in 2019 after growing 6% in 2018. However, they established a new record of 80,326 vehicles, an increase of 37% compared to the low level in 2013. Like in metropolitan France, the share of the diesel market continues to decline, down 5 points in 2019 (29% compared to 64% in 2012). The share of electric cars in registrations remains very low (0.7%) except in Reunion, where it reaches the same level as in metropolitan France (1.9%).

Sales of light commercial vehicles fell sharply in 2019. They fell by 10% on average in the five overseas departments (including 20% in Guadeloupe) after increasing by 11% in 2018. Their share in the overall sales thus fell to 15.1% compared to 17.4% in metropolitan France.

Conversely, registrations of commercial vehicles over 5 tonnes increased in 2019: +8% in 2019 (including

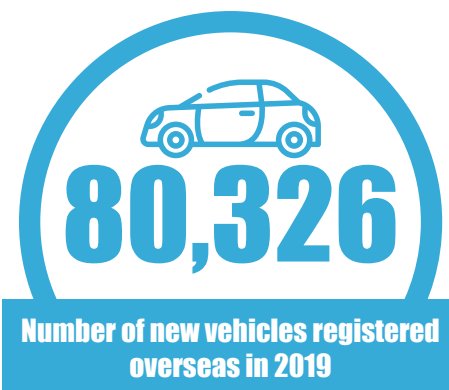
11% for coaches and buses) after an increase of 5% in 2018. However, their share in the total number of registrations remains lower (1.1%) than in metropolitan France (2%), given the geographic context.

The share of French groups on the passenger car market amounted to 53% in 2019. After falling to 45% in 2009, it is growing steadily and gained 3 points in 2017, in particular thanks to the integration of Opel into the PSA group from August 1. In the light commercial vehicle market, the share of French groups has increased by nearly 5 points, going from 57% in 2018 to 62% in 2019, which remains slightly lower than in metropolitan France (around two-thirds of the market). On the narrow market for industrial vehicles, Renault Trucks' market share remained at 26% in 2019.

Second-hand passenger car registrations stood at 127,746 units, an increase of 3.7% in 2019, and 33% from the low level observed in 2009 (96,000

units). The ratio of used/new vehicles sold fell to 1.9 after hovering around 2.3 between 2012 and 2016.

As of January 1, 2020, the number of passenger cars in the overseas departments was estimated at 876,220 units according to the data and statistical studies service (SDES) of the Ministry of Ecological and Solidarity Transition.



### NEW PASSENGER CARS

	2000	2010	2015	2018	2019	Change 2019/2010	Change 2019/2018
GUADELOUPE	13,691	13,438	13,409	16,962	16,741	24.6%	-1.3%
FRENCH GUIANA	4,031	4,382	4,414	5,373	5,450	24.4%	1.4%
MARTINIQUE	14,424	13,147	12,931	15,358	15,853	20.6%	3.2%
MAYOTTE (1)	-	-	1,083	1,335	1,729	-	29.5%
REUNION ISLAND	21,463	20,295	22,288	26,174	27,556	35.8%	5.3%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	53,609	51,262	54,125	65,202	67,329	31.3%	3.3%
TOTAL DOM USED PASSENGER CARS	N/A	104,381	125,457	123,247	127,746	22.4%	3.7%

### NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)

	2000	2010	2015	2018	2019	Change 2019/2010	Change 2019/2018
GUADELOUPE	2,685	2,394	2,214	3,067	2,465	3.0%	-19.6%
FRENCH GUIANA	1,143	1,239	1,159	1,517	1,311	5.8%	-13.6%
MARTINIQUE	2,368	2,016	2,156	2,362	2,059	2.1%	-12.8%
MAYOTTE (1)	-	-	230	396	401	-	1.3%
REUNION ISLAND	5,200	4,166	4,975	6,175	5,863	40.7%	-5.1%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	11,396	9,815	10,734	13,517	12,099	23.3%	-10.5%

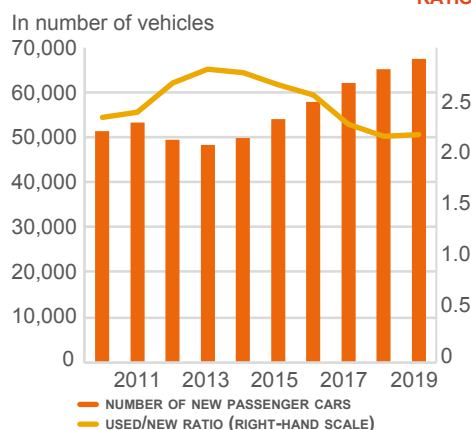
### NEW COMMERCIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5T)

	2000	2010	2015	2018	2019	Change 2019/2010	Change 2019/2018
GUADELOUPE	146	135	97	171	183	35.6%	7.0%
FRENCH GUIANA	66	85	50	90	88	3.5%	-2.2%
MARTINIQUE	187	84	128	173	170	102.4%	-1.7%
MAYOTTE (1)	-	-	48	57	81	-	42.1%
REUNION ISLAND	362	293	434	344	376	28.3%	9.3%
TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)	761	597	757	835	898	50.4%	7.5%

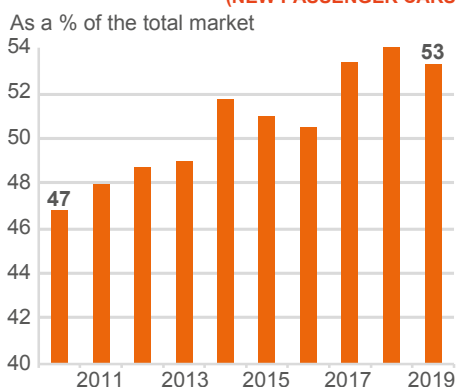
(1) Since April 1, 2011

Source: CCFA

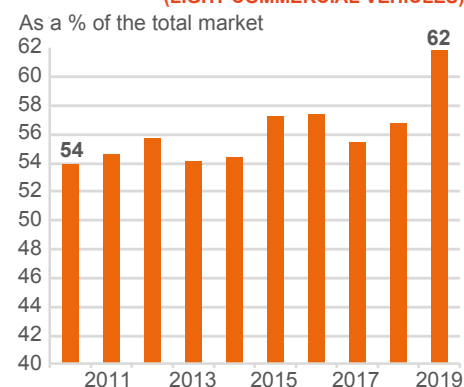
### NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS AND USED/NEW RATIO



### FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS (NEW PASSENGER CARS)



### FRENCH MANUFACTURER MARKET SHARE IN FRENCH OVERSEAS DEPARTMENTS (LIGHT COMMERCIAL VEHICLES)

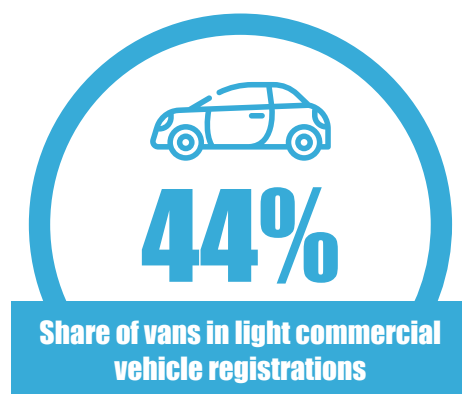


## NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

In 2019, registrations of new light commercial vehicles increased by 4.5% (after +4.7% in 2018) and reached a record level of 480,000 units, 20,000 units more than the peak observed in 2007.

Diesel vehicles have seen their share of registrations drop slightly over the past 4 years in favour of petrol and electric. They represent 93% of sales in 2019 compared to 97% in 2015. The share of electric vehicles reached 1.7% in 2019 with 7,958 units sold. French manufacturers are particularly present in this segment with 75% of the market share, compared to 66% for all energies combined.

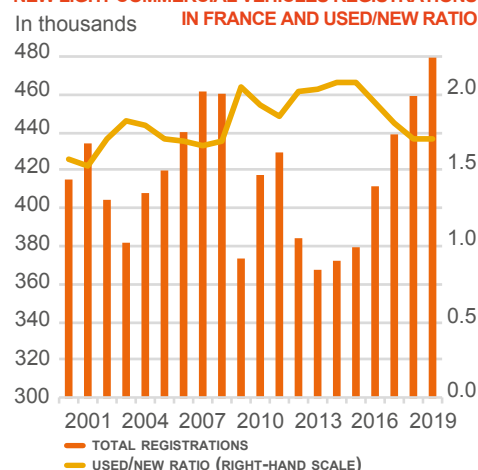
The new light commercial vehicles fleet, estimated at 6 million units as of January 1, 2020, is still largely dominated by diesel engines, which represent 95% of vehicles. The fleet of electric light commercial vehicles, although small (it is estimated at 38,500 units as of January 1, 2020), is progressing significantly. The fleet is made up of more than 50% of vehicles from 2.6 tonnes to 3.5 tonnes.



### ► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY BODY

BODIES	2000		2010		2015		2018		2019	
	units	%	units	%	units	%	units	%	units	%
CARS DERIVATIVES	133,679	32.2	116,582	27.9	85,976	22.7	79,109	17.2	74,776	15.6
SMALL VANS	110,727	26.7	113,152	27.1	99,227	26.2	110,431	24.1	120,532	25.1
VANS	99,953	24.1	136,647	32.7	140,153	36.9	193,462	42.1	209,299	43.6
MINI-BUSES/COACHES	867	0.2	525	0.1	621	0.2	388	0.1	363	0.1
PICKUP	6,327	1.5	12,126	2.9	12,877	3.4	22,487	4.9	15,320	3.2
4WD, SUV	4,470	1.1	9,302	2.2	9,908	2.6	10,609	2.3	11,312	2.4
OTHERS	58,943	14.2	29,278	7.0	30,666	8.1	42,654	9.3	48,147	10.0
<b>TOTAL</b>	<b>414,966</b>	<b>100.0</b>	<b>417,612</b>	<b>100.0</b>	<b>379,428</b>	<b>100.0</b>	<b>459,139</b>	<b>100.0</b>	<b>479,749</b>	<b>100.0</b>

### NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS IN FRANCE AND USED/NEW RATIO



### ► LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY WEIGHT

	2005	2010	2019
< 1,5T	3%	4%	1%
1,5T TO < 2,5T	56%	52%	42%
2,5T TO 3,5T	41%	43%	57%
> 3,5T TO 5T	0.2%	0.5%	0.3%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: CCFA

### ► LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY ENERGY

	2015		2019	
	units	%	units	%
DIESEL	368,150	97%	446,350	93%
PETROL	5,317	1%	22,155	5%
ELECTRIC	4,919	1%	7,958	2%
OTHERS	1,042	0%	3,321	1%
<b>TOTAL</b>	<b>379,428</b>	<b>100%</b>	<b>479,784</b>	<b>100%</b>

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 in the workplace, for transfers between sites, transport of equipment. They come in different categories: derivatives of passenger cars, combispaces, vans, vans, pick-ups and 4WD, SUV.

In 2019, sales of vans continued to grow (+9% and +53% since 2010) to reach 43.6% of new registrations. The second segment is that of small vans which represent a quarter of sales, a slight drop compared to 2010. Sales of pick-ups, which experienced strong growth between 2015 and 2018 (+75%), collapsed with the implementation in 2019 of the penalty and tax on company cars for this category of vehicle. Finally, derivatives of passenger cars only represented 15.6% of sales in 2019 compared to 32% in 2000.

Light commercial vehicles from 2.5 to 3.5 tonnes have been the majority since 2016 in new

registrations; their share reached 57% of sales in 2019 (+22 points since 2001), while that of vehicles from 1.5 to 2.5 tonnes rose from 59% to 42% over the same period. Since 2010, sales of vehicles from 2.5 to 3.5 tonnes have increased 52%, while sales of all other categories have declined.

In 2019, registrations of used light commercial vehicles reached a high level around 817,000 units (page 90), up 4% compared to 2018. However, the used/new ratio remains below 2 for the third consecutive year, due to the increase in sales of new vehicles, a level well below that observed for passenger cars. Indeed, for a new passenger car, it trades between 2 and 3 used cars (2.6 in 2019).

Specific to France, nearly 9% of new registrations of new commercial vehicles are made by private individuals, who prefer vans and small vans in their purchases as well as pick-ups. As of January 1, 2020, 46% of the fleet is owned by natural persons (individuals and craftsmen), 14% by legal persons operating in the construction sector and 9% in the

trade sector.

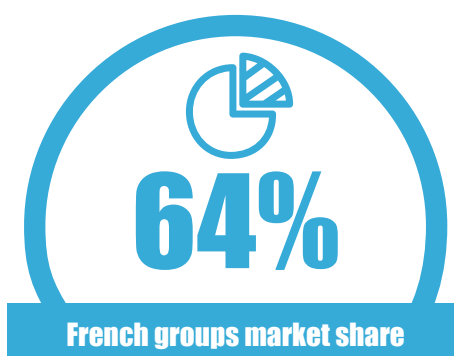
Light commercial vehicles are intensively used: they travel 15,000 km/year each year, compared to an average of 12,000 km/year for a private car (see page 48 for the traffic report). While individuals travel fewer kilometres with their light commercial vehicle (around 10,000 km per year), some sectors are very intensive users and reach 20,000 km/year, or even more: transport, messaging, storage, as well as specialised activities (scientific and technical, and administrative and support service activities) and manufacturing industry. These vehicles are mainly used in urban areas or on the road (except motorway). Routes of more than 150 km only represented 10% of the kilometres traveled in 2010 by professionals.



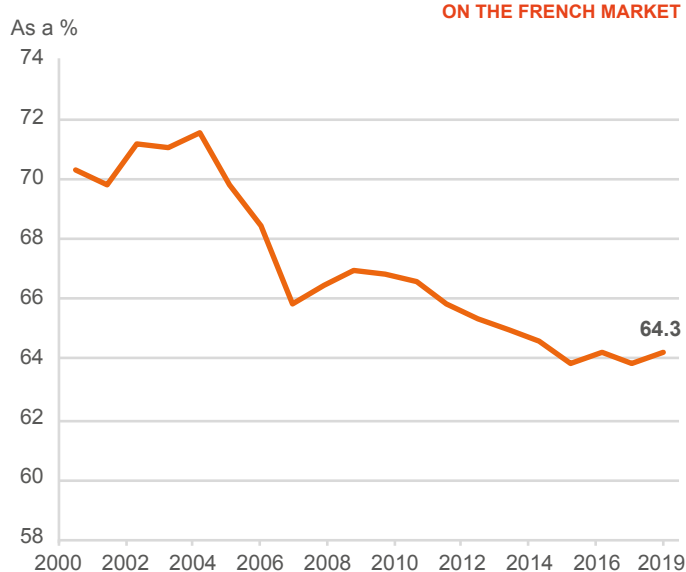
## CHARACTERISTICS OF NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

French groups are traditionally more present in the light commercial vehicle market than in the passenger car market. With the opening up of markets in Europe, such as for passenger cars, their market share has decreased in France, but has grown in our European neighbours. In 2019, the sales of French groups represented 64.3% of the total light commercial vehicle market in France, up 0.4 point compared to 2018, but at a level more than 5 points lower compared to 2005. In Europe excluding France, their market share is significant and has been consolidating year by year, going from 24% in 2011 to 34% in 2019 (see page 20).

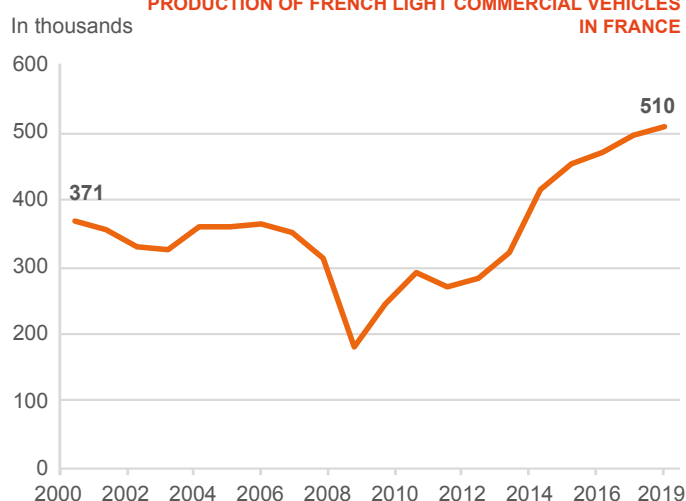
French groups are benchmark manufacturers and also produce on their sites for their partners (Renault for Fiat, Nissan and Daimler; PSA for Toyota). Production in France, entirely carried out by French groups, represents 2% of global production, i.e. 510,000 units in 2019, including 65,000 units for partners (13% of their production in France).



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



**PRODUCTION OF FRENCH LIGHT COMMERCIAL VEHICLES IN FRANCE**



**► RANKING OF MAJOR NEW LIGHT COMMERCIAL VEHICLES IN 2019**

Brand	Model	2019	Market share
RENAULT	KANGOO	44,572	9.3%
RENAULT	MASTER	32,552	6.8%
RENAULT	TRAFIC	30,885	6.4%
PEUGEOT	PARTNER	28,474	5.9%
CITROËN	BERLINGO	26,773	5.6%
FIAT	DUCATO	25,341	5.3%
RENAULT	CLIO	22,953	4.8%
PEUGEOT	EXPERT	22,338	4.7%
CITROËN	JUMPY	16,796	3.5%
PEUGEOT	BOXER	14,502	3.0%
CITROËN	JUMPER	13,837	2.9%
CITROËN	C3	13,378	2.8%
PEUGEOT	208	13,165	2.7%
MERCEDES-BENZ	SPRINTER	13,003	2.7%
FORD	T.CUSTOM	10,614	2.2%
FORD	TRANSIT	9,772	2.0%
VOLKSWAGEN	TRANSPORT	8,541	1.8%
RENAULT TRUCKS	MASTER RT	7,660	1.6%
MERCEDES-BENZ	VITO	7,348	1.5%
VOLKSWAGEN	CRAFTER	5,785	1.2%

Source: CCFA

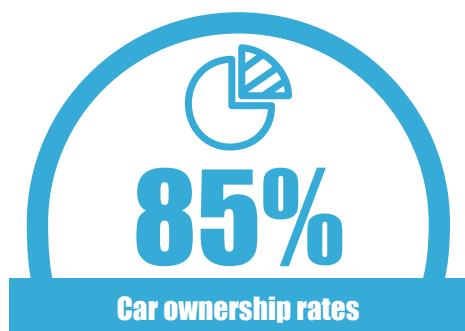
Thanks to the success of their models (Renault Kangoo, Citroën Berlingo, Peugeot Partner, Opel Combo), the French groups are particularly present in the small van segment (82% of sales in this market) as well as in that of passenger cars derivatives (87%) (Renault Clio, Peugeot 208). Regarding the largest market, the van segment, competition is more marked: French groups represent 61%, up 5 points since 2010. All segments combined, out of the 20 best-selling light commercial vehicle models in France in 2019,

13 are models from French manufacturers.

Light commercial vehicles are vehicles with high value-added products that are more easily manufactured in France. Over the last twenty years, the production of light commercial vehicles by French manufacturers in France has increased from 371,000 units in 2000 to 510,000 in 2019. It first fluctuated between 300,000 and 400,000 units between 2000 and 2008, then collapsed to 180,000 units in 2009. Since that date, it has more

than doubled and now represents 26% of the total production of light vehicles in France (compared to 16% in 2013). In line with the growth of the French and European market for light commercial vehicles, their production in France further increased by 3% in 2019.

## HOUSEHOLD VEHICLES IN USE



In 2019, the household car ownership rate increased by 0.1 point to reach 85%. Multi-car households represented nearly 37% of all households, against 30% in 2000, 26% in 1990 and 16% in 1980. Households with 3 or more cars represent 5.2% of all households (see page 93).

93.2% of households living in rural or peri-urban areas (rural areas close to towns) own a vehicle.

65.5% of households living in the Paris region are motorised. In other French urban areas, the rates remain closer to 80%.

66% of low-income households (less than 15,000 euros per year) are equipped with at least one car.

84% of households aged between 65 and 74 and 78% of over 75s have cars (75% in 2017). The possession of a driving licence and the share of drivers in this age group continue to increase steadily.

The rate of possession of a driving licence among individuals under 25 is not declining: it is around 65% among 18-21 year olds and around 84% among 22-25 year olds. It is 90% for those over 75.

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

	1990	1995	2000	2005	2010	2015	2019
<b>BY SOCIO-PROFESSIONAL CATEGORY</b>							
Farmers	95.9%	98.9%	91.1%	100.0%	92.1%	88.0%	93.3%
Farm workers	74.7%	-	-	-	-	-	-
Tradesmen, craftsmen, business owners	95.2%	89.4%	90.6%	91.2%	91.1%	90.9%	90.3%
Self-employed professionals, executives	94.4%	85.5%	84.6%	83.7%	84.1%	83.2%	84.9%
Middle management	93.3%	88.7%	90.8%	87.6%	89.8%	88.0%	89.2%
White collar workers	78.3%	75.9%	77.5%	80.9%	82.5%	80.1%	82.1%
Blue collar workers	87.2%	89.7%	88.7%	89.1%	91.2%	90.9%	92.0%
Non-working population	54.6%	65.8%	70.9%	72.8%	77.1%	77.6%	80.9%
of which retired persons	59.4%	70.9%	76.0%	76.2%	80.1%	80.6%	83.2%
<b>BY AREA OF RESIDENCE</b>							
Rural areas	82.1%	88.6%	91.1%	92.4%	92.7%	92.9%	93.2%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	88.4%	90.2%	91.1%	92.7%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	83.7%	87.1%	87.8%	88.8%
Towns with over 100,000 inhabitants	74.2%	75.1%	76.6%	78.5%	80.8%	81.4%	83.1%
Greater Paris	77.0%						
Inner Paris	47.3%	60.8	60.4	61.5	63.6	59.7	65.5
<b>BY LOCATION OF RESIDENCE</b>							
Town center	-	67.6%	69.4%	69.2%	73.0%	71.6%	74.0%
Suburb	-	79.3%	80.5%	80.9%	83.2%	82.1%	84.0%
Peri-urban area	-	88.5%	89.8%	91.2%	91.6%	92.5%	93.5%
Rural area	-	85.3%	90.4%	92.6%	94.8%	94.4%	91.3%
<b>BY AGE OF HEAD OF HOUSEHOLD</b>							
Under 25	-	51.2%	49.3%	63.3%	64.9%	74.0%	-
25 to 34	-	85.1%	82.4%	82.3%	83.9%	82.5%	85.2%
35 to 44	-	86.7%	86.3%	87.5%	88.0%	87.3%	88.5%
45 to 54	-	87.5%	87.4%	86.1%	88.1%	84.7%	85.9%
55 to 64	-	84.9%	87.0%	86.7%	86.9%	85.1%	87.2%
65 to 74	-						84.0%
Over 75	-	61.9%	69.0%	70.8%	76.2%	78.6%	77.7%
ALL	76.5%	78.4%	80.3%	81.2%	83.5%	82.9%	85.0%
VEHICLES WITH A WOMAN AS THEIR MAIN DRIVER	-	-	40.4%	40.7%	41.5%	41.9%	43.7%

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

The car ownership rate is measured by the percentage of households with at least one car. After several years of decline, it has increased since 2015 (+2 points) to stand at 85% in 2019.

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

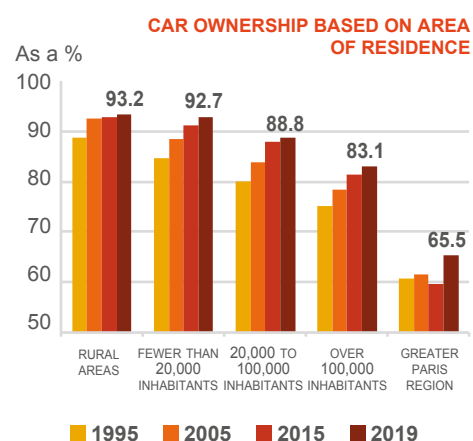
- While the wealthiest 20% of households have a car ownership rate higher than 90% in 2018, the lowest 20% have at least one car at 60%.

- Car ownership rates in cities with more than 100,000 inhabitants stabilised around 84% in 2019, compared to 75% in 1995. It is down slightly in the greater Paris district (-2 points to 65.5%) but up in the greater Marseille, Lyon and Lille districts after declining in 2018. In Lille and Lyon, car ownership rate now exceeds their previous levels.
- Rural households, large families, as well as

workers and farmers are highly multi-vehicled categories. Their car ownership rate averages over 90%.

- The categories of employees and inactive (including retirees) are relatively less equipped but, since 2000, their car ownership rate has increased steadily (+3.5 and +10 points respectively).

From 2010 to 2017, the proportion of households that were "demotorised" (among those without a vehicle) increased steadily, from 2 to 3% per year. However, for 2 years, the demotorisation rate has stabilised around 56%. The main cause of non-motorisation remains the lack of a driving licence, followed by the lack of need, preference for public transport, cycling or walking, the cost of ownership too high and difficulty in parking. Among non-motorised households, 14% of them plan to buy again in the next two years, up slightly from last year.



## HOUSEHOLD VEHICLES IN USE

After declining steadily from the 2000s, daily car use stabilised at around 72% between 2013 and 2018. In 2019, it fell by 3 points: the share of vehicles in the fleet used daily or almost daily reached 69%, compared to 72.5% in 2018 and 79% in 2000. The share of vehicles used for home-work journeys has however stabilised at around 52%. In 2019, that of business trips other than home-work trips amounted to 15%. As for trips related to education, their share was 22%.

The average age of the household fleet and the length of vehicle ownership tend to increase over the long term. But in 2019, for the first time in 10 years, these two indicators fell slightly: the average age of the fleet stood at 8.9 years, compared to 9.1 years in 2018, and the length of vehicle ownership reached 5.5 years, compared to 5.6 in 2018, 4.4 years in 2000 and 4.1

years in 1995.

The drop in the share of diesel vehicles in registrations has an impact on the composition of the fleet. The share of diesel in the fleet has declined for 4 years to stand at 54% in 2019.

The average accumulated mileage on the clock has fluctuated since 2005 around 104,000 km, compared to 70,000 km at the start of the 1990s. It has declined slightly for 4 years and stood at 102,100 km in 2019. Average mileage for diesel cars dipped slightly in 2019 (127,500 km), but remained 17,000 km above its 2000 level; that of a petrol cars, less intensively used, continues to decline to 71,800 km (-11,000 km since 2000).



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

	units	1990	1995	2000	2005	2010	2015	2019
<b>Total</b>	millions	23.0	25.1	27.4	31.0	33.6	34.1	36.1
<b>Average age</b>	year	5.8	6.6	7.3	7.7	8.0	8.9	8.9
<b>Average ownership period</b>	year	3.7	4.1	4.4	4.7	5.0	5.5	5.5
<b>BREAKDOWN BY AUTOMOTIVE GROUP</b>								
<b>Renault Group</b>	%	33.3	33.3	33.3	30.2	28.6	28.3	27.6
<b>PSA Group (1)</b>	%	38.3	36.2	35.2	36.4	38.2	36.5	39.2
<b>Foreign brands</b>	%	28.4	30.5	31.4	33.2	33.2	35.2	33.2
<b>BREAKDOWN BY FISCAL POWER</b>								
<b>2 and 3 CV</b>	%	3.4	1.6	0.7	43.3	44.4	49.2	51.7
<b>4 and 5 CV</b>	%	38.4	38.9	40.5	43.3	44.4	49.2	51.7
<b>6 and 7 CV</b>	%	47.1	48.6	50.0	46.6	42.5	39.0	35.7
<b>8 CV and above</b>	%	12.8	10.9	8.8	10.1	13.1	11.8	12.6
<b>BREAKDOWN BY VEHICLE RANGE</b>								
<b>Low range</b>	%	39.4	43.4	45.1	44.5	46.8	49.3	47.7
<b>Low-mid</b>	%	20.8	24.3	27.3	32.2	30.9	29.2	25.7
<b>High-mid</b>	%	26.0	22.2	19.9	16.2	11.5	7.9	4.9
<b>Premium range</b>	%	8.7	7.0	7.0	5.7	5.0	3.0	2.3
<b>Others</b>	%	5.1	3.2	0.8	1.4	5.7	10.6	18.5
<b>Percentage of vehicles purchased new</b>	%	50.4	45.2	43.9	40.1	41.1	41.5	41.8
<b>BREAKDOWN BY TYPE OF FUEL USED</b>								
<b>Premium unleaded - Petrol</b>	%	16.2	38.4	49.1	51.1	40.1	38.8	46.0
<b>Premium leaded - AVSR</b>	%	65.6	28.8	11.9				
<b>Diesel</b>	%	18.2	30.9	38.1	48.9	59.9	61.2	54.0
<b>Kilometres on clock</b>	km	69,500	84,080	93,140	99,460	103,470	105,590	102,120
<b>Percentage of vehicles used on daily or near daily basis</b>	%	75.1	77.4	78.7	75.7	71.8	71.9	69.0
<b>Percentage of vehicles used for travel to and from work</b>	%	55.4	54.3	55.1	55.2	53.7	52.2	52.0

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.

This fleet mainly includes passenger cars, but also light commercial vehicles (around 4% of the total).

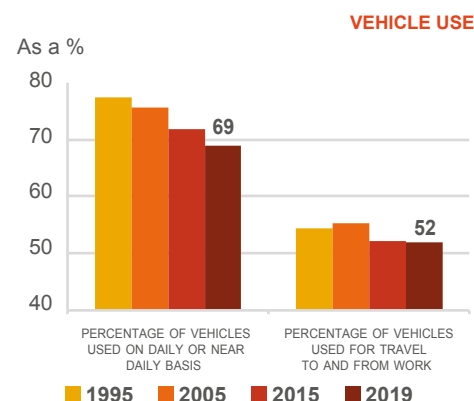
The renewal of the petrol fleet continues with an average age that has fallen by a year and a half since 2014, to reach 8.6 years. The average age of diesel has stabilised at around 9.2 years. The weight of vehicles over 5 years old in the fleet has been declining for 2 years and amounted to 65% in 2019. This is explained by the decline in the share of 5-10 year olds (-3 points in 2 years), while that of those over 10 stabilised at around 33%.

The most popular fiscal powers are between 2 and 5 CV. Low and low-mid ranges cars are very popular and their share in the fleet has remained high compared to those of higher ranges: in 2019 they represented 48% and 26% respectively of

the fleet, compared to 7% for cars in the high-mid range. The share of cars in the miscellaneous range, made up mainly of 4WD, SUV, is growing strongly. It stands at 14.6%, a doubling of their weight compared to 2015.

The high average age of the fleet implies a low rate of equipment in terms of automatic gearboxes and emergency systems (eCall) even if it is progressing steadily. In 2019, this ratio was respectively 14% (compared to 9% in 2016) and 6% (compared to 3% in 2016). This share is higher in multi-vehicle households at 18% and 7%.

Regarding the frequency of driving, more than 80% of rural and small town residents use their vehicle regularly. In the greater Paris area, this frequency is only 50% and tends to decrease in inner Paris and the inner suburbs. By contrast, in other large urban areas, use is intensifying: nearly 7 out of 10 households regularly use their car in 2019.



## DOMESTIC PASSENGER TRANSPORT

**+0.2%**

**Stability of domestic passenger transport all modes expressed in passenger-kilometres in 2019**

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 2019: 81% 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.

After a slight decline in 2018 (-0.2%), domestic passenger transport grew very slightly in 2019

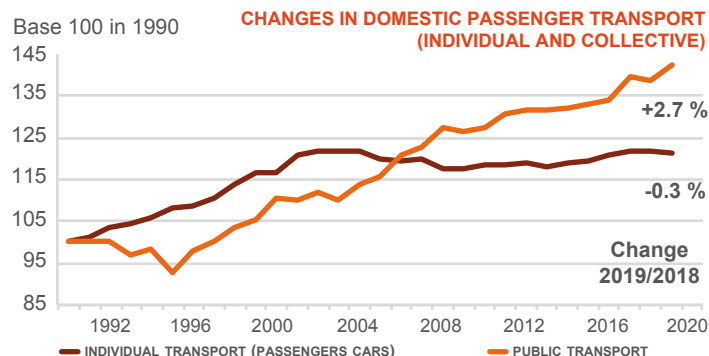
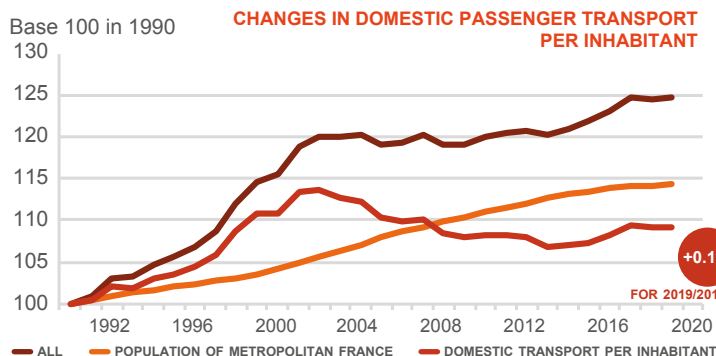
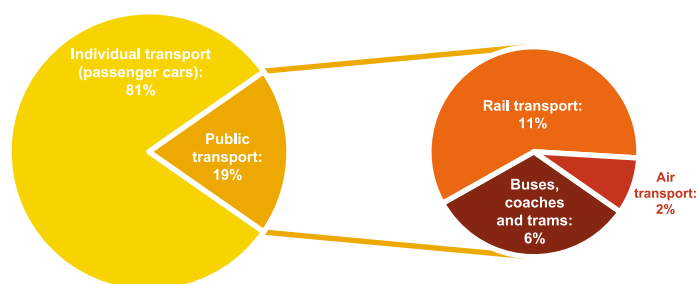
(+0.2%) to reach 988 billion passenger-kilometres. After stagnating in 2018, passenger car mobility fell very slightly in 2019 (-0.3%), despite the stability of fuel prices.

Unlike 2018, passenger transport is driven by public transport, which grew by 2.7% thanks to rail transport. It returned to growth after the strikes in 2018, and rose 4.3% in 2019, despite the social unrest in December. Conversely, public road transport fell by 0.1% in 2019. Even if urban public transport grew by 2.8% and so-called "Macron" coaches continue to develop (+8.1%), half of the passenger-kilometres of collective road transport are carried out by the "other coaches" category, which fell by 2.3% in 2019.

Finally, air transport continues to grow (+2%), driven by the installation of low-cost companies and the increase in transverse lines (province-province).



### BREAKDOWN OF PASSENGER DOMESTIC TRANSPORT BY MODE IN 2019



Sources: MTE/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 relative to the number of inhabitants, increased continuously between 1990 and 2002 (+1.1% per year). Then, due in particular to the rise of fuel prices, a ceiling seems to have been reached and an average drop of 0.5% was observed between 2002 and 2013. Since 2014, domestic passenger transport per inhabitant has increased again, related to the increase in individual mobility, but this growth stopped in 2018 and remains very weak in 2019.



## DOMESTIC FREIGHT TRANSPORT

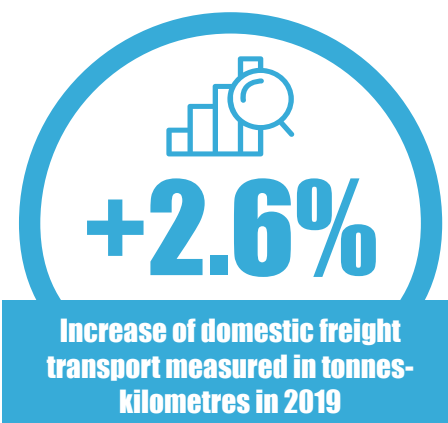
Freight transport is the drive-belt of the economy: it physically links together merchandise production sites, and those sites to the point of consumption, and then those points of consumption to reprocessing and recycling sites. As well as these geographical dimensions linked to territorial planning, 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: 53% of tonnes loaded under the French flag are delivered fewer than 50 kilometres away in 2018.

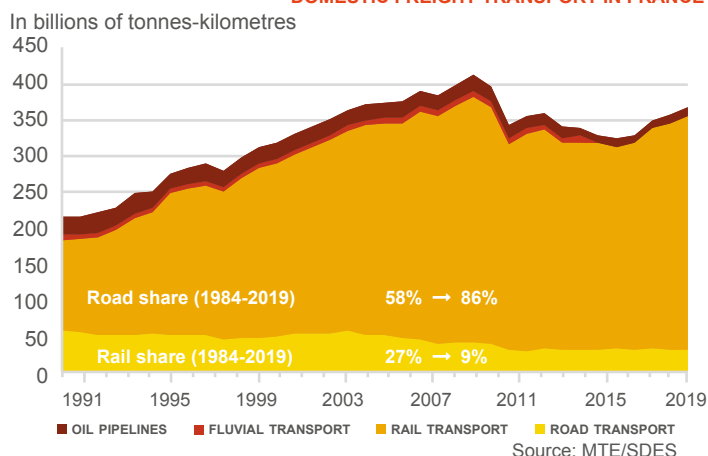
Between 2010 and 2015, road freight transport fell by 1.5% on average annually, in line with the decline in the activity of French operators (-2.6%/year), whilst foreign operators increased 0.8%

each year. From 2016, the economic recovery is fueling growth, accelerating in 2017 (+6.7%) thanks to the dynamism of the foreign pavilion, but also the French pavilion. In 2018 and 2019, this growth continued (+3% then +2.8%) as well as the good performance of French and foreign pavilions. Over the 2015-2019 period, road freight transport is growing at an average rate of 4% per year, but the level of activity remains below its pre-crisis level of 2008.

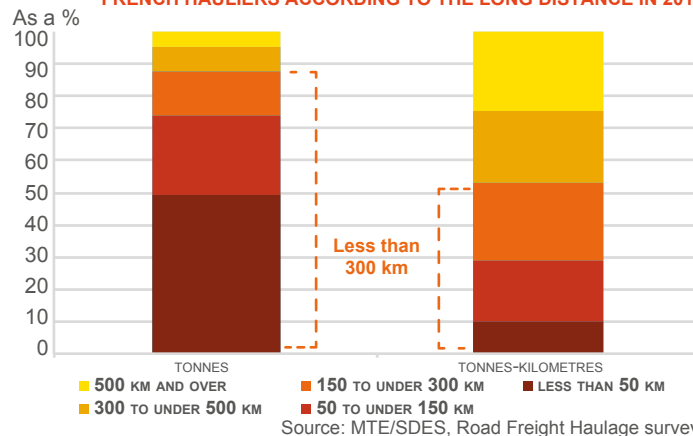
Rail freight transport, affected by the strikes in the second half of the year, fell sharply in 2018 (-4.2%). It recovered in 2019 and increased by 1.7%, despite the social movements of the fourth quarter. Since the 2009 crisis, it has fluctuated around 33 billion tonne-kilometres (60% of its 2000 level) and its market share stood at 9% in 2019 (compared to 16% in 2000). After several years of stagnation at a very low level, river transport rebounded strongly in 2019 (+9.8%).



DOMESTIC FREIGHT TRANSPORT IN FRANCE



BREAKDOWN OF FREIGHT TRANSPORT USING FRENCH HAULIERS ACCORDING TO THE LONG DISTANCE IN 2018



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 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 adaptation 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 86% share of tonne-kilometres completed. The road freight transport survey carried out by the Transport Ministry shows the predominance of distances under 300 kilometres: 49% of tonnes are transported by French hauliers over distances under 50 kilometres and 53% of tonnes-kilometres under 300 kilometres.

## ROAD TRAFFIC



**+0.6%**

**Average annual increase  
in traffic since 2012**

While road traffic, expressed in billions of vehicle-kilometres increased by an average of 2.1% per year

between 1990 and 2000, its growth slowed down over the following decades. Between 2000 and 2012, it grew by 1.2% per year, then, from 2012, its growth rate was divided by 2 (+0.6% per year). It remained on the rise between 2015 and 2018, then stabilised in 2019 (+0.1%).

Traffic is mainly carried out by light vehicles, which represent 92% of the total traffic. In a context of higher fuel prices and record traffic levels, the circulation of passenger cars under the French flag has been declining for 2 years (-0.3% in 2018 and -0.2% in 2019). This is explained both by the drop in average journeys per vehicle, but also by the stability of the passenger car fleet in 2019.

The circulation of light commercial vehicles registered in France, although less dynamic than in 2018, remained strong in 2019 (+1.5%). On the other hand, that of heavy goods vehicles, which was very dynamic in 2017, slowed down sharply in 2018 and fell slightly in 2019 (-0.1%), under the effect of the economic slowdown.

At the end of 2019, more than 50% of the passenger car fleet meets Euro 5 or Euro 6 standards. For heavy goods vehicles, the percentage of the fleet complying with Euro V or Euro VI standards now exceeds 60%. Their virtuous presence in traffic is all the more important as they are more on the road than old vehicles.

### ► OVERVIEW OF ROAD TRAFFIC

	Units	1990	2000	2012	2015	2018	2019	Average annual change as a %		
								2012/1990	2019/2012	2019/2018
<b>TOTAL VEHICLES (ANNUAL AVERAGES)</b>	thousands of vehicles	28,106	33,464	41,653	42,929	44,465	44,382	+1.8	+0.9	-0.2
New passenger cars		23,280	27,770	35,623	36,567	37,732	37,728	+2.0	+0.8	-0.0
Petrol		19,760	18,150	13,132	12,874	14,140	14,756	-1.8	+1.7	+4.4
Diesel		3,520	9,621	22,264	23,460	23,293	22,636	+8.7	+0.2	-2.8
Electric and hydrogen		-	-	7	33	92	121	-	+51.3	+31.7
Rechargeables hybrids and gas		-	-	202	184	194	203	-	+0.1	+4.5
Light commercial vehicles (LCV)		4,223	5,062	5,357	5,701	6,051	5,967	+1.1	+1.6	-1.4
Petrol		2,279	1,302	279	243	229	222	-9.1	-3.2	-3.2
Diesel		1,944	3,761	5,049	5,420	5,772	5,691	+4.4	+1.7	-1.4
Electric and hydrogen		-	-	6	17	31	36	-	+29.7	+18.2
Rechargeables hybrids and gas		-	-	18	16	16	15	-	-2.5	-1.6
Heavy trucks (>5t)		535	551	587	573	590	593	+0.4	+0.2	+0.5
Coaches and buses		68	81	86	89	91	93	+1.1	+1.1	+1.9
<b>KILOMETRES (ANNUAL AVERAGES)</b>	thousands of km									
New passenger cars		13.4	13.5	12.6	12.5	12.3	12.2	-0.3	-0.4	-0.2
Petrol		11.9	10.7	8.1	8.1	8.7	8.9	-1.7	+1.4	+3.1
Diesel		21.3	18.8	15.2	14.8	14.5	14.4	-1.5	-0.8	-0.4
Electric and hydrogen		0.0	0.0	8.7	9.6	9.2	9.3	-	+1.0	+1.7
Rechargeables hybrids and gas		0.0	0.0	13.3	12.4	12.4	12.7	-	-0.6	+2.5
Light commercial vehicles (LCV)		14.6	15.5	15.0	14.3	14.3	14.7	+0.1	-0.3	+2.9
Diesel		20.2	18.0	15.6	14.8	14.6	14.9	-1.2	-0.6	+2.2
Electric and hydrogen		0.0	0.0	14.5	10.5	16.3	19.0	-	+3.9	+16.6
Rechargeables hybrids and gas		0.0	0.0	10.1	9.5	11.0	12.3	-	+2.9	+11.9
Heavy trucks (>5t)		36.1	41.2	44.6	43.8	44.7	44.4	+1.0	-0.1	-0.7
Coaches and buses		31.0	30.2	34.8	34.3	35.0	34.3	+0.5	-0.2	-2.0
<b>CONSUMPTION PER VEHICLE</b>	litres/100 km									
Passenger cars: petrol		8.68	8.12	7.66	7.42	7.18	7.10	-0.6	-1.1	-1.1
Passenger cars: diesel		6.73	6.74	6.36	6.16	6.01	6.04	-0.3	-0.8	+0.5
LCV: diesel		9.77	9.67	9.20	8.93	8.71	8.80	-0.3	-0.6	+1.0
Heavy trucks: diesel		36.23	36.62	34.97	34.50	33.72	33.32	-0.2	-0.7	-1.2
Buses and coaches: diesel		32.00	32.99	32.78	31.81	31.09	30.72	+0.1	-0.9	-1.2
<b>FUEL CONSUMPTION (ALL ROAD TRANSPORT)</b>	millions of litres									
Petrol		24,110	18,729	9,805	9,389	10,418	11,053	-4.0	+1.7	+6.1
Diesel		17,977	30,779	41,911	41,483	40,910	40,283	+3.9	-0.6	-1.5
Total		42,086	49,508	51,716	50,872	51,329	51,336	+0.9	-0.1	+0.0
<b>TOTAL TRAFFIC (1)</b>	billions of vehicles-km	420	518	598	606	623	623	+1.6	+0.6	+0.1
Light vehicles and motorcycles		389	476	551	558	573	573	+1.6	+0.6	+0.1
Heavy trucks		22.4	29.5	32.9	33.1	34.9	34.9	+1.8	+0.8	-0.1

(1) Including vehicles registered abroad.

Source: MTE/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 2020, the traffic balance was partially "rebased". It is now based on the new SDIS road vehicle directory, which combines information from registration certificates and technical inspections. Based on this new source of information, the fleet of vehicles registered in France has been reassessed and amounts to 44.4 million vehicles in 2019. It grew by an average of 0.9% per year between 2012 and 2019, period for which the data in the new database are available.

The decline in diesel engines is accelerating in 2019. Overall, for light vehicles, its share in the fleet has decreased to 65% and its share in traffic is 71%. Regarding the petrol fleet, more than four out of five cars are now compatible with unleaded 95-E10, which accounts for 48% of total petrol deliveries.

Since 2017, the decline in average unit consumption of cars, observed in recent decades, is going down. Continuous improvement in technical performance is more difficult to compensate for the impact of the renewal of petrol in registrations and the appeal of SUVs. In 2019, the average unit consumption of cars even increased slightly (+0.3%).

As for the heavy vehicle fleet, it has returned to growth since 2015 and grew by 3.4% between

2015 and 2019 after 15 years of decline. In recent years, the drop in unit consumption of heavy goods vehicles has been accentuated, falling by almost 3.5% between 2015 and 2019. The heavy trucks fleet has also changed and now includes more than 45% of vehicles responding to the Euro VI standard, which came into force on January 1, 2014. This proportion is even higher within the tractor fleet, with 2 out of 3 vehicles meeting the Euro VI standard. Over the past ten years, there has also been a steady increase in the proportion of vehicles over 20 tonnes in the heavy vehicle fleet. They represented 27% of the fleet in 2011. Their share has now reached 35%. The rejuvenation of the vehicle fleet as well as the increase in vehicle carrying capacity help to optimise the energy efficiency of road freight transport.

## ROAD TRAFFIC AND CO<sub>2</sub> EMISSIONS

# -23 %

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

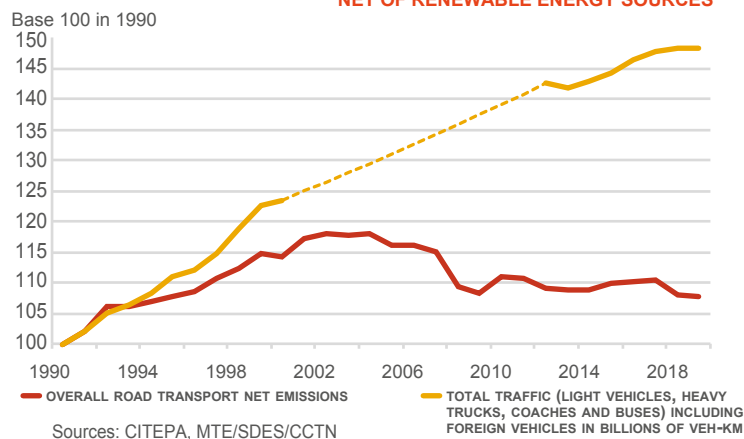
Since 1990, traffic of French and foreign vehicles in France has increased by 48%; the associated CO<sub>2</sub> emissions, net of renewable energies, have only increased by 8%.

Different factors explain this improved energy efficiency. The drop in unitary average consumption of passenger cars registered and in use in France was 23% since 1990. This downward trend is due to the dieselisation of the car fleet, the efforts of manufacturers and drivers and the impact of the bonus/penalty system introduced in 2008. The trend was interrupted punctually in 2017, mainly due to the increase, since 2013, in the share of petrol vehicles, which consumes more energy (7.1 l/100 km of petrol, compared to 6 l for diesel). In 2018, passenger car consumption fell mainly due to the efficiency

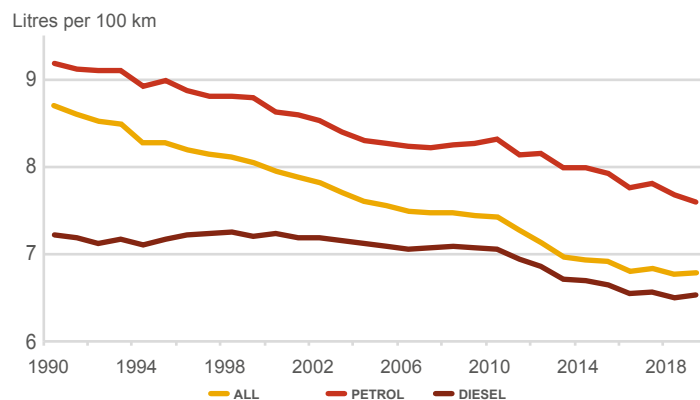
gains of petrol, which were greater than for diesel. But in 2019, the decline came to a halt again with the continued increase in the share of petrol cars in the fleet (+2 points) and their average annual mileage (+3%).

Energy efficiency in merchandise transport continued to improve. According to the latest figures, the quantity of CO<sub>2</sub> emitted by a heavy truck, when moving one tonne of goods over one kilometre on French territory, has fallen by 16% 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.

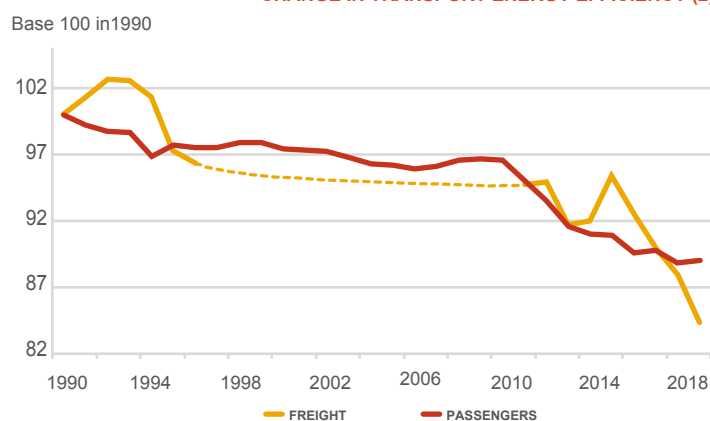
**TRAFFIC IN FRANCE AND CORRESPONDING CO<sub>2</sub> EMISSIONS NET OF RENEWABLE ENERGY SOURCES**



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



**CHANGE IN TRANSPORT ENERGY EFFICIENCY (2)**



(2) Energy efficiency relates to the change in the amount of CO<sub>2</sub> 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<sub>2</sub> emissions due to the use of biofuels is taken into account.  
Sources: MTE/SDS, CCFA calculations



The circulation of passenger cars results from two components: the car park and their average annual mileage. Over a long period, the rate of growth of the park has slowed down considerably, after the access-to-vehicle phase. The development of multimotorisation, followed by significant increases in fuel prices, are the main factors linked to the decline in average annual mileage. Since 2012, we have seen an increase in the growth rate of the fleet of 0.8% on average. The average annual

mileage, meanwhile, is down (-3% since 2012), in a context of a slowdown in the cycle.

In 2019, new estimates from the "Centre Interprofessionnel d'Etudes de la Pollution Atmosphérique" (CITEPA) for road transport show net CO<sub>2</sub> emissions from renewable energies of 123 million tonnes. After the ceiling observed at the beginning of the 2000s, around 135 million tonnes, a sharp decline was recorded from 2004 to 2009,

linked among other things to the effects of the economic crisis. Since then, CO<sub>2</sub> emissions have stabilised at around 125 million tonnes, thanks to improved energy efficiency.

## NEW USES OF THE AUTOMOBILE

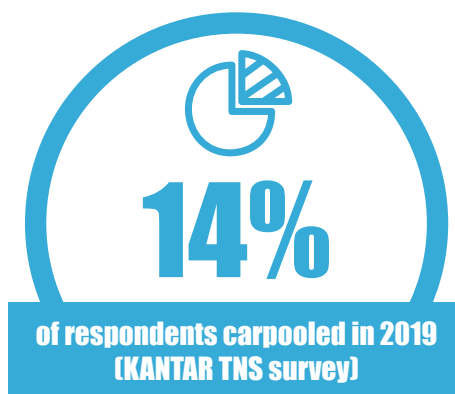
New improving technologies, economic constraints and the people growing awareness of environmental issues have fostered the development of new consumption and lifestyle trends in several sectors that favour the use rather than ownership.

In transport, the trend has taken the form of the development of new uses for cars, favouring vehicle sharing by the use of information and communication technologies. These include carpooling, car-sharing and rental between private individuals.

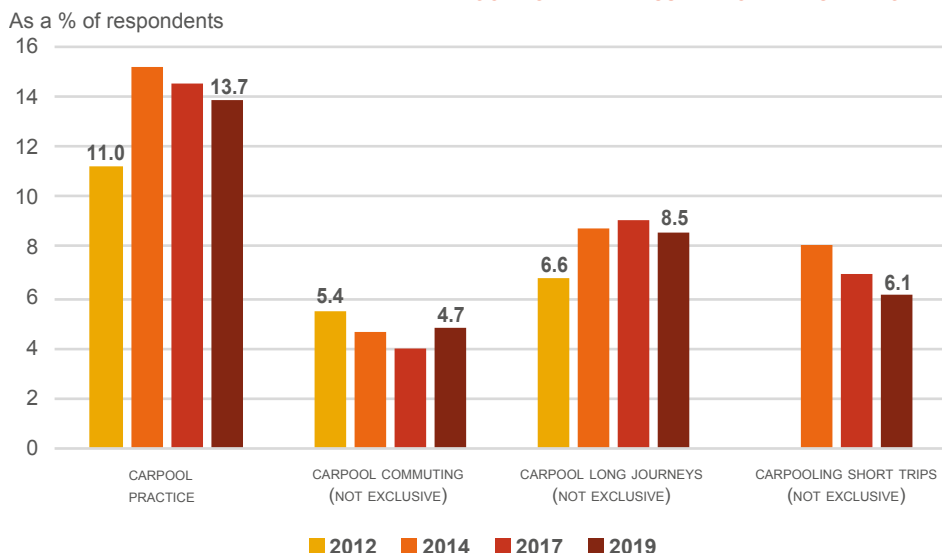
Car-sharing reduces operating and maintenance costs and increases the availability of transport in outer-urban and rural areas at a lower cost to the community. In densely-populated areas, it is also a complement to public transport (loading and staggered timetables) that improves vehicle occupancy rates, with positive effects on the environment and energy consumption.

Among the changes, there has also been strong growth in the number of chauffeur-driven vehicles (voitures de transport avec chauffeur - VTC) and new mobility services (passenger information, route planning, ticketing, parking assistance).

The automotive groups have adapted their offers to these new needs and are positioning themselves as true mobility operators by creating new dedicated entities (Renault M.A.I, Free2Move) and offering a whole range of new services: short rentals, car-sharing for businesses or individuals, "free-floating", but also platforms for rental services with drivers (taxis, VTC) and MAAS (Mobility As A Service) combining multimodal information and ticketing tools. They have also invested in mobility and connected services companies: acquisition of TravelCar for PSA, investments in various start-ups (Karhoo, Yuso, Como, iCabbi, Glide) for Renault.

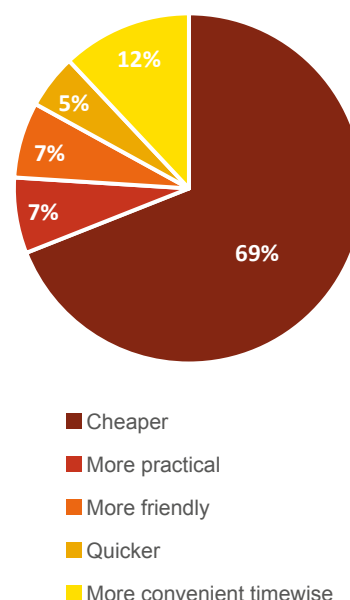


CARPOOLING PRACTICE SURVEY OVER LAST 12 MONTHS



Source: PARCAUTO TNS Sofres survey handled by CCFA and IFSTTAR

MAIN REASONS FOR CARPOOLING



Source: 6t/ADEME

### CARPOOLING

Carpooling is defined in France's energy transition law for green growth as "the joint use of a motorised land vehicle by a driver and one or more passengers, without charge, except for the sharing of costs, in the context of a journey that the driver makes on his own account. For this purpose, they may be brought together subject to a charge" (Art. L. 3132-1). The French mobility framework law (LOM) promulgated on December 24, 2019 gives substantial column-space to carpooling. Financial aid comes from the sustainable mobility package set up for home-to-work journeys, as well as through the possibility for local authorities to pay an allowance to drivers or passengers. The law also encourages the creation of carpooler lanes.

In practice, the spread and development of car sharing is still difficult to measure. According to the various surveys, regular car-pooling concerns 5-10% of the country's population. The Kantar TNS Parc Auto survey indicates that in 2019, 4.7% of people surveyed had used carpooling for their home-to-work journeys in the last 12 months, 8.5%

for journeys over 100 km and 6.1% for journeys under 100 km. In total, 13.7% of respondents made a carpool trip in 2019, unchanged compared to 2018. The latest ADEME (French environment agency) study shows that carpooling is gradually becoming a transport solution in its own right, with the average carpooler age increasing (now 33), no longer the exclusive domain of young urbanites, and now encompassing rural communities and older people. 69% of car-poolers cited economic reasons as their drivers.

Occasional carpooling, generally over long distances, is the most structured. Digital applications secure the transaction between drivers and passengers. According to the Parc Auto survey, the proportion of long journeys organised via a networking structure rose from 25% in 2012 to 63% in 2019. The average distance travelled is around 239 km per journey, with an average of 3.5 people per vehicle (BlaBlaCar, Zero Empty Seats, 2019).

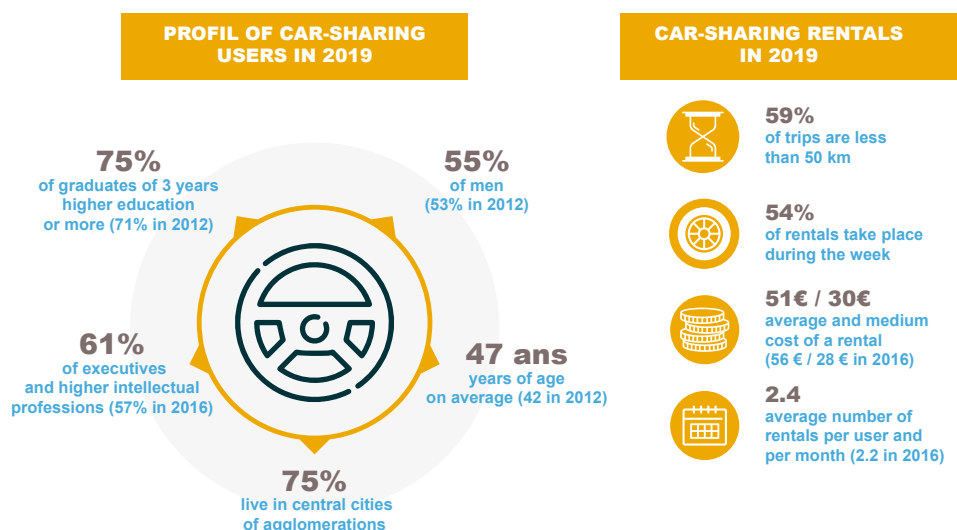
Home-to-work journeys and short journeys are more likely to be between friends or colleagues, but this is growing as a proportion of market players,

and the State has set itself the target of tripling the number of daily journeys made by carpooling by 2024.

Within the framework of Renault's Guyancourt Technocentre inter-company mobility plan, the firm offers its employees the possibility of using Klaxit to carpool. 86% of those registered found carpoolers on their journeys and at the times they needed. In addition, through its MOBILIZE fund, Renault supports ECOV, which works with local authorities to build reliable spontaneous and dynamic carpooling lines that are accessible to all in outer-urban and rural areas.

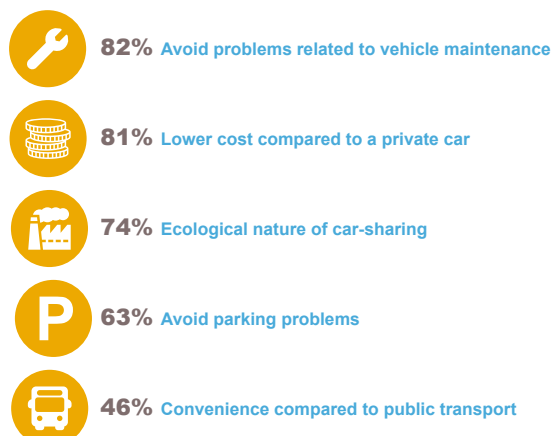


## NEW USES OF THE AUTOMOBILE



Source: National Survey on car-sharing, 6t/ADEME, 2012, 2016, 2019

### ► THE REASONS FOR JOINING A CAR-SHARING SERVICE



Source: National Survey on car-sharing, 6t/ADEME, 2019

### CAR-SHARING

Car-sharing is defined in the Grenelle II Act (Article 54) as the pooling of a vehicle or a fleet of motorised land transport vehicles for the benefit of users who are subscribers or authorised by the organisation or person managing the vehicles. Each subscriber or authorised user may access a vehicle without a driver for the journey of his or her choice and for a limited period of time. A distinction is made between P2P (rental between private individuals), B2B (for company employees) and B2C (for private individuals) commercial car-sharing.

In commercial car-sharing, the round-trip service is when the customer picks up the vehicle at a station and returns to drop it off at the same station. Conversely, the "one-way" service allows the user to drop the vehicle off at a different station, or anywhere within a given perimeter. In the latter case, this is known as "free-floating". These different systems correspond to very different periods of use and needs.

The latest ADEME survey, carried out in 2019, reminds us that the round-trip option is more substantial and longer-standing than "one-way". Nevertheless, free-floating has been growing since 2016. It also shows that B2C car-sharing users

are getting older (now 47 years old on average), are more qualified (73% have a baccalaureate +3 years or higher) and are financially better off than the average population of the large cities in which they live.

The mobility framework law, passed at the end of 2019, aims to facilitate the allocation of parking spaces reserved for car-sharing vehicles by the authorities responsible for organising mobility (AOM). These reserved parking spaces will include a "car-sharing label" granted to vehicles that comply with the conditions defined by the AOM (type of vehicles authorised, minimum number of rentals per month, etc.).

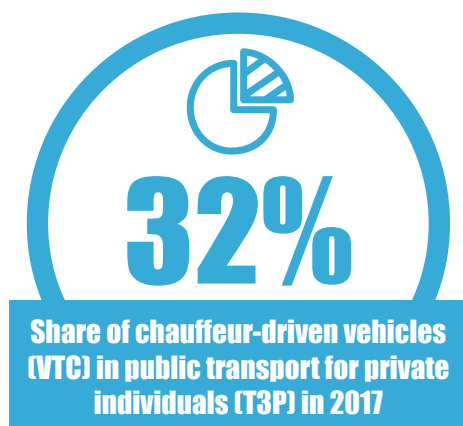
### THE B2C AND B2B RANGE OF FRENCH CAR MANUFACTURERS:

With the Renault Mobility application, Renault group offers various car-sharing services in several major cities. In Nice, users have access to a fleet of self-service closed-loop car-sharing zones. In Paris, the group offers 100%-electric vehicles on a free-floating basis (Moov'in Paris). Elsewhere in Europe, it is joining forces with other players to offer car-sharing services (Zity in Madrid) or equip car-sharing fleets with electric vehicles (Fetch Car Sharing in Amsterdam, Aimo in Stockholm, etc.). Finally, Renault also offers solutions for

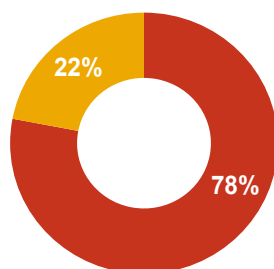
its corporate customers via RCI Mobility (which became Glide.io in November 2020).

With the Free2Move application, PSA group offers mobility services in 34 cities in 11 European countries and the United States, with car-sharing services operated directly by the group, such as in Paris (Free2Move Paris), Madrid and Lisbon (Emov) and Washington DC (Free2 Move Washington DC). PSA also offers services directed at companies, with a connected fleet management system (Connect Fleet), a car-sharing service (Fleet Sharing) and a fleet electro-mobility advisor service.

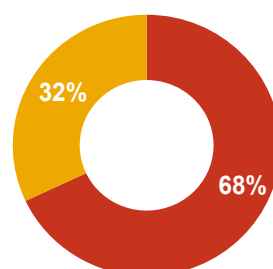
## NEW USES OF THE AUTOMOBILE



### SHARE OF TAXIS AND CHAUFFEUR-DRIVEN VEHICLES IN THE OFFER OF PUBLIC TRANSPORT FOR PRIVATE INDIVIDUALS (T3P)



2016



2017

### CHAUFFEUR-DRIVEN TRANSPORT VEHICLES (VOITURES DE TRANSPORT AVEC CHAUFFEUR - VTC)

The VTC activity involves public transport for private individuals (T3P), defined by the transport code, which also includes taxis and two- or three-wheeled motorised vehicles, commonly called "motorbike taxis".

Since their arrival in France at the beginning of 2010, VTC services have helped to broaden the mobility offer by bringing a pre-ordered passenger transport service. However, their rapid development has raised many questions about their legality and about their competition with taxis, leading the public authorities to review prevailing regulations.

Originally, VTC status was inherited from "voiture de grande remise", chauffeur-driven cars whose origins lie in the 17th century, and the profession of "Grand Remisier", by extension, the name given to the drivers of luxury passenger cars. In 2009, this regime was transformed by the Novelli law, which deregulated the activity and created the status of passenger car with driver. The Thévenoud (2014) and Grandguillaume (2018) laws made it possible to set new regulations applicable to VTCs, now called "chauffeur-driven transport vehicles", and to specify the activity of the profession.

Today, VTC vehicles are subject to special set-up and operating conditions that distinguish them from taxis

- Fares are not regulated, unlike taxi fares, which are fixed by decree.

The National Observatory of Public-Private Transport, created in 2017, and responsible for drawing up an inventory of the sector, has published an initial assessment of the sector. It indicates that there were 15,000 VTCs on the register in 2016 (22% of the Public-Private Passenger Transport offer), which jumped to 26,000 in 2017 for 56,000 taxis, (32% of the Public-Private Transport offer). This increase is the consequence of the Grandguillaume law, which requires drivers to register before December 31 in order to continue their business. The observatory also indicates that the VTC offer is highest in Île-de-France, which accounts for 80% of the national supply, compared with one-third of the taxi supply.

In August 2017, Renault group acquired Marcel, a VTC operator in Île-de-France, which it has been operating for three years, offering the first range of 100%-electric VTCs.

### HIRE BETWEEN PRIVATE INDIVIDUALS

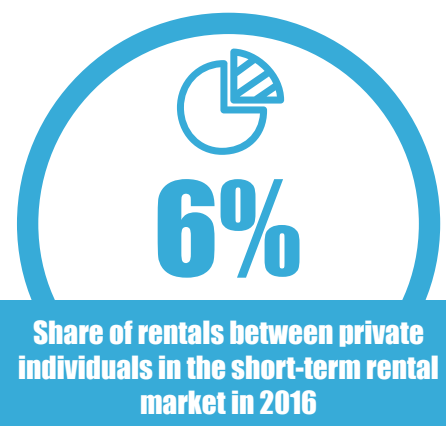
More recently, car sharing outside the private sphere has also developed and car rental services between private individuals have emerged. The rental is carried out through specialised websites, bringing together people who do not know each other. It allows individuals to share their vehicle in return for a fee and thus make it profitable to own and maintain their vehicle when stationary.

According to the KANTAR TNS PARC AUTO survey, 7% of households that used a rental car in 2019 (i.e. 6% of the sample) rented from a private individual, which is still a very marginal activity within the population.

However, a survey conducted by the CNPA indicates that this activity represented 6% of all short-term rentals (expressed in number of days) in 2016, compared to 3% the previous year, and that 5% of permit holders have already used it. The users are young (44% are under 35), less often in work than clients of traditional agencies (70%, compared with 83%), and less well-off: 47% belong to the higher socio-professional categories,

i.e. 10 points less than those who use traditional rentals.

In February 2019, PSA group acquired a French start-up, TravelCar, which offers parking and rental solutions for private individuals at airports.



- The vehicle used must meet certain "top-of-the-range" requirements. It must have between four and nine seats (including the driver), have been on the road for less than six years (excluding vintage vehicles) and meet certain technical requirements (size, power).
- The driver must obtain a VTC professional card and register with the national register of VTC operators.
- Passengers must reserve in advance, meaning that the vehicle may neither park nor drive on the public highway touting for business. Booking via digital platforms is prohibited and remains reserved for taxis



## THE AUTONOMOUS AND CONNECTED VEHICLE

Connected vehicles use wireless connectivity systems that allow communication and information-sharing with the outside world (either between vehicles - V2V - or between vehicles and the road or communication infrastructure - V2X). Different types of services are thus offered to vehicle users: music stored on their smartphone via Bluetooth, videos stored on the Cloud thanks to 4G LTE, remote information with radar connectivity, geolocation data with GNSS systems, but also real-time traffic info, calculation of energy consumption, etc.

In addition, the development of Advanced Electronic Driver Assistance and Support Systems (ADAS) on board vehicles allows the immediate environment of vehicles to be perceived through sensors. They make driving easier or safer for the driver with, for example, parking assistance (ParkingAssist), automatic windscreen wipers or automatic headlight control. Certain safety devices (intelligent speed adjustment, warning systems in case of drowsiness / loss of attention / distraction) will be made compulsory by European regulations. The progressive development of connectivity and automation technologies should eventually enable the deployment of highly automated vehicles.

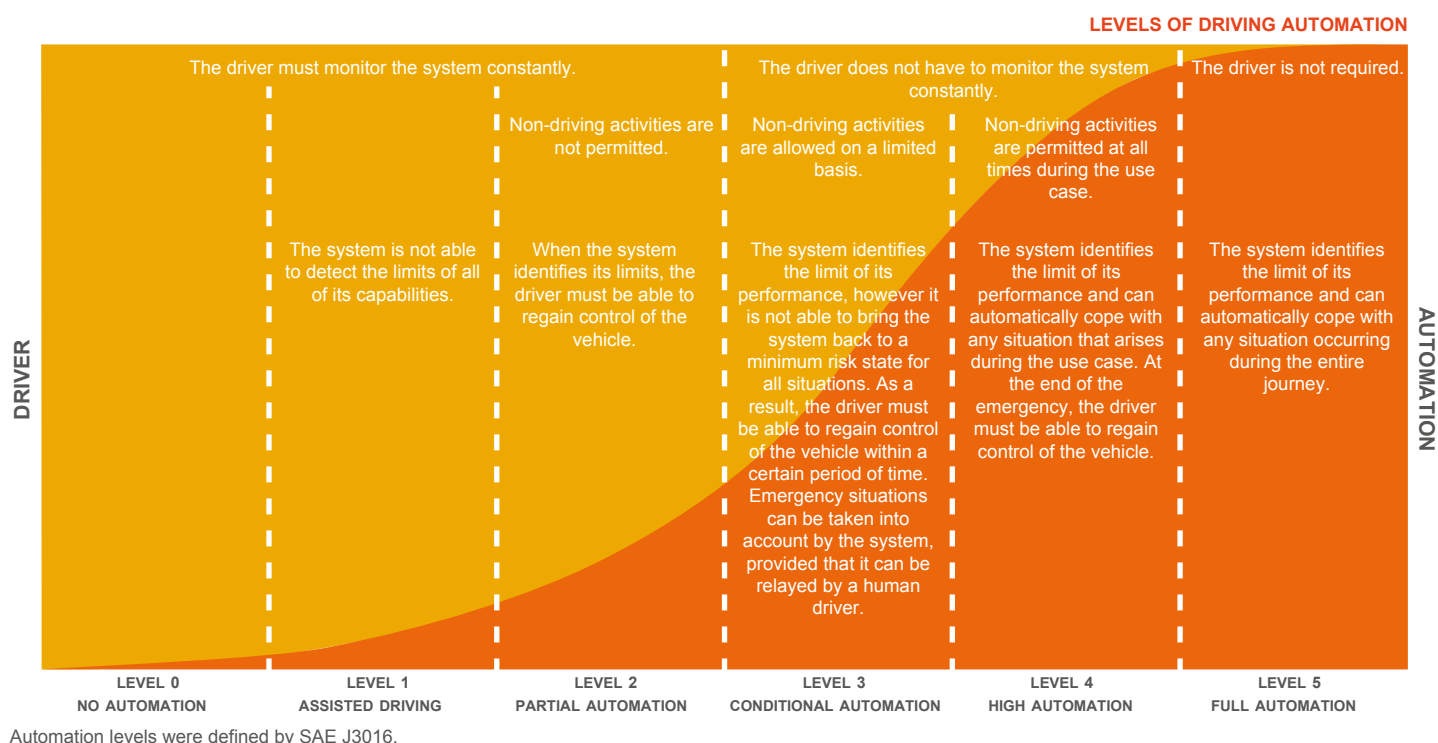
In technical and technological terms, the "autonomous vehicle" is defined by the SAE (Society of Automotive Engineers) nomenclature, which characterises automation systems by distinguishing between driver assistance systems (levels 1 and 2 available on the market today) and automation systems enabling the driver to delegate the driving task to the system (levels 3 to 5, which are not yet on the vehicle market).

Automation is developing incrementally, with an increase in the number of driving functions that can be delegated to the driver and a gradual broadening of environments in which they can be used.

The energy transition for green growth law of August 17, 2015 legally qualifies "autonomous vehicles" as vehicles with partial or total delegation of driving functions, whether they are passenger cars, goods vehicles or passenger transport vehicles.

The UNECE Regulation on Automated Lane Keeping Systems (ALKS), adopted on 24 June 2020, is the first technical regulation on level 3 automation. It establishes the strict technical and

safety requirements for the "ALKS" function, a low-speed driving delegation system that can be activated by the driver only on eligible separate lanes of carriageways and in traffic jams. It keeps the vehicle in its lane at a maximum speed of 60 kph, or at a lower speed, by lateral and longitudinal control for a long period of time and without driver intervention. The regulation comes into force in January 2021.



### Uses and issues

Connected to the infrastructure and other vehicles, the automated vehicle is intended to have positive effects on safety and the environment. It must also provide greater user comfort, freeing up travel time for tasks other than driving. However, its acceptability to users is subject to fundamental issues of safety, infrastructure optimisation, reduction of environmental impact and also local employment and business.

There are many uses for connected and autonomous vehicles: those relating to driving, road safety, warning systems, information feedback, others relating to the vehicle itself (maintenance and repair services), others still related to road infrastructure (traffic management or management of the infrastructure itself) or the driver (insurance services or infotainment services). A clear distinction can be made between the use of the data to serve general interest

objectives (e.g. traffic fluidity, improvement of road safety and environmental footprint, infrastructure management) and those used for the development of commercial services.

An these applications concern all types of vehicles: cars, lorries, buses, shuttles; driving on fluid or low-speed motorways in dense traffic, automatic valet parking, small collective vehicles, flow control vehicles in logistics centres or zones, urban shuttle streams (rebalancing

## THE AUTONOMOUS AND CONNECTED VEHICLE

of car-sharing stations). In long-distance road haulage, driverless lorries could follow a manned vehicle at the head of the convoy, guiding them.

In the coming years, manufacturers plan to deploy several Level 3 use cases: autonomous driving in traffic jams (Traffic Jam Driver), on motorways (Highway Driver) and automated parking. The deployment of multi-passenger transport using (driverless) robot-taxis on well-defined routes is also envisaged.

### DIFFERENT TYPES OF USE

**Infotainment**  
Multimedia and communication services, targeted offers, travel experience, on-board payment, etc.

**Car insurance**  
Personalised insurance based on driver behaviour and use of the vehicle.

**Maintenance and repair**  
Traditional repair and maintenance services. New online diagnostics, predictive and proactive troubleshooting services, etc.



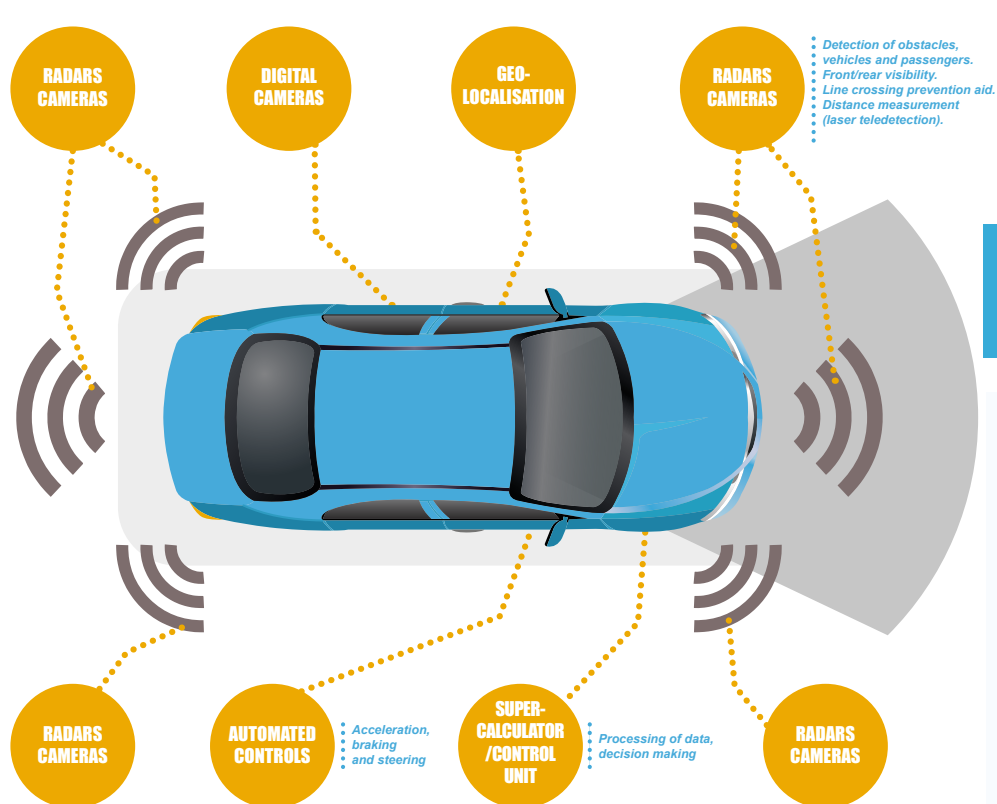
**Road safety**  
Warning systems related to driving behaviour, a known event or degraded traffic conditions.

**Traffic management**  
Management of road occupancy and transport incidents.

**Infrastructure management**  
Improved knowledge of the state of heritage. Surface and markings condition.

Source: Rapport Deloitte/CCFA report (January 2020)

### ► EXAMPLES OF ONBOARD INTELLIGENCE SYSTEMS FOR AUTOMATED DRIVING



12 km

of dedicated lanes for autonomous and connected vehicles, inaugurated in Monthéry in 2019

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 minimise any activity other than driving (§ 8.6);
- Every driver of a vehicle shall in all circumstances have his vehicle under control (§ 13.1).

### Public authorities' support for the development of the autonomous and connected vehicle

The French government has embarked on an ambitious approach to the development of automated vehicles with the objective of French leadership based on three principles: safety, progressiveness and acceptability. Its national strategy on autonomous vehicle development aims to enable automated vehicles to be used on public roads by 2022.

The year 2021 should therefore see the adoption of the implementing orders for the mobility guidance law (known as the "LOM" law), firstly, to adapt the existing legal framework, in particular the highway code and transport code, to allow automated vehicles of SAE levels 3 to 5 to use public roads, and secondly, to ensure that data is made available to private or public players for the

development of new services or for road safety purposes.

The State's public actions are continuing to develop technical innovation, establish a national framework for the validation of automated public transport systems, develop the action of local authorities and continue international work on technical regulations and the specific approval of automated vehicles.

In addition, in September 2020 France worked actively for the adoption of an amendment to the Vienna Convention on Road Traffic (International Treaty of 1968) to allow the circulation of vehicles using automated driving systems, which refers to systems combining hardware and software elements that enable the dynamic control of a vehicle over a long period of time.

### Experiments and tests on connected and autonomous vehicles

#### The general framework

In France, the regulatory framework for experiments was established by the order of August 3, 2016, which requires prior authorisation from the Minister of Transport for the experimental use of vehicles with partial or total delegation of driving authority on a road open to traffic. This framework was supplemented by the law of May 22, 2019, known as "PACTE law", which authorises experimentation with vehicles of the highest levels of automation with an adapted liability regime, and by the mobility orientation bill to draw up a framework for the circulation of autonomous vehicles.



## THE AUTONOMOUS AND CONNECTED VEHICLE

### The programme

An experimental programme has been set up in conjunction with the public authorities with the aim of rationalising feedback (use cases) and their deployment in the territory. In April 2019, the Government presented a list of 16 authorised experiments with autonomous vehicles, in both collective and individual transport, freight and logistics, under real road conditions, spread throughout the territory (rural and urban areas).

### Some examples

#### EVRA-SAM

A call for experimental projects on an autonomous road vehicle (EVRA), was launched for large-scale experiments of autonomous vehicles marketable in the coming years in the field of individual mobility, collective, freight or logistics. It aims to create an automated vehicle deployment ecosystem (consortium involving manufacturers, transport operators, local authorities, infrastructure managers, research laboratories) with a shared vision of the issues and results for the production of shared knowledge (common good). The selected projects (SAM and ENA) make it possible to gather experiments in various conditions of vehicles or shuttles.

#### 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 braking, etc.) and on-board units which send information to the vehicles upstream (V2V) as well as to the operator (V2I), 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 ministry of transport: 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: Île-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.

### Test centres for autonomous and connected vehicles

A test centre for autonomous and connected cars, TEQMO, has just been inaugurated in June 2019 by UTAC in Montlhéry, in the presence of public authorities and interested partners: Renault, PSA, but also Orange, Ericsson, Colas, Bouygues Telecom, Nokia, Valeo and Vedecom. Consisting of 12 km of test tracks associated with modern laboratories (environment, safety, endurance), the UTAC and TEQMO become a major tool for the development of the autonomous and connected vehicle, creating a French solution

against the competitors to internationally. In addition, Transpolis, with which Renault Trucks is associated, is a laboratory city located in Ain, dedicated to urban mobility.

### Use of 5G network technology for autonomous vehicles

Numerous projects have been launched at several sites in France to carry out use case tests of automated vehicles with 5G technology. The fifth generation of mobile networks (5G) should improve existing services and the development of new services with better speed and greater capacity. For example, the "5G OpenRoad" project, combining public and private partners, is planning open road trials to test use cases of autonomous vehicles and provide services on board connected vehicles.

At the European level, numerous projects have also been launched: 5GMED: 21 European players have joined forces to test and deploy 5G on road and rail between France and Spain.

### THE EXTENDED VEHICLE (EXVE) AND ITS STANDARDISED INTERFACES



Source: ACEA

### The question of access to vehicles data

The increased use of automated vehicles will increase the data produced for a variety of uses, with a significant impact on the development of mobility services. The rules concerning the management of data related to the automated vehicle, which can exchange information with its environment, constitute a major subject for the respect of the privacy of individuals. As such, the European regulation on the protection of personal data (RGPD), which came into force in May 2018, reinforces the protection of users' personal data. The mobility orientation law project also provides rules for the provision of some data for public authorities or infrastructure managers, manufacturers to improve vehicle safety or

between private operators.

In addition, European regulations on cyber security and cooperative intelligent transport systems are also key contributors. This mechanism is supplemented by "flexible" legal rules with the CNIL's compliance pack on connected vehicles in progress and technical standardisation (ISO).

The "extended vehicle" (ExVe) is a concept that the auto manufacturers, in league with the major equipment manufacturers and independent dealers, have been 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.

- 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, braking, 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.

Connected technologies and autonomous driving prepare new mobility scenarios and the development of a broader ecosystem in which car manufacturers play a decisive role (see Deloitte / Fréget report from January 2020). The development of artificial intelligence has a key role to contribute to innovation and the digital and ecological transformation of the automotive sector.

## PASSENGER TRANSPORT PRICE INDEXES

In 2019, the price index for private vehicles (purchases and use) slowed sharply (+1.1% compared to +5% in 2018), in line with the stability of fuel prices, which slowed down the increase in the prices of user spending (+1.3% in 2019 compared to +6.7% in 2018), but also thanks to the virtual stability of prices on vehicle purchases (+0.6% after +1.4% in 2018).

In passenger road transport, the slowdown in prices observed in 2018 continued in 2019 (+1.4%, after +1.6% in 2018), in particular thanks to the deceleration in prices in transport by coach and despite the high inflation observed in the public transport for private individuals (taxis, VTC). The rise in prices remained contained in air transport (+0.9% in 2019, after +0.5% in 2018) and prices fell in rail transport (-0.3%, after +0.3% in 2018).

Over the last fifteen years, the price indices of the various modes of passenger transport have evolved in a very different way. Since 2003, the real price indices, corrected by the general consumer price index, have increased by 18% in public transport for private individuals (taxis, VTC) and for private vehicles, but have decreased by 1% for other passenger road transport (buses, coaches) and by 12% in air transport. In passenger rail transport, real prices increased by 15% between 2003 and 2015, but have been declining for four years.

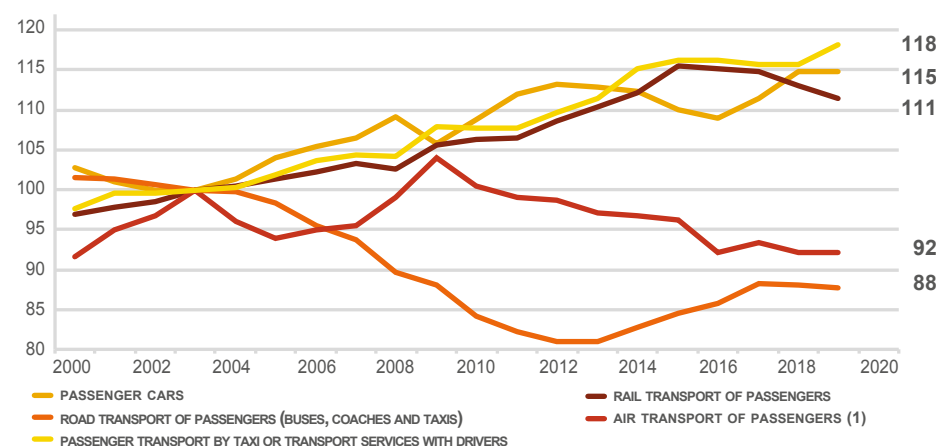


### ► ANNUAL VARIATION IN PRICE INDICES FOR DIFFERENT PASSENGER TRANSPORT MODES (AS A %)

	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)
2010	4.3%	2.1%	-1.7%	-3.0%	1.4%	-2.1%
2015	-2.0%	3.1%	1.8%	2.2%	1.0%	-0.6%
2016	-0.9%	0.0%	1.2%	1.6%	0.2%	-4.0%
2017	3.3%	0.7%	3.1%	4.1%	0.6%	2.4%
2018	5.0%	0.3%	1.6%	1.5%	1.8%	0.5%
2019	1.1%	-0.3%	1.4%	0.7%	3.2%	0.9%

Base 100 in 2003

### PASSENGER TRANSPORT MODES REAL PRICE INDEXES



(1) The methodology for calculating the price index for air transport services changed in January 2012.

Source: INSEE

The price indexes of the different modes of passenger transport reflect price trends including VAT. Thus, for air travel, airport taxes are included; likewise for the other forms, charges related to infrastructure are only shown up to what can be incorporated into the sale price. In addition, only the part directly paid by the household is monitored. For example, if a region or a local authority decides, as part of a spatial planning policy or social measures, to subsidise part of the costs related to transport, a decrease will be recorded in household spending. Fuel surcharges are incorporated in the monitoring of the passenger air transport index.

### Rail and road passenger transport indexes

primarily concern inter-urban connections. The index 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 indexes are corrected using the general consumer price index as illustrated in the graph above.

After remaining close to their 1995 level, the real price indexes of the various modes of passenger transport have experienced stronger and more contrasting trends since 2003: between 2003 and 2019, the real index linked to personal vehicles (purchases and use) has increased continuously (+15%), with the exception of the years 2014 to 2016. Rail transport has grown by 11% since

2003 but has been declining for 4 years. The real index of road passenger transport (coaches and buses) fell sharply between 2003 and 2013, then increased again until 2017, the decline being 12% over the period 2003-2019, while that of public transport for private individuals (taxis, VTC) is growing continuously (+18%). Finally, the real air transport price index continues to decline, which began in 2009.



## FREIGHT TRANSPORT PRICE INDEXES

In 2019, freight transport prices are slowing or falling on all forms, except air, where prices, which were down in 2018, rose 1.5%. In the fluvial and maritime sectors, prices fell by 0.2% and 1.5% respectively in 2019. In rail transport, the price index was stable on average but the national transport index fell (-1.3% in 2019) while that of international decelerates slightly (+1.5%, after +1.8% in 2018).

In road transport, prices rose less strongly than last year, ranging from +2.1% in 2018 to +1.6% in 2019. The price deceleration can be observed on interurban and international road transport, while the prices of local road freight accelerated (+1.6% in 2019, after +0.5% in 2018).

Since 2006, the price index for road freight transport has risen steadily: +17% in total, or an average of

+1.2% per year. The price index for international road transport rose slightly more (+6%) than that of local or interurban road transport (+4%). Over the same period, the price index for river transport and air transport has experienced more erratic trends, with phases of increases between 2006 and 2013 and a downward trend since that date.

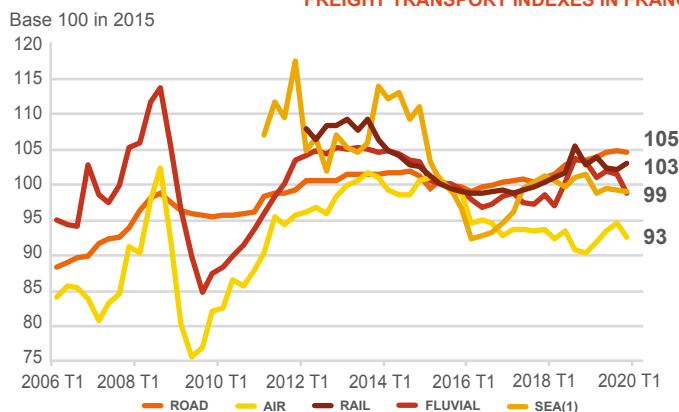
In rail transport, the price index has only been released since 2014, with a history going back to the first quarter of 2012. Over the observation period 2012-2019, we see a drop in prices of 4.5%, mainly due to a decline in national rail prices (-7%), while those of international rail increased by 9%. Since opening up to competition in 2006, new operators have grown and now represent 40% of the transported volumes, a level comparable to that of Germany.

# +1.6%

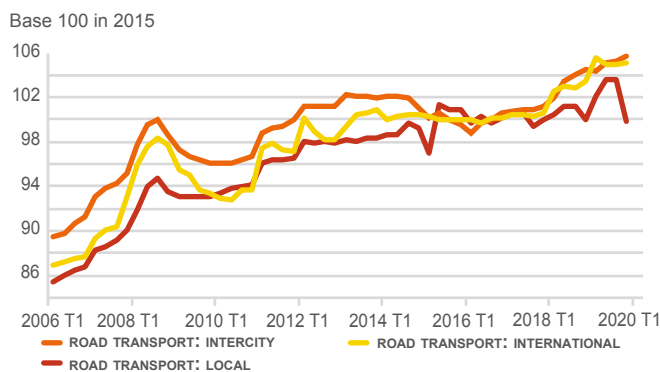
# +0.1%

**Respective price index increase in 2019 for road and rail freight**

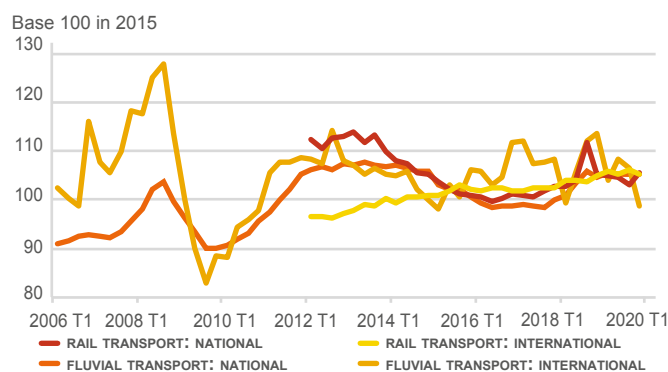
**FREIGHT TRANSPORT INDEXES IN FRANCE**



**FREIGHT TRANSPORT INDEXES IN FRANCE: ROAD**



**FREIGHT TRANSPORT INDEXES IN FRANCE: RAIL AND FLUVIAL**



(1) 2006-2011: very high volatility of sea freight price indexes.  
Source: MTE/SDES

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

For 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 sea transport price index comprises transport services for third parties, performed by companies registered in France whose activity is sea freight

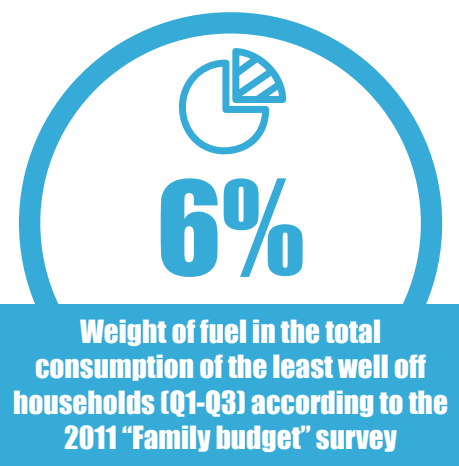
(bulk and ferry). Calculations are based on international price indexes, unitary prices and tariffs. It is very volatile, in line with bulk price trends.

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

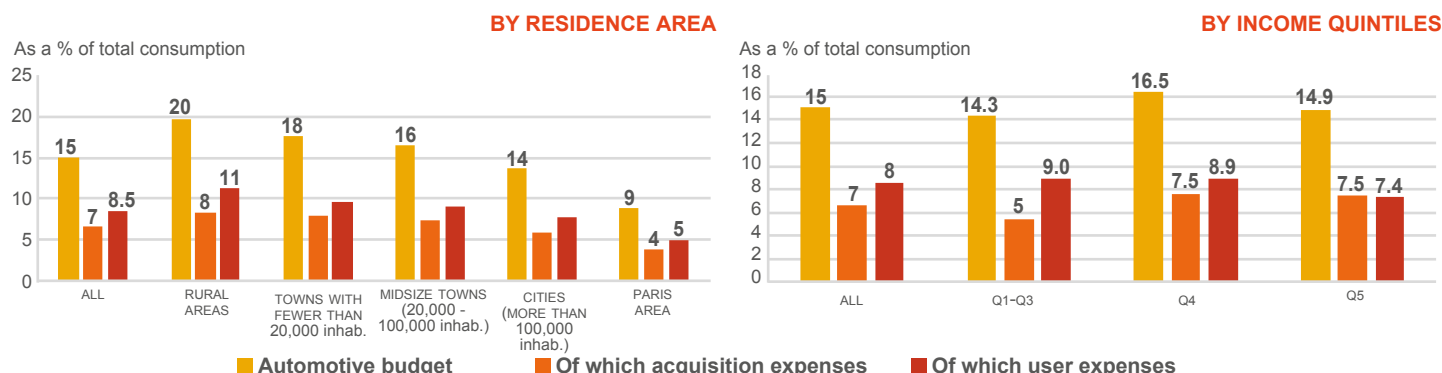
## HOUSEHOLD MOTORING COSTS

According to the latest "Family Budget" survey in 2017, metropolitan households spend on average 15% of their budget on cars. This budget varies from 20% among rural households to only 9% in the Paris area and represents more than half (57%) of the expenses related to the use of the vehicle (fuel, repair, maintenance, tolls, insurance). These user expenses amount to 8% of the total budget, but reach 11% among rural households and 9% on average among households belonging to the first 3 income quintiles (compared to 7.4% for the 5<sup>th</sup> quintile). The item that weighs the most within this group is fuel, which represents 4% of the total and reaches 6% in rural areas, against only 2% in the Paris area. The least well-off households (Q1-Q3) also devote a larger part of their budget to it (4.3%) than the richest households which belong

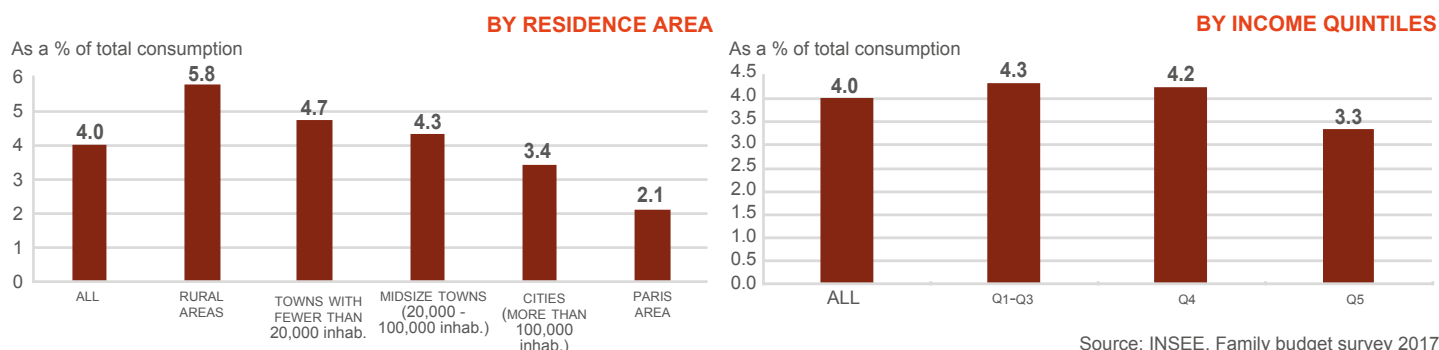
to the 5<sup>th</sup> quintile (3.3%). Finally, the breakdown by socio-professional categories also shows significant contrasts in terms of car spendings. The category of executives and employees, who frequently hold tertiary jobs in urban areas, devote a lower share of their budget to the automobile (13% and 15% respectively). Conversely, the category of farmers, workers and artisan traders, less present in urban areas and more forced to use their vehicles for work, devote 18% of their budget to cars.



### ► AUTOMOTIVE BUDGET IN 2017



### ► SHARE OF FUEL IN HOUSEHOLD CONSUMPTION IN 2017



Source: INSEE, Family budget survey 2017

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 (see page 61). 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.

The budget survey used in this edition is limited to metropolitan France. The breakdown of the various automotive items is expressed as a percentage

of total consumption excluding taxes, duties, loan repayments and major works. Expenses are broken down here according to the category of municipality of residence, and income quintiles. The 5<sup>th</sup> quintile, for example here corresponds to the 20% of households with the highest incomes.

In 2017, the automobile budget of metropolitan households represented 15% of their total consumption. The purchase item weighs less than half of the total (43%) varying from 5% of the budget for the 60% of households with the lowest incomes (Q1-Q3) to almost 8% for the 5<sup>th</sup> quintile. Conversely, the item "user expenditure" weighs more for households belonging to the first quintiles (9%) against 7.4% for the 5<sup>th</sup> quintile. This difference is in particular related to the weight of the fuel item for which the most modest households devote 1 point more in their budget to it than the most well-off households.

The same phenomenon is observed for insurance related to transport, which represents 2.6% of the budget of the most modest. As these two items are

the most taxed, it thus appears that households belonging to Q1-Q3 pay more for the use of their vehicles, in proportion to their consumption, than households belonging to the richest quintile.

Breaking down by category of municipality of residence, the fuel item appears to be higher the smaller the size of the municipality. Thus, households in the Paris area devote nearly 2% of their consumption to it, compared with more than 6% for households in rural municipalities, which benefit less from public transport and travel more frequently and over longer distances.



## ROAD FREIGHT COST PRICE



12%

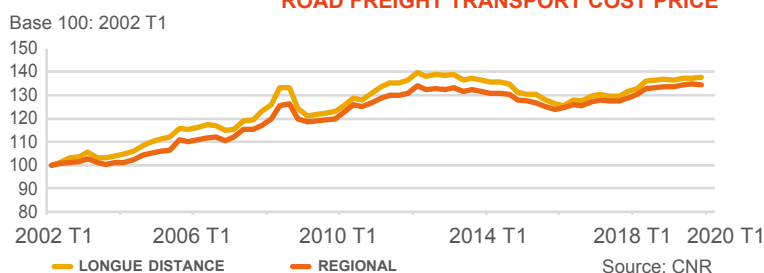
Share of material held in the CNR  
long haul road freight cost index  
in 2019

According to the National Road Committee (CNR), the cost of long-distance and regional road freight transport increased in 2019 by 1.1% and 1.3% respectively, a slowdown compared to the growth observed in 2018. This slowdown is explained by the stagnation of the price of crude oil in 2019 and therefore the cost of professional diesel which accounts for a quarter of the costs of long-distance transport.

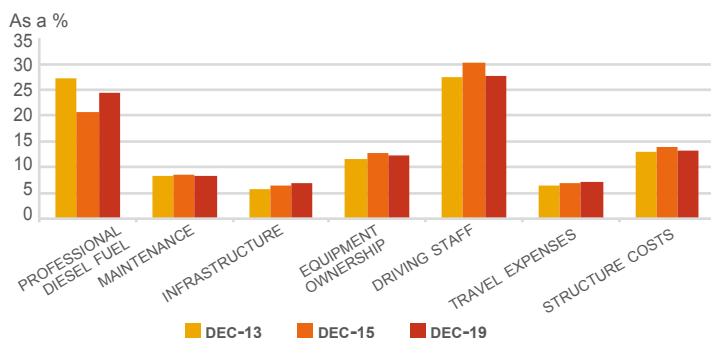
Since the end of 2015, the share of professional diesel in the cost of long-distance road freight transport has started to rise again (+4 points) and stood at 24.5% at the end of 2019. Conversely, the share of the driving staff fell 2.6 points over the same period. The share of equipment ownership in long-distance freight transport has remained virtually stable since 2016.



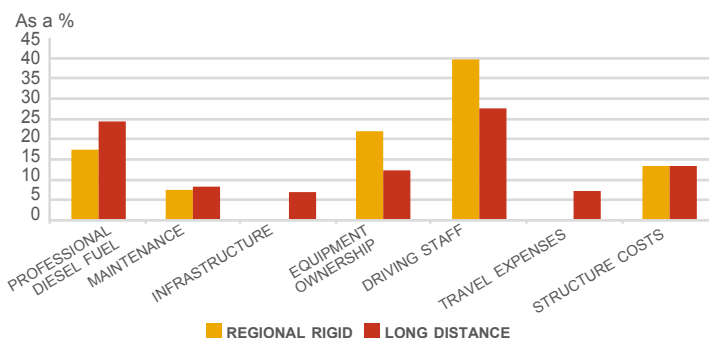
### ROAD FREIGHT TRANSPORT COST PRICE



### ROAD FREIGHT COST PRICE STRUCTURE FOR LONG DISTANCE



### ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2019



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.

The CNR now takes into account, in the calculation of its indices, the CICE since 2013, the year of its

entry into force, to make them comparable with the post 2019 period. The CICE is indeed transformed from January 1, 2019 into long-term relief from employers' social contributions.

In long-distance road freight transport, the first expense item is driving staff, which share has remained stable since 2013, around 29% but which fell by 1 point in 2019. Second expense item, the commercial diesel ratio rose to 27% of the cost price in 2013 before decreasing by 7 points until 2015, then growing again to oscillate at around 24% over the following three years.

The share of equipment ownership (tractor and semitrailer) has remained stable, at a level slightly above 12% since 2016, after two years of increase, following the increase in the price of new vehicles, linked to the entry in accordance with the environmental standard Euro VI as of January 1, 2014 (approximately 10%) and 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 (around 1/6 of the fleet per year) and by the slight drop in price observed for semi-trailers. In addition, in 2019, interest rates remain at historically low levels. On the other hand, the cost of automobile insurance, which is also included in the "material" item, grew by 4.3% in 2019.

The maintenance cost index, which includes tyres and vehicle maintenance and repair, has remained stable at 8.2% since 2016. Tyre prices have been trending up between 2013 and 2015, before coming closer, of their starting level and maintenance on Euro VI standard vehicles, in force for 4 years, seems more expensive than for previous generations (example: exhaust with particle filtering). Finally, the "infrastructure" item increased slightly in 2019 (+0.4 point), reaching 7% of the total cost.

In regional transport, the share of driving staff continued to drop slightly, which began in 2015, to stand at 39.7% at the end of December 2019. The weight of professional diesel comes in second in the cost of regional transport. After falling between 2013 and 2015 (-4 points), it has risen by more than 3 points since that date to stand at 17.8% in 2019. The holding of equipment, the third item of expenditure, stagnated in 2019 at 22.1% of costs. Finally, repair maintenance costs stabilised at around 7.4% of the total.

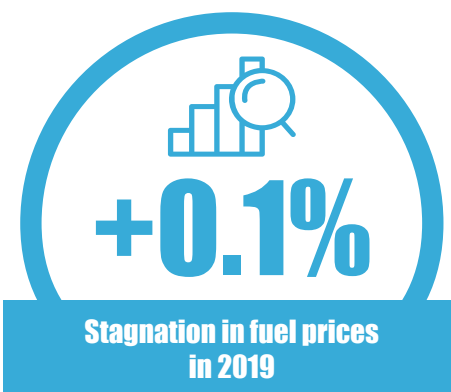
## AUTOMOTIVE PRICE INDEXES

In 2019, the new car price index rose 0.7%, a rate lower than inflation (+1.1%), after rising 1.9% in 2018.

Fuel prices remained almost stable in 2019 (+0.1%), after increasing by 14% in 2018. This sharp slowdown is explained by the decline in the average annual price of Brent in 2019, combined with a stability of taxation of oil products.

The price index for vehicle parts, accessories and maintenance-repair increased by 2.7% in 2019,

after an increase of 2.4% in 2018. This index groups together various components that evolve in a contrasted way. The cost of repair maintenance which includes the value of the service (cost of labour force and supplies) increased by 2.9% in 2019, and 49% since 2005 (of which 60% for labour force), while the price index for spare parts and accessories stagnated over the period 2005-2019.

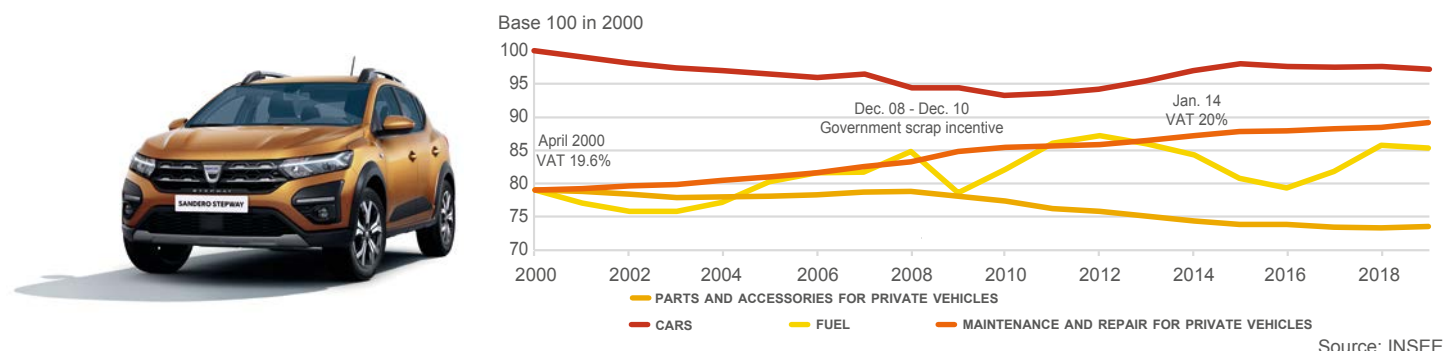


### ► YEAR ON YEAR AUTOMOTIVE PRICE CHANGES

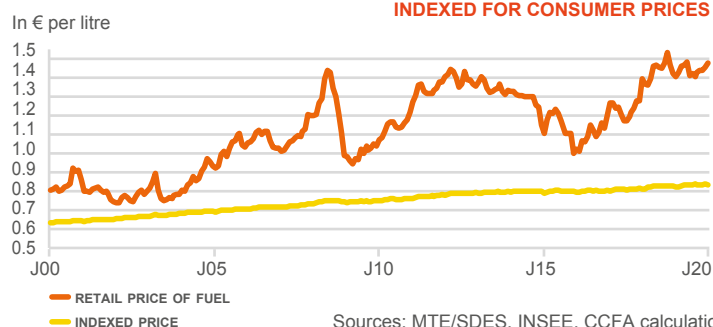
	Consumer prices	New car prices	Prices of car parts, accessories, repair and maintenance	Of which parts and accessories	Of which repair and maintenance	Fuel prices
2015	0.0%	1.1%	1.5%	-1.9%	1.6%	-9.8%
2016	0.2%	-0.3%	0.4%	0.0%	0.4%	-4.5%
2017	1.0%	1.0%	1.4%	-0.7%	1.7%	9.5%
2018	1.8%	1.9%	2.4%	1.7%	2.5%	13.9%
2019	1.1%	0.7%	2.7%	1.5%	2.9%	0.1%

Sources: INSEE, CCFA calculations

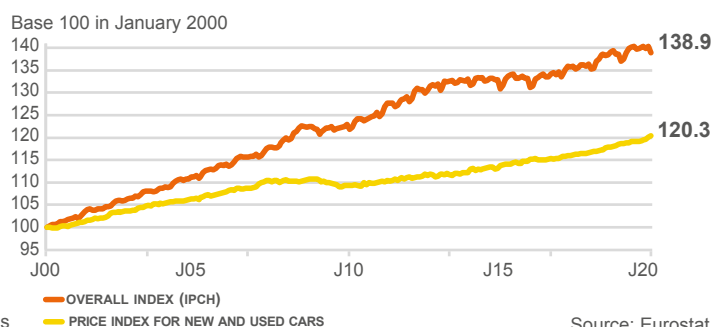
### NEW PASSENGER CAR, FUEL, PARTS, ACCESSORIES, MAINTENANCE AND REPAIR PRICE INDEXES



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



### HARMONISED PRICE INDICES IN THE EURO ZONE (17 COUNTRIES)



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 takes into account promotional offers made occasionally (i.e. outside the private sales market), as well as the bonus/penalty 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/penalty system and scrap incentive since 2008). Nevertheless, the tightening of the ecological bonus/penalty 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' purchasing power, as is the case for France. In 2019, the general price index was up 38% compared to 2000, whilst the price index for the purchase of new and second-hand cars was only up 19%.

## CONSUMER SPENDING ON PRIVATE VEHICLES

**9.6%**

**Share of vehicle purchases as a percentage of total household spending in 2019**

In 2019, the gross disposable income of households increased by 3.1% in value (after +3% in 2018) and the price index of final consumption expenditure slowed significantly (+0.9%, after +1.7% in 2018) due to the slowdown in energy prices. Thus, the purchasing power of households rose by 0.8 point more in 2019 compared to 2018 (+2.1%, compared to 1.3% in 2018) and household consumption expenditure is accelerating in volume (+1.5%, after +0.9% in 2018).

Vehicle purchases grew by 1% in 2019 (after +1.9% in 2018) to reach 49 billion euros. Automobile spending represents 87% of the total, the rest being purchases of motorcycles, cycles and caravans. Despite a strong increase in purchases of used

vehicles (+4.3%), automobile expenditure was slowed down (+0.4%) by the decline in purchases of new automobiles (-1.9% in 2018, after -0.2%). In 2019, spending on new cars amounted to 26 billion euros and represented only 61% of car spending, compared to 82% in 1990.

Spending on maintenance and repairs continued to grow strongly in 2019 to stand at 43.6 billion euros, an amount almost identical to the purchase of vehicles. Likewise, despite the sharp slowdown observed in fuel purchases (+1% in 2019, compared to +12.5% in 2018), they stood at around 41.5 billion euros in 2019, compared with 33.6 billion euros in 2017.

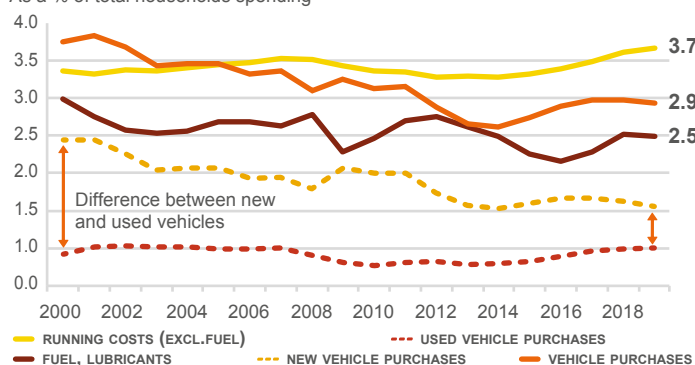
### ► HOUSEHOLD CONSUMER SPENDING ON TRANSPORT (AMOUNT AND % OF TOTAL HOUSEHOLDS SPENDING)

	Units	2000		2010		2018		2019		Change 2019/2018
<b>VEHICLE PURCHASES</b>	€billion	37.5	3.8%	44.2	3.1%	48.4	3.0%	48.9	2.9%	+1.0%
New and second-hand cars (including tax on registration certificates)		33.7	3.4%	39.1	2.8%	42.5	2.6%	42.7	2.6%	+0.4%
of which new cars		24.5	2.4%	28.3	2.0%	26.5	1.6%	26.0	1.6%	-1.9%
of which used cars		9.2	0.9%	10.9	0.8%	16.0	1.0%	16.7	1.0%	+4.3%
Caravans, motorcycles, bicycles		3.8	0.4%	5.0	0.4%	5.9	0.4%	6.2	0.4%	+4.9%
<b>RUNNING COSTS</b>	€billion	63.5	6.4%	82.5	5.8%	99.9	6.1%	102.7	6.2%	+2.8%
Maintenance, repairs, spare parts and accessories		24.3	2.4%	34.2	2.4%	41.7	2.6%	43.6	2.6%	+4.6%
of which automotive equipment manufacturing		11.1	1.1%	16.9	1.2%	21.6	1.3%	22.7	1.4%	+5.1%
of which automotive service		9.2	0.9%	11.9	0.8%	14.6	0.9%	15.3	0.9%	+5.1%
Fuel and lubricants		29.9	3.0%	34.8	2.5%	41.1	2.5%	41.5	2.5%	+1.0%
Tolls, parking fees, rental, driving lessons		9.3	0.9%	13.5	1.0%	17.1	1.1%	17.6	1.1%	+2.8%
<b>INSURANCE</b>	€billion	3.9	0.4%	6.1	0.4%	8.4	0.5%	8.6	0.5%	+2.7%
<b>TOTAL CONSUMER SPENDING ON CARS AND MOTORCYCLES</b>	€billion	105.0	10.5%	132.8	9.4%	156.7	9.6%	160.2	9.6%	+2.2%
Public transport	€billion	15.3	1.5%	24.1	1.7%	30.7	1.9%	32.2	1.9%	+4.9%
<b>TOTAL HOUSEHOLDS SPENDING</b>	€billion	1,000	100%	1,415	100%	1,631	100%	1,668	100%	+2.3%
Number of households (metropolitan France)	thousand	24,256		27,227		29,092		29,336		+0.8%
Spending on passenger cars per household	euros	4,327		4,876		5,387		5,462		+1.4%
Spending on passenger cars per vehicle-owning household	euros	5,388		5,840		6,421		6,510		+1.4%

Source: INSEE - Household consumer spending, 2019 - base 2014

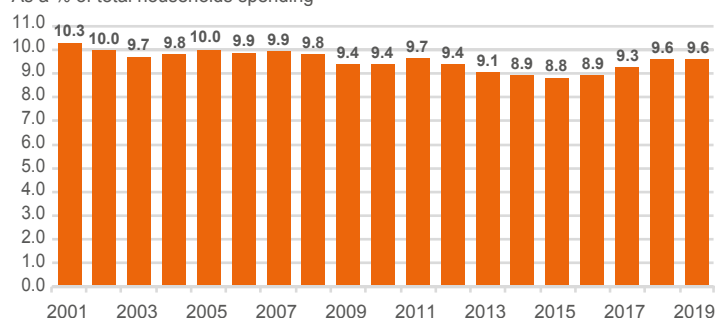
### AUTOMOTIVE BUDGET COEFFICIENTS FROM 2000 TO 2019

As a % of total households spending



### TOTAL VEHICLE RELATED EXPENDITURE

As a % of total households spending



According to national statistics – based on different fundamentals than those used for the Family budget survey (see page 58) – households in 2019 spent 160 billion euros (+6%) on personal transport. This sum represented 83% of all household expenditure dedicated to transport (individual and public).

The share of automobile consumption as a share of real national consumption is called the “automotive budgetary coefficient”. This coefficient varied between 9% and 11% at the beginning of the 1990s until the 2009 crisis. Since, it has vacillated around the 9% mark and was 9.6% in 2019.

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 2019 compared to 4.6% in 1990. Purchases of new passenger cars account for only 61% of overall vehicle purchases, compared to 82% in 1990.

The budget coefficient linked to the maintenance

and repair of personal vehicles has been rising since 2014 and now stands at 2.6%, which is equivalent to the purchase of cars.

Finally, the budget coefficient linked to fuels has fluctuated a lot in recent years in line with the evolution of energy prices. In 2019 it amounted to 2.5% for an amount of 41.5 billion euros.

## AUTOMOBILE FINANCING

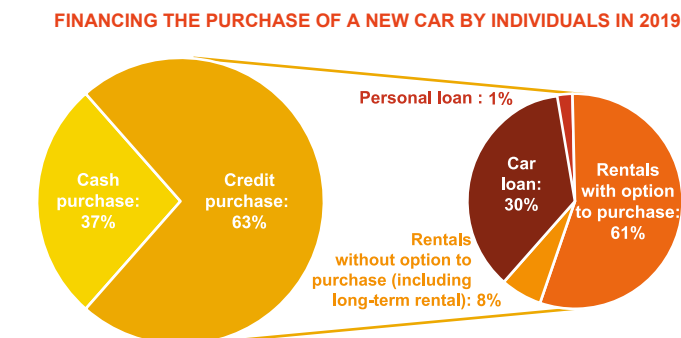
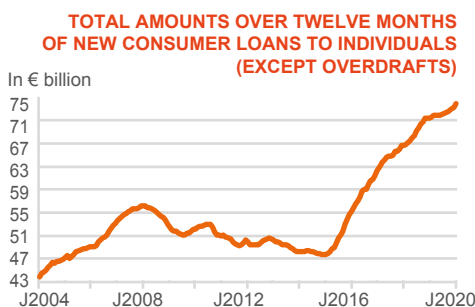
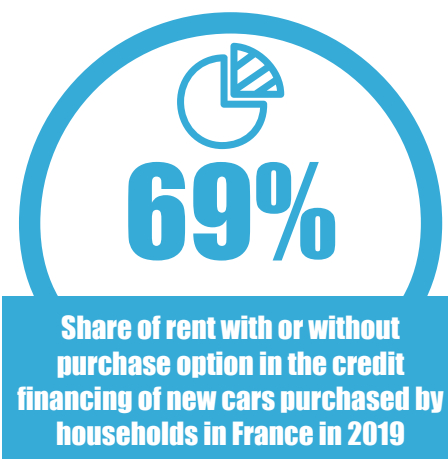
In 2019, consumer credit continued to grow, driven by low interest rates and strong auto purchases. More than 60% of new cars purchased by households are paid for on credit, more than half of which is financed by rental.

The financing arrangements for new car purchases by individuals have changed significantly over the past four years, favouring rental formulas to the detriment of conventional credit (or affected car credit). Since 2010, the number of loans allocated to the purchase of a new vehicle has fallen by 54%, while the number of rental transactions has multiplied by more than 3.

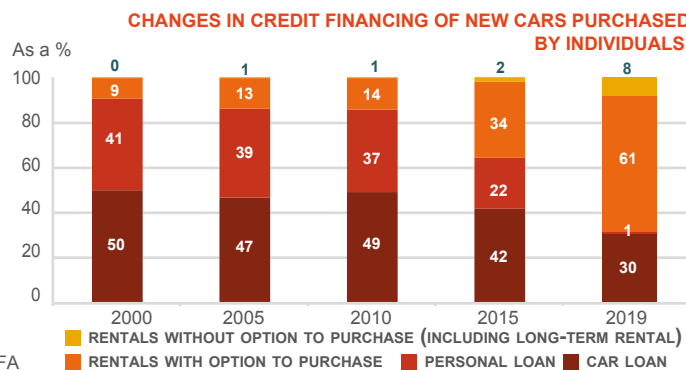
Thus, in vehicle credit, rental has become the dominant form of financing (69% of credit in 2019) ahead of specific car loans (30%) and personal loans (1%). Within the rental bracket, rent-to-buy is highly dominant (90% of rental financing) whilst rent without option to buy remained marginal.

For second-hand vehicles purchased by households, cash purchase remains the main method of financing (nearly 60%). However, the use of conventional credit for the purchase of used cars is increasing (+28% between 2013 and 2019) and rental formulas have also been developing since 2016 (+200% in 3 years). Thus, more than 430,000 used vehicle financing files were registered by ASF in 2019.

The credit financing of business equipment in new vehicles (passenger cars, light commercial vehicles and industrial vehicles) is also up in 2019 (+5%), with 716,000 funding applications. Since 2013, the rent without purchase option dominated by the long term rental, has increased by 54%, compared to 33% for the rent with purchase option. It now represents 61% of the financing files of companies, compared to 36% for the rent with purchase option.



Source: Banque de France



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

There are four 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 purchase option, 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 purchase option 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 an increase of 30% in 3 years, they increased again by 3% in 2019 to reach a record level.

Within these new loans, the financing of new

passenger cars to individuals slowed down in 2019 (+0.2%) while the financing of used cars remains dynamic (+7%). The number of rent with or without purchase option cases increased by 2% and 19% respectively compared to 2018, while the traditional funding allocated fell again by 8%.

The renewal of fleets and the enthusiasm of fleets for SUVs have helped maintain demand for vehicles from companies. Vehicle purchases by companies remained dynamic in 2019 and the number of financing files reached 716,000 (+5%). The "Syndicat des Entreprises des Services Automobiles en LLD et des Mobilités" (SesamId) indicates that at the end of 2019, the fleet in long term rental now stands at 1,455,195 units.



## CAR AND MOTORCYCLE SALES AND REPAIRS

Auto trade turnover reached a record level of 98 billion euros in 2019, an increase by 4.5% compared to 2018 compared to +2.9% the previous year. The performance of registrations of new passenger cars and light commercial vehicles (+1.9% in 2019) as well as the good results of the upper range and luxury segments explain this dynamism.

Vehicle maintenance and repair, which has seen a steady decline since 2009 (-2% per year between 2009 and 2015), is growing for the fourth consecutive year (+3.4% in 2018 after +4.8% in 2018). Since 2015, turnover has increased by more than 4 billion euros. The activity benefits from the growth of the fleet and its aging, which nevertheless came to a halt in 2019 (8.9 years in 2019 compared to 8.2 in 2010).

Retail sales of automotive equipment, on the other hand, fell by 0.3% after increasing more than 10% between 2015 and 2018.

Finally, the retail fuel trade also fell in 2019 (-3.4%) after an increase of more than 7% in 2018. Turnover stood at 17.3 billion euros in 2019.

According to INSEE-Esane data, the operating margin rate (gross operating surplus/value added at factor cost) of the motor vehicle trade rose sharply between 2015 and 2017, from 14.9% at 22.2%. The investment rate (tangible investment/value added excluding taxes) rose from 11.3% in 2015 to 21.8% in 2017. In the maintenance and repair of motor vehicles, the margin rate changed little, going from 18.1% in 2015 to 19.5% in 2017, and the investment rate from 10% to 11.8% over the same period.

Since the 1990s, automotive distribution has experienced a continuous movement of concentration, through external growth operations and numerous mergers. This development is linked to increased geographic coverage and the development of multi-

branding. It can be seen in the groups' sales statistics for new vehicles.

In 2019, the 100 largest automotive distribution groups sold more than 1.3 million new passenger cars, i.e. 59.6% of volumes. They achieved a turnover of 48.6 billion euros (up 9% on 2018), which represents 59% of the total turnover of the automotive trade. Within this ranking, the 10 largest operators registered 486,870 units, i.e. 21% of the volumes of new passenger cars, for a turnover of 17.6 billion euros (22% of the turnover of the automobile trade). Six automotive groups now have a turnover of over 1 billion euros compared to just one in 2015.

### ► LIGHT VEHICLE SALES NETWORKS IN FRANCE ON JANUARY 1, 2020

Brands	Primary dealership in 2020
Renault	649
Peugeot	401
Citroën	391
Opel	234
DS	162
<b>French groups</b>	<b>1,837</b>
Volkswagen	304
Toyota	260
Ford	232
Kia	214
Suzuki	207
Nissan	205
Fiat	192
Hyundai	186
Mercedes-Benz	169
BMW	158
Other Japanese brands	445
Other Korean brands	75
Other brands	1,565
<b>TOTAL</b>	<b>6,049</b>

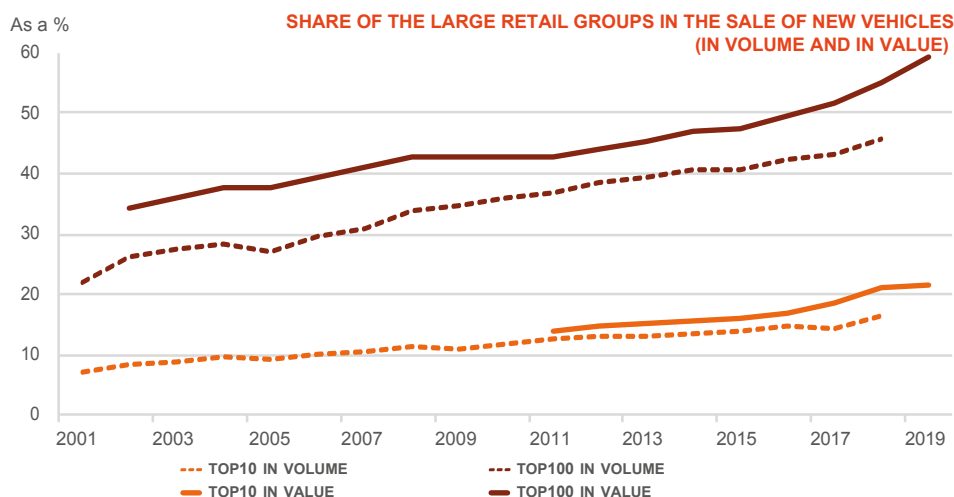
Source: Argus



### ► REVENUE FROM CARS AND MOTORCYCLES SALES AND REPAIRS (IN CURRENT € BILLION, INCLUDING VAT)

Activity	2010	2013	2016	2017	2018 (sd)	2019 (p)	Change 2019-2018
Motor vehicle sales	76.9	73.7	86.7	91.1	93.8	98.0	4.5%
Automotive maintenance and repairs	20.5	20.1	20.8	22.5	23.6	24.4	3.4%
Retail sales of automotive equipment	6.5	7.8	7.7	8.0	8.2	8.2	-0.3%
Motorcycle sales and repairs	4.0	3.6	3.8	4.3	4.4	4.6	5.6%
Retail fuel sales	15.6	18.8	15.5	16.7	17.9	17.3	-3.4%
<b>TOTAL</b>	<b>123.5</b>	<b>124.1</b>	<b>134.5</b>	<b>142.7</b>	<b>147.9</b>	<b>152.5</b>	<b>3.1%</b>

Source: INSEE - Trade Accounts, base 2010 of national accounts: (sd) semi-definitive; (p) provisional



The automobile requires a very special service: throughout its lifetime, it needs to be followed at all times and in all places to be maintained or repaired in the best conditions in order to maintain its initial qualities. According to the Parc Auto Kantar TNS survey, a car in the fleet available to households has an average of two maintenance and repair operations per year for recent vehicles and three for older vehicles.

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 2017: 14,500 automotive repair mechanics, 1,270 autocentres and 860 quick-repair centres).



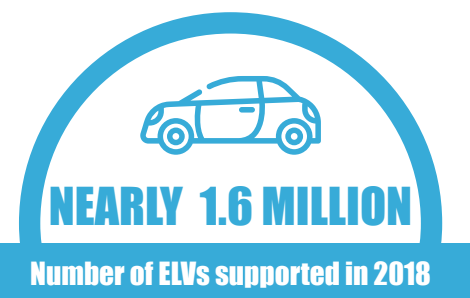
# CIRCULAR ECONOMY

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.

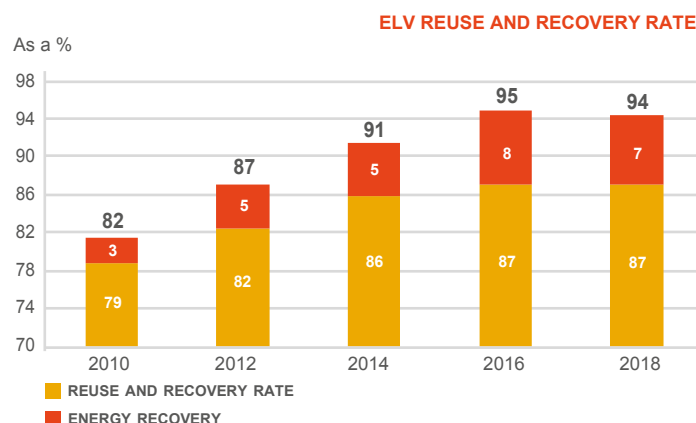
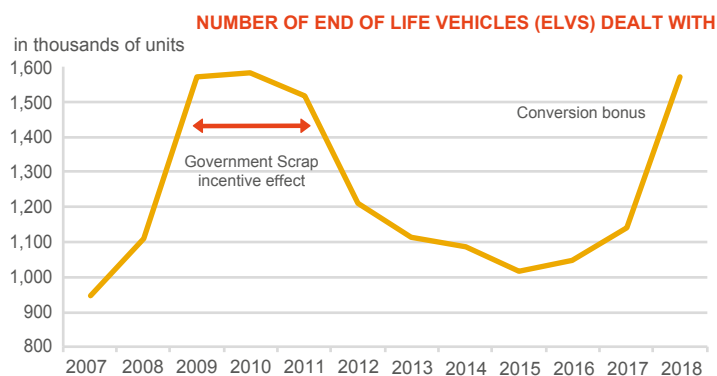
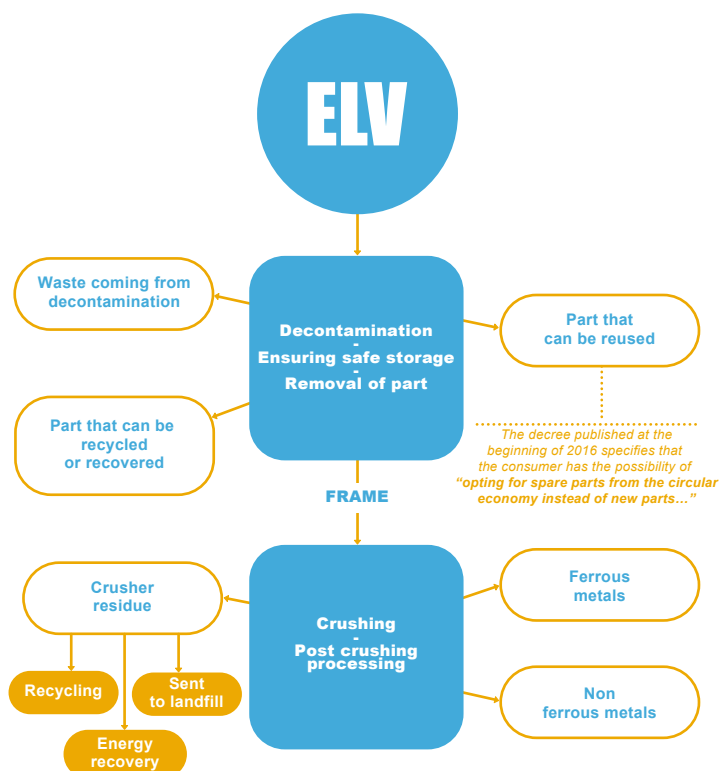
The circular economy in the automotive market concerns vehicles (private vehicles and vans in particular) and consumables (tyres, oils, batteries, etc.).

An end-of-life vehicle (ELV) is a vehicle that its last holder hands over to a third party for destruction. Nearly 1.6 million ELVs were taken care of by the approved sector in 2018, compared to 1.1 million in 2017.

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



Source: ADEME

In France, nearly 1.6 million end-of-life vehicles were taken care of by the sector in 2018 and processed by around 1,650 approved establishments: the ELV centres. Their average age was 19 and a half in 2018. The average mass of a passenger car is around one tonne (source: ADEME).

The resale of second-hand spare parts contributes to the achievement of recycling rates and contributes to the economic balance of the automotive industry. According to the CNPA, the used parts market is rapidly structuring and now represents around 400 million euros of turnover.

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 2018, the material decomposition of a ELV reveals in particular: 75% of metals (ferrous metals: 70%,

non-ferrous metals: 4% and electrical bundles: 1%), 12% of plastics, 3% of glass and 2% of textile. This illustrates the diversity of materials that go into the composition of a vehicle and the complexity for the optimal reprocessing of each of them.

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 2018, the collection of automobile batteries (battery intended to feed a system of starting, lighting or ignition car) decreased by 2.3% compared to 2017, to just under 170,000 tonnes. The recycling efficiency of lead-acid batteries reached 86%.

Collection from the automotive tyre industry (light and heavy vehicles) amounted to nearly 500,000 tonnes in 2018, an increase of 7.3% compared to

2017. The collection rate was 93.5% (i.e. an increase of 1.6% compared to 2017). The tyre recycling rate fell from 98.4% in 2017 to 99.7% in 2018. Around 41% of these tyres were intended for energy recovery in 2018 (substitute fuel in cement plants for example), 38.5 % material recovery, half of which is granulated (sports fields, street furniture), 16.1% for reuse (12.6% for second-hand resale and 3.5% for retreading) and 2.4% to public works.

Retreading is the technique of giving a used tyre a new tread. For the first time in many years, retreading increased compared to 2017 (+9.4%). However, these retreads increasingly face competition from new, low-cost tyres from overseas.

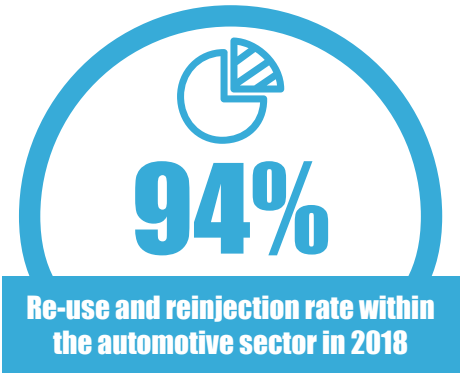
## CIRCULAR ECONOMY

The energy transition law for green growth of August 17, 2015 aims to promote the market for parts from the circular economy (CEIP), by requiring maintenance or repair professionals to inform consumers of the possibility of opting, for certain categories of spare parts, for parts from the circular economy instead of new parts.

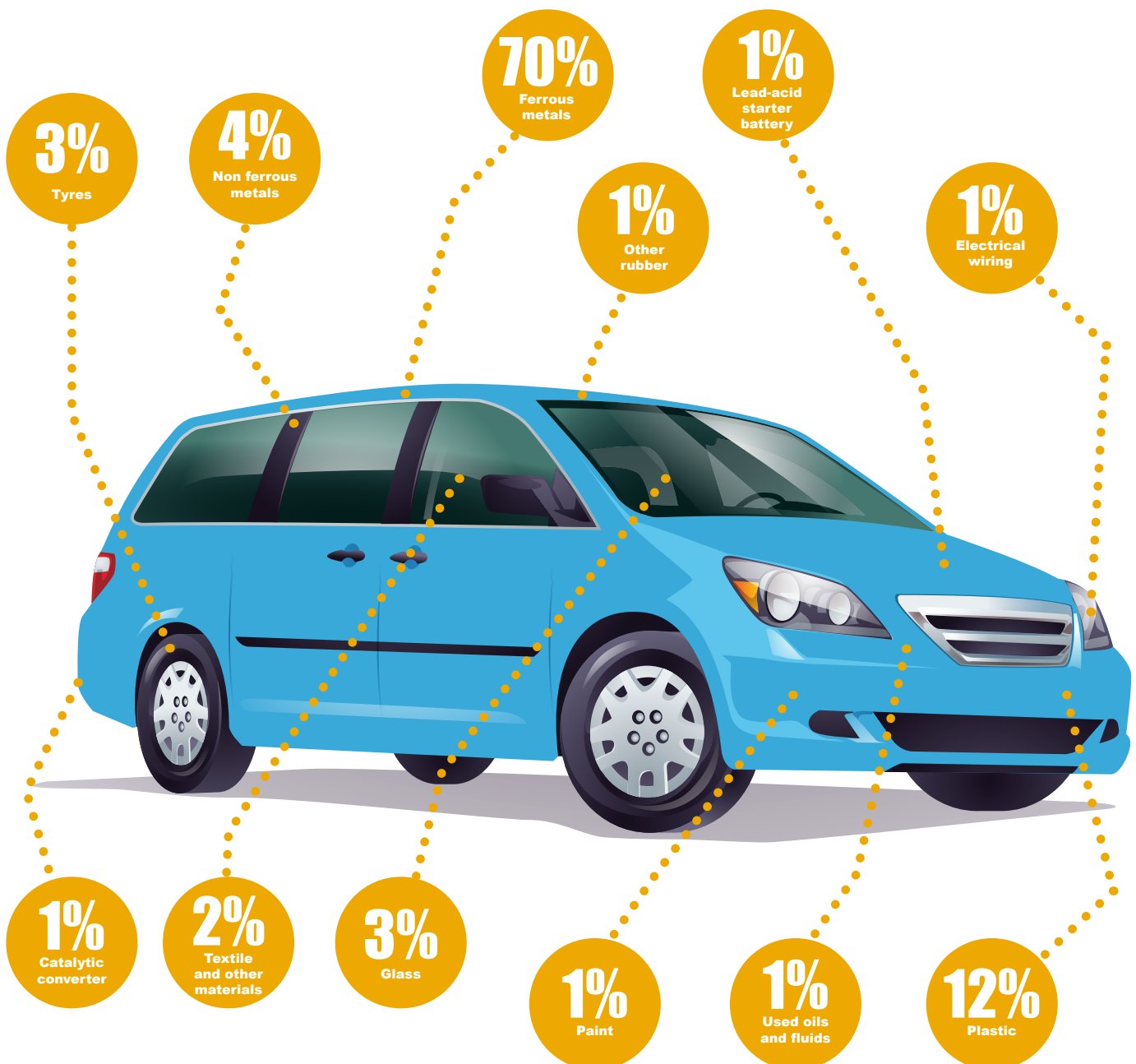
The May 30, 2016 decree specifies that parts from the circular economy are components and elements sold by approved ELV centres and components and elements reconditioned by the manufacturer (the manufacturer, for example), according to a precise specification, either in the manufacturer's factories or 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 57 car crushers (2017 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).

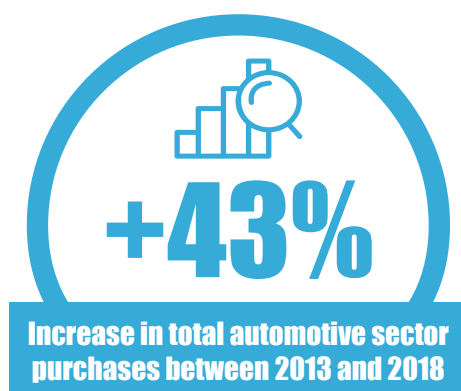


### ► COMPOSITION OF AN END OF LIFE VEHICLE IN 2018



Source: ADEME

# PRODUCTION OF THE AUTOMOTIVE INDUSTRY AND ITS ECONOMIC IMPACT



The production of the automotive industry amounted to 69 billion euros in 2018, an increase of 2% compared to the previous year and 34% compared to 2013, the last year of decline in the European market.

In the new 2014 base, where research and development expenses are now recorded in Gross Fixed Capital Formation (GFCF), total purchases (or intermediate consumption), including from the branch itself, represent more than 4 times its value added (VA). In 2018, they reached 55 billion euros, benefiting, with a stable structure, many sectors of the economy.

Since 2010, VA has fluctuated around 13 billion euros, a level close to the mid-2000s.

As a guarantee of future production in a highly capital-intensive industry, the investment rate (GFCF/VA ratio) is generally maintained at a high level during this period (see the graph on page 30) when the European markets are approaching their level of before the crisis. In 2018, the margin rate (ratio between gross operating surplus and VA) decreased but remained at a high level compared to 2013.

## ► ANALYSIS OF AUTOMOTIVE INDUSTRY PRODUCTION (AS A % OF TOTAL PURCHASES)

		2000	2005	2010	2015	2017	2018 (1)
<b>PURCHASES FROM OTHER INDUSTRIES</b>	%	71.7	76.3	75.6	72.4	72.1	71.6
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	18.6	19.2	19.0
manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	3.3	3.8	3.5
manufacture of electrical equipment	%	3.1	3.4	3.5	3.4	3.5	3.4
manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	11.8	12.0	12.1
Other industries (including coking and refining)	%	35.8	39.8	39.7	37.4	36.4	36.3
metallurgy and metalworking	%	16.0	16.7	17.5	16.2	15.6	15.9
manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	9.6	9.6	9.2
other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.3	4.2	4.2
chemical industry	%	2.6	2.8	3.0	2.8	2.6	2.6
manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.9	1.8	1.8	1.8	1.7
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	2.0	1.8	1.9
electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	1.2	1.1	1.2
water, sanitation, waste management and decontamination	%	0.7	0.7	0.8	0.8	0.7	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	1.2
Transport and storage	%	1.2	1.3	1.5	1.5	1.5	1.5
Information and communications	%	0.4	0.4	0.5	0.4	0.4	0.4
Financial and insurance services	%	0.8	0.7	0.9	1.1	1.0	0.9
Real estate activities	%	0.2	0.2	0.2	0.2	0.2	0.2
Corporate services	%	7.7	7.7	7.3	7.5	7.7	7.5
legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.2	2.2	2.2
scientific research and development	%	0.0	0.0	0.0	0.0	0.0	0.0
other specialized, scientific and technical activities	%	2.8	2.7	2.7	3.0	3.2	3.0
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	2.3	2.4	2.4
All commercial sector purchases	%	13.4	13.6	13.4	14.1	14.3	14.0
<b>PURCHASES WITHIN THE INDUSTRY</b>	%	28.3	23.7	24.4	27.6	27.9	28.4
Total industry production at base prices	Current € billion	70.3	75.6	58.3	56.5	67.2	68.8
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
Total purchases (2)	Current € billion	52.8	58.2	43.9	43.2	53.4	55.5
As a % of production at base prices	%	75.1	77.0	75.4	76.6	79.5	80.6
Value added by the industry	Current € billion	17.5	17.4	14.4	13.2	13.8	13.4
As a % of production at base prices	%	24.9	23.0	24.6	23.4	20.5	19.4
Gross operating surplus (GOS)	Current € billion	-	-	-	5.7	6.0	5.5
As a % of value added (margin rate)	%	-	-	-	43.0	43.8	40.9

(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)

The total purchases of the automobile branch, which account for more than three quarters of its production, are 28% for the branch itself, compared with 23% in 2012, and for the remaining 72% for the other branches.

Purchases to "other industries" account for 36% of all purchases, of which metallurgy and manufactured metal products remain the largest suppliers (16% of total purchases, down slightly but steadily).

Purchases to machinery and equipment manufacturers (excluding electrical, electronic and computer products) account for 12% of total purchases in the automotive industry.

In 2014, where research and development expenses are recorded in GFCF, the automobile industry spends 14% of its purchases on the tertiary sector, compared to 13% in 2010. A part of these purchases is mainly intended for business support activities (which ratio hovers around 7.5%).



## AUTOMOTIVE OEMS AND AUTOMOTIVE INDUSTRY SUPPLIERS

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

second and third respectively in Europe in terms of turnover.

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



### ► 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 sector	143	24	43
Ratio (sector/core)	1.6	2	-
Manufacturing industry	900	215	34
Weight of the automotive sector 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 Entreprises" 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 value added 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 amounted to 70,900 employees at the end of 2019, for a turnover of 18.5 billion euros, of which 54% was intended for export. OEMs address two types of market: the original equipment market, where equipment is intended for assembly lines, and the aftermarket or aftermarket. The share of turnover from original

equipment in France or for export represents a little over 80% of the whole.

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 85% according to FIEV).

In recent years, among other automotive suppliers, nearly one-fifth of the plastics and electronics business was automotive. In addition, 10% of the internal market for the metal trades was for the automotive industry. For the smithy and smelter, this share was close to 50%. This ratio was 70% for the polymers and rubber sector. Moreover, according to the "Observatoire de l'Intérêt", the automobile industry (excluding suppliers) accounted for more than 4% of total employment volumes in 2018 (in full-time equivalent).

The French automotive industry still relies on its French industrial base. It represents significant parts of the activity of technical plastic parts,

industrial rubber markets, foundry, industrial services of metals which are composed in particular of sectors of cutting, stamping, industrial mechanics, bar turning, forging, stamping and metal coatings. According to the GIST (Group of industries of mechanical subcontracting), the automotive sector accounted in recent years about 40% of its business turnover. To express the total industrial weight of the automotive sector, it is necessary to add to these automotive suppliers what is for example the purchases in France of the automobile industry from other sectors such as the steel industry (of which the automobile industry represents 25% of tonnage), chemistry (10% for all transport materials) or energy producers (see page 66).

## EMPLOYMENT

# 8%

**French employed active population  
in the automotive industry  
(direct, indirect and road  
transport-related jobs)**

In broader terms, 2.2 million people worked in activities linked to the automotive industry in 2019, i.e. 8% of the working population.

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

After the crisis, the competitiveness deficit continued to weigh on automotive industrial activities, including upstream ones. However, it is easing as the market rises. Concerning use, the

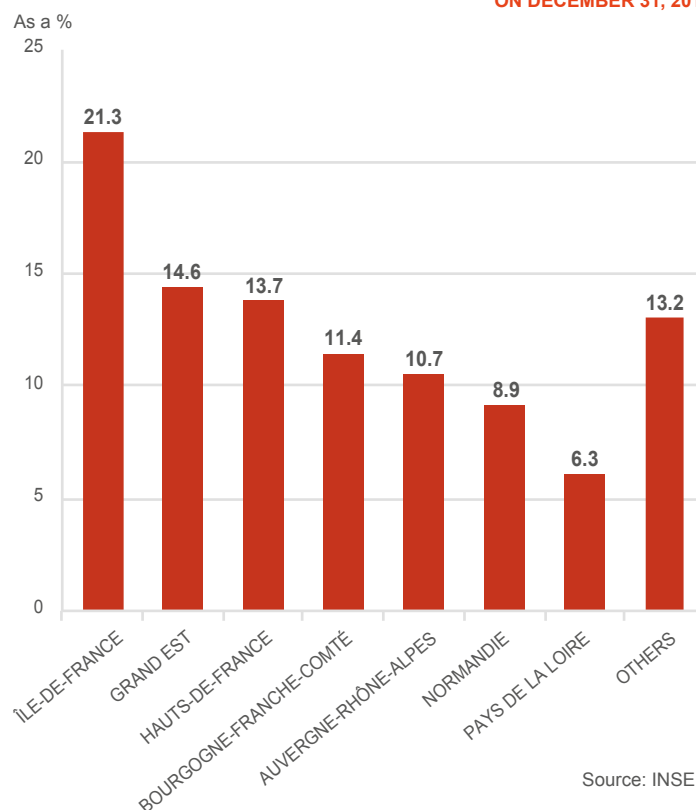
trades are by nature less sensitive, through their links with the vehicle fleet which continues to grow; nevertheless, the number of jobs fell slightly with the crisis, but in recent years a ceiling seems to have been reached. These changes are already incorporating the first impacts of the ecological and digital transition which will modify professions and skills. A prospective study carried out by the Observatory of Metallurgy in 2018 assesses the impact of the drop in diesel engines on industrial employment at around 15,000 fewer jobs by 2030. But the new skills will also lead to needs for significant recruitment.

### ► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2019 (IN THOUSANDS OF PEOPLE)

	2019
Production operations	470
Raw materials and services	246
Manufacturing and energy sector	139
Services	107
Automotive industry	224
Automotive manufacturing	107
Equipements, accessories	96
Bodywork, trailers, caravans	21
Cars use	536
Sales, repairs, automotive equipment sales, vehicle inspections, short-term rentals, breakers and recycling	410
Insurance, experts, financing, long-term rental, etc.	90
Others (fuel retailing, self-employed, etc.)	28
Motor sport, media, publishing, other	8
Transports	1,210
Road transport (passengers and freight, outsourced and in-house), related services	1,060
Police, health, education, non-commercial administration	31
Road building and maintenance	119
<b>Total jobs related to the automotive industry</b>	<b>2,216</b>

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

### 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 470,000 jobs through its production and its purchases from other branches (source ESANE). 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 536,000 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 (passengers and goods) and their infrastructure employed around 1.2 million people thanks to the dynamism of urban public transport, taxis and VTC, but also road transport of goods. On the infrastructure side, the resumption of orders from public authorities impacted activity and employment.

According to INSEE data, on December 31, 2015, Île-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%). This geographical distribution can be found in the figures on the employment of equipment manufacturers in France in 2019, published by the FIEV.

# THE FRENCH AUTOMOTIVE INDUSTRY



→ ANALYSIS & STATISTICS  
2020 EDITION

**7.3**

**MILLION VEHICLES**

produced by French manufacturers  
worldwide

**79%**

**OF VEHICLES**

produced by French manufacturers  
are sold abroad

**€6.8**

**BILLION**

French automotive industry  
research and development  
budget in 2018

**€50**

**BILLION**

French exports of industrial  
automotive products

**81%**

Share of domestic  
travel in France  
using passenger cars

**86%**

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.

## ► PASSENGERS CARS (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
<b>EUROPE</b>	17,407,047	17,585,503	17,330,380	18,545,798	19,054,909	19,457,054	19,662,030	18,713,116
<b>WESTERN EUROPE</b>	14,778,879	14,217,571	12,110,446	12,636,580	13,058,080	13,132,328	12,615,798	11,677,736
Germany	5,131,918	5,350,187	5,552,409	5,708,138	5,746,808	5,645,584	5,120,409	4,661,328
Belgium	912,233	895,109	528,996	369,172	354,003	332,979	265,958	247,020
Spain	2,366,359	2,098,168	1,913,513	2,218,980	2,354,117	2,291,492	2,267,396	2,248,019
<b>FRANCE</b>	2,879,810	3,112,961	1,924,171	1,555,000	1,636,000	1,754,200	1,773,748	1,665,787
Italy	1,422,284	725,528	573,169	663,139	712,971	742,642	670,932	542,007
The Netherlands	215,085	115,121	48,025	57,019	87,609	155,000	214,000	176,113
Portugal	178,509	137,602	114,563	115,468	99,200	126,426	234,151	282,142
United Kingdom	1,641,452	1,596,356	1,270,444	1,587,677	1,722,698	1,671,166	1,519,440	1,303,135
Sweden	259,959	288,659	177,084	188,987	205,374	226,000	291,000	279,000
<b>CENTRAL AND EASTERN EUROPE</b>	2,330,692	2,914,269	4,616,540	5,118,191	5,045,941	5,181,820	4,803,177	4,788,248
<b>TURKEY</b>	297,476	453,663	603,394	791,027	950,888	1,142,906	1,026,461	982,642
<b>AMERICA</b>	10,022,089	8,795,982	8,228,067	9,394,539	8,778,776	8,236,350	7,690,288	6,973,304
<b>NAFTA</b>	8,371,806	6,523,591	5,084,330	7,019,427	6,712,992	5,691,163	5,022,072	4,356,864
Canada	1,550,500	1,356,271	967,077	888,565	803,230	751,048	655,896	461,370
USA	5,542,217	4,321,272	2,731,105	4,162,808	3,916,584	3,033,216	1,581,012	1,382,714
Mexico	1,279,089	846,048	1,386,148	1,968,054	1,993,178	1,906,899	2,785,164	2,512,780
<b>SOUTH AMERICA</b>	1,650,283	2,272,391	3,143,737	2,375,112	2,065,784	2,545,187	2,668,216	2,616,440
Argentina	238,921	182,761	508,401	308,756	241,315	203,694	208,573	108,364
Brazil (1)	1,351,998	2,011,817	2,584,690	2,017,639	1,778,464	2,307,443	2,387,967	2,448,490
<b>ASIA-OCEANIA</b>	13,573,073	20,249,215	32,408,358	40,125,960	43,884,300	44,937,856	43,622,768	40,666,078
China	605,000	3,941,767	13,897,083	21,143,351	24,420,744	24,806,687	23,529,423	21,360,193
South Korea	2,602,008	3,357,094	3,866,206	4,135,108	3,859,991	3,735,399	3,661,730	3,612,587
India	517,957	1,264,111	2,831,542	3,408,849	3,707,348	3,961,327	4,032,481	3,623,335
Japan	8,359,434	9,016,735	8,310,362	7,830,722	7,873,886	8,347,836	8,359,286	8,328,756
<b>AFRICA</b>	213,444	319,598	356,872	604,130	673,685	671,782	776,967	787,287
South Africa	230,577	324,875	295,394	341,025	335,539	321,358	321,097	348,665
<b>TOTAL</b>	41,215,653	46,950,298	58,323,677	68,670,427	72,391,670	73,303,042	71,752,053	67,139,785

## ► COMMERCIAL VEHICLES (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
<b>EUROPE</b>	2,783,468	3,132,236	2,529,925	2,672,648	2,434,598	2,563,228	2,602,435	2,571,856
<b>WESTERN EUROPE</b>	2,326,653	2,246,450	1,686,875	1,794,888	1,571,867	1,608,788	1,645,308	1,658,806
Germany	394,697	407,523	353,576	325,226	nd	nd	nd	nd
Belgium	121,061	31,406	26,306	40,081	45,424	44,023	42,535	38,777
Spain	666,515	654,332	474,387	514,221	531,805	556,843	552,169	574,336
<b>FRANCE</b>	468,551	436,047	305,250	417,000	454,279	471,500	495,941	509,563
Italy	316,031	312,824	265,017	351,084	390,334	399,568	389,136	373,298
The Netherlands (2)	52,234	65,627	46,107	2,252	2,280	n/a	n/a	n/a
Portugal	68,215	83,458	44,166	41,158	43,896	49,118	60,215	63,562
United Kingdom	172,442	206,753	123,019	94,479	93,924	78,219	84,888	78,270
Sweden	41,384	50,570	40,000	n/a	n/a	n/a	n/a	n/a
<b>CENTRAL AND EASTERN EUROPE</b>	323,203	459,997	351,887	309,991	327,692	401,615	433,438	434,448
<b>TURKEY</b>	133,471	425,789	491,163	567,769	535,039	552,825	523,689	478,602
<b>AMERICA</b>	9,761,798	10,488,678	8,119,880	11,567,600	12,042,894	12,478,652	13,157,330	13,129,455
<b>NAFTA</b>	9,325,214	9,795,192	7,069,234	10,935,086	11,438,330	11,787,657	12,402,403	12,426,534
Canada	1,411,136	1,331,621	1,101,112	1,394,742	1,567,426	1,442,955	1,369,898	1,455,215
USA	7,257,640	7,625,381	5,011,988	7,943,180	8,263,717	8,156,769	2,519,758	2,604,080
Mexico	656,438	838,190	956,134	1,597,164	1,607,187	2,187,933	8,512,747	8,367,239
<b>SOUTH AMERICA</b>	436,584	693,486	1,050,646	632,514	604,564	690,995	754,927	702,921
Argentina	100,711	136,994	208,139	217,901	231,461	269,714	258,076	206,423
Brazil (1)	329,519	519,023	797,038	411,782	377,892	429,359	493,051	496,498
<b>ASIA-OCEANIA</b>	4,497,938	5,878,721	8,600,629	7,863,313	7,962,121	8,528,632	9,034,058	8,600,795
China	1,464,000	1,775,852	4,367,678	3,423,899	3,698,050	4,208,747	4,279,773	4,360,472
South Korea	512,990	342,256	405,535	420,849	368,518	394,276	367,104	338,030
India	283,403	374,563	725,531	751,736	811,993	830,904	1,110,328	892,682
Japan	1,781,362	1,782,924	1,318,558	1,447,516	1,330,927	1,342,838	1,370,308	1,355,542
<b>AFRICA</b>	115,305	199,195	158,204	232,291	229,883	224,777	325,069	317,860
South Africa	126,787	200,352	176,655	274,633	263,465	268,593	289,757	283,318
<b>TOTAL</b>	17,158,509	19,698,830	19,408,638	22,335,852	22,669,496	23,795,289	25,118,892	24,619,966

(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
<b>European manufacturers</b>	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
<b>American manufacturers</b>	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
<b>Japanese manufacturers</b>	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
<b>Korean manufacturers</b>	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
<b>Chinese manufacturers</b>	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
<b>Indian manufacturers</b>	0	0	532	0	0	0	0	400	932
TATA	0	0	532	0	0	0	0	400	932
<b>ALL MANUFACTURERS QUOTED ABOVE</b>	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
<b>European manufacturers</b>	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%
<b>American manufacturers</b>	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%
<b>Japanese manufacturers</b>	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%
<b>Korean manufacturers</b>	12%	3%	10%	6%	0%	44%	16%	9%	100%
HYUNDAI-KIA	12%	3%	10%	6%	-	44%	16%	9%	100%
<b>Chinese manufacturers</b>	0%	0%	13%	0%	0%	0%	87%	0%	100%
GEELY	-	-	31%	-	-	-	69%	0%	100%
SAIC	-	-	-	-	-	-	100%	-	100%
<b>Indian manufacturers</b>	0%	0%	57%	0%	0%	0%	0%	43%	100%
TATA	-	-	57%	-	-	0%	-	43%	100%
<b>ALL MANUFACTURERS QUOTED ABOVE</b>	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	2015	2016	2017	2018	2019
Germany	3,378,343	3,319,259	2,916,259	3,206,042	3,351,607	3,441,262	3,435,778	3,607,258
Belgium	515,204	480,088	547,340	501,066	539,519	546,558	549,632	550,003
Spain	1,381,515	1,528,877	982,015	1,094,077	1,147,007	1,234,932	1,321,438	1,258,260
France	2,133,884	2,118,042	2,251,669	1,917,226	2,015,177	2,110,748	2,173,481	2,214,279
Italy	2,415,600	2,244,108	1,961,580	1,575,737	1,824,968	1,970,497	1,910,701	1,916,320
The Netherlands	597,640	465,196	482,531	449,350	382,825	414,306	443,531	446,114
United Kingdom	2,221,670	2,439,717	2,030,846	2,633,503	2,692,786	2,540,617	2,367,147	2,311,140
European Union (15 countries)	14,312,087	14,170,958	12,559,450	12,772,785	13,481,105	13,828,253	13,744,976	13,838,113
Europe (17 countries, 18 since 2015) (1)	14,725,982	14,565,695	12,984,549	13,261,258	13,971,468	14,320,223	14,210,016	14,303,469
Poland	-	207,007	315,855	354,975	416,123	486,352	531,889	555,598
Russia	-	1,520,225	1,912,794	1,282,740	1,239,680	1,448,700	1,606,676	1,567,743
Turkey	456,696	438,597	509,784	725,596	756,938	722,759	486,321	387,256
Central and Eastern Europe (2)	2,551,000	3,340,760	3,515,314	3,149,305	3,320,351	3,654,058	3,702,320	3,664,535
Canada	849,132	847,436	694,349	712,322	661,088	639,824	581,977	496,603
USA	8,846,625	7,659,983	5,635,432	7,516,826	6,872,729	6,080,229	5,303,580	4,715,005
Mexico	603,010	714,010	503,748	892,194	1,065,912	984,262	866,918	761,720
Argentina	224,950	290,648	522,591	480,952	525,757	663,550	610,943	282,299
Brazil	1,188,818	1,439,822	2,856,540	2,123,009	1,676,722	1,856,450	2,101,884	2,262,069
China	-	3,971,101	13,757,794	21,210,339	24,376,902	24,718,321	23,709,782	21,444,180
South Korea	1,057,620	893,159	1,237,482	1,533,670	1,533,813	1,526,660	1,525,150	1,539,060
India	-	1,106,863	2,387,197	2,772,270	2,966,637	3,229,109	3,394,756	2,962,052
Indonesia	-	364,319	541,475	755,566	834,920	833,681	878,595	798,813
Iran	-	730,000	1,410,403	1,055,400	1,320,300	1,361,456	1,128,017	619,028
Japan	4,259,771	4,748,482	4,203,181	4,215,889	4,146,459	4,386,378	4,391,160	4,301,091
Malaysia	-	410,892	543,594	591,275	514,545	514,680	533,201	550,179
Thailand	-	178,291	346,644	356,063	328,053	665,871	729,709	468,638
Australia	-	789,096	827,407	924,154	927,274	915,658	873,713	799,263
South Africa	-	419,868	337,130	412,670	361,289	361,289	365,242	355,378
<b>WORLD</b>	<b>38,689,767</b>	<b>45,404,638</b>	<b>55,809,158</b>	<b>66,327,133</b>	<b>69,512,720</b>	<b>70,694,834</b>	<b>68,678,212</b>	<b>64,341,693</b>

## ► NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
Germany	314,804	295,627	282,157	333,783	357,260	369,146	386,282	409,801
Belgium	66,125	71,413	60,157	70,458	78,335	87,084	94,802	99,440
Spain	335,684	430,611	132,104	182,982	200,337	199,661	242,058	242,956
France	477,204	480,122	457,215	427,866	463,295	495,052	519,266	541,416
Italy	268,057	251,328	202,573	150,342	225,324	221,263	211,664	215,596
The Netherlands	114,354	80,787	59,781	71,828	86,585	73,633	95,672	92,628
United Kingdom	301,523	388,410	262,730	427,903	430,969	369,788	375,325	365,778
European Union (15 countries)	2,245,881	2,304,191	1,646,742	1,882,620	2,089,507	2,005,197	2,236,626	2,305,295
Europe (17 countries, 18 since 2015) (1)	2,310,844	2,376,384	1,712,171	1,962,508	2,173,752	2,087,531	2,325,540	2,398,755
Poland	-	48,100	50,722	77,464	88,427	90,945	97,634	96,768
Russia	-	286,400	194,341	158,183	164,784	208,870	214,644	211,098
Turkey	199,825	276,615	251,129	285,598	250,919	257,518	155,229	104,653
Central and Eastern Europe (2)	579,060	780,487	596,654	662,918	693,287	621,547	617,388	562,588
Canada	736,951	782,706	889,039	1,227,195	1,322,657	1,398,975	1,458,284	1,479,252
USA	8,965,048	9,784,346	6,136,787	10,328,798	10,993,044	11,470,292	12,397,822	12,764,999
Mexico	302,944	454,498	344,606	497,280	581,811	546,236	598,524	597,951
Argentina	81,995	112,042	175,813	163,069	183,725	198,782	192,609	126,375
Brazil	302,288	274,822	658,524	445,967	373,599	316,288	464,310	525,781
China	-	1,787,088	4,304,142	3,451,263	3,651,273	4,160,583	4,370,795	4,324,497
South Korea	372,840	252,071	273,891	300,116	289,228	303,328	301,991	256,074
India	-	333,592	653,193	652,566	702,640	830,346	1,005,422	854,839
Indonesia	-	169,598	223,235	275,856	213,215	235,993	274,162	244,204
Iran	-	127,500	232,440	166,600	128,200	67,716	66,488	36,487
Japan	1,703,114	1,103,552	752,967	830,621	823,801	847,788	880,907	894,125
Malaysia	-	140,150	61,562	75,402	65,579	61,956	65,499	54,108
Thailand	-	514,215	453,713	443,569	440,735	340,191	560,093	538,914
Australia	-	199,173	208,167	231,254	250,859	273,458	247,683	235,116
South Africa	-	197,538	155,777	205,079	186,117	186,117	186,984	181,233
<b>WORLD</b>	<b>18,723,143</b>	<b>20,513,294</b>	<b>19,149,816</b>	<b>23,380,189</b>	<b>24,398,752</b>	<b>24,965,772</b>	<b>26,782,710</b>	<b>26,854,021</b>

(1) Including Iceland since 2015.

(2) New member states, Russia, Turkey and other countries of Central and Eastern Europe.

Sources: CCFA, OICA since 2005, 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
<b>FRENCH GROUPS</b>								
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%
<b>GERMANY</b>								
Mercedes-Benz	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%
<b>SPAIN</b>								
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%
<b>ITALY</b>								
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	-	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%
<b>UNITED KINGDOM</b>								
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	-	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	-	-	-	-	-	-
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	2014	2015	2016	2017	2018	2019
<b>PSA GROUP</b>	2,111	1,849	1,395	1,480	1,472	1,886	2,499	2,467
	13.6%	13.4%	10.7%	10.4%	9.7%	12.1%	16.0%	15.6%
<b>RENAULT GROUP</b>	1,635	1,416	1,234	1,350	1,516	1,612	1,621	1,647
	10.5%	10.2%	9.5%	9.5%	10.0%	10.3%	10.4%	10.4%
<b>FCA group</b>	1,085	1,080	766	871	993	1,044	1,017	941
	7.0%	7.8%	5.9%	6.1%	6.6%	6.7%	6.5%	6.0%
<b>Ford group</b>	1,269	1,128	960	1,031	1,049	1,043	1,009	993
	8.2%	8.2%	7.4%	7.3%	6.9%	6.7%	6.5%	6.3%
<b>General Motors</b>	1,590	1,196	923	943	994	600	4	3
	10.2%	8.6%	7.1%	6.6%	6.6%	3.8%	0.0%	0.0%
<b>Volkswagen group</b>	3,041	2,984	3,307	3,516	3,641	3,712	3,726	3,857
	19.5%	21.6%	25.5%	24.8%	24.1%	23.8%	23.9%	24.4%
<b>Daimler group</b>	830	676	714	839	954	1,011	983	1,030
	5.3%	4.9%	5.5%	5.9%	6.3%	6.5%	6.3%	6.5%
<b>BMW group</b>	772	753	833	936	1,032	1,043	1,032	1,047
	5.0%	5.4%	6.4%	6.6%	6.8%	6.7%	6.6%	6.6%
<b>Nissan</b>	361	407	481	560	561	575	497	395
	2.3%	2.9%	3.7%	3.9%	3.7%	3.7%	3.2%	2.5%
<b>Toyota-Lexus-Daihatsu</b>	852	629	563	603	651	730	758	796
	5.5%	4.5%	4.3%	4.3%	4.3%	4.7%	4.9%	5.0%
<b>Other Japanese brands</b>	911	718	604	695	754	766	800	819
	5.8%	5.2%	4.7%	4.9%	5.0%	4.9%	5.1%	5.2%
<b>Hyundai-Kia</b>	569	614	773	854	937	985	1,033	1,061
	3.7%	4.4%	6.0%	6.0%	6.2%	6.3%	6.6%	6.7%
<b>Volvo</b>	249	231	255	285	290	301	322	341
	1.6%	1.7%	2.0%	2.0%	1.9%	1.9%	2.1%	2.2%
<b>Tata group</b>	128	100	146	179	233	237	236	224
	0.8%	0.7%	1.1%	1.3%	1.5%	1.5%	1.5%	1.4%
<b>Other brands (including MG-Rover, Saab)</b>	168	53	32	46	41	65	71	162
	1.1%	0.4%	0.2%	0.3%	0.3%	0.4%	0.5%	1.0%
<b>TOTAL EU + EFTA</b>	15,572	13,832	12,987	14,189	15,118	15,610	15,607	15,782
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		-5.0%	5.4%	9.3%	6.7%	3.4%	10.0%	4.4%

## ► NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY GROUP IN THE EUROPEAN UNION (1) + EFTA (2) (IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005 (3)	2010	2014	2015	2016	2017	2018	2019
<b>PSA GROUP</b>	389	344	330	354	380	461	533	557
	18.1%	21.9%	20.3%	19.5%	18.9%	22.1%	24.7%	25.1%
<b>RENAULT GROUP</b>	331	266	258	299	328	338	349	362
	15.4%	17.0%	15.9%	16.5%	16.3%	16.2%	16.2%	16.3%
<b>FCA group</b>	284	233	207	229	270	265	266	269
	13.2%	14.9%	12.8%	12.7%	13.4%	12.7%	12.3%	12.2%
<b>Ford group</b>	235	171	215	268	319	332	355	351
	10.9%	10.9%	13.2%	14.8%	15.8%	15.9%	16.5%	15.8%
<b>General Motors</b>	153	78	84	104	106	58	0	0
	7.1%	5.0%	5.2%	5.7%	5.3%	2.8%	0.0%	0.0%
<b>Volkswagen group</b>	212	185	225	218	243	251	267	271
	9.9%	11.8%	13.9%	12.0%	12.1%	12.0%	12.4%	12.2%
<b>Daimler group</b>	166	140	159	172	186	198	201	219
	7.7%	8.9%	9.8%	9.5%	9.2%	9.5%	9.3%	9.9%
<b>Nissan</b>	103	43	47	50	66	68	62	57
	4.8%	2.7%	2.9%	2.7%	3.3%	3.3%	2.9%	2.6%
<b>Toyota-Lexus-Daihatsu</b>	65	39	38	41	40	52	56	55
	3.0%	2.5%	2.3%	2.3%	2.0%	2.5%	2.6%	2.5%
<b>Other Japanese brands</b>	81	38	30	37	41	40	40	46
	3.8%	2.4%	1.9%	2.0%	2.1%	1.9%	1.9%	2.1%
<b>Hyundai-Kia</b>	52	6	3	4	7	6	5	4
	2.4%	0.4%	0.2%	0.2%	0.4%	0.3%	0.2%	0.2%
<b>Other brands (including MG-Rover, Saab)</b>	78	27	30	35	26	20	24	25
	3.6%	1.7%	1.9%	1.9%	1.3%	0.9%	1.1%	1.1%
<b>TOTAL EU + EFTA</b>	2,149	1,569	1,627	1,813	2,011	2,089	2,157	2,218
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		8.8%	10.9%	-9.8%	10.9%	3.9%	3.3%	2.8%

(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 + Alpine + Dacia + Lada (since January 1, 2017)

Fiat Chrysler Automobiles = Alfa Romeo + Fiat + Iveco + Lancia + Maseratti + 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 group = 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 01/01/2020



## REGISTRATIONS

► **NEW PASSENGER CAR REGISTRATIONS IN THE EUROPEAN UNION + EFTA IN 2019** (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 group	Japanese brands	Korean brands
Germany	3,607	351	62	73	215	133	113	1,314	280	332	390	314	202
	100%	9.7%	1.7%	2.0%	6.0%	3.7%	3.1%	36.4%	7.8%	9.2%	10.8%	8.7%	5.6%
Austria	329	36	8	11	27	18	19	114	19	23	17	38	27
	100%	11.0%	2.4%	3.4%	8.2%	5.4%	5.6%	34.5%	5.9%	6.8%	5.1%	11.7%	8.1%
Belgium	550	104	30	43	70	49	23	119	24	45	39	55	37
	100%	18.9%	5.4%	7.8%	12.8%	8.8%	4.3%	21.6%	4.4%	8.1%	7.2%	9.9%	6.8%
Denmark	225	43	16	19	14	12	3	62	13	10	12	43	17
	100%	19.2%	7.3%	8.5%	6.1%	5.1%	1.2%	27.7%	5.6%	4.3%	5.3%	19.0%	7.5%
Spain	1,258	239	72	98	142	86	70	290	57	60	58	188	125
	100%	19.0%	5.7%	7.8%	11.3%	6.9%	5.5%	23.0%	4.5%	4.8%	4.6%	14.9%	10.0%
Finland	114	10	2	3	5	3	1	30	8	4	6	27	11
	100%	8.7%	1.8%	2.2%	4.5%	3.0%	1.3%	25.9%	7.2%	3.5%	5.6%	24.0%	9.9%
France	2,214	708	262	380	549	410	88	286	79	86	81	211	85
	100%	32.0%	11.8%	17.1%	24.8%	18.5%	4.0%	12.9%	3.6%	3.9%	3.6%	9.5%	3.8%
Greece	114	24	7	10	6	4	8	21	4	5	5	27	11
	100%	21.2%	6.1%	8.6%	5.4%	3.7%	7.2%	18.2%	3.4%	4.5%	4.6%	23.7%	9.8%
Ireland	117	11	1	6	10	7	1	32	10	5	3	26	18
	100%	9.2%	0.8%	4.8%	8.2%	5.6%	0.5%	26.9%	8.2%	3.9%	2.8%	22.4%	15.0%
Italy	1,917	298	91	110	198	114	454	302	123	80	98	210	100
	100%	15.5%	4.7%	5.7%	10.3%	5.9%	23.7%	15.7%	6.4%	4.2%	5.1%	11.0%	5.2%
Luxembourg	55	7	2	3	5	4	3	16	3	6	6	4	2
	100%	13.0%	4.1%	6.1%	8.6%	7.1%	5.1%	28.6%	4.6%	10.6%	10.2%	6.9%	4.4%
The Netherlands	445	77	16	29	29	26	8	94	25	29	20	70	43
	100%	17.3%	3.5%	6.6%	6.6%	5.9%	1.8%	21.1%	5.7%	6.5%	4.4%	15.6%	9.6%
Portugal	224	48	15	24	36	29	17	28	9	17	21	28	11
	100%	21.7%	6.5%	10.6%	15.9%	13.0%	7.8%	12.4%	4.0%	7.4%	9.2%	12.6%	5.1%
United Kingdom	2,311	296	55	81	90	59	44	501	236	235	176	352	183
	100%	12.8%	2.4%	3.5%	3.9%	2.6%	1.9%	21.7%	10.2%	10.2%	7.6%	15.2%	7.9%
Sweden	356	16	3	10	16	12	8	98	9	25	20	58	32
	100%	4.5%	0.9%	2.8%	4.6%	3.4%	2.2%	27.7%	2.6%	6.9%	5.5%	16.2%	8.9%
European Union (15 countries)	13,838	2,269	641	899	1,413	966	859	3,306	898	959	952	1,650	904
	100%	16.4%	4.6%	6.5%	10.2%	7.0%	6.2%	23.9%	6.5%	6.9%	6.9%	11.9%	6.5%
Iceland	12	1	0	0	1	0	0	1	0	0	0	5	2
	100%	4.6%	1.6%	2.0%	7.4%	2.3%	0.9%	11.6%	3.7%	1.7%	1.7%	41.2%	20.3%
Norway	142	8	2	4	3	2	0	34	4	11	3	35	11
	100%	5.5%	1.2%	2.6%	1.8%	1.7%	0.2%	24.1%	2.6%	8.0%	2.4%	24.9%	7.6%
Switzerland	311	25	7	9	20	12	17	96	14	30	28	44	14
	100%	8.1%	2.1%	2.8%	6.4%	3.8%	5.5%	30.8%	4.5%	9.6%	9.1%	14.2%	4.5%
Europe (18 countries) (3)	14,303	2,302	650	912	1,436	981	877	3,437	917	1,001	984	1,735	932
	100%	16.1%	4.5%	6.4%	10.0%	6.9%	6.1%	24.0%	6.4%	7.0%	6.9%	12.1%	6.5%
Bulgaria	39	5	1	2	8	3	2	10	1	1	1	8	3
	100%	11.7%	3.4%	5.7%	20.3%	7.4%	4.2%	24.9%	3.8%	3.6%	2.0%	20.6%	7.0%
Croatia	63	11	3	4	9	6	3	18	2	2	1	10	5
	100%	18.1%	4.0%	5.7%	15.1%	9.2%	4.9%	28.5%	3.5%	2.7%	2.3%	16.1%	7.7%
Estonia	28	4	1	2	4	3	0	7	0	0	0	8	3
	100%	13.5%	4.8%	5.6%	14.9%	10.3%	1.5%	25.1%	1.6%	1.7%	1.7%	28.5%	9.4%
Hungary	158	16	2	3	19	8	7	29	16	4	5	47	13
	100%	10.0%	1.0%	1.9%	11.8%	4.8%	4.6%	18.1%	10.0%	2.6%	3.2%	29.5%	8.5%
Latvia	18	2	0	1	1	1	0	6	1	1	0	5	1
	100%	11.9%	2.7%	6.4%	8.2%	2.8%	1.9%	31.2%	3.7%	3.0%	1.3%	27.3%	8.0%
Lithuania	46	2	0	1	3	1	21	8	1	1	0	8	2
	100%	4.7%	0.8%	3.0%	5.8%	3.1%	45.1%	17.6%	1.8%	1.9%	0.7%	16.3%	4.7%
Poland	554	61	12	15	57	28	20	151	30	23	22	121	54
	100%	11.1%	2.2%	2.8%	10.3%	5.0%	3.7%	27.3%	5.4%	4.1%	3.9%	21.8%	9.8%
Czech Rep.	250	23	7	11	25	10	3	116	10	6	7	25	29
	100%	9.1%	2.6%	4.5%	10.0%	4.0%	1.2%	46.2%	3.9%	2.2%	2.9%	10.2%	11.6%
Romania	162	14	3	4	64	14	2	26	12	4	4	22	11
	100%	8.9%	1.6%	2.3%	39.6%	8.4%	1.3%	16.2%	7.7%	2.4%	2.7%	13.5%	6.6%
Slovakia	102	15	4	6	11	4	2	33	2	3	3	15	17
	100%	15.0%	4.3%	6.0%	10.8%	3.9%	1.9%	32.1%	1.5%	2.7%	2.8%	14.7%	17.1%
Slovenia	60	11	3	4	9	7	3	19	2	2	1	7	4
	100%	18.9%	5.5%	6.5%	15.3%	12.3%	5.7%	32.3%	2.8%	2.7%	2.3%	11.4%	7.4%
11 new EU members	1,479	165	37	53	211	84	65	422	77	46	46	275	143
	100%	11.2%	2.5%	3.6%	14.2%	5.7%	4.4%	28.5%	5.2%	3.1%	3.1%	18.6%	9.7%
Europe (29 countries)	15,782	2,467	687	965	1,647	1,064	941	3,859	993	1,047	1,030	2,010	1,074
	100%	15.6%	4.3%	6.1%	10.4%	6.7%	6.0%	24.4%	6.3%	6.6%	6.5%	12.7%	6.8%

(1) Opel is included in PSA group since August 1, 2017.

(2) Respectively 635,943 units for Citroën and 49,681 for DS in EU-29.

(3) Europe (18 countries): EU (15 countries) and EFTA (Iceland, Norway and Switzerland).

# REGISTRATIONS

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

## ► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

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

	2000	2005	2010	2015	2016	2017	2018	2019
PSA group	1,930	2,012	1,776	1,423	1,410	1,785	2,338	2,302
	13.1%	13.8%	13.7%	10.8%	10.1%	12.5%	16.5%	16.1%
RENAULT group	1,559	1,442	1,305	1,230	1,369	1,445	1,439	1,436
	10.6%	9.9%	10.1%	9.3%	9.8%	10.1%	10.1%	10.0%
FCA group	1,575	951	1,035	841	959	1,001	966	877
	10.7%	6.5%	8.0%	6.4%	6.9%	7.0%	6.8%	6.1%
Ford group	1,248	1,210	1,063	966	975	965	931	917
	8.5%	8.3%	8.2%	7.3%	7.0%	6.7%	6.6%	6.4%
General Motors	1,720	1,539	1,119	878	919	554	4	3
	11.7%	10.6%	8.6%	6.7%	6.6%	3.9%	0.0%	0.0%
Volkswagen group	2,776	2,743	2,757	3,202	3,277	3,317	3,305	3,437
	18.8%	18.9%	21.3%	24.3%	23.5%	23.2%	23.3%	24.0%
Daimler group	811	819	662	815	919	969	938	984
	5.5%	5.6%	5.1%	6.2%	6.6%	6.8%	6.6%	6.9%
BMW group	499	761	735	906	995	1,000	993	1,001
	3.4%	5.2%	5.7%	6.9%	7.1%	7.0%	7.0%	7.0%
Nissan	392	342	384	524	527	538	458	364
	2.7%	2.4%	3.0%	4.0%	3.8%	3.8%	3.2%	2.5%
Toyota-Lexus-Daihatsu	576	793	582	539	572	632	647	673
	3.9%	5.5%	4.5%	4.1%	4.1%	4.4%	4.6%	4.7%
Other Japanese brands	701	820	651	624	666	671	691	697
	4.8%	5.6%	5.0%	4.7%	4.8%	4.7%	4.9%	4.9%
Hyundai-Kia	303	530	539	760	829	865	903	919
	2.1%	3.6%	4.2%	5.8%	5.9%	6.0%	6.4%	6.4%
Volvo	230	243	222	274	276	286	304	321
	1.6%	1.7%	1.7%	2.1%	2.0%	2.0%	2.1%	2.2%
Tata group	112	125	97	174	226	230	227	216
	0.8%	0.9%	0.7%	1.3%	1.6%	1.6%	1.6%	1.5%
Other brands (including MG-Rover, Saab)	304	207	47	43	50	62	66	155
	2.1%	1.4%	0.4%	0.3%	0.4%	0.4%	0.5%	1.1%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	14,738	14,536	12,975	13,198	13,970	14,319	14,210	14,303
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	-2.1%	-1.4%	-5.0%	9.1%	5.8%	2.5%	-0.8%	0.7%

## ► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

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

	2000	2005	2010	2015	2016	2017	2018	2019
PSA group	349	370	326	329	352	430	496	521
	18.1%	18.4%	22.1%	19.6%	18.9%	22.3%	25.0%	25.5%
RENAULT group	272	296	251	274	300	307	313	328
	14.1%	14.7%	17.0%	16.3%	16.1%	15.9%	15.8%	16.1%
FCA group	275	256	214	201	238	234	234	236
	14.2%	12.8%	14.5%	12.0%	12.8%	12.1%	11.8%	11.5%
Ford group	180	225	161	251	299	311	331	326
	9.3%	11.2%	10.9%	15.0%	16.1%	16.1%	16.7%	16.0%
General Motors	92	146	75	96	99	54	0	0
	4.8%	7.3%	5.1%	5.7%	5.3%	2.8%	0.0%	0.0%
Volkswagen group	202	189	170	202	227	234	247	250
	10.5%	9.4%	11.6%	12.1%	12.2%	12.1%	12.4%	12.2%
Daimler group	178	152	133	164	177	189	189	206
	9.2%	7.6%	9.0%	9.8%	9.5%	9.8%	9.5%	10.1%
Nissan	100	101	41	48	63	65	59	55
	5.2%	5.1%	2.8%	2.9%	3.4%	3.4%	3.0%	2.7%
Toyota-Lexus-Daihatsu	69	62	37	38	36	46	50	48
	3.6%	3.1%	2.5%	2.3%	1.9%	2.4%	2.5%	2.4%
Other Japanese brands	102	85	36	35	38	37	37	43
	5.3%	4.2%	2.4%	2.1%	2.1%	1.9%	1.9%	2.1%
Hyundai-Kia	44	48	5	4	6	6	5	3
	2.3%	2.4%	0.4%	0.2%	0.3%	0.3%	0.2%	0.2%
Other brands (including MG-Rover, Saab)	69	76	26	34	25	19	23	24
	3.6%	3.8%	1.8%	2.0%	1.4%	1.0%	1.2%	1.2%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	1,931	2,004	1,475	1,674	1,860	1,933	1,984	2,041
	100%	100%	100%	100%	100%	100%	100%	100%
Year-on-year change	5.6%	3.8%	11.1%	11.2%	11.1%	3.9%	2.6%	2.9%

(1) Including Iceland since 2015.

The scope of the groups reflects their situation as at 01/01/2020 (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	2015	2016	2017	2018	2019
PSA group	99	73	57	61	101	161	165
	9.5%	8.5%	5.7%	5.3%	7.8%	11.6%	11.2%
RENAULT group	193	112	120	141	167	182	211
	18.7%	13.0%	12.1%	12.3%	13.0%	13.0%	14.2%
FCA group	50	45	30	34	43	51	65
	4.8%	5.3%	3.0%	3.0%	3.3%	3.6%	4.4%
Ford group	59	65	65	73	78	78	77
	5.7%	7.5%	6.6%	6.3%	6.0%	5.6%	5.2%
General Motors	132	76	64	75	46	0	0
	12.7%	8.9%	6.5%	6.5%	3.6%	0.0%	0.0%
Volkswagen group	257	226	314	361	396	421	422
	24.8%	26.4%	31.7%	31.4%	30.6%	30.1%	28.5%
Daimler group	11	13	24	35	42	45	46
	1.1%	1.6%	2.5%	3.0%	3.3%	3.2%	3.1%
BMW group	11	17	30	37	42	40	46
	1.0%	2.0%	3.0%	3.2%	3.3%	2.8%	3.1%
Nissan	19	23	36	34	38	39	30
	1.8%	2.6%	3.6%	3.0%	2.9%	2.8%	2.0%
Toyota-Lexus-Daihatsu	60	47	65	77	98	111	122
	5.8%	5.5%	6.5%	6.7%	7.6%	8.0%	8.3%
Other Japanese brands	91	67	71	89	95	109	122
	8.7%	7.9%	7.2%	7.7%	7.4%	7.8%	8.2%
Hyundai-Kia	39	75	95	108	120	130	141
	3.8%	8.7%	9.5%	9.4%	9.3%	9.3%	9.6%
Volvo	7	9	12	14	15	18	20
	0.6%	1.1%	1.2%	1.2%	1.2%	1.3%	1.3%
Tata group	2	3	4	6	7	8	8
	0.2%	0.3%	0.5%	0.5%	0.5%	0.6%	0.5%
Other brands (including MG-Rover, Saab)	7	6	3	5	4	5	5
	0.7%	0.7%	0.3%	0.4%	0.3%	0.4%	0.4%
<b>TOTAL NEW EU MEMBER STATES</b>	<b>1,035</b>	<b>857</b>	<b>991</b>	<b>1,148</b>	<b>1,291</b>	<b>1,397</b>	<b>1,479</b>
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		<b>-4.8%</b>	<b>12.0%</b>	<b>15.9%</b>	<b>12.5%</b>	<b>8.2%</b>	<b>5.9%</b>

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

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

	2005 (2)	2010	2015	2016	2017	2018	2019
PSA group	20	18	26	27	31	37	36
	13.6%	19.5%	18.4%	18.1%	19.9%	21.5%	20.5%
RENAULT group	35	15	26	29	30	36	34
	24.4%	16.3%	18.4%	19.0%	19.3%	20.9%	19.0%
FCA group	21	19	28	32	31	32	34
	14.7%	19.8%	20.4%	21.1%	20.0%	18.5%	19.1%
Ford group	14	10	18	20	20	24	25
	9.8%	10.1%	12.8%	13.2%	13.0%	13.7%	13.8%
General Motors	8	3	8	7	4	0	0
	5.2%	3.2%	5.8%	4.6%	2.7%	0.0%	0.0%
Volkswagen group	21	14	16	15	17	20	21
	14.7%	14.9%	11.6%	10.1%	10.9%	11.3%	12.1%
Daimler group	10	7	9	10	10	11	14
	6.8%	7.9%	6.4%	6.6%	6.2%	6.5%	7.7%
Nissan	2	2	2	3	3	3	2
	1.4%	2.5%	1.2%	2.0%	1.8%	1.5%	1.3%
Toyota-Lexus-Daihatsu	2	2	3	4	6	6	7
	1.6%	2.2%	2.2%	2.7%	3.7%	3.6%	4.1%
Other Japanese brands	3	2	2	3	2	3	3
	2.3%	2.1%	1.7%	1.7%	1.6%	1.6%	1.7%
Hyundai-Kia	5	1	1	1	1	1	0
	3.2%	0.7%	0.4%	0.4%	0.4%	0.3%	0.2%
Other brands (including MG-Rover, Saab)	4	1	1	1	1	1	1
	2.5%	0.8%	0.8%	0.6%	0.5%	0.6%	0.6%
<b>TOTAL NEW EU MEMBER STATES</b>	<b>145</b>	<b>95</b>	<b>139</b>	<b>151</b>	<b>156</b>	<b>173</b>	<b>177</b>
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		<b>-17.5%</b>	<b>17.5%</b>	<b>8.9%</b>	<b>3.5%</b>	<b>10.9%</b>	<b>2.0%</b>

(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 01/01/2019 (see page 74).

# REGISTRATIONS

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

	2000	2005	2010	2015	2016	2017	2018	2019
Germany	3,378,343	3,318,259	2,916,259	3,206,042	3,351,607	3,441,261	3,435,778	3,607,258
Austria	309,427	307,915	328,563	308,555	329,604	353,320	341,068	329,363
Belgium	515,204	480,088	547,340	501,066	539,519	546,558	549,632	550,003
Denmark	112,688	146,881	153,583	206,999	222,895	221,592	218,358	225,410
Spain	1,381,515	1,528,877	982,015	1,034,232	1,147,009	1,234,932	1,321,437	1,258,258
Finland	134,646	147,949	107,346	108,844	118,912	118,529	120,480	114,188
France	2,133,884	2,117,561	2,251,669	1,917,226	2,015,177	2,110,748	2,173,481	2,214,279
Greece	290,222	269,728	141,501	75,804	78,873	88,083	103,431	114,226
Ireland	230,989	171,741	88,445	124,804	146,649	131,332	125,557	117,100
Iceland	-	-	-	14,008	18,473	21,324	17,976	11,719
Italy	2,415,600	2,237,272	1,961,578	1,575,614	1,825,608	1,971,204	1,910,610	1,916,523
Luxembourg	41,896	48,517	49,726	46,473	50,561	52,775	52,786	54,923
Norway	97,376	109,907	127,754	150,686	154,603	158,650	147,929	142,381
The Netherlands	597,640	465,160	482,527	448,925	382,514	414,306	443,531	445,420
Portugal	257,834	206,488	223,464	178,503	207,330	222,129	228,327	223,806
United Kingdom	2,221,670	2,439,717	2,030,846	2,633,503	2,692,786	2,540,617	2,367,147	2,311,140
Sweden	290,529	274,301	289,684	345,108	372,318	379,393	353,729	356,036
Switzerland	316,519	264,941	292,453	321,669	315,295	311,996	299,135	311,256
<b>TOTAL EUROPE</b> <b>(17 then 18 countries) (1)</b>	<b>14,725,982</b>	<b>14,536,302</b>	<b>12,974,753</b>	<b>13,198,061</b>	<b>13,969,733</b>	<b>14,318,749</b>	<b>14,210,392</b>	<b>14,303,460</b>

(1) 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	2015	2016	2017	2018	2019
Germany	1,023,997 30.3%	1,404,479 42.2%	1,220,675 41.9%	1,534,990 47.9%	1,535,436 45.8%	1,330,413 38.7%	1,103,886 32.1%	1,152,034 31.9%
Austria	191,402 61.9%	199,908 64.9%	167,106 50.9%	179,821 58.3%	188,819 57.3%	175,456 49.7%	140,051 41.1%	125,794 38.2%
Belgium	290,301 56.3%	348,630 72.6%	415,728 76.0%	299,357 59.7%	279,528 51.8%	253,243 46.3%	194,941 35.5%	168,387 30.6%
Denmark	14,898 13.2%	35,356 24.1%	72,670 47.3%	64,095 31.0%	80,325 36.0%	77,572 35.0%	72,090 33.0%	58,706 26.0%
Spain	734,256 53.1%	1,036,789 67.8%	693,905 70.7%	647,108 62.6%	650,569 56.7%	597,439 48.4%	474,231 35.9%	348,671 27.7%
Finland	- -	25,110 17.0%	44,574 41.5%	38,857 35.7%	39,637 33.3%	36,279 30.6%	28,768 23.9%	21,213 18.6%
France	1,046,485 49.0%	1,466,296 69.2%	1,593,173 70.8%	1,097,124 57.2%	1,050,418 52.1%	998,116 47.3%	844,830 38.9%	755,583 34.1%
Greece	2,006 0.7%	4,189 1.6%	5,661 4.0%	47,792 63.0%	42,991 54.5%	39,022 44.3%	36,900 35.7%	30,390 26.6%
Ireland	23,259 10.1%	36,953 21.5%	55,016 62.2%	88,618 71.0%	102,610 70.0%	85,630 65.2%	68,238 54.3%	53,281 45.5%
Italy	812,203 33.6%	1,308,548 58.5%	901,310 45.9%	872,493 55.4%	1,040,194 57.0%	1,109,747 56.3%	975,833 51.1%	759,926 39.7%
Luxembourg	21,110 50.4%	36,561 75.4%	37,403 75.2%	32,694 70.4%	32,661 64.6%	28,474 54.0%	24,759 46.9%	22,961 41.8%
Norway	8,761 9.0%	43,146 39.3%	95,733 74.9%	61,482 40.8%	47,622 30.8%	36,613 23.1%	26,352 17.8%	22,744 16.0%
The Netherlands	134,426 22.5%	123,990 26.7%	98,477 20.4%	129,804 28.9%	72,526 19.0%	72,451 17.5%	57,391 12.9%	32,773 7.4%
Portugal	62,417 24.2%	131,731 63.8%	149,046 66.7%	121,650 68.2%	135,103 65.2%	136,203 61.3%	123,039 53.9%	113,899 50.9%
United Kingdom	313,149 14.1%	897,887 36.8%	936,448 46.1%	1,275,411 48.4%	1,285,383 47.7%	1,067,506 42.0%	747,574 31.6%	583,033 25.2%
Sweden	18,325 6.3%	26,527 9.7%	147,802 51.0%	198,956 57.7%	191,510 51.4%	183,723 48.4%	131,505 37.2%	114,803 32.2%
Switzerland	29,466 9.3%	75,247 28.4%	88,760 30.4%	124,898 38.8%	124,204 39.4%	113,007 36.2%	89,891 30.1%	79,533 25.6%
<b>TOTAL EUROPE</b> <b>(17 then 18 countries) (1)</b>	<b>4,726,461</b>	<b>7,198,347</b>	<b>6,723,487</b>	<b>6,821,827</b>	<b>6,907,793</b>	<b>6,349,843</b>	<b>5,147,162</b>	<b>4,447,252</b>
Diesel share in Europe	32.1%	49.5%	51.8%	51.7%	49.4%	44.3%	36.2%	31.1%
Year-on-year change	+10.7%	+2.2%	+6.9%	+5.9%	+1.3%	-8.1%	-18.9%	-13.6%

(1) Including Iceland since 2015.



# REGISTRATIONS

## ► NEW CARS WITH HYBRID ENGINES (RECHARGEABLE OR NOT) OR ELECTRICAL REGISTRATIONS IN WESTERN EUROPE (IN UNITS AND AS A % OF TOTAL REGISTRATIONS)

	POWER	2005	2010	2015	2016	2017	2018	2019
Germany	electric	0	160	12,319	11,163	24,294	34,360	60,527
		0.0%	0.0%	0.4%	0.3%	0.7%	1.0%	1.7%
	hybrid	3,559	10,174	32,714	47,055	84,135	129,334	234,760
		0.1%	0.3%	1.0%	1.4%	2.4%	3.8%	6.5%
Austria	electric	0	112	1,677	3,829	5,433	6,754	9,242
		0.0%	0.0%	0.5%	1.2%	1.5%	2.0%	2.8%
	hybrid	460	1,248	3,514	4,711	8,296	9,417	16,531
		0.1%	0.4%	1.1%	1.4%	2.3%	2.8%	5.0%
Belgium	electric	0	47	1,358	2,048	2,712	3,648	8,830
		0.0%	0.0%	0.3%	0.4%	0.5%	0.7%	1.6%
	hybrid	471	4,073	10,711	16,892	24,283	25,049	33,939
		0.1%	0.7%	2.1%	3.1%	4.4%	4.6%	6.2%
Denmark	electric	2	50	4,468	1,320	692	1,524	5,575
		0.0%	0.0%	2.2%	0.6%	0.3%	0.7%	2.5%
	hybrid	5	148	2,657	6,243	8,192	12,412	17,330
		0.0%	0.1%	1.3%	2.8%	3.7%	5.7%	7.7%
Spain	electric	0	69	1,461	2,143	3,920	6,130	10,050
		0.0%	0.0%	0.1%	0.2%	0.3%	0.5%	0.8%
	hybrid	908	6,253	20,547	27,688	58,312	80,311	112,809
		0.1%	0.6%	2.0%	2.4%	4.7%	6.1%	9.0%
France	electric	6	184	17,268	21,751	24,910	31,059	42,764
		0.0%	0.0%	0.9%	1.1%	1.2%	1.4%	1.9%
	hybrid	2,857	9,655	61,619	58,385	81,559	106,369	125,372
		0.1%	0.4%	3.2%	2.9%	3.9%	4.9%	5.7%
Italy	electric	28	112	1,452	1,377	2,020	4,998	10,665
		0.0%	0.0%	0.1%	0.1%	0.1%	0.3%	0.6%
	hybrid	1,132	4,841	26,262	38,868	66,443	86,837	114,847
		0.1%	0.2%	1.7%	2.1%	3.4%	4.5%	6.0%
Norway	electric	7	355	25,779	24,222	33,025	46,092	60,315
		0.0%	0.3%	17.1%	15.7%	20.8%	31.2%	42.4%
	hybrid	337	3,144	15,704	38,154	49,803	43,070	37,782
		0.3%	2.5%	10.4%	24.7%	31.4%	29.1%	26.5%
The Netherlands	electric	0	96	3,204	3,988	7,959	23,985	61,638
		0.0%	0.0%	0.7%	1.0%	1.9%	5.4%	13.8%
	hybrid	2,940	16,099	56,261	30,020	20,651	25,637	34,798
		0.6%	3.3%	12.5%	7.8%	5.0%	5.8%	7.8%
United Kingdom	electric	0	167	9,934	10,264	13,591	15,474	37,782
		0.0%	0.0%	0.4%	0.4%	0.5%	0.7%	1.6%
	hybrid	5,766	22,148	64,692	79,506	106,334	139,496	199,466
		0.2%	1.1%	2.5%	3.0%	4.2%	5.9%	8.6%
Sweden	electric	1	9	2,880	2,945	4,217	7,078	15,595
		0.0%	0.0%	0.8%	0.8%	1.1%	2.0%	4.4%
	hybrid	1,947	3,628	14,478	23,896	34,648	44,449	57,445
		0.7%	1.3%	4.2%	6.4%	9.1%	12.6%	16.1%
Switzerland	electric	13	199	3,777	3,372	4,726	5,161	13,143
		0.0%	0.1%	1.2%	1.1%	1.5%	1.7%	4.2%
	hybrid	1,413	4,210	8,400	10,494	11,717	15,185	26,894
		0.5%	1.4%	2.6%	3.3%	3.8%	5.1%	8.6%
TOTAL EUROPE (17 then 18 countries including...)	electric	57	1,611	87,206	90,181	131,101	193,493	349,179
		0.0%	0.0%	0.7%	0.6%	0.9%	1.4%	2.4%
	hybrid	23,210	90,198	333,028	404,241	583,131	759,984	1,068,281
		0.2%	0.7%	2.5%	2.9%	4.1%	5.3%	7.5%

(1) Including Iceland since 2015.

# REGISTRATIONS

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

	2000	2005	2010	2015	2016	2017	2018	2019
Germany	212,290	202,372	202,446	243,305	263,495	275,050	290,155	309,959
Austria	27,243	28,878	28,130	33,013	36,104	40,348	43,769	43,578
Belgium	54,090	62,672	56,006	65,179	72,421	80,933	83,023	86,672
Denmark	33,092	58,076	16,848	33,177	37,493	37,081	35,037	34,529
Spain	299,246	387,203	116,770	155,400	172,796	199,661	215,227	215,789
Finland	15,056	16,211	11,550	11,986	14,181	16,054	16,401	15,611
France	414,966	420,065	417,612	379,428	410,102	438,654	459,140	479,784
Greece	23,008	23,374	10,935	5,756	5,767	6,769	7,059	8,144
Ireland	41,474	37,073	10,486	23,837	28,203	24,207	25,444	25,332
Iceland	-	-	-	1362	1,794	2,172	1,977	1,451
Italy	225,517	207,067	177,887	134,265	201,146	194,947	182,587	188,591
Luxembourg	3,083	3,064	3,291	4,016	4,614	4,908	4,921	5,308
Norway	31,627	37,021	30,422	34,394	37,180	37,453	38,907	39,313
The Netherlands	96,570	66,232	49,863	57,921	70,654	73,633	79,339	76,543
Portugal	152,836	66,774	45,756	30,996	35,007	38,715	39,394	38,445
United Kingdom	245,163	330,436	231,539	380,996	383,193	369,788	367,129	376,390
Sweden	31,854	35,098	38,543	45,124	52,002	55,640	56,867	54,127
Switzerland	24,121	22,428	26,507	34,297	34,066	36,890	37,505	40,659
TOTAL EUROPE (17 then 18 countries) (1)	1,931,236	2,004,044	1,474,591	1,674,452	1,860,218	1,932,903	1,983,881	2,040,535

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

	2000	2005	2010	2015	2016	2017	2018	2019
Germany	96,830	88,364	75,014	85,002	87,695	88,071	90,117	93,717
Austria	8,508	8,235	5,138	7,151	7,829	8,041	8,094	7,946
Belgium	11,061	11,657	7,133	8,188	9,497	9,952	10,803	11,518
Denmark	4,597	5,902	2,682	4,687	5,033	4,950	4,917	4,951
Spain	33,700	39,753	13,215	22,043	24,340	24,190	23,587	24,020
Finland	3,072	3,492	2,368	2,400	2,924	3,182	3,226	3,237
France	57,918	55,281	34,221	41,714	47,134	50,419	54,284	55,215
Greece	1,633	1,589	1,081	439	276	426	315	402
Ireland	4,666	4,621	1,011	1,867	2,511	2,275	2,152	2,230
Iceland	-	-	-	183	282	391	399	273
Italy	38,388	35,313	17,532	15,020	23,548	24,121	25,264	23,268
Luxembourg	1,451	1,394	803	1,089	1,232	1,234	1,290	1,290
Norway	3,564	4,952	3,126	4,366	5,060	5,097	5,658	6,117
The Netherlands	16,835	13,405	9,390	13,546	15,148	14,490	15,822	15,220
Portugal	7,403	4,588	3,116	3,956	4,783	5,236	5,073	4,770
United Kingdom	51,864	53,344	27,988	44,364	46,715	45,501	43,544	47,700
Sweden	5,549	5,688	4,605	5,289	6,340	6,662	6,690	7,165
Switzerland	4,733	3,817	3,388	4,079	4,165	4,605	4,474	4,405
TOTAL EUROPE (17 then 18 countries) (1)	351,772	341,395	211,811	265,383	294,512	298,843	305,709	313,444

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

	2000	2005	2010	2015	2016	2017	2018	2019
Germany	5,684	4,891	4,697	5,476	6,070	6,026	6,010	6,125
Austria	706	565	733	878	1,008	1,215	1,107	1,146
Belgium	974	754	909	778	593	715	976	1,250
Denmark	419	315	450	269	202	298	231	184
Spain	2,738	3,655	2,119	2,537	3,202	3,448	3,244	3,147
Finland	-	252	300	330	407	347	306	518
France	4,320	4,776	5,382	6,724	6,059	5,979	5,842	6,417
Greece	374	575	325	44	91	67	147	202
Ireland	121	271	47	313	362	339	441	442
Iceland	-	-	-	34	103	37	64	48
Italy	4,152	4,514	3,931	2,163	2,509	3,007	4,118	3,100
Luxembourg	108	147	173	247	196	235	207	263
Norway	427	708	1,052	660	1,148	723	733	2,013
The Netherlands	949	1,134	524	332	817	870	541	910
Portugal	806	620	418	199	278	305	458	497
United Kingdom	4,496	4,630	3,203	3,931	4,245	3,706	3,499	3,100
Sweden	1,071	1,021	1,302	1,172	1,158	1,141	804	1,150
Switzerland	491	457	476	689	607	641	629	568
TOTAL EUROPE (17 then 18 countries) (1)	27,836	29,285	26,041	26,776	29,055	29,099	29,357	31,884

(1) Including Iceland since 2015.

# REGISTRATIONS

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

	2005	2010	2015	2016	2017	2018	2019
Bulgaria	-	15,646	24,256	27,162	33,265	37,506	39,118
Croatia	70,541	38,587	35,715	44,106	50,769	60,041	62,938
Estonia	19,640	10,295	21,033	22,997	25,618	26,297	27,585
Hungary	198,982	43,476	77,171	96,555	116,265	136,601	157,906
Latvia	16,602	6,365	13,766	16,357	16,698	16,878	18,233
Lithuania	10,467	7,970	17,071	20,284	25,836	32,382	46,388
Poland	235,522	333,490	352,378	418,033	487,593	531,335	553,942
Czech Republic	151,699	169,580	230,857	259,693	271,595	261,437	249,915
Romania	215,554	106,333	81,162	94,919	105,083	130,919	161,562
Slovakia	57,125	64,033	77,979	88,165	96,105	98,195	101,568
Slovenia	59,324	61,142	59,664	58,963	62,522	65,115	59,862
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>749,361</b>	<b>818,330</b>	<b>991,052</b>	<b>1,147,234</b>	<b>1,291,349</b>	<b>1,396,706</b>	<b>1,479,017</b>

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

	2005	2010	2015	2016	2017	2018	2019
Bulgaria	-	3,211	4,875	4,873	5,129	4,699	4,667
Croatia	7,671	2,845	6,909	8,359	8,535	9,149	9,143
Estonia	2,944	1,406	3,962	4,423	4,834	5,070	4,487
Hungary	20,479	9,337	17,719	21,545	20,200	23,053	26,410
Latvia	1,753	649	2,473	2,324	2,337	2,447	2,783
Lithuania	3,371	1,044	2,533	3,003	3,410	3,884	4,606
Poland	35,985	42,852	55,207	57,416	59,170	67,263	68,010
Czech Republic	16,024	11,318	17,595	19,472	19,529	20,456	20,612
Romania	35,842	10,404	13,471	15,269	16,898	18,870	19,122
Slovakia	14,428	6,953	7,321	7,499	7,584	9,048	8,534
Slovenia	6,897	4,744	6,686	7,782	8,742	9,021	8,653
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>101,881</b>	<b>91,918</b>	<b>138,751</b>	<b>151,965</b>	<b>156,368</b>	<b>172,960</b>	<b>177,027</b>

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

	2005	2010	2015	2016	2017	2018	2019
Bulgaria	-	18,857	29,131	32,035	38,394	42,205	43,785
Croatia	78,212	41,432	42,624	52,465	59,304	69,190	72,081
Estonia	22,584	11,701	24,995	27,420	30,452	31,367	32,072
Hungary	219,461	52,813	94,890	118,100	136,465	159,654	184,316
Latvia	18,355	7,014	16,239	18,681	19,035	19,325	21,016
Lithuania	13,838	9,014	19,604	23,287	29,246	36,266	50,994
Poland	271,507	376,342	407,585	475,449	546,763	598,598	621,952
Czech Republic	167,723	180,898	248,452	279,165	291,124	281,893	270,527
Romania	251,396	116,737	94,633	110,188	121,981	149,789	180,684
Slovakia	71,553	70,986	85,300	95,664	103,689	107,243	110,102
Slovenia	66,221	65,886	66,350	66,745	71,264	74,136	68,515
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>851,242</b>	<b>910,248</b>	<b>1,129,803</b>	<b>1,299,199</b>	<b>1,447,717</b>	<b>1,569,666</b>	<b>1,656,044</b>

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

	2005	2010	2015	2016	2017	2018	2019
Bulgaria (2)	-	1,000	1,500	1,600	1,900	2,100	2,200
Croatia	1,463	599	1,044	1,464	1,479	1,543	1,741
Estonia	927	502	934	979	1,207	1,171	1,207
Hungary	4,400	2,408	6,045	5,714	6,238	6,580	5,776
Latvia	1,284	520	1,372	1,663	1,670	1,709	1,169
Lithuania	2,297	1,355	3,633	6,055	7,205	8,694	7,688
Poland	11,079	11,611	23,226	27,019	28,216	30,371	28,758
Czech Republic	8,200	5,750	12,416	12,629	10,725	10,897	10,889
Romania	5,019	2,686	6,485	8,260	6,360	7,693	7,740
Slovakia	3,754	2,870	4,637	4,783	4,588	4,581	3,691
Slovenia	1,635	985	2,025	2,537	2,521	2,833	2,456
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>33,500</b>	<b>29,700</b>	<b>63,317</b>	<b>72,703</b>	<b>72,109</b>	<b>78,172</b>	<b>73,315</b>

(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	2015	2016	2017	2018	2019
Citroën	1,168,470	1,379,082	1,452,847	1,153,855	1,135,894	1,054,146	1,053,240	980,758
DS				103,342	85,218	51,473	53,746	62,601
Peugeot	1,708,968	1,996,284	2,152,331	1,702,393	1,915,220	2,126,674	1,756,034	1,455,444
Opel	-	-	-	-	-	400,324	988,462	920,314
Others	-	-	-	22,191	16,527	17,125	16,508	17,092
PSA group	2,877,438	3,375,366	3,605,178	2,981,781	3,152,859	3,649,742	3,867,990	3,436,209
Renault	2,356,616	2,326,359	2,099,027	2,255,701	2,664,073	2,792,190	2,643,374	2,610,246
Alpine	-	-	-	-	-	117	3,304	4,244
Dacia	55,183	172,021	341,090	570,533	612,728	690,170	737,346	696,018
Renault Samsung Motors	14,517	118,438	276,169	206,418	234,147	264,020	215,851	143,143
Lada	-	-	-	-	-	407,092	521,079	407,963
Renault group (1)	2,426,316	2,616,818	2,716,286	3,032,652	3,510,948	4,153,589	4,120,954	3,861,614
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	-	-	-	-	-	-	-
<b>TOTAL (4)</b>	<b>5,402,776</b>	<b>6,056,172</b>	<b>6,353,338</b>	<b>6,014,433</b>	<b>6,663,807</b>	<b>7,794,624</b>	<b>7,964,877</b>	<b>7,271,006</b>

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	192,238	205,376	180,462	185,969	195,360	204,000	204,210	192,631
Peugeot	186,917	187,300	210,252	208,075	217,665	230,862	245,871	241,559
Opel	-	-	-	-	-	35,635	104,183	115,509
Others	-	-	-	22,191	16,527	17,125	16,508	17,092
PSA group	379,155	392,676	390,714	416,235	429,552	487,622	570,772	566,791
Renault	312,801	401,785	302,706	387,670	420,564	426,425	470,440	457,961
Dacia	12,580	19,871	17,704	28,208	31,238	34,484	35,312	27,434
Renault group (1)	325,381	421,656	320,410	415,878	451,802	460,909	505,752	485,395
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	-	-	-	-	-	-	-
<b>TOTAL (4)</b>	<b>803,558</b>	<b>878,320</b>	<b>742,998</b>	<b>832,113</b>	<b>881,354</b>	<b>939,824</b>	<b>1,052,457</b>	<b>1,025,369</b>

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

	2000	2005	2010	2015	2016	2017	2018	2019
<b>FOREIGN MANUFACTURERS</b>								
Bugatti	-	5	0	-	-	-	-	-
Fiat	10,377	8,304	888	-	-	-	-	-
Heuliez	-	37,390	0	0	0	0	0	1
Lancia	2,265	5,713	1,561	-	-	-	-	-
Smart	101,365	77,015	97,373	93,357	90,725	84,368	84,500	67,300 (5)
Toyota	0	180,643	158,512	228,033	237,851	233,506	248,548	223,024
Passenger cars	114,007	309,070	258,334	321,390	328,576	317,874	333,048	290,324
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
<b>TOTAL FOREIGN MANUFACTURERS</b>	<b>164,680</b>	<b>342,828</b>	<b>290,853</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
<b>FRENCH MANUFACTURERS</b>								
<b>TOTAL FRENCH MANUFACTURERS (4)</b>	<b>3,183,681</b>	<b>3,206,180</b>	<b>1,938,528</b>	<b>1,656,470</b>	<b>1,753,473</b>	<b>1,907,845</b>	<b>1,936,641</b>	<b>1,885,026</b>
<b>FRENCH AND FOREIGN MANUFACTURERS</b>								
<b>TOTAL ALL VEHICLES (4)</b>	<b>3,348,361</b>	<b>3,549,008</b>	<b>2,229,381</b>	<b>1,977,860</b>	<b>2,082,049</b>	<b>2,225,719</b>	<b>2,269,689</b>	<b>2,175,350</b>

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).

(5) Estimates June 2020.



# WORLD PRODUCTION BY FRENCH GROUPS

## ► PASSENGER CAR PRODUCTION BY BRAND (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	976,232	1,173,706	1,272,385	967,886	940,534	850,146	849,030	788,127
DS	-	-	-	103,342	85,218	51,473	53,746	62,601
Peugeot	1,522,051	1,808,984	1,942,079	1,494,318	1,697,555	1,895,812	1,510,163	1,213,885
Opel	-	-	-	-	-	364,689	884,279	804,805
PSA group	2,498,283	2,982,690	3,214,464	2,565,546	2,723,307	3,162,120	3,297,218	2,869,418
Renault	2,043,815	1,924,574	1,796,321	1,868,031	2,243,509	2,365,765	2,172,934	2,152,285
Alpine	-	-	-	-	-	117	3,304	4,244
Dacia	42,603	152,150	323,386	542,325	581,490	655,686	702,034	668,584
Renault Samsung Motors	14,517	118,438	276,169	206,418	234,147	264,020	215,851	143,143
Lada	-	-	-	-	-	407,092	521,079	407,963
Renault group (1)	2,100,935	2,195,162	2,395,876	2,616,774	3,059,146	3,692,680	3,615,202	3,376,219
<b>TOTAL</b>	<b>4,599,218</b>	<b>5,177,852</b>	<b>5,610,340</b>	<b>5,182,320</b>	<b>5,782,453</b>	<b>6,854,800</b>	<b>6,912,420</b>	<b>6,245,637</b>
of which production in France	2,765,803	2,803,891	1,665,797	1,241,794	1,300,111	1,436,389	1,440,700	1,375,463
Citroën	504,323	605,988	468,398	204,040	186,831	55,047	35,731	119,364
DS	-	-	-	80,980	70,468	45,363	49,412	62,282
Peugeot	1,094,756	1,155,292	722,214	607,150	648,536	884,415	897,497	804,101
Opel	-	-	-	-	-	28,820	72,110	85,841
PSA group	1,599,079	1,761,280	1,190,612	892,170	905,835	1,013,645	1,054,750	1,071,588
Renault	1,166,724	1,042,611	475,185	349,624	394,276	422,627	382,646	299,631
Alpine	-	-	-	-	-	117	3,304	4,244
Renault group (1)	1,166,724	1,042,611	475,185	349,624	394,276	422,744	385,950	303,875

(1) See notes page 82.

## ► PASSENGER CAR PRODUCTION BY MODEL IN 2019 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
<b>PSA group</b>	<b>2,869,418</b>	<b>1,071,588</b>	<b>1,797,830</b>
Citroën	788,127	119,364	668,763
C-ZERO	1,430	0	1,430
C1	52,870	0	52,870
C3, C3 AIRCROSS, C3 PICASSO	344,930	0	344,930
C4, C4 AIRCROSS, C4 CACTUS	126,535	0	126,535
C-ELYSEE	44,050	0	44,050
C5, C5 AIRCROSS	125,678	108,196	17,482
C6	2,729	0	2,729
BERLINGO	76,958	0	76,958
SPACETOURER	11,168	11,168	0
Others	1,779	0	1,779
<b>DS</b>	<b>62,601</b>	<b>62,282</b>	<b>319</b>
DS3	4,399	4,399	0
DS3 CROSSBACK	27,115	27,115	0
DS5	15	0	15
DS7 CROSSBACK	31,019	30,726	293
Others	53	42	11
<b>Peugeot</b>	<b>1,213,885</b>	<b>804,101</b>	<b>409,784</b>
ION	631	0	631
108	58,572	0	58,572
208	261,414	104,326	157,088
2008	181,587	146,445	35,142
301	23,343	0	23,343
308	159,212	146,615	12,597
3008	241,237	236,507	4,730
5008	100,982	92,078	8,904
408	12,118	0	12,118
4008	17,080	0	17,080
508	61,586	56,190	5,396
RIFTER	69,925	0	69,925
PARTNER	1,870	0	1,870
TRAVELLER	13,329	11,037	2,292
Others	10,999	10,903	96

Brands/Models	World production	Production in France	Production outside France
<b>OPEL</b>	<b>804,805</b>	<b>85,841</b>	<b>718,964</b>
CORSA	223,161	0	223,161
CROSSLAND	127,240	0	127,240
ASTRA, ZAFIRA LIFE	161,206	2,893	158,313
GRANDLAND	102,829	82,948	19,881
INSIGNIA, CASCADA	47,137	0	47,137
COMBO	27,104	0	27,104
Others	116,128	0	116,128
<b>Renault group</b>	<b>3,376,219</b>	<b>303,875</b>	<b>3,072,344</b>
Renault	2,152,285	299,631	1,852,654
TWINGO	70,913	0	70,913
CLIO	482,838	41,931	440,907
KWID	190,112	0	190,112
KADJAR	115,956	0	115,956
CAPTUR	302,133	0	302,133
ZOE	64,063	64,063	0
LOGAN, SANDERO	267,263	0	267,263
DUSTER	156,613	0	156,613
MEGANE	196,050	67,593	128,457
FLUENCE	37,838	0	37,838
KOLEOS	27,454	0	27,454
TALISMAN	15,013	15,013	0
ESPACE	8,958	8,958	0
KANGOO	35,831	35,831	0
Others	181,250	66,242	115,008
Alpine	4,244	4,244	0
Dacia	668,584	0	668,584
LOGAN, SANDERO	333,633	0	333,633
DUSTER	243,305	0	243,305
DOKKER	58,199	0	58,199
LODGY	33,447	0	33,447
Renault Samsung Motors	143,143	0	143,143
ROGUE	69,484	0	69,484
FLUENCE	4,071	0	4,071
LATITUDE	2,676	0	2,676
KOLEOS	47,100	0	47,100
TALISMAN	16,414	0	16,414
SM7, XM3	3,398	0	3,398
Lada	407,963	0	407,963
GRANTA, GRANTA HATCHBACK	175,139	0	175,139
VESTA	61,823	0	61,823
Others (Kalina, 4x4, others)	171,001	0	171,001
<b>TOTAL</b>	<b>6,245,637</b>	<b>1,375,463</b>	<b>4,870,174</b>

NB : Renault also produced 1,805 Twizy at its Valladolid plant (Spain) and Busan (South Korea).  
Source: CCFA

# WORLD PRODUCTION BY FRENCH GROUPS

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	192,238	205,376	180,462	185,969	195,360	204,000	204,210	192,631
Peugeot	186,917	187,300	210,252	208,075	217,665	230,862	245,871	241,559
Opel	-	-	-	-	-	35,635	104,183	115,509
Others	-	-	-	22,191	16,527	17,125	16,508	17,092
PSA group (1)	379,155	392,676	390,714	416,235	429,552	487,622	570,772	566,791
Renault (2)	312,801	401,785	302,706	387,670	420,564	426,425	470,440	457,961
Dacia	12,580	19,871	17,704	28,208	31,238	34,484	35,312	27,434
Renault group (1)	325,381	421,656	320,410	415,878	451,802	460,909	505,752	485,395
Renault Trucks (1)	8,321	9,460	-	-	-	-	-	-
Others	42	24	-	-	-	-	-	-
<b>TOTAL (3)</b>	<b>712,899</b>	<b>823,816</b>	<b>711,124</b>	<b>832,113</b>	<b>881,354</b>	<b>939,824</b>	<b>1,052,457</b>	<b>1,025,369</b>
of which production in France (3)	370,538	361,521	243,029	414,676	453,362	471,456	495,941	509,563
Citroën	53,561	58,223	42,882	41,471	45,752	40,876	42,405	31,826
Peugeot	67,629	68,166	38,514	39,058	40,320	58,073	72,704	60,488
Opel	-	-	-	-	-	8,707	24,067	44,809
Others	-	-	-	22,191	16,527	16,747	16,508	17,092
PSA group (1)	121,190	126,389	81,396	102,720	102,599	124,403	155,684	154,215
Renault	240,985	225,648	161,633	311,956	350,763	355,760	364,324	382,165
Renault group (1)	240,985	225,648	161,633	311,956	350,763	355,760	364,324	382,165
Renault Trucks (1)	8,321	9,460	-	-	-	-	-	-
Others	42	24	-	-	-	-	-	-

(1) See notes page 74.

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

(3) Excluding double count production of Opel Movano and Opel Vivaro from 2017.

## ► LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2019 (IN UNITS)

Brands/models	World production	Production in France	Production outside France
<b>PSA group</b>	<b>566,791</b>	<b>154,215</b>	<b>412,576</b>
<b>Citroën</b>	<b>192,631</b>	<b>31,826</b>	<b>160,805</b>
C3	9,359	0	9,359
C4	1,878	0	1,878
BERLINGO	73,702	0	73,702
JUMPY	43,359	31,826	11,533
JUMPER	64,333	0	64,333
<b>Peugeot</b>	<b>241,559</b>	<b>60,488</b>	<b>181,071</b>
208	12,449	12,447	2
308	3,381	3,381	0
PARTNER	95,144	0	95,144
EXPERT	57,696	44,660	13,036
BOXER	72,233	0	72,233
Others	656	0	656
<b>Opel</b>	<b>115,509</b>	<b>44,809</b>	<b>70,700</b>
COMBO	36,481	0	36,481
MOVANO	26,245	26,245	0
ZAFIRA/VIVARO	52,783	18,564	34,219
Others	17,092	17,092	0
<b>Renault group</b>	<b>485,395</b>	<b>382,165</b>	<b>103,230</b>
<b>Renault</b>	<b>457,961</b>	<b>382,165</b>	<b>75,796</b>
DOKKER/LUDOSPACE	16,553	0	16,553
KANGOO	113,909	113,909	0
TRAFIC	124,823	124,823	0
MASTER	153,758	143,433	10,325
Others (Alaskan, Jinbei)	48,918	0	48,918
<b>Dacia</b>	<b>27,434</b>	<b>0</b>	<b>27,434</b>
LUDOSPACE	27,434	0	27,434
<b>TOTAL (1)</b>	<b>1,025,369</b>	<b>509,563</b>	<b>515,806</b>

(1) Excluding Opel's double count production in 2019.

Source: CCFA

## WORLD PRODUCTION BY FRENCH GROUPS

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

	2000	2010	2013 (1)	2014	2015	2016	2017	2018	2019
Renault Trucks	87,719	31,874	32,295	25,702	31,598	31,933	34,026	36,621	36,870
of which Mack Trucks	34,562	-	-	-	-	-	-	-	-
Others	2	0	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>87,721</b>	<b>31,874</b>	<b>32,295</b>	<b>25,702</b>	<b>31,598</b>	<b>31,933</b>	<b>34,026</b>	<b>36,621</b>	<b>36,870</b>
of which production in France	44 402	29 702	-	-	-	-	-	-	-
Renault Trucks	44 400	29 702	-	-	-	-	-	-	-
Others	2	-	-	-	-	-	-	-	-

(1) The perimeter of industrial vehicles bears from 2012 on invoices of 7 tonnes and more.

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

	2000	2010	2013	2014	2015	2016	2017	2018	2019
Renault Trucks	-	-	-	-	-	-	-	-	-
C.B.M.	-	-	-	-	-	-	-	-	-
Heuliez (1)	391	-	-	-	-	-	-	-	-
Irisbus-Renault (1)	2,547	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>2,938</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
dont production en 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	2018	2019
<b>TOTAL</b>	<b>52,172</b>	<b>43,956</b>	<b>38,648</b>	<b>46,973</b>	<b>47,983</b>	<b>49,930</b>	<b>54,868</b>	<b>54,098</b>
16t and more	30,771	25,302	21,266	26,111	25,976	28,327	30,521	30,002
7 to <16t	7,460	6,993	4,436	5,487	5,957	5,699	6,100	5,948
<7t	13,941	11,661	12,946	15,375	16,050	15,904	18,247	18,148

### ► RENAULT TRUCKS RANGE

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

Source: CCFA

# WORLD PRODUCTION BY FRENCH GROUPS

## ► COMMERCIAL VEHICLES PRODUCTION (INCLUDING COACHES AND BUSES) BY WEIGHT AND ENGINE TYPE (IN UNITS)

		2000	2005	2010	2014	2015	2016	2017	2018	2019
Less than 3.5t		577,926	670,654	531,452	544,739	588,686	619,851	666,597	742,675	708,800
	P	55,883	39,019	61,998	52,488	46,973	54,803	86,109	n/a	n/a
	D	521,229	631,499	469,178	486,431	537,345	558,175	573,437	n/a	n/a
	E	814	136	276	5,820	4,368	6,873	7,051	9,565	13,057
From 3.5t to less than 5.1t		134,973	153,162	179,672	213,887	243,427	261,503	273,227	309,782	316,569
	P	1,724	719	0	0	0	0	0	0	0
	D	133,249	152,443	179,672	213,887	243,427	261,503	273,227	309,455	316,215
	E	-	-	-	-	-	-	-	327	354
From 5.1t to 12t	D	13,593	11,820	2,453	n/a	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	n/a
From 16t to 20t	D	7,304	7,115	4,484	n/a	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	n/a
Tractors	D	20,998	20,237	16,328	n/a	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	52,488	46,973	54,803	86,109	n/a	n/a
Total diesel		710,243	838,446	680,724	n/a	n/a	n/a	n/a	n/a	n/a
Total electric		814	136	276	5,820	4,368	6,873	7,051	9,892	13,411
Total NGV or LPG		332	-	-	-	-	-	-	-	-
General total		768,996	878,320	742,998	n/a	n/a	n/a	n/a	n/a	n/a

P: Petrol. D: Diesel. E: Electric. G: NGV or LPG.

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

	2000	2005	2010	2014	2015	2016	2017	2018	2019
<b>Cars derivatives</b>									
Citroën	29,449	26,227	14,972	13,072	11,715	13,905	11,900	9,773	11,237
Peugeot	41,451	38,133	33,403	18,720	19,122	19,073	18,643	17,198	16,486
Opel	-	-	-	-	-	-	994	3,689	-
PSA group	70,900	64,360	48,375	31,792	30,837	32,978	31,537	30,660	27,723
Renault-Dacia	60,320	55,009	48,167	37,810	40,158	35,984	33,041	32,703	0 (2)
Total	131,220	119,369	96,542	69,602	70,995	68,962	64,578	63,363	27,723
<b>Small vans</b>									
Citroën	100,832	97,954	98,042	89,765	90,957	91,048	92,950	87,752	73,702
Peugeot	70,443	70,480	97,608	93,909	95,144	96,641	99,590	97,140	95,144
Opel	-	-	-	-	-	-	5,865	14,494	36,481
PSA group	171,275	168,434	195,650	183,674	186,101	187,689	198,405	199,386	205,327
Renault-Dacia	147,670	118,404	97,142	109,070	117,863	124,282	126,400	106,460	157,896
Total	318,945	286,838	292,792	292,744	303,964	311,971	324,805	305,846	363,223
<b>Vans</b>									
Citroën	61,957	81,195	67,448	74,657	83,297	90,407	99,150	106,685	107,692
Peugeot	75,023	78,687	79,241	82,419	93,809	101,951	112,629	131,533	129,929
Opel (1)	-	-	-	-	-	-	28,776	86,000	79,028
Others	-	-	-	22,670	22,191	16,527	17,125	16,508	17,092
PSA group	136,980	159,882	146,689	179,746	199,297	208,885	257,680	340,726	333,741
Renault	104,811	228,372	148,404	189,314	224,799	259,484	263,506	269,228	278,581
Renault Trucks	8,321	9,460	0	0	0	0	0	0	0
Sovam-Etalmobil	42	24	0	0	0	0	0	0	0
Total (1)	250,154	397,738	295,093	369,060	424,096	468,369	512,479	585,887	585,505
<b>Others (Pick-ups, 4WD, others)</b>									
Renault-Dacia-Samsung	12,580	19,871	26,697	27,220	33,058	32,052	37,962	97,361	48,918
TOTAL	712,899	823,816	711,124	758,626	832,113	881,354	939,824	1,052,457	1,025,369

(1) Excluding double production of Opel Movano and Opel Vivaro from 2017.

(2) Cars derivatives have been accounted for in cars.

Source: CCFA



## DELIVERIES BY FRENCH MANUFACTURERS OUTSIDE FRANCE

The perimeter of the groups is the one of January 1st of the year of the data.

Vehicle deliveries by French manufacturers include mounted vehicles and spare parts collections. From 2005, deliveries from Dacia outside France are included in the scope, then those of Renault Samsung Motors in 2007. In addition, some deliveries are assigned to zones, but not to countries.

The integration of Lada into the Renault Group on January 1, 2017, then from Jinbei and Huasong on January 1, 2018 and finally from Opel PSA Group since August 1, 2017 have a strong impact on delivery figures.

From 2018, the scope of deliveries changes to be closer to sales. In general, the deliveries corresponding to productions for partners are no longer counted. In addition, reclassifications of vehicles in the categories "passenger cars" and "commercial vehicles" are made locally.

### ► NEW PASSENGER CAR DELIVERIES BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
Europe (1)	2,636,150	2,835,899	2,331,256	2,384,342	2,597,262	3,353,245	3,555,577	3,473,547
European Union (2)	2,261,904	2,424,350	1,893,455	1,871,647	2,068,564	2,489,355	2,782,252	2,758,235
Germany	337,743	365,860	299,072	266,587	339,993	461,107	531,513	543,083
Austria	41,510	48,779	50,767	41,349	45,844	56,045	64,585	58,254
Belgium-Luxembourg	172,806	171,552	182,241	146,015	151,959	172,589	175,988	172,727
Denmark	30,239	34,477	27,801	49,204	56,683	55,913	64,067	55,776
Spain	556,934	577,439	302,663	310,876	348,207	400,650	406,155	381,672
Greece	54,270	32,681	10,744	12,132	13,350	13,658	27,987	28,498
Italy	353,616	377,100	317,851	304,829	362,678	449,591	474,014	490,766
The Netherlands	120,438	99,707	108,951	106,236	90,353	109,383	124,134	108,857
Portugal	68,375	66,524	58,750	54,165	66,261	75,075	87,807	81,773
United Kingdom	432,507	413,743	280,244	294,142	290,542	316,137	393,885	362,364
Sweden	31,473	43,062	16,691	32,650	37,692	40,759	36,340	29,867
10 new EU member states	-	147,859	130,576	104,417	115,165	274,145	334,128	354,270
12 then 13 new EU member states (3)	-	276,433	176,330	170,849	184,142	357,494	356,817	354,270
CEEC/CIS (3)	164,814	214,335	206,868	258,054	262,982	569,893	558,053	590,644
Hungary	23,887	26,926	6,156	11,031	14,585	21,486	32,015	34,141
Poland	59,093	47,521	53,521	50,485	62,874	90,486	108,072	108,887
Romania	7,520	122,930	41,804	45,361	49,786	59,706	76,918	79,278
Russia	6,042	42,637	158,018	272,461	182,432	519,984	488,928	498,581
Switzerland	45,654	41,231	50,740	43,545	41,337	43,394	47,802	43,505
Turkey	148,264	142,160	168,456	211,096	224,379	250,603	150,990	124,668
Africa	69,865	103,130	171,484	241,078	196,459	197,313	257,277	235,921
South Africa	13,913	32,941	14,711	23,223	16,835	12,836	28,742	30,933
Maghreb	37,236	42,881	139,790	184,708	152,016	63,039	171,232	158,644
Nigeria	8,860	6,159	210	301	171	489	327	297
America	230,270	314,505	559,780	426,937	490,120	552,775	523,612	489,142
Argentina	97,605	70,099	149,746	122,408	177,049	208,607	148,753	64,058
Brazil	80,205	144,030	320,930	210,638	186,229	204,726	236,119	253,871
Colombia	16,659	36,499	6,329	50,819	51,825	42,000	47,774	54,538
Mexico	1,408	39,871	24,822	10,685	7,626	12,863	26,411	27,136
Asia (1)	166,261	512,772	1,201,459	1,070,526	1,422,282	1,535,988	933,172	458,887
Japan	15,976	16,323	12,346	25,072	18,016	19,291	20,082	23,061
China	54,334	143,756	392,569	756,268	635,296	459,825	317,831	136,498
Iran	45,722	304,326	516,121	38,176	340,139	600,958	238,444	-
India	-	-	4,488	50,877	132,235	128,365	82,368	88,869
South Korea	-	-	157,824	90,056	251,102	134,242	202,757	156,599
Oceania	9,984	16,698	14,079	17,929	11,188	22,099	14,271	11,780
Australia	2,765	11,872	9,761	13,435	6,805	15,639	8,976	6,571
<b>TOTAL</b>	<b>3,174,447</b>	<b>3,841,448</b>	<b>4,306,065</b>	<b>4,159,198</b>	<b>4,735,057</b>	<b>5,695,129</b>	<b>5,303,355</b>	<b>4,674,081</b>

### ► NEW COMMERCIAL VEHICLE DELIVERIES BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
Europe (1)	379,289	401,860	357,998	456,712	513,113	563,607	760,825	772,391
European Union (2)	312,421	326,077	312,293	418,876	476,550	522,689	688,881	728,474
Germany	50,081	40,760	46,406	90,020	99,293	111,313	108,268	118,576
Austria	4,697	6,206	6,797	7,585	8,259	10,323	16,791	16,711
Belgium-Luxembourg	22,857	24,827	29,330	29,267	42,443	47,934	52,657	52,473
Spain	57,516	71,185	28,263	38,386	40,887	43,425	125,673	121,639
Italy	35,910	29,706	39,690	34,656	52,716	60,661	64,682	70,963
The Netherlands	23,087	11,630	13,848	15,904	22,367	23,269	30,326	27,027
Portugal	34,551	25,410	18,557	15,539	18,484	19,420	24,868	25,421
United Kingdom	55,647	64,554	60,997	101,797	94,776	100,653	122,097	134,302
10 new EU member states	-	24,939	28,891	44,233	71,491	54,180	97,884	-
12 then 13 new EU member states (3)	-	51,099	33,784	55,213	85,750	67,795	104,223	95,137
CEEC/CIS (3)	25,100	46,685	16,121	29,981	22,716	16,942	28,472	28,168
Poland	5,624	9,039	14,258	13,563	20,223	24,759	37,813	32,594
Switzerland	4,293	5,934	8,500	7,855	7,725	8,129	12,271	12,684
Africa	16,074	22,597	27,769	27,611	24,601	13,106	21,513	21,291
Maghreb	13,509	18,345	24,690	26,466	21,779	12,345	13,839	17,152
America	36,682	33,328	85,810	61,943	63,191	64,572	114,589	92,699
Asia (1)	8,260	11,781	5,632	9,512	9,018	10,088	166,909	168,674
Oceania	1,797	1,967	2,208	6,064	6,386	5,942	6,054	6,080
<b>TOTAL</b>	<b>444,516</b>	<b>474,532</b>	<b>480,430</b>	<b>563,013</b>	<b>617,832</b>	<b>658,225</b>	<b>1,073,039</b>	<b>1,063,544</b>

(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.

Source: CCFA

# 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 since 2012 (below) come from this new source. Trends between the old and new scopes are minor for the moment.

	Units	2000	2010	2015	2016	2017	2018 (1)	2019 (1)
<b>PHYSICAL DATA</b>								
Employees (2)	units	190,830	-	-	-	-	-	-
Employees on 12/31 (excluding temporary staff)	units	-	137,527	118,952	111,268	110,778	109,000	107,000
Production in France (only light vehicles since 2012)	thousands	3,348	2,229	1,978	2,082	2,226	2,270	2,175
Production per employee	units	17.5	16.2	16.6	18.7	20.1	20.8	20.3
<b>FINANCIAL DATA</b>								
Net sales	€ million	73,684	78,969	83,969	89,477	98,021	103,000	102,000
Export sales	€ million	42,290	45,526	54,290	57,447	61,678	65,000	64,000
Exports as a % of total sales	%	57.4%	57.6%	64.7%	64.2%	62.9%	63.1%	62.7%
Value added value before tax	€ million	13,282	10,112	11,332	11,853	12,251	12,900	12,800
Value added / sales	%	18.0%	12.8%	13.5%	13.2%	12.5%	12.5%	12.5%
Value added per employee	€ thousand	70	74	95	107	111	118	120
Social costs	€ million	2,153	2,302	2,072	2,031	2,051	-	-
Social costs per employee	€ thousand	11.3	16.7	17.4	18.3	18.5	-	-
Wages and salaries	€ million	5,093	5,696	5,186	5,097	5,129	-	-
Wages and salaries per employee	€ thousand	26.7	41.4	43.6	45.8	46.3	-	-
Personnel costs	€ million	7,246	7,999	7,258	7,128	7,180	-	-
Personnel costs per employee	€ thousand	38.0	58.2	61.0	64.1	64.8	-	-
Personnel costs / value added	%	54.6%	79.1%	64.0%	60.1%	58.6%	-	-
Gross operating surplus	€ million	5,201	1,340	3,293	3,884	4,253	-	-
Gross operating surplus / value added	%	39.2%	13.3%	29.1%	32.8%	34.7%	-	-
Interest expense	€ million	1,178	2,862	2,337	2,099	561	-	-
Interest expense / value added	%	8.9%	28.3%	20.6%	17.7%	4.6%	-	-
Interest income	€ million	2,508	2,191	2,523	2,536	3,087	-	-
Interest income / value added	%	18.9%	21.7%	22.3%	21.4%	25.2%	-	-
Net interest income	€ million	1,330	-671	186	437	2,526	-	-
Net interest income / value added	%	10.0%	-6.6%	1.6%	3.7%	20.6%	-	-
Cash flow	€ million	5,499	1,078	3,291	3,905	4,394	-	-
Cash flow / value added	%	41.4%	10.7%	29.0%	32.9%	35.9%	-	-
Taxes, payments, assimilated payments	€ million	-	-	822	866	864	-	-
Net income	€ million	2,851	293	1,244	2,395	2,769	-	-
Net income / sales	%	3.9%	0.4%	1.5%	2.7%	2.8%	-	-
Capital expenditure	€ million	3,807	-	-	-	-	-	-
Gross fixed investments exclusive of contributions	€ million	-	2,078	1,959	2,182	2,027	1,950	2,100
Capital expenditure / sales	%	5.2%	2.6%	2.3%	2.4%	2.1%	1.9%	2.1%
Capital expenditure / value added	%	28.7%	20.6%	17.3%	18.4%	16.5%	15.1%	16.4%

(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.

In 2019, ESANE data relating to the 2017 financial year were produced and disseminated for the first time in "companies" (in the economic sense) across the field. An enterprise, in the economic sense, is the smallest combination of legal units which constitutes an organisational unit for the production of goods or services, enjoying a certain autonomy of decision, in particular for the allocation of its current resources (Law of modernisation of the economy - LME - of August 4, 2008). This definition is based on the notion of a group of companies (rather than a legal unit), and makes it possible to take better account of new economic realities.

From the 2013 vintage until the 2016 vintage, only the largest groups were thus taken into account (in 2016, around fifty of the largest groups broken down into around one hundred companies). All the other groups (small, medium or large) are taken into account in the company statistics from the 2017 vintage. For each of these groups, we assume that all the legal units in the ESANE field which compose it form one company and one. These changes explain the differences observed compared to the previous edition.

In 1993, the French nomenclature of activity (NAF1), harmonised in the European Union, was introduced. The reclassification of certain companies (metalworking, electrical equipment, car seats) in other nomenclatures leads to a statistical break. Since 2008, this nomenclature has evolved into the NAF2, still harmonised at the European

level: manufacturers of electrical equipment for engines and vehicles, as well as manufacturers of seats for motor vehicles, have been added in particular to automotive equipment suppliers.

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, tyres, 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	2010	2015	2016	2017	2018 (1)	2019 (1)
<b>PHYSICAL DATA</b>								
No. of companies (>20 employees up to 2007)	units	243	639	611	571	561	-	-
Employees (2)	units	94,171	-	-	-	-	-	-
Employees on 12/31 (excluding temporary staff)	units	-	61,759	81,309	94,038	96,015	97,000	96,000
<b>FINANCIAL DATA</b>								
Sales before tax	€ million	17,766	16,056	22,157	28,573	32,227	32,000	32,000
Export sales	€ million	7,512	7,865	11,159	14,191	15,256	-	-
Exports as a % of total sales	%	42.3%	49.0%	-	-	-	-	-
Exports as a % of production (source: FIEV)	%	-	51%	55%	54%	55%	54%	53%
Value added before tax	€ million	4,643	3,885	5,664	7,549	7,659	7,700	7,600
Value added / sales before tax	%	26.1%	24.2%	25.6%	26.4%	23.8%	24.1%	23.8%
Value added per employee before tax	€ thousand	49	63	70	80	80	79	79
Social costs	€ million	902	937	1,357	1,714	1,727	-	-
Social costs per employee	€ thousand	9.6	15.2	16.7	18.2	18.0	-	-
Wages and salaries	€ million	2,213	2,302	3,186	4,026	4,122	-	-
Wages and salaries per employee	€ thousand	23.5	37.3	39.2	42.8	42.9	-	-
Personnel costs	€ million	3,115	3,239	4,543	5,740	5,849	-	-
Personnel costs per employee	€ thousand	33.1	52.4	55.9	61.0	60.9	-	-
Personnel costs / value added	%	67.1%	83.4%	80.2%	76.0%	76.4%	-	-
Gross operating surplus	€ million	1,206	412	818	1,411	1,395	-	-
Gross operating surplus / value added	%	26.0%	10.6%	14.4%	18.7%	18.2%	-	-
Interest expense	€ million	440	177	301	1,253	1,580	-	-
Interest expense / value added	%	9.5%	4.6%	5.3%	16.6%	20.6%	-	-
Interest income	€ million	337	217	661	1,868	2,401	-	-
Interest income / value added	%	7.3%	5.6%	11.7%	24.8%	31.4%	-	-
Net interest income	€ million	-103	40	360	615	821	-	-
Net interest income / value added	%	-2.2%	1.0%	6.4%	8.2%	10.7%	-	-
Cash flow	€ million	889	341	1,188	1,614	2,246	-	-
Cash flow / value added	%	19.2%	8.8%	21.0%	21.4%	29.3%	-	-
Taxes, payments, assimilated payments	€ millions	-	-	316	416	431	-	-
Net income	€ millions	-92	-17	702	1,208	1,995	-	-
Net income / sales	%	-0.5%	-0.1%	3.2%	4.2%	6.2%	-	-
Capital expenditure	€ millions	1,024	-	-	-	-	-	-
Gross fixed investments exclusive of contributions	€ millions	-	413	856	955	994	-	-
Capital expenditure / sales	%	5.8%	2.6%	3.9%	3.3%	3.1%	-	-
Capital expenditure / value added	%	22.0%	10.6%	15.1%	12.7%	13.0%	-	-

(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

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

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	261,508	275,053	301,607	201,065	195,012	201,373	213,844	235,110
DS	-	-	26,539	30,257	28,081	21,323	24,004	26,845
Opel (1)	-	-	-	-	-	27,016	71,619	66,901
Peugeot	397,547	385,739	400,663	327,393	335,881	366,872	389,518	379,582
Alpine	-	-	-	-	-	7	1,156	3,172
Dacia	-	9,760	104,641	97,441	110,529	117,865	140,326	138,977
Renault	602,415	546,227	497,820	382,504	407,930	416,577	406,222	407,134
Bolloré	-	-	-	1,191	944	56	104	1
Others France	63	148	56	50	51	101	123	121
<b>FRENCH GROUPS</b>	<b>1,261,533</b>	<b>1,216,927</b>	<b>1,331,326</b>	<b>1,039,901</b>	<b>1,078,428</b>	<b>1,151,190</b>	<b>1,246,916</b>	<b>1,257,843</b>
Alfa Romeo	12,774	13,847	13,033	6,353	7,334	9,208	8,332	3,937
Audi	34,937	44,311	50,936	58,734	64,660	65,690	51,582	57,533
BMW	31,576	40,508	46,074	53,558	60,522	61,309	57,537	58,751
Chevrolet	1,043	7,940	21,247	121	137	138	92	52
Fiat	95,983	46,157	72,717	54,443	62,545	68,196	78,226	71,666
Ford	117,061	103,597	114,810	80,729	79,173	84,382	82,633	78,838
Honda	8,716	8,883	11,251	7,325	9,143	8,491	8,309	8,196
Hyundai	11,019	27,396	18,785	23,968	28,043	29,570	35,542	39,970
Infiniti	-	-	267	1,139	3,295	1,985	945	216
Jaguar	1,939	2,118	1,126	1,530	3,738	3,541	4,580	3,561
Jeep	3,001	3,525	1,177	8,585	9,983	10,892	13,191	11,541
Kia	2,631	18,073	24,055	29,146	33,684	37,235	42,313	45,056
Lada	1,867	1,671	346	3	2	-	-	-
Lancia	5,864	4,414	3,368	1,469	185	34	1	1
Land Rover	7,570	6,946	2,735	8,846	10,388	9,079	6,803	7,878
Lexus	-	-	1,921	4,457	5,100	5,390	6,101	7,159
Mazda	6,366	11,440	10,232	8,418	10,320	11,778	11,129	12,596
Mercedes-Benz	43,389	54,779	45,612	55,376	62,069	68,007	65,808	70,214
Mini	-	12,627	18,007	22,512	25,176	26,431	27,378	27,158
Mitsubishi	5,575	6,758	3,514	3,936	2,922	2,378	4,879	7,207
Nissan	31,330	40,858	54,084	74,102	69,072	71,492	59,606	42,313
Opel (1)	133,576	106,462	94,877	64,170	68,281	45,548	-	-
Porsche	825	2,404	2,073	4,943	5,396	5,457	4,567	5,572
Rover	13,474	1,980	-	-	-	-	-	-
Saab	3,265	2,701	574	-	-	-	-	-
Seat	40,562	32,744	30,645	22,009	21,648	24,714	31,219	37,148
Skoda	11,570	15,044	18,533	21,759	23,621	26,799	31,423	36,498
Smart	6,645	12,649	6,408	8,107	8,980	8,162	7,446	10,494
Ssangyong	19	3,972	451	636	963	669	301	157
Subaru	2,312	1,464	1,146	841	851	721	720	510
Suzuki	11,355	21,125	22,070	18,506	20,528	25,043	27,241	30,758
Tesla	-	-	11	708	945	1,368	1,252	7,442
Toyota	43,698	87,500	65,390	71,755	77,696	88,662	97,286	101,730
Volkswagen	152,868	136,011	146,538	144,103	143,106	139,360	140,313	149,105
Volvo	6,777	11,096	11,841	13,876	15,604	16,219	18,349	21,696
<b>TOTAL FOREIGN (2)</b>	<b>872,351</b>	<b>900,634</b>	<b>920,345</b>	<b>877,325</b>	<b>936,749</b>	<b>959,558</b>	<b>926,565</b>	<b>956,436</b>
<b>TOTAL ALL CATEGORIES</b>	<b>2,133,884</b>	<b>2,117,561</b>	<b>2,251,668</b>	<b>1,917,226</b>	<b>2,015,177</b>	<b>2,110,748</b>	<b>2,173,481</b>	<b>2,214,279</b>
of which Temporary Transit	-	49,772	39,011	31,665	31,448	31,762	32,112	30,326
<b>FRENCH GROUPS AS A %</b>	<b>59.1%</b>	<b>57.5%</b>	<b>59.1%</b>	<b>54.2%</b>	<b>53.5%</b>	<b>54.5%</b>	<b>57.4%</b>	<b>56.8%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>40.9%</b>	<b>42.5%</b>	<b>40.9%</b>	<b>45.8%</b>	<b>46.5%</b>	<b>45.5%</b>	<b>42.6%</b>	<b>43.2%</b>

(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	2015	2016	2017	2018	2019
<b>TOTAL ALL CATEGORIES</b>	<b>5,082,122</b>	<b>5,383,361</b>	<b>5,386,007</b>	<b>5,562,082</b>	<b>5,643,348</b>	<b>5,678,595</b>	<b>5,632,361</b>	<b>5,790,612</b>
Used/new ratio	2.4	2.5	2.4	2.9	2.8	2.7	2.6	2.6

## ► USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS (IN UNITS)

	2000	2005	2010	2015	2016	2017	2018	2019
<b>TOTAL ALL CATEGORIES</b>	<b>651,033</b>	<b>718,948</b>	<b>806,398</b>	<b>789,073</b>	<b>805,011</b>	<b>797,223</b>	<b>785,852</b>	<b>817,241</b>
Used/new ratio	1.6	1.7	1.9	2.1	2.0	1.8	1.7	1.7



# REGISTRATIONS

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

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	138,628	185,733	228,977	113,446	93,165	85,109	65,796	80,631
DS	-	-	14,864	15,281	13,157	9,031	11,160	10,774
Peugeot	206,153	275,898	307,518	190,548	176,231	178,061	159,139	149,244
Opel (1)	-	-	-	-	-	9,126	17,112	11,252
Dacia	-	0	53,737	54,326	48,735	51,174	62,022	53,487
Renault	257,909	373,738	352,530	233,998	233,354	220,723	185,026	157,234
<b>FRENCH GROUPS (2)</b>	<b>602,690</b>	<b>835,369</b>	<b>957,626</b>	<b>607,599</b>	<b>564,642</b>	<b>553,224</b>	<b>500,255</b>	<b>462,622</b>
Alfa Romeo	7,444	10,857	8,432	2,995	3,307	4,726	4,474	2,903
Audi	25,901	39,420	45,201	44,445	46,511	41,495	26,682	21,291
BMW-Mini	21,065	36,859	50,906	57,145	60,740	54,330	41,650	39,099
Chrysler-Dodge-Jeep	4,161	6,561	2,863	7,183	7,345	7,969	9,226	4,746
Fiat-Lancia	38,337	27,223	28,240	16,935	18,385	18,066	16,891	8,297
Ford	58,896	76,494	89,334	41,986	39,398	38,903	28,192	16,098
Honda	413	4,473	5,029	4,364	4,709	3,205	2,546	482
Hyundai	5,510	22,137	13,174	15,069	16,572	13,230	12,113	13,568
Jaguar -Land Rover	5,656	8,172	3,551	9,403	13,204	11,897	9,696	5,169
Kia	1,200	10,610	15,428	15,870	17,322	16,548	15,092	10,751
Mazda	3,204	6,061	6,768	4,802	4,466	4,353	3,234	2,893
Mercedes-Benz	30,007	44,165	41,460	47,646	50,751	53,274	49,361	48,424
Mitsubishi	3,227	4,798	3,102	2,053	1,905	1,062	827	75
Nissan-Infiniti	15,533	23,499	35,092	46,879	44,310	43,815	27,170	18,245
Opel (1)	63,726	75,957	63,751	29,335	27,445	16,232	-	-
Seat	27,861	26,421	25,462	10,683	8,478	7,456	8,357	10,841
Skoda	7,741	12,391	14,781	12,930	12,773	13,908	14,651	15,392
Suzuki	3,165	11,979	9,263	4,359	4,038	2,448	1,468	63
Toyota-Lexus	12,282	54,639	35,744	17,879	11,141	6,582	2,908	1,474
Volkswagen	89,487	107,005	118,702	80,893	75,425	68,608	55,744	60,158
Volvo	4,786	10,270	11,614	12,747	13,545	13,602	13,461	12,735
<b>TOTAL FOREIGN (2)</b>	<b>443,795</b>	<b>631,303</b>	<b>635,547</b>	<b>489,525</b>	<b>485,771</b>	<b>444,893</b>	<b>344,575</b>	<b>292,957</b>
<b>TOTAL ALL CATEGORIES</b>	<b>1,046,485</b>	<b>1,466,672</b>	<b>1,593,173</b>	<b>1,097,124</b>	<b>1,050,413</b>	<b>998,117</b>	<b>844,830</b>	<b>755,579</b>
of which Temporary Transit	-	37,259	34,432	27,141	22,887	20,180	19,471	17,563
% diesel	49.0%	69.2%	70.8%	57.2%	52.1%	47.3%	38.9%	34.1%
<b>FRENCH GROUPS AS A %</b>	<b>57.6%</b>	<b>57.0%</b>	<b>60.1%</b>	<b>55.4%</b>	<b>53.8%</b>	<b>55.4%</b>	<b>59.2%</b>	<b>61.2%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>42.4%</b>	<b>43.0%</b>	<b>39.9%</b>	<b>44.6%</b>	<b>46.2%</b>	<b>44.6%</b>	<b>40.8%</b>	<b>38.8%</b>

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	77,048	73,166	70,579	59,295	62,418	68,979	72,504	73,992
DS	-	-	259	489	485	259	222	179
Peugeot	74,950	73,778	72,228	59,649	65,771	73,628	78,532	85,360
Opel (1)	-	-	-	-	-	3,232	6,191	7,442
Dacia	-	0	5,434	2,594	1,582	1,492	1,259	1,571
Renault	139,752	140,059	135,591	124,634	131,742	137,927	140,825	147,861
Others France	40	10,076	528	905	1,348	896	911	899
<b>FRENCH GROUPS</b>	<b>291,790</b>	<b>297,079</b>	<b>284,619</b>	<b>247,566</b>	<b>263,346</b>	<b>286,413</b>	<b>300,444</b>	<b>317,304</b>
Fiat	25,253	12,497	34,659	32,071	36,626	36,693	38,381	37,572
Ford	18,110	19,695	20,437	22,534	25,567	28,810	31,788	32,798
Hyundai	588	1,380	237	195	256	227	331	347
Isuzu	108	1,370	1,961	2,024	2,030	1,858	2,360	2,495
Iveco	16,534	15,721	11,610	11,414	13,519	14,356	16,468	17,031
Land Rover	1,857	1,256	1,550	2,591	776	463	648	625
Mazda	916	635	482	58	73	76	80	51
Mercedes	23,139	18,973	19,051	18,643	19,767	19,890	20,491	23,385
Mitsubishi	3,392	1,350	2,639	1,836	1,998	1,858	2,099	1,756
Nissan	5,197	9,746	7,307	7,260	10,121	10,111	9,850	8,167
Opel (1)	7,561	12,617	7,195	6,782	6,992	4,339	-	-
Toyota	1,771	2,587	4,013	5,210	5,322	6,927	7,805	8,542
Volkswagen	13,819	10,043	13,249	16,375	18,359	21,080	21,414	21,182
<b>TOTAL FOREIGN (2)</b>	<b>123,176</b>	<b>122,986</b>	<b>132,993</b>	<b>131,860</b>	<b>146,756</b>	<b>152,241</b>	<b>158,696</b>	<b>162,480</b>
<b>TOTAL ALL CATEGORIES</b>	<b>414,966</b>	<b>420,065</b>	<b>417,612</b>	<b>379,426</b>	<b>410,102</b>	<b>438,654</b>	<b>459,140</b>	<b>479,784</b>
<b>FRENCH GROUPS AS A %</b>	<b>70.3%</b>	<b>70.7%</b>	<b>68.2%</b>	<b>65.2%</b>	<b>64.2%</b>	<b>65.3%</b>	<b>65.4%</b>	<b>66.1%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>29.7%</b>	<b>29.3%</b>	<b>31.8%</b>	<b>34.8%</b>	<b>35.8%</b>	<b>34.7%</b>	<b>34.6%</b>	<b>33.9%</b>

(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

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

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

	2000	2005	2010	2015	2016	2017	2018	2019
Citroën	338,556	352,790	372,186	260,360	257,429	270,352	286,348	309,136
DS	-	0	26,798	30,746	28,567	21,582	24,226	27,024
Opel (1)	-	-	-	-	-	30,248	77,810	74,343
Peugeot	472,497	459,580	472,890	387,042	401,653	440,500	468,050	464,942
Alpine	-	-	0	0	0	7	1,156	3,172
Dacia	-	9,760	110,075	100,035	112,111	119,357	141,588	140,549
Renault	742,167	687,868	633,411	507,138	539,672	554,504	547,044	554,960
<b>FRENCH GROUPS</b>	<b>1,553,323</b>	<b>1,514,050</b>	<b>1,615,945</b>	<b>1,287,467</b>	<b>1,341,774</b>	<b>1,437,603</b>	<b>1,547,360</b>	<b>1,575,147</b>
Fiat	121,236	68,546	107,376	86,514	99,171	104,889	116,607	109,238
Ford	135,171	125,427	135,247	103,263	104,740	113,192	114,421	111,636
Land Rover	9,427	8,205	4,285	11,437	11,164	9,542	7,451	8,503
Mercedes-Benz	66,528	74,757	64,663	74,017	81,836	87,897	86,299	93,599
Nissan-Infiniti	36,527	50,606	61,658	82,581	82,545	83,603	70,406	50,696
Opel (1)	141,137	119,103	102,072	70,952	75,273	49,887	-	-
Seat	42,230	33,075	31,080	22,419	21,919	24,961	31,905	37,715
Toyota-Lexus	45,469	90,094	71,324	81,422	88,118	100,979	111,192	117,436
Volkswagen	166,687	146,137	159,787	160,478	161,465	160,440	161,727	170,287
<b>TOTAL FOREIGN</b>	<b>995,527</b>	<b>1,024,072</b>	<b>1,053,335</b>	<b>1,009,185</b>	<b>1,083,505</b>	<b>1,111,790</b>	<b>1,085,261</b>	<b>1,118,881</b>
<b>TOTAL ALL CATEGORIES</b>	<b>2,548,850</b>	<b>2,538,122</b>	<b>2,669,280</b>	<b>2,296,652</b>	<b>2,425,279</b>	<b>2,549,393</b>	<b>2,632,621</b>	<b>2,694,028</b>
<b>TOTAL FRANCE AS A %</b>	<b>60.9%</b>	<b>59.7%</b>	<b>60.5%</b>	<b>56.1%</b>	<b>55.3%</b>	<b>56.4%</b>	<b>58.8%</b>	<b>58.5%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>39.1%</b>	<b>40.3%</b>	<b>39.5%</b>	<b>43.9%</b>	<b>44.7%</b>	<b>43.6%</b>	<b>41.2%</b>	<b>41.5%</b>

(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	2015	2016	2017	2018	2019
Renault Trucks	20,818	18,339	10,908	11,568	12,531	13,954	15,156	15,308
<b>TOTAL FRANCE</b>	<b>20,992</b>	<b>18,465</b>	<b>10,964</b>	<b>11,584</b>	<b>12,553</b>	<b>13,963</b>	<b>15,167</b>	<b>15,323</b>
DAF	4,365	6,321	4,464	4,723	5,815	6,118	6,829	7,295
Iveco	6,998	5,901	4,003	4,783	5,293	5,417	5,243	4,248
MAN	3,498	4,545	2,729	4,581	4,910	5,058	5,998	6,095
Mercedes-Benz	9,976	9,325	5,229	6,128	7,089	7,526	7,965	7,513
Scania	4,963	4,417	2,553	4,359	5,219	5,512	5,864	7,038
Volvo	6,739	5,870	3,938	5,219	5,789	6,321	6,699	7,018
<b>TOTAL FOREIGN</b>	<b>36,924</b>	<b>36,819</b>	<b>23,257</b>	<b>30,132</b>	<b>34,582</b>	<b>36,465</b>	<b>39,117</b>	<b>39,892</b>
<b>TOTAL ALL CATEGORIES</b>	<b>57,916</b>	<b>55,284</b>	<b>34,221</b>	<b>41,716</b>	<b>47,135</b>	<b>50,428</b>	<b>54,284</b>	<b>55,215</b>
<b>TOTAL FRANCE AS A %</b>	<b>36.2%</b>	<b>33.4%</b>	<b>32.0%</b>	<b>27.8%</b>	<b>26.6%</b>	<b>27.7%</b>	<b>27.9%</b>	<b>27.8%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>63.8%</b>	<b>66.6%</b>	<b>68.0%</b>	<b>72.2%</b>	<b>73.4%</b>	<b>72.3%</b>	<b>72.1%</b>	<b>72.2%</b>

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

	2000	2005	2010	2015	2016	2017	2018	2019
<b>TOTAL</b>	<b>59,056</b>	<b>55,975</b>	<b>56,142</b>	<b>48,381</b>	<b>52,271</b>	<b>54,399</b>	<b>51,474</b>	<b>53,571</b>
Used/new ratio	1.0	1.5	1.6	1.1	1.1	1.1	0.9	1.0

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

	2000	2005	2010	2015	2016	2017	2018	2019
Renault	1,633	-	-	-	-	-	-	-
Others France	367	-	-	-	-	-	-	-
Kässbohrer-Setra	261	-	-	-	-	-	-	-
Mercedes-Benz	602	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>4,320</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Iveco Bus (1)	-	2,459	2,412	3,197	2,917	2,419	2,523	2,862
Evobus (2)	-	888	1,433	2,050	1,646	1,672	1,704	1,444
Groupe VGF (3)	-	404	559	589	465	475	584	942
Bova	-	198	116	-	-	-	-	-
Temsa	-	301	309	146	158	235	258	150
Van Hool	230	238	169	98	126	108	113	157
Yutong	-	-	-	96	118	127	55	20
Autres	-	237	384	548	629	943	605	842
<b>TOTAL</b>	<b>-</b>	<b>4,773</b>	<b>5,382</b>	<b>6,724</b>	<b>6,059</b>	<b>5,979</b>	<b>5,842</b>	<b>6,417</b>

(1) Iveco Bus group: Iveco and Iveco Bus, Irisbus, Heuliez.

(2) Evobus: Kässbohrer-Setra and Mercedes-Benz.

(3) VGF: MAN and Neoplan, Scania since 2015.

# VEHICLE OWNERSHIP

## ► MOTORISATION RATE IN EUROPE

NUMBER OF CARS PER 1,000 INHABITANTS

	2014	2015	2016	2017	2018
Germany	550	555	557	563	569
Belgium	493	497	501	505	507
Spain	474	481	493	508	516
France	481	482	486	489	493
Greece	467	470	475	480	481
Hungary	314	324	337	354	372
Italy	610	614	624	636	645
The Netherlands	487	493	497	503	511
Poland	526	545	571	593	617
Portugal	431	437	445	466	487
Czech republic	470	490	509	529	547
Romania	246	259	277	305	330
United Kingdom	507	517	526	527	526
Sweden	475	479	484	485	481
EUROPEAN UNION	497	504	513	523	531
Norway	497	502	507	512	514
Switzerland	544	547	549	549	550
EFTA	526	529	533	535	536
Russia	284	284	289	294	301
Turkey	129	136	144	151	153
EUROPE	417	423	430	438	446

Source : ACEA, Vehicles in use Europe 2019

## ► TOTAL VEHICLES IN USE (ON JANUARY 1, 2020)

(IN THOUSANDS)

	All fuels	Diesel	Others
<b>Passenger cars</b>			
5 HP and less	18,562	9,373	9,189
From 6 HP to 10 HP	17,674	12,062	5,611
11 HP and more	1,979	1,065	915
<b>Total passenger cars</b>	<b>38,215</b>	<b>22,500</b>	<b>15,715</b>
<b>Light commercial vehicles (LCV)</b>			
Less than 2.5t	2,997	2,737	260
From 2.5t to 3.5t	3,032	3,009	23
<b>Total LCV up to 3.5t</b>	<b>6,029</b>	<b>5,746</b>	<b>283</b>
<b>Total passenger cars and LCVs</b>	<b>44,244</b>	<b>28,246</b>	<b>15,998</b>
<b>Heavy trucks over 3.5t</b>			
<b>Rigids</b>			
From 3.5t to less than 12t	98	96	2
From 12t to less than 20t	152	152	1
20t and more	133	132	1
<b>Total rigids</b>	<b>384</b>	<b>380</b>	<b>4</b>
<b>Tractors</b>	<b>217</b>	<b>215</b>	<b>2</b>
<b>Total heavy trucks</b>	<b>601</b>	<b>595</b>	<b>6</b>
<b>Coaches and buses</b>	<b>69.1</b>	<b>68.6</b>	<b>0.5</b>
<b>Total commercial vehicles over 3.5t (excluded buses)</b>	<b>670</b>	<b>664</b>	<b>6</b>
<b>Total commercial vehicles all weights (excluded buses)</b>	<b>6,699</b>	<b>6,410</b>	<b>290</b>
<b>Total all vehicles (excluded buses)</b>	<b>44,914</b>	<b>28,910</b>	<b>16,005</b>

Sources: MTE/SDES, CCFA estimates

## ► VEHICLE OWNERSHIP

	units	2000	2005	2010	2015	2017	2018	2019 (1)
Households without a vehicle	%	19.7%	18.8%	16.5%	17.1%	16.1%	15.1%	15.0%
Households with a vehicle	%	80.3%	81.2%	83.5%	82.9%	83.9%	84.9%	85.0%
Households with one vehicle	%	50.7%	46.4%	47.6%	48.4%	47.5%	48.4%	48.3%
Households with two vehicles	%	25.4%	29.4%	30.7%	29.4%	31.1%	31.2%	31.5%
Households with three or more vehicles	%	4.2%	5.4%	5.2%	5.1%	5.3%	5.3%	5.2%
Households without any vehicle	%	58%	51%	45%	55%	57%	56%	56%
Average age of the vehicle	year	7.25	7.71	8.0	8.9	9.1	9.1	8.9
Average ownership period	year	4.43	4.73	5.0	5.5	5.6	5.6	5.5
Used passenger cars	%	56.1	59.9	58.9	58.5	58.7	58.5	58.0
Total average kilometres	km	13,670	12,960	12,240	11,710	11,950	11,900	11,900
Petrol average kilometres	km	11,690	10,090	8,440	8,030	8,440	8,290	8,850
Diesel average kilometres	km	18,240	16,330	14,720	13,990	14,340	14,540	14,410
<b>Domestic passenger road transport</b>								
By passenger car	billions of passengers-km	697.6	n/a	n/a	787	801	801	799
By coach-bus	billions of passenger-km	49.7	n/a	n/a	58.4	60.2	60.74	60.68
Total traffic	billions of passenger-km	845.0	n/a	n/a	964.4	987.5	985.7	988.2
Road transport as a % of total traffic	%	88.4	n/a	n/a	87.6	87.3	87.4	87.0
<b>Annual change</b>								
By passenger car	%	-0.0	n/a	n/a	+0.7	+0.8	-0.0	-0.0
By coach-bus	%	+2.7	n/a	n/a	+1.5	+0.8	+1.0	-0.0

(1) Provisional.

Sources: KANTAR TNS PARC AUTO and MTE/SDES

## ► TOTAL VEHICLES IN USE ON JANUARY 1 DEPENDING ON ENGINE (IN THOUSANDS)

	2015	2019	2020
Electric and hydrogen	26	106	141
Petrol	13,120	14,756	15,354
Diesel	23,631	23,263	22,500
Gas	165	142	135
Rechargeable hybrids	19	56	73
Others	16	13	12
<b>All</b>	<b>36,977</b>	<b>38,336</b>	<b>38,215</b>

## ► TOTAL VEHICLES IN USE ON JANUARY 1 DEPENDING ON CRIT'AIR STICKER (IN THOUSANDS)

	2015	2019	2020
Crit'air E	26	106	141
Crit'air 1	2,922	7,042	8,433
Crit'air 2	9,383	12,807	13,355
Crit'air 3	12,644	10,644	9,866
Crit'air 4	5,732	4,290	3,682
Crit'air 5	2,192	1,250	977
Unknown and unclassified	4,078	2,197	1,761
<b>All</b>	<b>36,977</b>	<b>38,336</b>	<b>38,215</b>

Source: MTE/SDES

## POLLUTANT EMISSIONS AND CO<sub>2</sub>

### ► TOTAL AUTOMOBILE EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 ET 2019

	1990	2000	2005	2010	2015	2018	2019 (1)	Change 2019/1990	Change 2019/2018
<b>ROAD POLLUTANTS (IN THOUSANDS OF TONNES)</b>									
SO <sub>2</sub>	143.2	23.0	4.2	0.8	0.8	0.8	0.8	-99%	-0.2%
CO	5,588	2,468	1,385	674	378	296	283	-95%	-4.3%
NOx	1,237	933	748	582	498	422	392	-68%	-7.0%
COVNM	909	436	231	110	64	52	50	-95%	-4.7%
Lead (in tonnes)	3,902	48	48	52	53	53	53	-99%	-0.1%
PM10: particles	74	68	53	44	33	28	26	-65%	-6.1%
<b>OTHER ROAD EMISSIONS (IN MILLIONS OF TONNES)</b>									
CO <sub>2</sub> net of CO <sub>2</sub> emissions of renewable energies	112	128	130	123	122	120	120	7%	-0.2%
CO <sub>2</sub> from combustion of biomass	0	1	2	7	8	9	9	-	-0.2%

(1) 2019 estimates.

Source: CITEPA/Secten data

### ► CO<sub>2</sub> EMISSIONS IN METROPOLITAN FRANCE BY BUSINESS SECTOR (IN MILLIONS OF TONNES OF CO<sub>2</sub>)

	1990	2000	2005	2010	2015	2018	2019 (1)
Energy processing	68.8	63.5	67.0	58.8	40.0	39.8	39.4
Manufacturing industry	108.9	106.6	101.4	83.2	72.6	72.5	71.3
Waste management	1.9	1.4	1.3	1.3	1.3	1.2	1.2
Residential/Commercial	85.3	88.0	98.6	93.9	74.0	70.0	68.2
Agriculture/silviculture	11.6	12.5	12.3	11.9	12.0	11.4	11.5
Transports	119.1	135.9	136.6	129.7	128.2	126.5	126.4
of which road	112.1	128.0	129.8	123.4	122.2	120.1	119.8
of which other transports	7.0	7.9	6.8	6.2	6.0	6.4	6.5
<b>TOTAL EXCLUDING LLUCF (2)</b>	<b>395.7</b>	<b>407.8</b>	<b>417.1</b>	<b>378.8</b>	<b>328.0</b>	<b>321.4</b>	<b>318.1</b>
<b>LLUCF (2)</b>	<b>-29.1</b>	<b>-26.0</b>	<b>-52.7</b>	<b>-45.3</b>	<b>-34.5</b>	<b>-33.5</b>	<b>-33.5</b>
<b>Total with LLUCF (2)</b>	<b>366.6</b>	<b>381.8</b>	<b>364.3</b>	<b>333.4</b>	<b>293.5</b>	<b>287.8</b>	<b>284.5</b>

(1) 2019 estimates.

(2) LLUCF: Land Use, Land Use Change and Forestry.

Source: CITEPA/CORALIE/format Secten, 2020 edition

### ► AVERAGE CO<sub>2</sub> EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE (IN GRAMS OF CO<sub>2</sub> PER KM) (IN GRAMS OF CO<sub>2</sub> PER KM)

	2000	2005	2010	2015	2017	2018	2019	2019/2000
<b>FRANCE</b>								
Petrol	168	159	130	116	117	116	116	-52
Diesel	155	149	130	111	110	112	113	-42
<b>TOTAL FRANCE</b>	<b>162</b>	<b>152</b>	<b>130</b>	<b>111</b>	<b>111</b>	<b>112</b>	<b>112</b>	<b>-50</b>
<b>EUROPEAN UNION</b>								
Italy	161	149	134	115	113	n/a	n/a	-
Spain	162	150	140	115	115	n/a	n/a	-
United Kingdom	180	169	145	121	121	n/a	n/a	-
Germany	179	170	152	128	127	n/a	n/a	-
<b>EU 15 COUNTRIES AVERAGE</b>	<b>171</b>	<b>161</b>	<b>141</b>	<b>119</b>	<b>119</b>	<b>n/a</b>	<b>n/a</b>	<b>-</b>

Source: ADEME (June 2020)



# AUTOMOTIVE TAXES AND DUTIES

## ► ROAD FUEL CONSUMPTION, PRICES AND TAXES

	UNITS	2000	2005	2010	2015	2016	2017	2018	2019
<b>Fuel consumption</b>									
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	6,292	6,297	6,201	6,015	5,916
Premium unleaded 95-E10	millions de litres	-	-	1,379	3,198	3,465	3,938	4,518	5,381
% of total petrol	%	-	-	12.7%	33.6%	35.5%	38.8%	42.9%	47.6%
Total petrol	millions of litres	18,253	14,529	10,880	9,510	9,762	10,140	10,533	11,296
Diesel	millions of litres	32,373	36,744	39,749	41,187	41,156	41,058	39,794	39,048
<b>TOTAL ROAD FUEL</b>	millions of litres	<b>50,627</b>	<b>51,273</b>	<b>50,629</b>	<b>50,697</b>	<b>50,918</b>	<b>51,198</b>	<b>50,326</b>	<b>50,345</b>

Source: CPDP

	UNITÉS	2000	2005	2010	2015	2016	2017	2018	2019
<b>Retail prices of fuel (annual average)</b>									
Regular petrol inc. VAT	euros/litre	-	-	-	-	-	-	-	-
Tax as a %	%	-	-	-	-	-	-	-	-
Premium leaded - AVSR	euros/litre	1.17	1.27	-	-	-	-	-	-
Tax as a %	%	71	67	-	-	-	-	-	-
Premium unleaded 98	euros/litre	1.11	1.20	1.38	1.42	1.36	1.44	1.57	1.57
Tax as a %	%	69	65	60	61	64	62	61	61
Petrol	euros/litre	1.12	1.18	1.35	1.35	1.30	1.38	1.50	1.51
Tax as a %	%	69	67	61	63	66	59	54	62
Diesel	euros/litre	0.85	1.02	1.15	1.15	1.11	1.23	1.44	1.44
Tax as a %	%	62	57	54	59	63	61	59	59

Source: DGEC

## ► AUTOMOTIVE TAXES AND DUTIES (IN € MILLION)

	2000	2005	2010	2015	2016	2017	2018	2019
Tax on road-use oil products (including VAT)	30,630	32,205	32,324	36,294	36,412	39,239	42,763	43,070
Tax on vehicle registration certificates	1,373	1,623	1,917	2,086	2,188	2,229	2,326	2,296
Automotive insurance tax	3,429	4,057	4,126	4,662	4,730	4,938	5,102	5,268
Road tax	539	145	0	0	0	0	0	0
Tax on company cars	644	867	992	753	692	638	751	768
Tax based on number of axles	223	205	168	169	167	100	102	104
Fixed rate police and traffic fines	720	1,266	1,255	1,562	1,704	1,758	1,677	1,586
Driver's licence tax	14	4	1	11	10	10	10	10
Regional development tax	442	499	539	555	512	516	472	523
Government royalty	-	154	186	326	331	351	348	355
General tax on polluting activities (TGAP)	-	20	500	600	600	600	407	426
VAT on spending to acquire vehicles (passenger cars)	6,603	7,693	8,171	8,709	9,443	10,110	10,401	11,000
VAT on repairs, maintenance, MoTs and driving licences	4,324	5,727	6,551	7,055	7,380	7,863	8,301	8,301 (2)
<b>Automotive taxes and duties (including VAT)</b>	<b>49,073</b>	<b>54,465</b>	<b>56,731</b>	<b>62,783</b>	<b>64,169</b>	<b>68,352</b>	<b>72,660</b>	<b>73,707</b>
of which specific automotive taxation	-	37,200	37,300	40,800	42,900	44,900	47,900	47,494
of which tax on fuels: TICPE and VAT on TICPE	-	28,900	28,200	31,500	33,491	35,477	38,189	37,594
<b>ADDITIONAL INFORMATION IN € MILLION</b>								
Freeway tolls (excl. VAT)	4,457	6,410	8,110	9,390	9,830	10,170	10,470	10,860
Freeway tolls (incl. VAT)	5,330	7,666	9,700	11,268	11,796	12,204	12,564	13,032
<b>Total expense by the APUs (2) for the road</b>	<b>-</b>	<b>15,800</b>	<b>16,500</b>	<b>14,600</b>	<b>13,600</b>	<b>13,800</b>	<b>14,100</b>	<b>14,300</b>

(1) 2018 figures.

(2) APU: Public administration: the entire transportation expenditure (all modes) is equal to the everyday expenditure and the capital expenditure; the figure shown may include dual accounts and it is thus a plus.

Sources: Internal Revenue, CCFA, URF, MTE/SDES, French National Transport Accounting Commission

# USEFUL ADDRESSES

## ► FRENCH AUTOMOTIVE MANUFACTURERS

### PSA group

Route de Gisy  
78140 Vélizy-Villacoublay  
Tel: 01 55 94 81 00  
[www.groupe-psa.com](http://www.groupe-psa.com)

### Renault group

13-15, quai Le Gallo  
92153 Boulogne Billancourt cedex  
Tel: 01 76 84 50 50  
[www.renault.com](http://www.renault.com)

### Renault Trucks

99, route de Lyon  
69800 St Priest  
Tel: 04 69 09 60 00  
[www.renault-trucks.fr](http://www.renault-trucks.fr)

### Alpine-Renault

Avenue de Bréauté  
76885 Dieppe cedex  
Tel: 01 76 86 31 50  
[www.alpinecars.com/fr](http://www.alpinecars.com/fr)

## ► AUTOMOTIVE PROFESSIONAL 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.org](http://www.afgnv.org)

### Fédération Française de Carrosserie Industries et Services (FFC)

Immeuble Le Cardinet  
8, rue Bernard Buffet  
75017 PARIS  
Tel: 01 44 29 71 00  
[www.ffc-carrosserie.org](http://www.ffc-carrosserie.org)

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

5, square de l'Avenue du Bois  
75016 Paris  
Tel: 01 53 64 50 30  
[www.csiam-fr.org](http://www.csiam-fr.org)

### Conseil National des Professions de l'Automobile (CNPA)

43 bis, route de Vaugirard  
CS 80016  
92197 Meudon  
Tel: 01 40 99 55 00  
[www.cnpa.fr](http://www.cnpa.fr)

### Fédération des Industries d'Équipements pour Véhicules (FIEV)

79, rue Jean-Jacques Rousseau  
92158 Suresnes cedex  
Tel: 01 46 25 02 30  
[www.fiev.fr](http://www.fiev.fr)

### Groupement pour l'Amélioration des Liaisons dans l'Automobile (GALIA)

20, rue Barthélémy Danjou  
92100 Boulogne-Billancourt  
Tel: 01 41 31 68 68  
[www.galia.com](http://www.galia.com)

### Groupement Plasturgie Automobile (GPA)

125, rue Aristide Briand  
92300 Levallois  
Tel: 01 44 01 16 38  
[www.autoplasticgate.com](http://www.autoplasticgate.com)

### PFA, Filière automobile et mobilités

2, rue de Presbourg  
75008 Paris  
Tel: 01 41 44 94 30  
[www.pfa-auto.fr](http://www.pfa-auto.fr)

### SNLVLD/SESAMILD (Syndicat des Entreprises des Services Automobiles en LLD et des Mobilités)

Immeuble Arc en Ciel  
17, rue de la Vanne  
92120 Montrouge  
Tel: 01 85 65 11 25  
[www.sesamild.com](http://www.sesamild.com)

### Syndicat des Véhicules de Loisirs (UNI VDL)

3, rue des Cordelières  
75013 Paris  
Tel: 01 43 37 86 61  
[www.univdl.org](http://www.univdl.org)

### Industries et Métiers de la Métallurgie (UIMM)

56, avenue de Wagram  
75017 Paris  
Tel: 01 40 54 20 20  
[www.uimm.fr](http://www.uimm.fr)

### Union Routière de France (URF)

9, rue de Berri  
75008 Paris  
Tel: 01 44 13 37 17  
[www.unionroutiere.fr](http://www.unionroutiere.fr)

### Union Technique de l'Automobile, du Motocycle et du Cycle (UTAC)

Autodrome de Linas-Monthléry  
91311 Montlhéry cedex  
Tel: 01 69 80 17 00  
[www.utaceram.com](http://www.utaceram.com)

## ► INTERNATIONAL AUTOMOTIVE ASSOCIATIONS

### Association des Constructeurs Européens d'Automobiles (ACEA)

85, avenue des Nerviens  
1040 Bruxelles (Belgique)  
Tel: 00 32 2 732 55 50  
[www.acea.be](http://www.acea.be)

### Organisation Internationale des Constructeurs d'Automobiles (OICA)

4, rue de Berri - 75008 Paris  
Tel: 01 43 59 00 13  
[www.oica.net](http://www.oica.net)

## ► AUTOMOTIVE ASSOCIATIONS IN FRANCE

### 40 millions d'automobilistes

75 boulevard Marie et Alexandre Oyon  
72100 Le Mans  
Tel: 02 43 50 06 30  
[www.40millionsdautomobilistes.com](http://www.40millionsdautomobilistes.com)

### ACA - Automobile Club Association

Head office: 38, avenue du Rhin  
67027 Strasbourg Cedex  
Tel: 09 70 40 11 11  
Paris office: 9 rue d'Artois  
75008 Paris  
Tel: 01 40 55 43 00  
[www.automobileclub.org](http://www.automobileclub.org)

### Fédération Française du Sport Automobile (FFSA)

32, avenue de New-York  
75781 Paris Cedex 16  
Tel: 01 44 30 24 00  
[www.ffa.org](http://www.ffa.org)

### Association Prévention Routière

33, rue de Mogador  
75009 Paris  
Tel: 01 44 15 27 00  
[www.preventionroutiere.asso.fr](http://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  
[www.sia.fr](http://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.averre-france.org](http://www.averre-france.org)

### Groupe d'Etudes et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile (GERPISA)

4, avenue des Sciences,  
91190 Gif-sur-Yvette  
Tel: 01 47 40 59 50  
[www.gerpisa.org](http://www.gerpisa.org)

### ID4CAR

Technocampus Composites  
Chemin du Chaffault - ZI du Chaffault  
44340 Bouguenais  
Tel: 02 28 44 36 50  
[www.id4car.org](http://www.id4car.org)

### IFP Énergies nouvelles (IFPEN)

1 & 4, avenue de Bois Préau  
92852 Rueil Malmaison Cedex  
Tel: 01 47 52 60 00  
[www.ifpennergiesnouvelles.fr](http://www.ifpennergiesnouvelles.fr)

### Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)

IFSTTAR head office  
14-20, boulevard Newton  
Cité Descartes, Champs sur Marne  
77447 Marne la vallée Cedex 2  
Tel: 01 81 66 80 00  
[www.ifsttar.fr](http://www.ifsttar.fr)

### CARA

1, boulevard Edmond Michelet  
69372 Lyon Cedex 08  
Tel: 04 51 08 40 20  
[www.cara.eu](http://www.cara.eu)

### Pôle Mov'eo

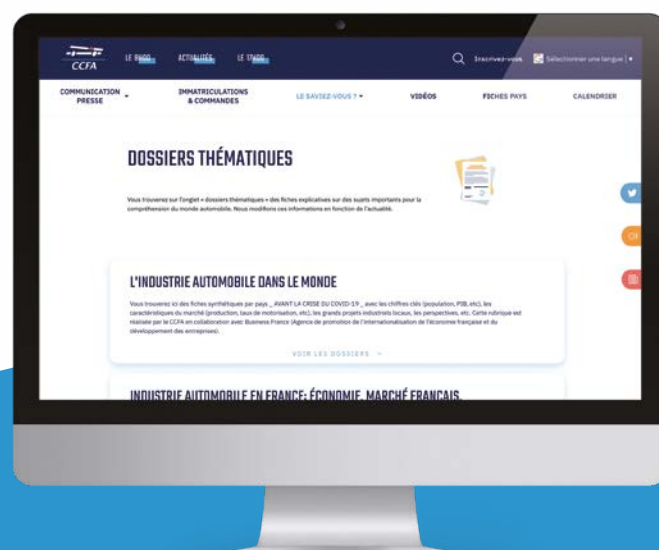
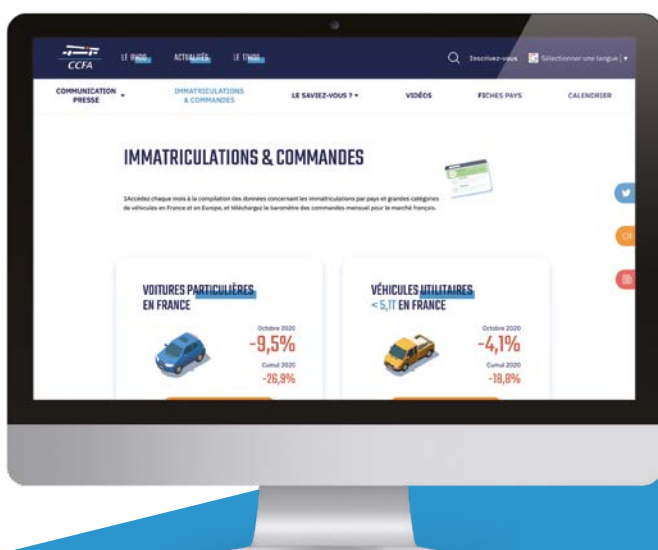
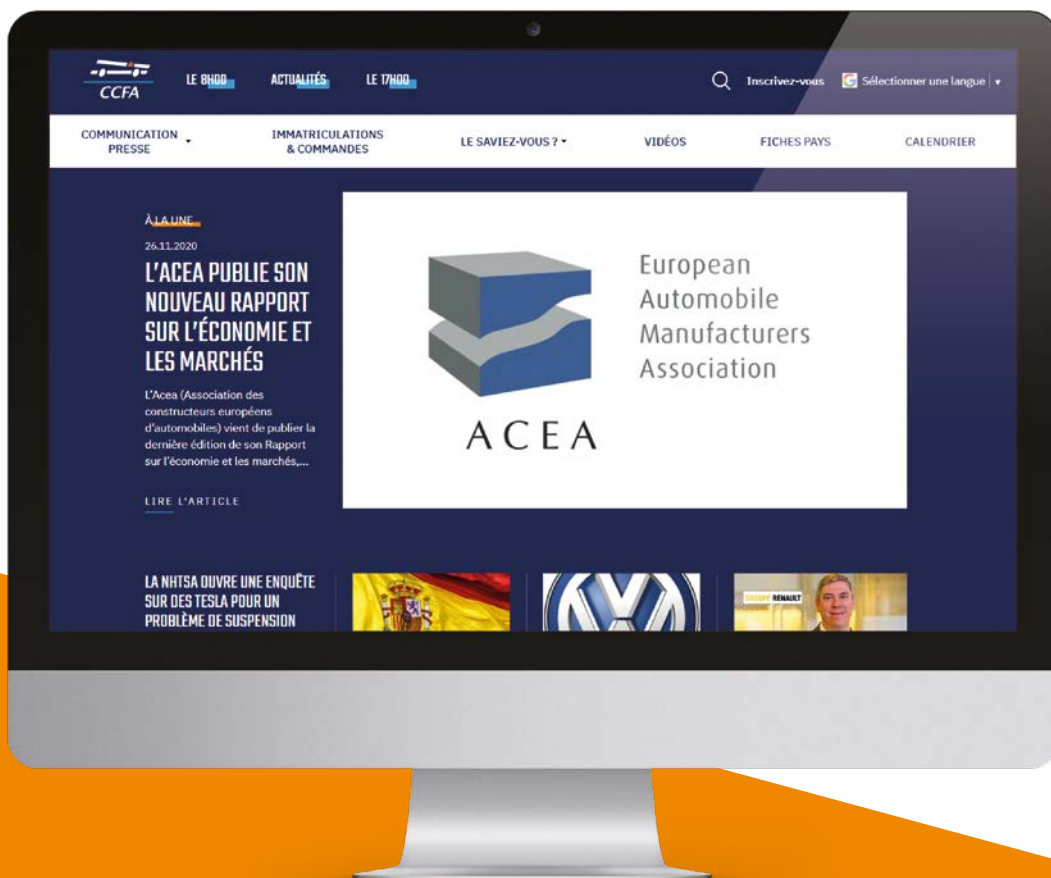
Haute-Normandie head office  
Technopôle du Madrillet  
Avenue Galilée BP 20060  
76801 Saint Etienne du Rouvray Cedex  
Tel: 02 32 91 54 50  
[www.pole-moveo.org](http://www.pole-moveo.org)

### Pôle Véhicule du Futur

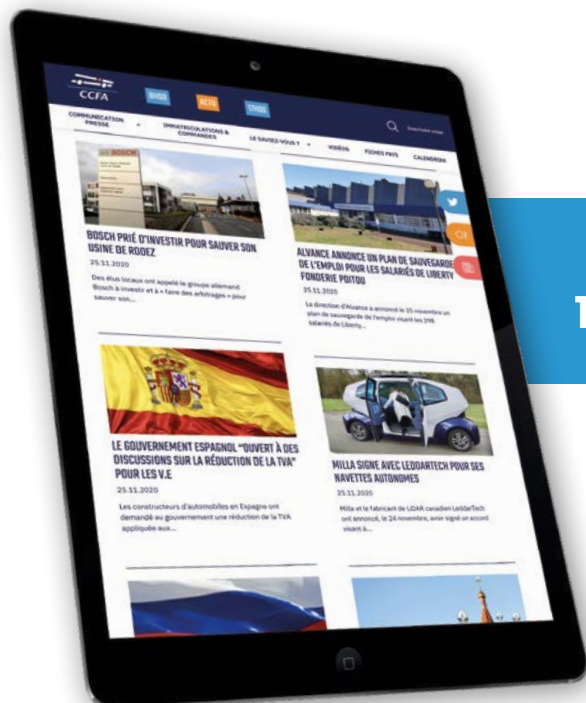
Head office: Centre d'affaires Technoland  
15, rue Armand Japy  
25461 Etupes Cedex  
General secretary: Technopole de Mulhouse  
40, rue Marc Seguin  
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