

# THE FRENCH AUTOMOTIVE INDUSTRY

CCFA



**5.3**  
million  
vehicles

Produced by French  
manufacturers  
worldwide

→ ANALYSIS & STATISTICS  
2021 EDITION



**79%**  
of  
vehicles

Produced by French  
manufacturers are  
sold abroad



**€6.9**  
billion

French automotive  
industry research  
and development  
budget in 2019



**€41**  
billion

French exports of  
industrial automotive  
products



**85%**

Share of domestic  
travel in France  
using passenger  
cars



**86%**

Share of domestic  
freight transport in  
France by road



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“The French Automotive Industry – Analysis and Statistics” can be downloaded from the CCFA website for €3, which will be fully donated to an organisation focusing on industry training for young people.”

## A WORD FROM THE PRESIDENT



### 2020, 2021, 2022 and Ongoing Crises

Bad weather is still very much a reality for the automotive industry. With as many disruptions in 2021 as in 2020, we were unable to publish our Analysis and Statistics brochure in time. Considerable data was published late, with world events leading to new deadlines.

2022 has begun with the war in Ukraine. We hope the new crisis will resolve quickly and that Europe will soon be at peace again. We also hope to see 2022 celebrate the end of Covid-19 (though the epidemic has flared up again in China) and of the semiconductor shortage, so the economy can finally recover.

In 2020, global automotive markets contracted for 78 million vehicles, a 14% drop following the 4.5% 2019 setback. Compared to 2018, the best year for automobiles in history, the market has dropped by 17.5 million units (-18%). The impact of the health crisis was particularly critical in Europe (-24%) and on the American continent (-19%), whilst Asia resisted better (-8%) thanks to China (-2%), which represents nearly a third of the global market.

French groups that are solidly implanted in Europe (27% of the European market for light vehicles markets) were particularly affected by the crisis. Their growing presence in other world territories, including South America, Russia, or India, which was also weakened, was insufficient to mitigate the extent of the decline.

In 2020, French car manufacturers produced 5.3 million light vehicles, amounting to 7% of the world automobile production.

In 2021, the semiconductor shortage picked up where the Covid-19 crisis had left off. This limited the market's scope of recovery, which only grew by 5%, and is still lagging by 10% compared to 2019. In Europe, the go-to market for French manufacturers, sales have remained at a stable low level whilst they were progressing more strongly in Asia and America.

The market in France, the largest one for French groups, remains very low, as does the European one.

Car mobility suffered the effects of lockdowns, but quickly recovered in France, as much for people, with 85% of journeys, as for merchandise, with 86% of tonnages transported. In 2021, transport fuel consumption progressed, nearing 2019 levels, a testimony to the resilience of this mode of transport.

In this volatile environment, the global sales of French groups remain low. Specific strategies have been deployed to restore the profitability of groups in order to continue investing in the three disruptions.

- Thanks to a larger offer, energy transition is gaining traction as sales of electric vehicles and rechargeable hybrids grow. However, other technologies must also be considered. Hydrogen, for example, will be able to better meet the needs of companies in the future... when prices become accessible.
- Digital transition is highly committed to connectivity, which is imposing itself in nearly every new model. Research on self-driving cars seems less urgent in a more difficult economic context, and given that the capacity of clients likely to buy new features is not yet consolidated.
- The service transition is still emerging, mobilising new projects and research.

With the Covid health crisis, the shortage of electronic components, a significant rise in energy and raw material prices, and the Ukrainian conflict, we remain steeped in a period of major uncertainty. Yet manufacturers must continue to invest, not only to satisfy customers and meet regulatory standards (environmental, for instance), but also to prepare for digital and service transitions. Since 2015, total R&D expenditures in France have progressed by 25%, amounting to nearly 7 billion euros in 2019. Competition is intense within the global automotive industry, but the competitiveness of French manufacturers on their national territory is stable.

Despite efforts by the French government, such as the CICE tax credit, lower manufacturing taxes, and maintaining the R&D tax credit (CIR), competitiveness continues to lag compared to the European average; further reducing manufacturing taxes is essential.

2020, 2021, 2022... One crisis after another, French car manufacturers are continually adapting in order to hold their own on passenger car, light commercial vehicle, and industrial vehicle markets. They are unfailingly producing, restructuring, innovating, and investing. But in France, public authorities must keep on encouraging a healthy competitive environment for its industry and considering automotive ecosystem capacities within the framework of the ecological transition. In the wake of three years of crisis, car manufacturers remain competitive and stand ready for new impetus as soon as there is an upturn.

*Enjoy the read!*

**Thierry COGNET**

## THE FRENCH AUTOMOBILE MANUFACTURERS' ASSOCIATION

The professional representation of the Automobile began in 1898 with the creation of the Chambre Syndicale de l'Automobile-CSA. In 1909, automobile manufacturers became independent and founded the Chambre Syndicale des Constructeurs d'Automobiles-CSCA, which was replaced in 1991 by the Comité des Constructeurs Français d'Automobiles-CCFA. Currently, its members are: Alpine, PSA (Automobiles Citroën - Automobiles Peugeot), Renault and Renault Trucks. Its purpose is to study and defend the economic and industrial interests of all French manufacturers nationally and internationally (excluding social issues which are dealt with by the Union des Industries et des Métiers de la Métallurgie - UIMM). It has a subsidiary, AAA DATA, which purpose is to provide solutions to its customers thanks to its presence throughout the Data value chain, particularly automotive.

In 2021, the CCFA will directly carry out its study missions (economy, statistics and transport) and rely mainly on the Plateforme Filière Automobile et Mobilités - PFA for communication and lobbying.

Other branches of the industrial automobile sector, also members of the PFA, are grouped together within other federations (FIEV, Fédération des Industries des Équipements pour Véhicules - French Automotive Equipment Industries Association, FFC, Fédération Française de Carrosserie, Industries et Services - French Bodybuilding, 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).

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, in the context of energy, digital and service transitions, the PFA entered a new stage with the following missions: leading 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). The downstream of the automotive sector is represented by the National Council of Automotive Professions (CNPA) which brings together trades in vehicle sales, fuel distribution, repair, recycling and automotive services.

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.



# 1898

**The Chambre Syndicale de l'Automobile was founded**

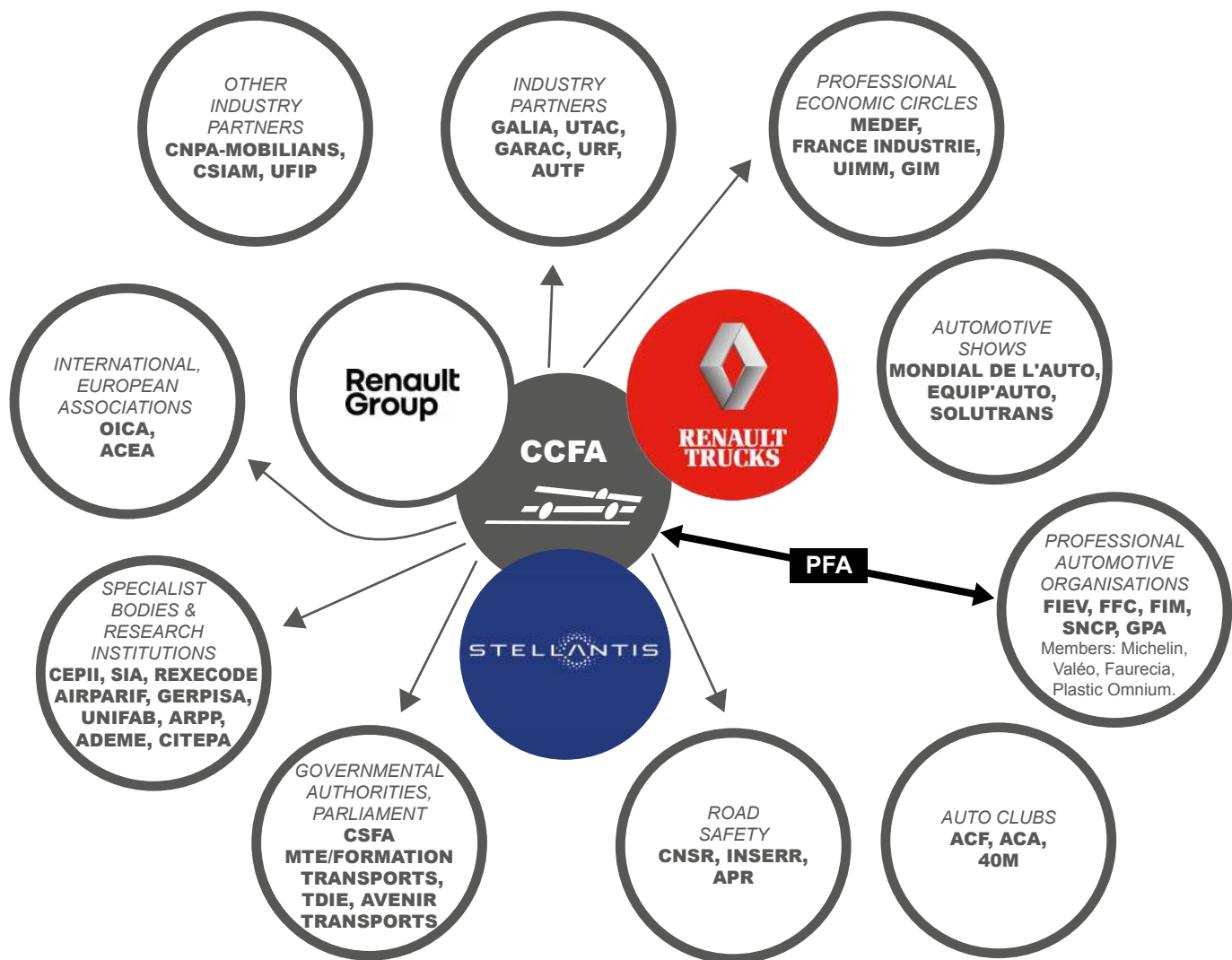


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## THE CCFA AND ITS PARTNERS IN 2020



### ► INTERNATIONAL, EUROPEAN MANUFACTURERS ASSOCIATIONS

**OICA:** International Organisation of Motor Vehicle Manufacturers

**ACEA:** European Automobile Manufacturers' Association

### ► INDUSTRY PARTNERS

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

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

**GARAC:** Ecole Nationale des Professions de l'Automobile

**URF:** Union Routière de France

**AUTF:** Association des Utilisateurs de Transport de Fret

**CNPA-Mobilians:** Conseil National des Professions de l'Automobile

**UFIP:** Union Française des Industries Pétrolières

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

**ARPP:** Autorité de Régulation Professionnelle de la Publicité

### ► SPECIALIST BODIES & RESEARCH INSTITUTIONS

**CEPII:** Centre d'Etudes Prospectives et d'Informations Internationales

**SIA:** Société des Ingénieurs de l'Automobile

**AIRPARIF:** Association de surveillance de la qualité de l'air en Ile-de-France

**GERPISA:** Groupe d'Etudes et de Recherche Permanent sur l'Industrie et les Salariés de l'Automobile

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

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

**CITEPA:** Centre Interprofessionnel Technique d'Etudes de la Pollution Atmosphérique

**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

**CSFA:** Comité Stratégique de la Filière Automobile

**MTE/SDES/formation transports:** Section mobilités et transports du MTE

**TDIE:** Transports, développement intermodalité et environnement

### ► PROFESSIONAL ECONOMIC CIRCLES

**MEDEF:** Mouvement des Entreprises de France

**FRANCE INDUSTRIE:** Représentation de l'Industrie en France

**UIMM:** Union des Industries et Métiers de la Métallurgie

**GIM:** Groupe des Industries Métallurgiques de la Région Parisienne

### ► PROFESSIONAL AUTOMOBILE ASSOCIATED ORGANISATIONS

**FFC:** Fédération Française de la Carrosserie

**FIEV:** Fédération des Industries d'Equipements pour Véhicules

**FIM:** Fédération des Industries Mécaniques

**SNCP:** Syndicat National du Caoutchouc et des Polymères

**GPA:** Groupement Plasturgie Automobile

### ► ROAD SAFETY

**CNSR:** Conseil National de la Sécurité Routière

**INSERR:** Institut National de la Sécurité Routière et de Recherches

**APR:** Association Prévention Routière

## THE HEALTH CRISIS HAS CAUSED A COLLAPSE OF GLOBAL AUTOMOTIVE MARKETS

European markets, which had dropped and were at very low levels during the 2009 crisis, began recovering in 2014. Along with a broader scope, the recovery allowed French groups to gain market shares in Europe until 2018. In 2020, the health crisis recession caused a collapse of automotive markets in Western Europe (-24%) on a greater

scale than the two previous crises. In this context, French groups have slightly increased their market share in France (58.8%), but it decreased by a percentage point of 1.5 in Europe, excluding France (20.7%).

Outside Europe, Asian markets have weathered

the crisis better, particularly thanks to China's resistance (-1.9%), with only a small impact on French group deliveries, which dropped by 24% for Asia and by 25% overall. Global light vehicle production of French car manufacturers has decreased by 28%.

### ► KEY DATA (IN THOUSANDS)

	1997	2007	2019	2020	Change 2020/2019	Change 2020/2013
<b>World production of French groups (PSA* and Renault groups)</b>	<b>4,046</b>	<b>6,188</b>	<b>7,271</b>	<b>5,257</b>	<b>-28%</b>	<b>-5%</b>
Passenger cars	3,472	5,301	6,246	4,466	-28%	-7%
Light commercial vehicles	507	830	1,025	791	-23%	6%
All light vehicles	3,979	6,131	7,271	5,257	-28%	-5%
Heavy trucks (at constant scope)	36	58	n/a	n/a	-	-
<b>Production of French groups in France</b>	<b>2,525</b>	<b>2,573</b>	<b>1,885</b>	<b>1,108</b>	<b>-41%</b>	<b>-23%</b>
Passenger cars	2,235	2,165	1,375	719	-48%	-38%
Light commercial vehicles	258	352	510	389	-24%	38%
All light vehicles	2,493	2,518	1,885	1,108	-41%	-23%
Heavy trucks	30	55	n/a	n/a	-	-
<b>Vehicles deliveries outside France</b>	<b>2,822</b>	<b>4,697</b>	<b>5,536</b>	<b>4,088</b>	<b>-26%</b>	<b>-7%</b>
Passenger cars	2,526	4,110	4,756	3,500	-26%	-9%
Light commercial vehicles	276	549	758	573	-24%	12%
All light vehicles	2,802	4,659	5,515	4,074	-26%	-6%
Heavy trucks	20	38	21	14	-33%	-25%
<b>Vehicles deliveries outside Europe (17 countries)</b>	<b>659</b>	<b>2,110</b>	<b>2,513</b>	<b>1,929</b>	<b>-23%</b>	<b>-29%</b>
Passenger cars	563	1,914	2,276	1,764	-22%	-29%
Light commercial vehicles	88	178	227	157	-31%	-30%
All light vehicles	651	2,092	2,503	1,921	-23%	-29%
Heavy trucks	8	18	11	8	-28%	-29%
<b>Vehicles registrations in France</b>	<b>2,068</b>	<b>2,629</b>	<b>2,756</b>	<b>2,100</b>	<b>-24%</b>	<b>-5%</b>
Passenger cars	1,713	2,110	2,214	1,650	-25%	-8%
Light commercial vehicles	313	461	480	402	-16%	10%
All light vehicles	2,026	2,571	2,694	2,053	-24%	-5%
Heavy trucks	39.3	52.5	55.2	41.7	-24%	-4%
Coaches and buses	3.1	5.5	6.4	5.8	-10%	-8%
<b>Registrations in Europe (17 countries) of vehicles from French groups</b>	<b>3,300</b>	<b>3,906</b>	<b>4,613</b>	<b>3,377</b>	<b>-27%</b>	<b>20%</b>
Passenger cars	2,841	3,181	3,738	2,680	-28%	17%
Light commercial vehicles	432	690	849	679	-20%	37%
All light vehicles	3,273	3,871	4,587	3,359	-27%	21%
Heavy trucks	27	35	26	18	-29%	-11%

\*On 01/17/2021, the PSA group and the FCA group merge to create Stellantis group.

In 2020, the health crisis caused an unprecedented global economic crisis, with a decline in GDP (Gross Domestic Product) of more than 3%. With Turkey, China is one of the rare countries to have experienced positive growth in 2020 (+2.3%). In this context, the global production of French groups has receded by 28% for private vehicles and by 23% for light commercial vehicles. The collapse is to be compared with that of global markets, which dropped respectively by 15.9% and 8.7%. Consequently, total sales of French carmakers dropped by 20% in 2020, along with their investments, albeit to a lesser extent to better meet the numerous automotive sector challenges, such as the competitiveness of industrial resources, market and production globalisation, preserving the environmental sustainability, and

the growth of digital technology and new mobility services.

In France, economic activity receded by 8% in 2020, while the automotive market dropped by 25% for private vehicles and by 16% for light commercial vehicles. Due to travel restrictions, road traffic also collapsed (-17%). Lockdown measures and shop closures caused household car expenditures to drop by more than 7%, despite a greater purchasing power. The share of French car manufacturers on the light vehicle market has reached 58.8% (+0.3 point), alongside a higher share for electrified vehicles (both electric and plug-in hybrid).



**-24%**

**Fall in vehicle registrations in Western Europe in 2020**

## FRENCH GROUPS, REPRESENTING 27% OF THE EUROPEAN MARKET FOR LIGHT MARKETS, ARE SUFFERING FROM THE SALES DECREASE IN EUROPE

The share of French groups in global vehicle production dropped to 7% in 2020, down one percentage point compared to 2019.

	Unités	2019	2020	Change 2020/2019
<b>Market share of French groups (new light vehicles)</b>				
In France	%	58.5%	58.8%	+0.3 point
In Europe (17 countries) excluding France	%	22.1%	20.7%	-1.4 point
In Europe (17 countries)	%	28.1%	26.9%	-1.1 point
<b>Market share of French brands (new heavy trucks)</b>				
In Europe (17 countries)	%	8.2%	7.8%	-0.5 point
<b>French groups' share in world production (PSA* and Renault Groups)</b>				
Passenger cars	%	9.3%	8.0%	-1.3 point
Commercial vehicles	%	4.2%	3.7%	-0.5 point
Total	%	7.9%	6.8%	-1.1 point
<b>French automobile international trade</b>				
Exports	€ billions	51.7	42.3	- 18.2%
Imports	€ billions	66.9	57.6	- 14.0%
Balance	€ billions	-15.2	-15.3	+ 0.5%
<b>Automotive industry contribution to foreign trade goods balance</b>				
Exports	%	10.4%	10.1%	-0.3 point
Imports	%	11.6%	11.5%	-0.1 point
<b>World key figures for french manufacturers (PSA* and Renault Groups)</b>				
Sales	€ billions	130.3	104.2	- 20.0%
Capital expenditure	€ billions	5.7	-	-
Number of employees	thousands of people	388	394	+ 1.5%
<b>Jobs related to the automotive industry in France</b>				
Automotive industry	thousands of people	232	216	-
As a share of industry	%	7%	7%	-
Total jobs (directly and indirectly related)	thousands of people	2,219	2,187	-
As a % of the employed working population	%	8%	8%	-

\*On 01/17/2021, the PSA group and the FCA group merge to create Stellantis group.

In 2020, in Western Europe, markets for new vehicles receded by 25%, whilst the market share of French groups dropped by 1.1 point, following an increase in 2018 due to the integration of new brands. The weight of European sales amongst French group sales will not continue in the long term, due to differences in automobile density between a mature territory and emerging countries.

In Eastern Europe, markets collapsed just as drastically as in the rest of Europe (-23%). However, starting from a lower level following the 2019 sales drop, the Russian market only dropped by 9% in 2020. Indeed, French groups have gained market shares here. Likewise, the Turkish automotive market is one of the rare ones to have experienced a growth in 2020. It bounced back following two years of drastic dips in registrations, leading to French car manufacturers also gaining market shares in this country.

The Chinese market weight and its rate of change explain evolutions in the general Asian market.

Here, the decline in registrations was contained thanks to an earlier economic upturn compared to the rest of the world. Following continued growth since 2013, Asian opportunities for French groups have been divided by three since 2018, including due to deliveries to Iran halting, as well as the severe drop in exports to China, where strategies have been readjusted.

In Latin America, markets regressed by 27% in 2020, and up to 57% in Columbia. Sales of French carmakers to this area dropped by nearly 40%, except in Argentina, where deliveries only dropped by 10%.

Finally, Africa was also severely affected by the economic crisis, with registrations declining by 22%, except in Egypt, where the market has bounced back. In this context, opportunities for French groups have receded by 40%. In Egypt and Morocco, they have nonetheless slightly increased their market shares.

In emerging countries, where opportunities should

grow over time, French groups are continuing to expand both commercially and industrially, with or without partnerships, to meet motorisation needs. This involves continued efforts in Asia, South America, and various African countries.



10%

Weight of the automobile in the foreign trade of goods

## WORLD VEHICLE PRODUCTION

In 2020, global vehicle production was hit hard by plant closures and declining sales linked to containment measures following the health crisis. The number of vehicles produced worldwide fell by 16% to 77.7 million, or 14.5 million less than in 2019. Production was down 22% in Europe and America, 10% in Asia and 28% in Africa.

After the drop in 2009, world production grew continuously until 2017 (+3% per year), to peak at 97 million units. Then, in 2018, it experienced a first decline which was confirmed in 2019. In 2020, the sharp drop in production brings it back to its level of 2010. Automotive demand is characterised by the scale of its fluctuations even at the global

level and, in 3 years, the cumulative decline since the record level of 2017 reaches -20%, or -20 million units.

In mature areas (Western Europe, North America, Korea, Japan), the production levels observed in 2020 are now all lower than their pre-crisis levels (2007). However, in emerging areas or countries and particularly in Asia, which is the current centre of automotive expansion, production remains higher than before the crisis. China, which has held up much better than the other countries and is experiencing a decline in production of only 2% in 2020, has multiplied its volumes by nearly 3 since 2007.

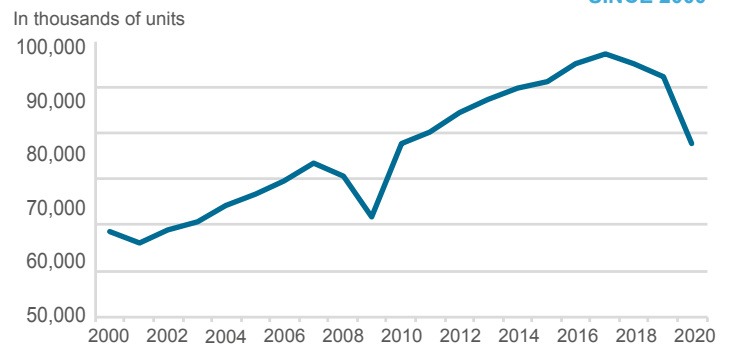


# -16%

## Drop in global vehicle production in 2020

In thousands	2019	2020	Change %
<b>EUROPE</b>	<b>21,579</b>	<b>16,947</b>	<b>-21.5</b>
<b>WESTERN EUROPE</b>	<b>13,623</b>	<b>10,210</b>	<b>-25.1</b>
Germany	4,947	3,742	-24.4
Belgium	286	267	-6.4
Spain	2,823	2,268	-19.6
France	2,175	1,316	-39.5
Italy	915	777	-15.1
The Netherlands	176	127	-27.9
United Kingdom	1,381	987	-28.5
Sweden*	279	249	-10.8
<b>CENTRAL AND EASTERN EUROPE AND TURKEY</b>	<b>7,957</b>	<b>6,736</b>	<b>-15.3</b>
New EU Member States	4,379	3,582	-18.2
Russia	1,720	1,435	-16.6
Turkey	1,461	1,298	-11.2
<b>AMERICA</b>	<b>20,149</b>	<b>15,690</b>	<b>-22.1</b>
NAFTA (1)	16,823	13,376	-20.5
South America	3,326	2,315	-30.4
<b>ASIA-OCEANIA</b>	<b>49,334</b>	<b>44,289</b>	<b>-10.2</b>
ASEAN (2)	4,143	2,835	-31.6
China	25,751	25,225	-2.0
South Korea	3,951	3,507	-11.2
India	4,524	3,394	-25.0
Japan	9,685	8,068	-16.7
<b>AFRICA</b>	<b>1,114</b>	<b>799</b>	<b>-28.3</b>
<b>TOTAL</b>	<b>92,176</b>	<b>77,724</b>	<b>-15.7</b>

CHANGES IN WORLD MOTOR VEHICLE PRODUCTION SINCE 2000



(1) NAFTA: Canada, USA, Mexico.

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

\* Only passenger cars

Sources: OICA - CCFA estimates March 2021

In Europe, production fell by 21.5% in 2020, standing at 17 million vehicles, or 22% of the total. The drop is more marked in Western Europe where production volumes fell by 25% in 2020, with significant drops in major countries: Germany (-24%), Spain (-20%), Italy (-15%), United Kingdom (-29%). France is the most affected country with a 39.5% decline in its production, which is also explained by the departure of production of lower-range cars, due to its lack of competitiveness. In Central and Eastern Europe

including Turkey, production fell by 15%. It fell by 18% in the new member states of the European Union, by 17% in Russia and by 11% in Turkey.

On the American continent, production represented 15.7 million vehicles in 2020 (20% of the total), down 22% compared to 2019. South America experienced a more marked drop (-30%) than the America, where production fell by 20%, including -19% in the United States.

Asia-Oceania, which accounts for more than half of world production, is holding up better than the other regions (-10%), mainly thanks to China, which recorded a drop of only 2%. In India, production collapsed by 25% while in Japan and Korea, it fell by 16.7% and 11.2% respectively.



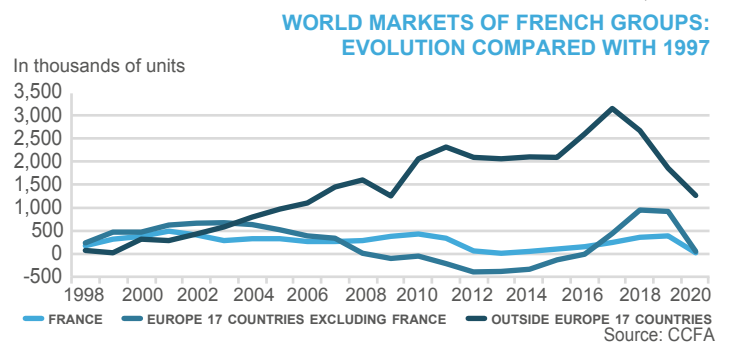
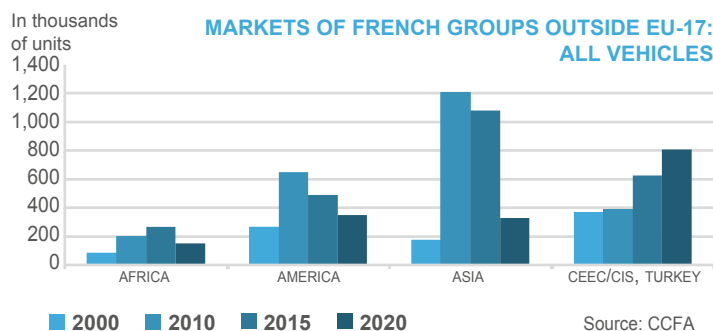
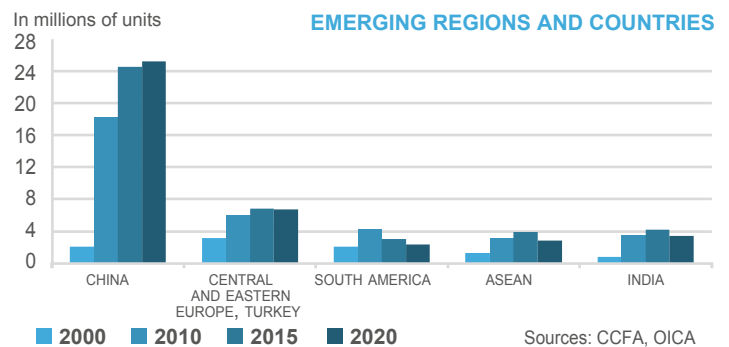
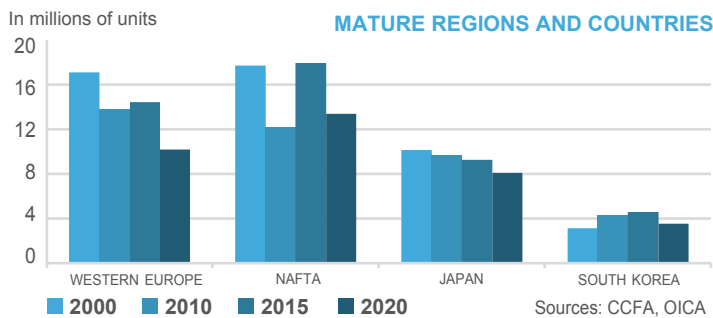
# WORLD VEHICLE PRODUCTION

Between 2010 and 2018, the automotive industry remained globally dynamic overall. Vehicle production increased by 25%, or 19 million units. Only South America and South Korea were exceptions with declining production over the same period. But, in 2019, we are witnessing a first decline in world production (-5.3%) due to the international context marked by political and economic uncertainties which weigh on trade and growth. Then, the year 2020, marked by the health crisis, led to a collapse in production (-16%) which returned to its 2010 level, i.e. 78 million vehicles. However, there are contrasting developments between mature areas or countries and emerging areas or countries.

In mature areas or countries, production increased by nearly 5.5 million vehicles between 2010 and 2018, reaching a level of 45.5 million units. However, in 2019, it fell by 3.7%, then by 20% in 2020, losing nearly 9 million vehicles in two years. Thus, over the entire 2010-2020 period, the area lost nearly 5 million vehicles and now represents only 45% of global production, compared to 48% in 2019 and 52% in 2010. During the period, only North America saw its production increase (+10%), in particular thanks to Mexico (+36%). With production falling by 25% in 2020, Western Europe is the region that has suffered the greatest decline over the entire period 2010-2020 (-26%) while production in Japan and South Korea fell by 16% and 18% respectively.

In emerging areas or countries, production increased by 13.5 million vehicles between 2010 and 2018 (+38%) and fell by 8 million units between 2018 and 2020 (-17%). This represents a gain over the period 2010-2020 of nearly 5 million units produced and increases the share of this zone in world production (52% of the total). Within this group, China, Central and Eastern Europe and Turkey are the areas in which production remains above its 2010 level in 2020. China experienced the strongest increase between 2010 and 2018 (+9.5 million vehicles) but has lost 2.6 million units since 2018. In 2020, it represents 32% of global production, compared to 24% in 2010. Central and Eastern European countries and Turkey have also increased sharply between 2010 and 2018 (+1.9 million units) but stagnated in 2019 and fell by 15% in 2020. They represent 9% of

world production. Indian production increased by more than 30% over the same period (+1.6 million units and a share of 5%) but fell by 34% between 2018 and 2020. Finally, production in ASEAN countries gained 1.2 million units between 2010 and 2018 but lost 1.5 million between 2018 and 2020. South America is the only emerging zone which saw its production drop over both periods. It only represents 3% of world production, compared to 5% in 2010.



In the context of the global slowdown observed in 2018 and 2019, French groups experienced a drop in their deliveries outside Europe (-30% between 2017 and 2019), while deliveries to Europe 17 countries outside France increased by 20% in two 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, also had a strong impact on the volumes of deliveries to these areas. Over the 2010-2019 period, deliveries increased overall, except in Asia (-770,000 units)

due to market difficulties in China and Iran. They are also down in Latin America (-96,000 units). Deliveries are up in Central and Eastern European countries and in Turkey (+355,000 units) and in Africa (+53,000 units). In Europe, deliveries to Spain and Italy continued to grow (respectively +172,000 and +204,000 units since 2010), after the fall due to the crisis. In 2020, we are witnessing a collapse in deliveries to all zones, except the PECO/CIS zone, Turkey, due to the rebound of the Turkish market and the nearly 80% increase in deliveries to this country.

**52%** Share of emerging zones and countries in global vehicle production

## THE WORLD RANKING OF CAR MANUFACTURERS

The top 10 manufacturers accounted for 67% of global production in 2020. French manufacturers Renault and PSA produced just over 5 million vehicles between them and rank tenth and twelfth in the world respectively. In order to strengthen their competitiveness, manufacturers are multiplying cooperation in different forms. French manufacturers are part of this approach. On the one hand, Renault relies on its alliance with Nissan, which has been extended to Mitsubishi; together they produced more than 7 million vehicles in 2020. On the other, PSA merged in 2021 with FCA to create Stellantis, which would have represented nearly 6 million vehicles in 2020.

In 2020, global production fell by 16%, but in Europe the drop reached 21% and particularly impacted European manufacturers. Thus, the production of vehicles by French manufacturers

has been particularly affected by the health crisis and the collapse of European markets. Their production represented 7% of world production and that of passenger cars 8%, a level that remains higher than that observed in 2013 - 2014 (6%).

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

31 and 57% in 2017). The various cooperations between manufacturers are accelerating this phenomenon of internationalisation.



# 7%

**Share of French groups  
in global vehicle  
production in 2020**

### ► WORLD VEHICLES PRODUCTION IN 2020 (1) (IN THOUSANDS)

Rank	GROUP	2019	2020	% Change
1	TOYOTA	10,725	9,213	-14.1
2	VOLKSWAGEN	10,823	8,900	-17.8
3	HYUNDAI-KIA	7,200	6,351	-11.8
4	GM (2)	7,332	6,131	-16.4
5	HONDA	5,171	4,399	-14.9
6	FORD (2)	5,386	4,187	-22.3
7	NISSAN	4,958	3,630	-26.8
8	FCA	4,600	3,435	-25.3
9	DAIMLER AG	3,295	2,840	-13.8
10	<b>RENAULT</b>	<b>3,862</b>	<b>2,799</b>	<b>-27.5</b>
11	SUZUKI	3,056	2,579	-15.6
12	<b>PSA</b>	<b>3,436</b>	<b>2,477</b>	<b>-27.9</b>
13	SAIC	2,538	2,464	-2.9
14	BMW	2,564	2,325	-9.3
15	GEELY	2,178	2,100	-3.6
16	CHANGAN	1,178	1,394	18.4
17	DONGFENG MOTOR	1,297	1,182	-8.9
18	MAZDA	1,488	1,175	-21.0
19	GREAT WALL	1,087	1,124	3.4
20	BAIC	953	1,057	10.9
21	TATA	1,274	961	-24.5
22	SUBARU	987	885	-10.4
23	MITSUBISHI	1,441	854	-40.7
24	CHERY	659	689	4.6
25	ISUZU	648	597	-7.8
37	<b>VOLVO-UD TRUCKS-RENAULT TRUCKS-MACK</b>	243	173	-28.6
	<b>ALLIANCE RENAULT- NISSAN-MITSUBISHI</b>	<b>10,261</b>	<b>7,283</b>	<b>-29.0</b>
	<b>STELLANTIS (FCA-PSA)</b>	<b>8,036</b>	<b>5,912</b>	<b>-26.4</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 July 2021

The decline in global production in 2020 has had an impact on all major automotive groups. Those most established in Europe and America seem to have suffered the most from the decline in the markets.

Thus, the Toyota group took first place in the ranking in 2020, overtaking the Volkswagen group, thanks to a production which fell slightly less than the latter (-14% against -18% for Volkswagen).

General Motors, already impacted by the evolution of its perimeter, now without Opel, fell further, moving to fourth position. Ford's production is, for its part, strongly affected by the decline in North America and falls to sixth place.

Japanese manufacturers are, for their part, less affected by the health crisis. Hyundai-Kia saw its production fall by 12%, which allowed it to move up to third place, while Honda passed Ford in fifth place in the ranking. Suzuki is also moving up the rankings, while Nissan, despite a sharp drop in production, is not moving.

As for European groups, the Volkswagen group, which is very present in emerging countries, particularly in China, held up better than its European counterparts and fell by «only» 18%. Similarly, Daimler and BMW managed to limit the fall in their production to -14% and -9%. For the other European groups, the situation is very degraded with production cuts of around 25%.

Manufacturers in emerging countries (China, India) are experiencing very contrasting situations. The Indian manufacturer Tata was particularly affected by the decline in the Indian market (-25%) and saw its production drop by 25%. Chinese manufacturers, on the other hand, benefited from the better resistance of the markets in China. Changan, Great Wall or BAIC even manage to maintain an increase in production in 2020.

For heavy vehicle manufacturers, the global economic situation has also had a strong impact on their activity and the Volvo group (including Renault Trucks) has reduced its production by 29% in 2020.



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



## 36%

Share of exported vehicles in Japanese production in 2020

China, which has become the world's leading producer 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 the production.

The European Union (28 countries) is the second largest producing area in the world, thanks to its internal market and the weight of its exports (one third of production).

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

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

In Japan, exports represent approximately 50% of production, except in 2020 when their weight drops to 36%. As for imports, they still account for around 6% of total registrations.

	European Union (1)		USA, Canada and Mexico (3)		Japan	
<b>PASSENGER CARS</b>						
<b>PRODUCTION</b>	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
2019	15 828	107	4 370	62	8 329	100
2020	12 040	81	3 222	45	6 960	83
<b>IMPORTS (2)</b>	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%
2019	4,316	27%	n/a	n/a	298	4%
2020	3,511	29%	n/a	n/a	254	4%
<b>EXPORTS (2)</b>	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%
2019	5,319	34%	n/a	n/a	4,373	53%
2020	4,595	38%	n/a	n/a	2,624	38%
<b>LIGHT COMMERCIAL VEHICLES</b>						
<b>PRODUCTION</b>	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
2019	1,880	81	12,453	144	1,356	76
2020	1,525	66	10,154	117	1,108	62
<b>IMPORTS (2)</b>	in thousands	share of production	in thousands	share of production	in thousands	share of production
2000	242	10%	915	11%	8	0.4%
2010	310	17%	1,136	16%	2	0.1%
2019	493	26%	n/a	n/a	1	0.1%
2020	391	26%	n/a	n/a	2	0.2%
<b>EXPORTS (2)</b>	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%
2019	471	25%	n/a	n/a	445	33%
2020	390	26%	n/a	n/a	319	29%

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

(2) EU community trade is not included.

(3) Mexico is included since 2009.

Sources: OICA, Eurostat, CFA 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	-
2015	24,567	135	728	3%	1,103	4%
2019	25,721	141	1,040	4%	n/a	-
2020	25,225	138	964	4%	n/a	-

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

In the European Union (28 countries), vehicle production grew by 9% between 2000 and 2018 (compared to around 15% between 2000 and 2007) and trade, already significant, has increased very markedly. In 2019 and 2020, despite declines in production of 5% and 23% respectively, vehicle exports only fell by 2% and 14%.

In North America, production fell by 6% between

2000 and 2019. Imports, already very significant in 2000, grew by 67% between 2000 and 2018 and represent more than a third of production, both for passenger cars and for commercial vehicles. As for exports, in 2018 they represented only 13% of production (one third for the EU and half for Japan), with a very significant weight for passenger cars (31%, against 3% for commercial vehicles).

In Japan, vehicle production fell by 5% between 2000 and 2019, but is higher than its 2010-2018 average, following the dynamism of the domestic market and exports. The latter had increased significantly, in

connection with the depreciation of the yen, and in 2008 exceeded the level of 2000 by 51%; in 2020, production only fell by 17% thanks to the better performance of the domestic market, while exports fell by 39%.

In China, production increased by 41% between 2010 and 2019, and exports by 108%, but the latter only represent a small volume. In 2020, Chinese production only fell by 2% and exports by 7%.

## WORLD VEHICLE MARKETS

In 2020, the global automotive market experienced an unprecedented fall of 14%, bringing the volume of registrations back to their 2010 level, i.e. 78 million vehicles. The passenger car market suffered more from the crisis than the commercial vehicle market (-16% against -9%). The decline in sales was more marked in Europe (-20%) and America (-18.5%), while Asia held up better thanks, in particular, to the lesser decline observed in China (-1.9%) which represents two-thirds of the Asian market. Africa, which represents only 1% of the market, suffered a sharp decline. We also see that the least developed countries, where the support mechanisms have been less, have suffered more from the crisis with market declines of more than 20%.

In Europe, the decline in sales is less marked in the Central and Eastern European markets, in particular because the Russian and Turkish markets, which fell in 2019, started from a lower level. In America, NAFTA countries show a less steep drop (-16.6%)

than Central and South American countries (-27%). In Asia, India and Japan were more affected by the crisis than China and South Korea, with a drop in registrations of -23% and -11.5% respectively.

The automotive markets are strongly linked to the economic situation and cyclical phenomena mainly explain their evolutions. However, they are also characterised by short-term fluctuations of significant magnitude, whether for renewal or first equipment.

Since 2005, the centre of gravity of the global automotive market has shifted from Western Europe and North America, mature markets (56% of the global market in 2005, against 38% in 2020) to Asia. Over this period, the Western European market stagnated, before collapsing in 2020, and only represents 16% of the total, against 26% in 2005. NAFTA, which weighed 31% of the world market in 2005, in today represents 22%. Over the same period, the Asian region experienced triple-digit growth, thanks in

particular to the strong increase of sales in China and India, and now represents more than 51% of worldwide sales (compared to 31% in 2005).

China, which became the world's largest market in 2009, now accounts for 32.5% of the total, followed by the United States (18.5%), Japan (5.9%), Germany (4.2%) and India (3.8%). The top five world markets thus represent 65% of the world market.

**China :  
1/3  
Of the world market**

	Passenger cars			Commercial vehicles			Total			Change 2020/2019
	2019	2020		2019	2020		2019	2020		
	thousands	thousands	%	thousands	thousands	%	thousands	thousands	%	%
<b>EUROPE</b>	17,951	14,166	26.4	2,978	2,540	10.4	20,929	16,706	21.4	-20.2
Western Europe	14,287	10,789	20.1	2,373	1,927	7.9	16,660	12,716	16.3	-23.7
Central and Eastern Europe	3,663	3,377	6.3	605	613	2.5	4,269	3,990	5.1	-6.5
<b>AMERICA</b>	9,546	6,775	12.6	15,286	13,471	55.3	24,832	20,245	26.0	-18.5
NAFTA (1)	5,981	4,253	7.9	14,353	12,704	52.1	20,334	16,957	21.7	-16.6
USA	4,720	3,402	6.3	12,317	11,051	45.3	17,037	14,453	18.5	-15.2
Central and South America	3,565	2,522	4.7	932	767	3.1	4,498	3,289	4.2	-26.9
<b>ASIA-OCEANIA</b>	35,361	32,001	59.7	8,122	8,106	33.3	43,483	40,107	51.4	-7.8
China	21,472	20,178	37.6	4,325	5,133	21.1	25,797	25,311	32.5	-1.9
South Korea	1,497	1,618	3.0	298	288	1.2	1,795	1,906	2.4	+6.2
India	2,962	2,433	4.5	855	505	2.1	3,817	2,939	3.8	-23.0
Japan	4,301	3,810	7.1	894	789	3.2	5,195	4,599	5.9	-11.5
ASEAN (2)	2,392	1,649	3.1	1,079	807	3.3	3,471	2,456	3.1	-29.2
Other Asia-Oceania	2,737	2,312	4.3	671	585	2.4	3,409	2,897	3.7	-15.0
<b>AFRICA</b>	873	657	1.2	307	255	1.0	1,180	913	1.2	-22.6
<b>TOTAL</b>	63,730	53,599	100.0	26,693	24,372	100.0	90,424	77,971	100.0	-13.8
<b>Change 2020/2019</b>		<b>-15,9%</b>			<b>-8,7%</b>			<b>-13,8%</b>		

(1) NAFTA: Canada, USA and Mexico.

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

Source: OICA

Global automotive sales were heavily impacted by the 2020 health and economic crisis and fell 14%. The Chinese market, which had been in decline for two years, is one of those that has best resisted the pandemic; it fell by only 1.9%, to just over 25 million vehicles.

In the United States, the market recorded a drop of 15.2%, to 14.5 million vehicles, i.e. a volume which remains higher than that observed during the 2009 crisis (10.6 million). In Canada, the decline was more pronounced with a 21% drop in registrations. Finally, in Mexico, the market fell by 28%. In Central and South America, the Brazilian market, which had been recovering for a few years, collapsed by 26%, losing 800,000 vehicles to reach 2 million units in 2020. In other countries, declines range from 18% in Argentina to 57% in Colombia.

In Western Europe, the market, down 24% in 2020, now stands at 12.7 million vehicles, i.e. a lower level than the trough of 2013 (13.2 million). Despite the sharp declines observed on the Italian (-26%) and Spanish (-31%) markets, registered volumes remain

above the low points recorded in 2012-2013. On the other hand, in France and the United Kingdom, where the declines were also marked (-24% and -28%), volumes fell below their lowest level in 2013. As for Germany, down by 18%, it returned to a volume identical to 2013 with 3.2 million vehicles.

Central and Eastern Europe, which accounts for 5.1% of the global market, saw its automotive market shrink by 6.5% in 2020. New member states of the European Union experienced negative growth rates similar to other members of the Union, i.e. around -20%. On the other hand, the Russian market, starting from a low level in 2019, fell less (-8%) to 1.6 million vehicles. Turkey, after two years of crisis, saw its vehicle sales jump by 66%.

In the Asia-Oceania zone, the market excluding China amounted to 15 million vehicles in 2020, or 19% of the total. The Japanese market reached 4.6 million vehicles, down 11.5% in 2020. The Indian market totaled 2.9 million vehicles in 2020, down 25% compared to 2019, in an already declining market last year (-13% compared to 2018). Indonesia

is the country that has seen the sharpest decline, going from more than one million vehicle registrations in 2019 to 500,000 vehicles in 2020. Conversely, in South Korea, the market which was down in 2019 (-1.8%) grew by 6.2% in 2020 and reached 1.9 million vehicles.

In Africa, registrations fell by 22.6% in 2020 and fell below one million vehicles to represent only 1.2% of the world market. South Africa, Africa's leading market, saw its registrations drop by 30% in 2020 to 377,000 vehicles. In Morocco, the market fell by 20% to 133,000 units. Only Egypt, the second African market, is experiencing a rebound in 2020 with a 29% growth in registrations.

# VEHICLES IN USE IN THE WORLD

In 2015, the global vehicle fleet (passenger cars and commercial vehicles) amounted to 1.3 billion units (nearly 75% passenger cars), an increase of 4% compared to the previous year. The average growth rate since 2011 is 4%, a more dynamic pace than during the crisis (+3% on average between 2007 and 2009). In 2015, registrations represented 7% of the fleet and ensure both the renewal of the existing fleet and its pure growth. In 2020, with a collapse in sales and a larger base, this ratio will drop significantly, which should result in a slower rate of growth of the base.

Bases are almost stable in the mature markets of developed countries (increases generally between 0% and 2%). They are growing strongly in emerging countries (between 3% and 12%).

The United States fleet is the largest in the world with 264 million vehicles, ahead of those in China and Japan (respectively 163 and 77 million units). France ranks eighth in the world.

The car density in the world averaged 182 vehicles per 1000 inhabitants (+27% compared to 2005). Nevertheless, it varies from 42 vehicles in Africa to 670 in the NAFTA zone (United States, Canada, Mexico), passing through 85 in Asia (excluding Japan and South Korea), 176 for Central and South America and to more than 500 for the European Union and Japan/South Korea. The density of Europe as a whole stands at 471.

North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has benefited

from strong growth in the base with an average rate of 6% per year since 2005. The latter is thus increased from 10 to 19 million units.



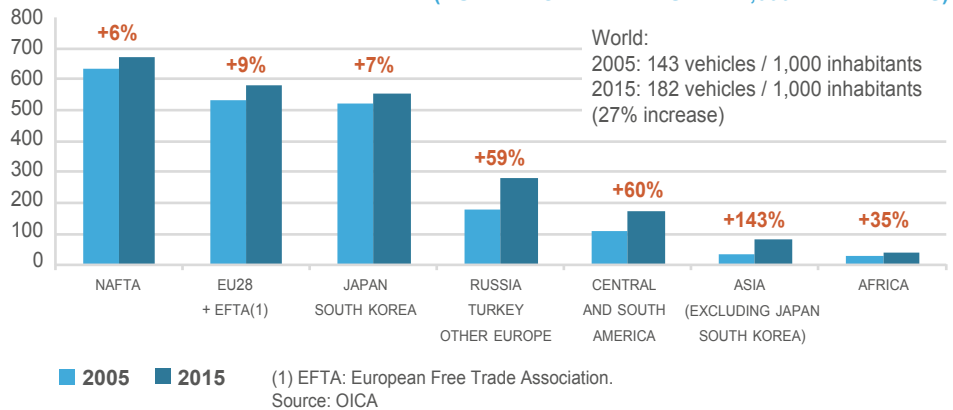
**1.3 billion** Number of vehicles in use in the world in 2015

	Total		Change 2015/2014
	2014	2015	
	thousands	thousands	%
<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>

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



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



In 2015, mature areas represented more than 50% of the world stock and 15% of the world population. They have lost around 15 points to the benefit of emerging zones since 2005.

Within the Europe zone, which represents about a third of the global stock, the number of vehicles in use is growing more rapidly in the east than in the west (see page 19). Motorisation rates are also mixed. The number of vehicles in the fleet in this zone increased by nearly 65 million units compared to 2005, of which 73% outside Western Europe (+20 million additional units in Russia).

In the Americas, NAFTA (25% of the global fleet) is a mature market with a high car ownership rate, especially in the United States where it stands at 821. Mexico is experiencing the highest growth in the fleet (+4% between 2010 and 2015). On the other hand, Central and South America is an emerging zone whose share reached 7% of the world fleet in 2015. Its density stood at 176. The number of vehicles in America has increased by 86 million units since 2005, almost equally between NAFTA and Central and South America.

In Asia, Japan and South Korea (8% of the global fleet), mature markets, have a motorisation rate of 609 and 417 respectively. On the other hand, emerging countries, with a larger population, have a low car density : 22 in India, 87 in Indonesia and 118 in China. Since 2005, almost all of the increase in the number of customers has come from Asia - excluding Japan and South Korea. China (131 million additional units) is far ahead of India (+19 million) and Indonesia (+13 million).

## WORLD TRADE IN AUTOMOTIVE PRODUCTS

In 2019, even before the pandemic, global merchandise trade contracted for the first time since the 2009 crisis. Trade was held back by political tensions and protectionist measures as well as weaker global GDP growth, weaker than in 2018. Global exports of automotive products fell by 2.7% to \$1.502 billion, representing 8% of global merchandise exports and 12% of manufactured goods exports.

In addition to the macro-economic context, world trade in automotive products is influenced by multilateral agreements under the aegis of the WTO but also, increasingly, by bilateral or regional agreements signed between areas. In 2017, faced with high-level markets in the European Union and NAFTA, the share of intraregional trade in world trade was around 75%. The renegotiation of the free trade agreement between Mexico, the United States and Canada (CUSMA), which replaces

NAFTA on July 1, 2020, will further strengthen intraregional trade in this area. Conversely, in Asia-Oceania, intraregional trade barely reaches 30%. This area remains very outward-oriented with national markets that are not as open (Japan, etc.).

Finally, world trade is also influenced by changes in exchange rates. In 2019, the euro depreciated against the dollar due to the slowdown in economic activity in the euro zone. The dollar, meanwhile, appreciated against all currencies due to trade and geopolitical tensions, except with the yen.

In 2019, the European Union remains the main exporter of automotive products with 752 billion dollars, or 50% of world exports. The other major exporters are Japan (\$152 billion), the United States (\$139 billion) and Mexico (\$124 billion). South Korea and Canada are also among the top exporters of automotive products (\$60 billion

in 2019). Chinese exports have been growing in recent years but are at a lower level (59 billion dollars). In 2019, only the NAFTA countries and South Korea saw an increase in their exports.

On the import side, the European Union 28 countries imported 642 billion automotive products in 2019, 82% of which came from its area.

Automotive balances are positive in Japan (+129 billion dollars), in the European Union and in particular in Germany (+110 billion dollars), Mexico (+74 billion dollars) and South Korea (+49 billion of dollars). On the other hand, they are in deficit, at a record level in the United States (-178 billion dollars) and in China (-21 billion dollars).

**1,500 billion dollars**  
Amount of world exports of automotive industry products in 2019

### ► 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
2018	135.5	314.8	-179.4
2019	139.3	317.7	-178.4
<b>MEXICO</b>			
2010	55.6	29.4	26.2
2018	121.8	51.6	70.1
2019	124.0	49.7	74.3
<b>CANADA</b>			
2010	50.1	59.6	-9.5
2018	60.8	76.0	-15.2
2019	60.8	75.5	-14.7
<b>EUROPEAN UNION (1)</b>			
2010	546.4	426.9	119.4
2018	782.8	632.2	150.6
2019	752.1	642.6	109.6
<b>JAPAN</b>			
2010	149.5	14.2	135.3
2018	158.4	24.6	133.8
2019	152.4	23.5	128.9
<b>SOUTH KOREA</b>			
2010	54.5	8.0	46.5
2018	63.4	16.9	46.4
2019	65.2	16.4	48.8
<b>CHINA (EXCLUDING HONG-KONG)</b>			
2010	28.0	53.0	-25.0
2018	50.9	93.5	-42.6
2019	60.7	86.8	-26.2

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%

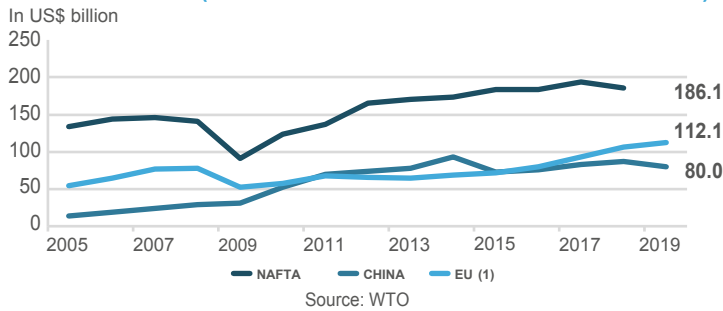
### ► TRADE OF THE MAIN EUROPEAN UNION COUNTRIES (1) AND THE UK (IN US\$ BILLION)

	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
2018	267.0	133.8	133.2	59.4	71.7	-12.3	60.0	49.8	10.2	43.9	49.6	-5.8	56.5	74.5	-18.1
2019	246.6	136.0	110.7	55.3	70.4	-15.1	57.0	46.8	10.2	39.4	46.3	-6.8	51.8	73.5	-21.7

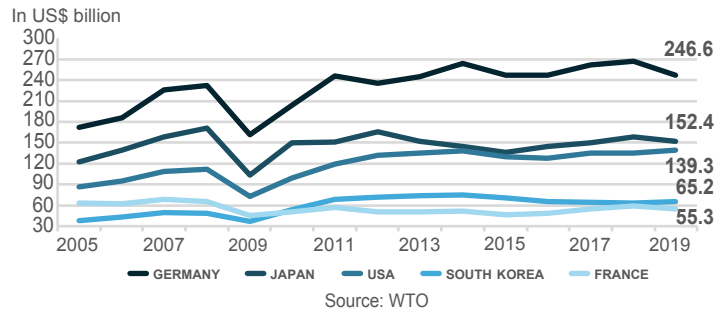
(1) For comparisons, 15 countries are counted in the whole European Union from 1993, 25 countries from 2004, 27 countries from 2006 and 28 from 2014. Source: WTO

# WORLD TRADE IN AUTOMOTIVE PRODUCTS

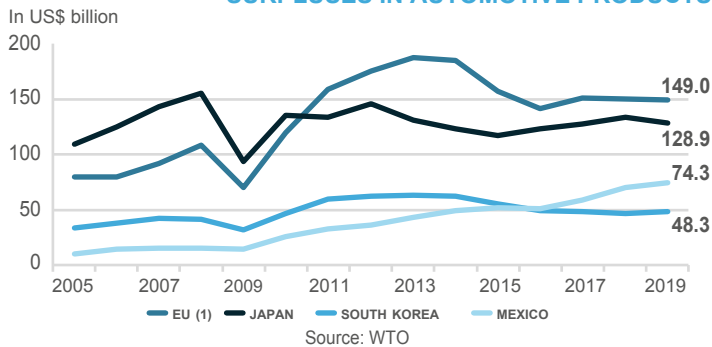
## IMPORTS FROM THE MAIN REGIONS FOR AUTOMOTIVE PRODUCTS (NOT INCLUDING INTRA-REGIONAL TRADE)



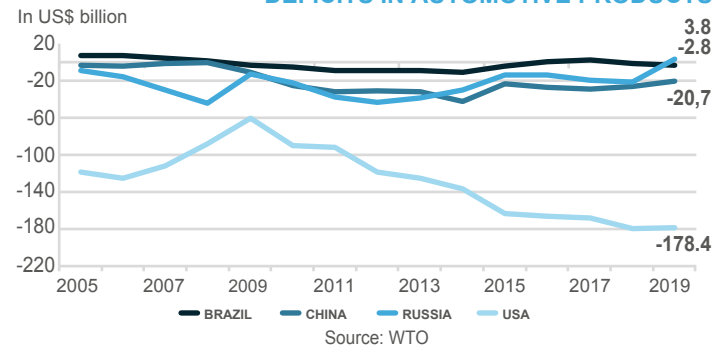
## MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



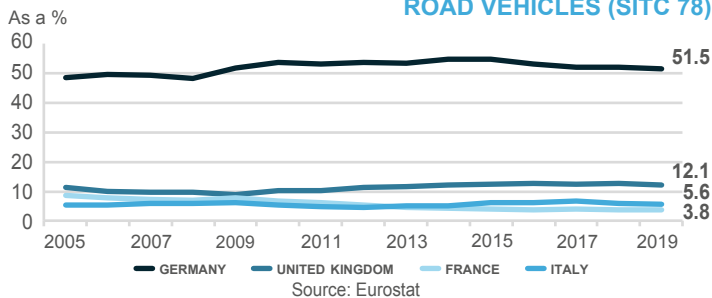
## SURPLUSES IN AUTOMOTIVE PRODUCTS



## DEFICITS IN AUTOMOTIVE PRODUCTS



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



**4%** Share of France in world exports of automotive industry products in 2019

(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, trade balances in automotive industry products evolved in contrasting ways depending on the country or zone. Mexico, South Korea, Japan and the European Union saw their trade surpluses increase. Conversely, the deficit balances of the United States, Canada and China increased until 2018. In 2019, the positive balance of the European Union deteriorated sharply (-40 billion dollars) with the decline in exports in the main countries (-8% in Germany and the United Kingdom, -7% in France and -5% in Spain).

In other areas, the trade balance in automotive products, which was positive, has become negative. In Canada, for example, the balance of 9 billion dollars in 2005 became a deficit of 15 billion in 2019, in connection with the place taken by Mexico in trade within NAFTA. Thus, in Mexico, the trade surplus was multiplied by 7 between 2005 and 2019. China, which has become the world's largest automotive market, multiplied its trade deficit by six, from -4 to -21 billion dollars between 2005 and 2019.

In 2019, Germany, with a third of European exports and 16% of world exports (\$247 billion), remains the leading exporter of automotive industry products in the world. In second place, Japan represented 10% of world exports of automotive products in 2019, with 152 billion euros, of which around 60 billion went to North America. Its exports to China fell to 14 billion dollars, a level close to

those to the EU28 (20 billion). France represented nearly 4% of world exports of automotive products with 59 billion dollars (including intra-EU trade), compared to nearly 7.6% in 2004.

Exports from the European Union to 28 countries reached \$752 billion (50% of world exports of automotive products), including 70% intra-EU trade in 2019 (74% in 2009). EU exports to China amounted to around \$37 billion. They reached 10 billion dollars to Russia as well as to Japan, 17 billion to Africa and 13 billion to the Middle East. Based on Eurostat data, more than half of EU exports to non-EU countries come from Germany (51% in 2019), ahead of the United Kingdom (12%), Italy (6%), Spain and France (4%). The share of the six new entrants (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) amounted to 10% in 2019.

The United States remained the world's largest importer of automotive products, with \$318 billion; following in particular the high level of its domestic market, its deficit in automotive products is significant and reached 178 billion dollars in 2019. With Canada and Mexico, the zone imports 443 billion dollars of automotive products, of which 40% comes from the 'outside'. But the new CUSMA deal is expected to bolster imports from Mexico amid the U.S. distancing from China and a drive to relocate production nearby.

According to the Mexican Automobile Federation

(AMIA), eight out of ten vehicles manufactured in Mexico are exported, of which 77% go to the United States. Chinese imports fell by 8% in 2019 to \$80 billion, but since 2005 they had grown by 15% per year. Reflecting the evolution of their oil resources, imports have developed strongly since 2005 in Russia, Saudi Arabia and the United Arab Emirates. In Russia, they increased nearly fourfold between 2005 and 2013, then fell sharply to pick up again in 2017. In 2019, they returned to a level close to that of 2010 (25 billion dollars). Finally in Australia, imports have almost doubled since 2005 to reach 25 billion dollars; this country has ceased to have production sites for light vehicles since the end of 2017.

# NEW PASSENGER CAR REGISTRATIONS BY COUNTRY



**-25%**

**Drop in new passenger car registrations in Western Europe in 2020**

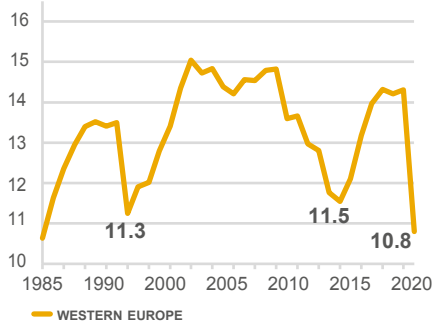
The passenger car market in Western Europe (90% of the European market) lost 3.5 million units in 2020 (-25% compared to 2019) to fall to 10.8 million registrations, i.e. a level below the low point of 1993 (11.3 million units) and 2013 (11.5 million units).

The main passenger car markets in Western Europe are Germany (which accounts for 27% of the Western European market), France (15.3%), which in 2020 overtakes the United Kingdom (15.1%), followed by Italy (12.8%) and Spain (7.9%). In 2020, all these countries experienced a drastic drop in their registrations, ranging from

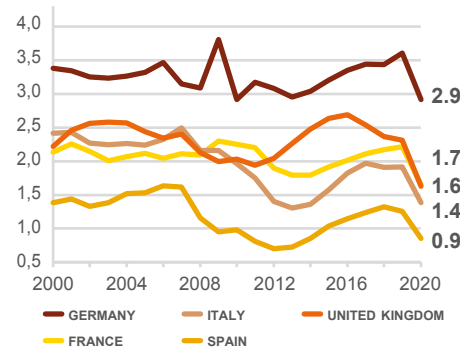
-19% in Germany to -32% in Spain (-25% in France). For the first three countries (Germany, United Kingdom, France), this decline caused the level of registrations to fall below their low point of 2013. On the other hand, in Italy and Spain, it remains above (+18% in Spain, +6% in Italy). In the other southern European countries (Greece, Portugal), despite markets down 30% in 2020, the level of registrations remains around 40% higher than their low point in 2012. In European countries North (Denmark, Finland, Norway, Sweden), less impacted by the first wave of COVID in March 2020, the markets fell less sharply, from only -0.7% in Norway to -18% in Sweden.

## ► NEW PASSENGER CARS REGISTRATIONS IN WESTERN EUROPE

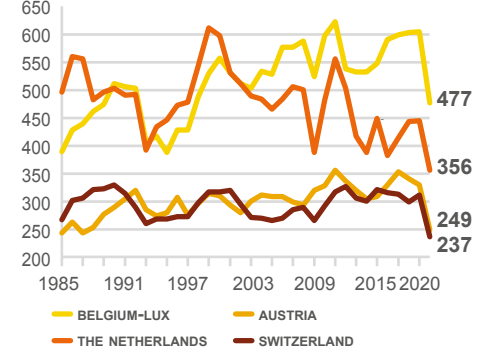
In millions of units



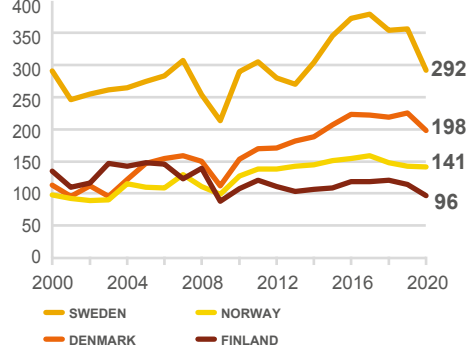
In millions of units



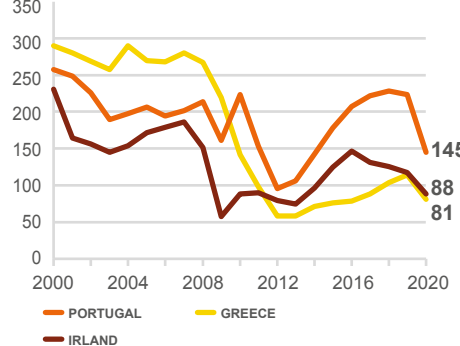
In thousands of units



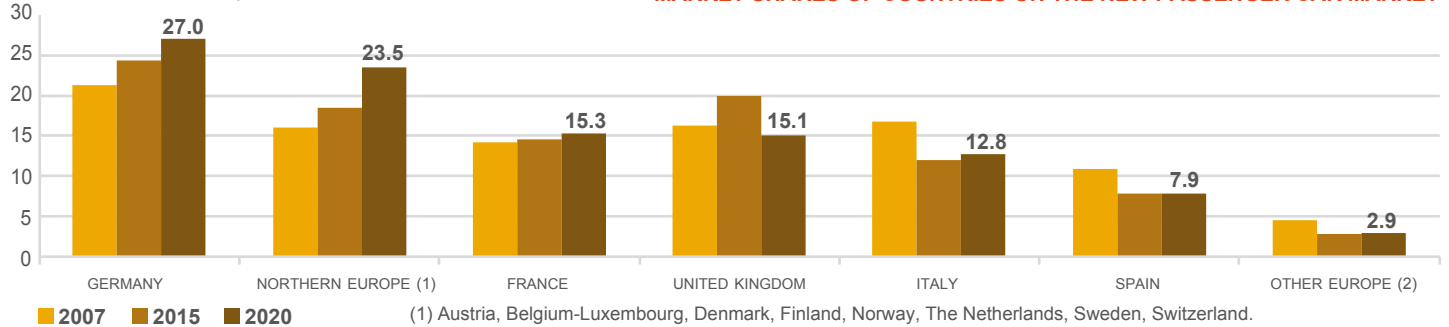
In thousands of units



In thousands of units



As a % of Western European market



## MARKET SHARES OF COUNTRIES ON THE NEW PASSENGER CAR MARKET

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

The Western European market brings together the markets of 18 countries: the 15 member countries of the European Union before 2004, plus the countries of the European Free Trade Association (EFTA: Switzerland, Norway and Iceland). The United Kingdom, even though it officially left the EU on January 31, 2020, also remains counted in this group. These countries have a close environment and obey comparable economic rules.

The market had experienced two major crises before that of 2020: the first in 1993 (down -16% or -2.2 million units in 1 year) and the second from the end of 2008. The latter had led to a 22% fall in the market between 2007 and 2013 (-3.3 million units) with a contrasting impact depending on the geographical area. The group of countries comprising Northern Europe, Germany and the United Kingdom had suffered a drop of only 5% during the crisis, while it reached more than 50%

for Southern Europe (Spain, Italy, Portugal and Greece). In 2019, the countries of the first group had caught up with their pre-crisis level, while the countries of southern Europe were still below this level. With the 2020 health crisis, the market lost 3.5 million units in one year, a shock of greater magnitude than the two previous crises.



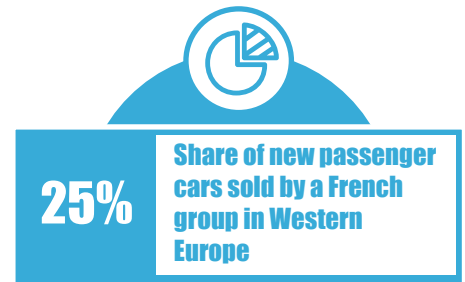
## NEW PASSENGER CAR REGISTRATIONS BY GROUP

In 2020, the PSA and Renault groups represented 25% of the Western European market for new passenger cars, down one point from 2019.

The French groups rely on their different brands which are complementary. The Renault group is based on the brands Renault (7% market share), Alpine and Dacia. The latter, which represented 0.5% of the market in 2007, grew to reach 3.2% in 2019; in 2020, it drops slightly to 2.8%. As for the PSA group, it now includes four brands: Peugeot (6.5%), Citroën (3.9%), Opel/Vauxhall (4.2%) and DS (0.4%). On January 16, 2021, the PSA group

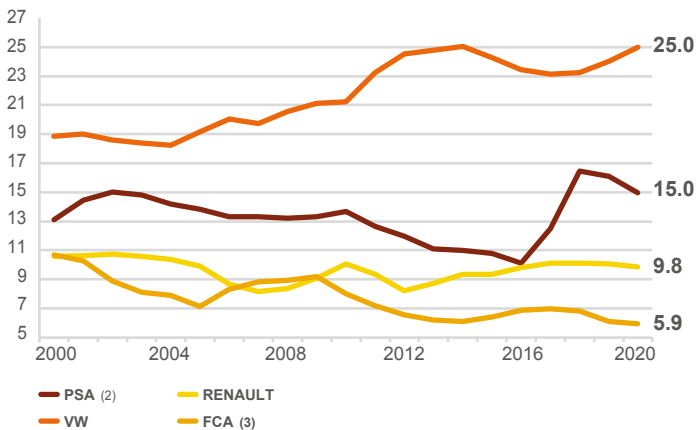
merged with the FCA group to create Stellantis, which brings together the 14 brands from the two entities representing a total of 21% of the market.

In 2020, foreign groups are mainly represented by the Volkswagen group, which holds a 25% market share, and by five other large generalist groups (including FCA) and two groups specialising in higher ranges, each with a market share of between 6% and 7%.

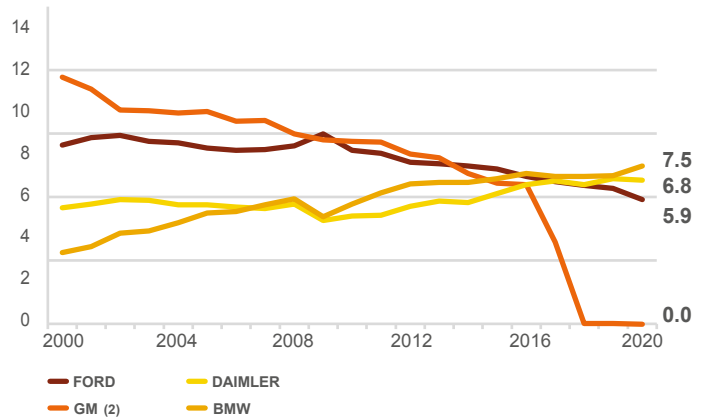


### ▶ MARKET SHARES OF GROUPS (1) IN WESTERN EUROPE (EU18)

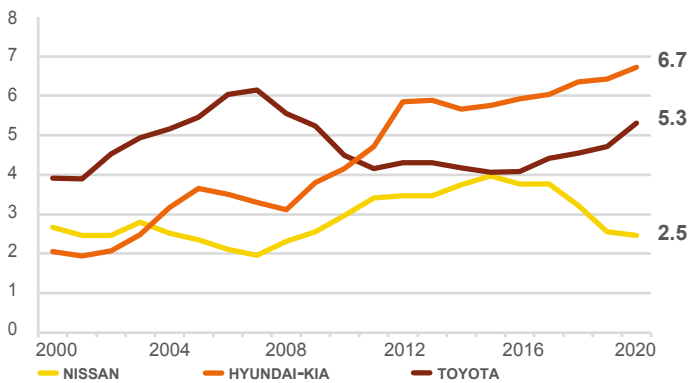
As a % of the total market



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.  
 (3) On January 16, 2021, the PSA group merged with the FCA group to create Stellantis.  
 See page 74 for groups definitions.  
 Source: CCFA

The market share of the French groups PSA and Renault (25% in total) fell in 2020 but remains above its 2007 level. At the start of the 2000s, it was above 25% because the French and Southern European markets 45% of the Western European market. Today, these markets only represent 38% of the Western European market, but PSA's market share has increased thanks to the integration of Opel on August 1, 2017. In 2020, Opel's market share has lost 1 point to 4.2%, while DS gained 0.1 point of market share and stands at 0.4%.

Since 1995, the Volkswagen group (VW), with its four main brands, has consolidated its positions and in 2020 regained its 2014 level (25%) after falling between 2014 and 2018.

The Fiat group, including the brands of the Chrysler group, represented 5.9% of the West European market in 2020, compared to nearly 13% in 1997. In 2020, the market share of the Fiat brand remains almost stable at 4.1%.

The American group Ford has experienced a similar evolution to that of the Fiat group, halving its market share between the beginning of the 1990s and today to stand at 5.9% in 2020.

The German groups Daimler and BMW, specialists in higher 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 been growing since 1997 as a result of the diversification of its vehicle range, is stable in 2020 at 6.8%. BMW, including the Mini

brand, also remains stable at 7%.

The market share of the Toyota group, which rose continuously from 1995 (3%) to 2007 (6%), then fell back to 4.1% in 2016. Since then, the market share has grown again and reached 5.3% in 2020.

The market share of the Hyundai-Kia group, which was almost non-existent in 1990 (0.1%), has steadily increased over the past thirty years. Rising from 2.1% in 2000 to 4.2% in 2010, its market share gains another 0.3 point, to 6.7%, in 2020.

## RANGE RANKING IN 2020

63  
& 18

Respective numbers  
of models and electric  
models offered by the  
French groups

The French groups have enriched their ranges of vehicles by offering more than sixty different models (compared to 27 in 2000). In recent years, they have developed their offer in the different ranges (multipurpose vehicles, 4WD, SUV, sedan) and in the electric vehicle segment with 18 models. They regularly renew existing models (C3, C4, 5008,

Mégane, Scenic) or develop new ones (E-C4, Spring). In addition, each body includes different versions depending on the equipment of the car, which implies the marketing of several thousand possible combinations (more than 8,000 for the entire market according to ADEME).

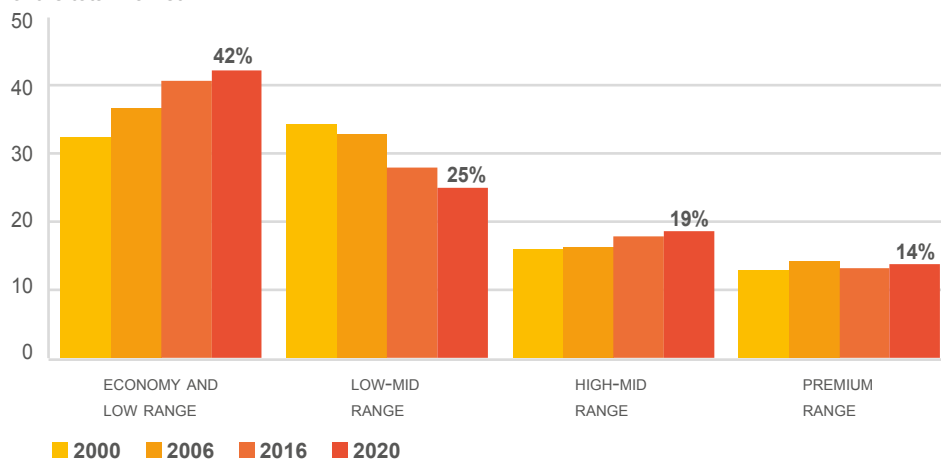
Groups	Brands	Economy and low range	Low-mid range	High-mid range	Premium range
RENAULT group	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE	Mégane (including Scénic, Grand Scénic), Master	Trafic, Kadjar, Koleos	Espace, Talisman
	DACIA	Logan, Sandero, Duster, Dokker, Spring	Lodgy		
	ALPINE				A110
	LADA	Niva, Vesta			
PSA group (Stellantis)	CITROËN	C-Zéro, C1, C3, C4 Cactus, Berlingo, E-Mehari	C3 Air Cross, C4, C5 Air Cross, E-C4, Jumpy, Jumper	C-Elysée	
	DS	DS3, DS3 Crossback		DS7	
	PEUGEOT	108, 208, 2008, Partner, Rifter, Ion	308, 3008, 5008, Expert, Traveller, Boxer	508, 301	
	OPEL	Corsa, Combo, Mokka, Crossland, Grandland	Ampera, Ampera-E, Astra, Zafira, Movano	Insignia, Vivaro	
	ALFA ROMEO		Giulietta		Giulia, Stelvio
FCA group (Stellantis)	FIAT	Panda, 500, Fiorino, Doblo	124 Spider, Ducato, Tipo	Talento	
	MASERATI				Ghibli, Levante, Quattroporte
	JEEP	Renegade		Wrangler, Compass, Cherokee	Grand Cherokee
	LANCIA	Ypsilon			
BMW group	BMW	i3	1, 2 Series, M2	4 Series, X1, X2	Alpina, 3, 5, 6, 7, 8 Series, X3, X4, X5, X6, X7, Z4, i8, M3, M4, M5, M8
	MINI	Mini			
DAIMLER group	MERCEDES-BENZ	Citan	A, B Classes, CLA, Vito, Sprinter	GLA	CL, C, E, G, S, SL, V, CLS, EQC, GLB, GLC, GLE, GLS, GT Classes, G Series, SLC, SLK,
	SMART	Fortwo, Forfour			
FORD EUROPE	FORD	Ka+, Fiesta, T. Courier, T. Connect, Ecosport, Puma	Focus, Kuga, Transit, T. Custom	Mondeo, Ranger	S-Max, Mustang, Galaxy, Edge, Explorer
GEELY	VOLVO			V40, XC40	S60, S90, V60, V90, XC60, XC90
HONDA	HONDA	Jazz, E	Civic, HR-V	CR-V	
HYUNDAI KIA	HYUNDAI	I10, I20, IX20, Kona	I30, Elantra, H-1	I40, Santa Fe, Tucson, Ioniq, Nexo	
	KIA	Picanto, Soul, Stonic, Venga	Cee-d, Ceed, Niro, Proceed, Rio, Xceed	Optima, Sportage, Stinger	Sorento
MAZDA	MAZDA	2, CX-3, MX-30	3, MX5, CX-5	6, CX-30	
MITSUBISHI	MITSUBISHI	i-MiEV	ASX, Spacestar	Outlander, ECL-Cross	
NISSAN	NISSAN	Micra, Juke	Leaf, NV200, NV300	Qashqai, X-Trail	370Z, GT-R, NV400
SUBARU	SUBARU			Impreza, Legacy, Forester, Levorg	BRZ
SUZUKI	SUZUKI	Celerio, Ignis, Jimny, Swift, SX4, Vitara	Baleno, Swace	Across, Grand Vitara	
TATA group	JAGUAR			E-Pace	F-Pace, F-Type, XE, XF, XJ, F-Type, I-Pace
	LAND ROVER			RR Evoque, Defender	Discovery, Discovery.Sp, Range Rover, Rangsport, RR-Velar
TESLA	TESLA				Model 3, Model S, Model X
TOYOTA	LEXUS		CT200H	UX	ES, IS, LS, RC, RX, NX200T, NX300H
	TOYOTA	Aygo, Yaris	Auris, Corolla, Proace, Pro.City	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, 718 Cayman, Macan, Cayenne, Panamera, Taycan
	SEAT	Mii, Ibiza, Arona	Leon	Ateca, Formentor	Alhambra, Tarraco
	SKODA	Citigo	Fabia, Rapid, Kamiq, Scala	Octavia, Karoq	Superb, Kodiaq
	VOLKSWAGEN	Up, Polo, Caddy, T-Cross, T-Roc, ID.3	Golf, Touran, Crafter	Passat, Arteon, Tiguan, Transporter, ID.4	Sharan, Touareg

# NEW PASSENGER CARS BY RANGE, BODY AND TECHNICAL CHARACTERISTICS

## ► RANGES, BODY TYPES AND TECHNICAL CHARACTERISTICS OF NEW PASSENGER CARS BY COUNTRY (AS A % OF NEW CAR REGISTRATIONS BY COUNTRY) IN 2020

	Economy and low range	Low-mid range	High-mid range	Premium range	Sedans	Station wagons	Coupés	Convertibles	MPVs	Average engine size (cm <sup>3</sup> )	Average power (kW)	4WD (in %)
GERMANY	31%	28%	20%	19%	33%	17%	3%	7%	34%	1,541	112	21%
AUSTRIA	38%	27%	21%	15%	33%	15%	1%	9%	40%	1,483	95	22%
BELGIUM	38%	26%	21%	14%	35%	12%	2%	8%	43%	1,468	96	11%
DENMARK	43%	26%	20%	12%	49%	17%	1%	4%	28%	-	-	7%
SPAIN	42%	29%	21%	8%	40%	5%	1%	3%	52%	1,453	94	8%
FINLAND	26%	30%	26%	17%	38%	20%	0%	2%	37%	1,524	103	19%
FRANCE	56%	25%	12%	6%	50%	4%	1%	5%	39%	1,309	83	6%
GREECE	62%	19%	15%	3%	50%	2%	0%	1%	44%	1,355	-	6%
IRELAND	32%	26%	29%	12%	40%	5%	0%	2%	52%	1,482	90	10%
ITALY	62%	17%	14%	6%	46%	4%	1%	3%	45%	1,385	83	12%
LUXEMBOURG	31%	26%	20%	23%	31%	11%	3%	7%	45%	1,700	124	25%
THE NETHERLANDS	44%	25%	14%	16%	49%	11%	1%	2%	37%	1,110	75	8%
PORTUGAL	48%	31%	13%	9%	47%	13%	1%	2%	35%	1,329	87	6%
UNITED KINGDOM	38%	23%	21%	17%	43%	6%	3%	3%	45%	1,483	105	18%
SWEDEN	18%	23%	27%	32%	26%	28%	1%	2%	41%	1,566	113	36%
EU 14 + UNITED KINGDOM	43%	25%	18%	13%	41%	10%	2%	5%	40%	1,435	98	15%
ICELAND	31%	21%	31%	16%	30%	1%	0%	2%	60%	-	-	39%
NORWAY	20%	24%	23%	33%	38%	9%	1%	3%	48%	884	61	44%
SWITZERLAND	29%	22%	24%	24%	31%	12%	3%	7%	45%	1,669	127	49%
ALL 18 COUNTRIES	42%	25%	19%	14%	41%	10%	2%	5%	41%	1,442	98	16%

As % of the total market  
**BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY RANGE IN EU-18**



Source: CCFA

In 2020, the diversity of the offer continues to increase; the market share of the top 15 vehicles sold in Western Europe is only 24% compared to 40% in 2010.

The economy and lower ranges dominate the market with 42% of registrations in 2020, a stable figure since 2014. On the other hand, the lower-mid range, rich in sedans, has lost nearly 5 points of market share since 2014 (to 25%), in favour of the higher ranges (high-medium, premium and luxury) which gained 4 points and represented 32% of the market. Differences remain between Northern Europe, which is more focused on upper ranges and station wagons, and Southern Europe, which favours lower and low-mid ranges. Despite the success of the lower range and sedans in Germany and the United Kingdom during the 2009 crisis, the market shares of the lower ranges remain, in these two countries, 5 to 11 points below the European average, while those of the higher ranges remain above (39%).

The bodies of new cars have also evolved over the past ten years in Western Europe. Sedans now represent 41% of registrations, compared to 57% in 2010, while the 4WD and SUV category, which benefits from a varied and growing offer, has gone from 11% of the market in 2010 to 41% today.

The technical characteristics of the vehicles (engine, displacement, power) have also undergone changes thanks to the reduction in the size of the engines (downsizing, identical power of the engine with a smaller displacement) and the development of electrification, but remain closely linked to the economical, fiscal and geographical aspects of each national market. Engine displacements and average power are higher in Northern Europe with the exception of Norway where the electric car market is highly developed.

Finally, the 4WD market has grown significantly in Western Europe since 2010 with a market share

**12**  
of the **15**  
Best-selling models in Western Europe were in the economy and lower range in 2020

## ► RANKING OF THE 25 LEADING MODELS IN WESTERN EUROPE IN 2020

Models	Units	Market share
VOLKSWAGEN GOLF	284,996	2.6%
RENAULT CLIO	220,842	2.0%
PEUGEOT 208	192,990	1.8%
OPEL CORSA	188,414	1.7%
RENAULT CAPTUR	165,483	1.5%
VOLKSWAGEN POLO	163,365	1.5%
FORD FOCUS	162,648	1.5%
VOLKSWAGEN TIGUAN	159,681	1.5%
TOYOTA YARIS	155,451	1.4%
FORD FIESTA	152,614	1.4%
VOLKSWAGEN T-ROC	148,619	1.4%
PEUGEOT 2008	148,510	1.4%
FIAT 500	148,228	1.4%
DACIA SANDERO	147,640	1.4%
FIAT PANDA	141,866	1.3%
CITROËN C3	140,963	1.3%
SKODA OCTAVIA	125,502	1.2%
NISSAN QASHQAI	124,792	1.2%
PEUGEOT 3008	118,843	1.1%
HYUNDAI KONA	118,214	1.1%
FORD PUMA	109,164	1.0%
TOYOTA COROLLA	105,908	1.0%
DACIA DUSTER	105,874	1.0%
VOLKSWAGEN T-CROSS	105,574	1.0%
VOLVO XC40	104,969	1.0%

Source: CCFA

that has doubled in ten years to reach 16% in 2020. It is higher than average in Nordic and mountainous countries, in order to meet the needs of the geographical relief or the weather conditions and reaches nearly 50% in Norway and Switzerland. In Germany, it is also higher than the European average with a market share of 21%, an increase of 13 points in ten years.

## NEW PASSENGER CARS BY ENERGY



**+4  
points**

**Increase in the share of electric passenger cars in Western Europe**

The share of new cars equipped with a diesel engine in registrations in Western Europe hovered around 52% until 2015. Then, from 2016, it fell sharply to 26.4% in 2020, a decline of almost 50% in four years. France, Belgium and Spain, starting from diesel market share above 70%, have experienced the largest declines in ten years (-45 points). Now, in all Western European countries, diesel car sales account for less than half of total sales. Petrol engines have therefore become the majority again from 2016 and represent 47% of registrations in 2020. In Eastern Europe,

the situation is different with stability on the part of diesel at a lower level (24.4%), and a share of petrol still high (nearly 60%), but down 10 points compared to 2019.

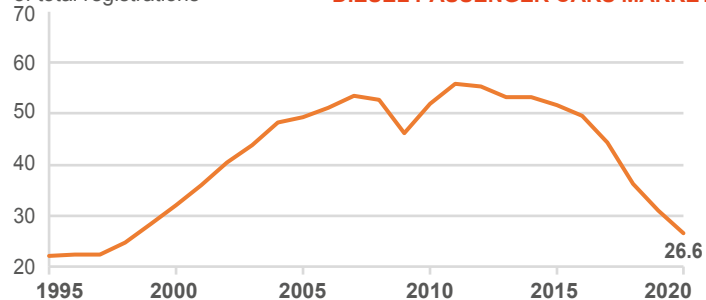
2020 has seen an acceleration in the development of electrified vehicles in Europe. In a market down 25%, registrations of electric cars increased by 109% to 6.7% market share (+4 points). Those of hybrid cars grew by 71%, representing a gain of 10 points in market share to 18% of total registrations, including 5.4% for plug-in hybrids.

### ► NEW PASSENGER CARS BY ENERGY IN EUROPE IN 2020

	Diesel %	Petrol %	Hybrids (all) %	Non-rechargeable hybrids %	Plug-in hybrids %	Electric %
GERMANY	28.4	46.9	17.2	10.5	6.7	6.5
AUSTRIA	36.6	43.9	12.9	10.2	2.7	6.4
BELGIUM	30.8	48.5	16.3	8.9	7.4	3.5
DENMARK	22.8	55.9	14.1	4.9	9.2	7.2
SPAIN	28.1	49.9	17.4	14.7	2.7	2.1
FINLAND	14.2	48.5	30.9	18.7	12.2	4.4
FRANCE	30.6	46.9	14.8	10.2	4.5	6.7
GREECE	27.6	54.2	15.5	14.2	1.3	0.8
IRELAND	41.4	36.3	17.7	13.6	4.2	4.5
ITALY	32.9	38.5	18.2	16.3	1.9	2.4
LUXEMBOURG	36.8	43	14.7	8.7	5.9	5.5
THE NETHERLANDS	3.7	56.8	18.5	14.3	4.3	20.5
PORTUGAL	32.8	44.2	16.3	8.2	8.2	5.4
UNITED KINGDOM	17.4	56.3	18.1	15.7	3.5	6.6
SWEDEN	18.9	34.2	36.1	14.5	21.7	9.6
EUROPEAN UNION 14 COUNTRIES + UNITED KINGDOM	26.8	45.9	17.5	12.2	4.9	5.9
ICELAND	19.7	23.8	31.7	12.7	19.1	24.3
NORWAY	8.3	6.4	32.0	10.6	21.5	53.3
SWITZERLAND	22.2	50.4	18.8	14.6	4.3	8.2
ALL 18 COUNTRIES	26.4	47.1	18.0	12.6	5.4	6.7
NEW EUROPEAN UNION COUNTRIES (11 COUNTRIES) (1)	24.4	59.7	14.2	13.2	1.0	1.4

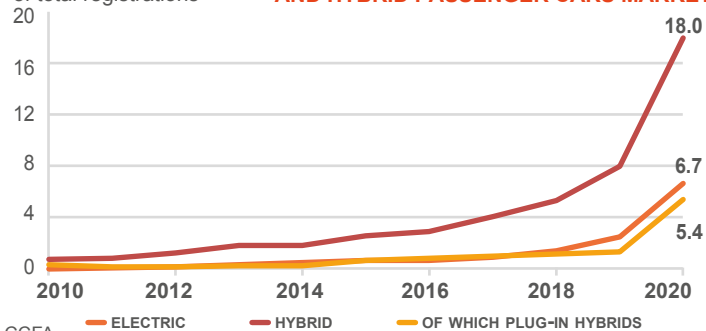
As a %  
of total registrations

#### EUROPEAN (18 COUNTRIES) DIESEL PASSENGER CARS MARKET



As a %  
of total registrations

#### EUROPEAN (18 COUNTRIES) ELECTRIC AND HYBRID PASSENGER CARS MARKET



Source: CCFA

The share of diesel in sales is largely influenced by the regulations and taxation of each country. In recent years, it has also been impacted by announcements by national and local authorities aimed at restricting the circulation of combustion-powered cars and encouraging consumers to turn to alternative energies. The European Green Pact has set the goal of achieving 100% new zero-emission cars by 2035.

In 2020, diesel car sales fell by 33% in Western Europe. At the same time, the year was marked by the sharp increase in sales of alternative energy cars. The market share of electric cars increased by 4 points in Germany and 5 points in France. In the Netherlands, where they already accounted for 14% of sales in 2019, the market share of electric cars reached 21% in 2020. For the first time in Norway, sales of electric cars accounted

for more than half of total sales (53%). In Greece, Spain or Italy, the market share of electric cars has increased by 1 to 2 points to represent 2% of sales in 2020. For plug-in hybrid cars, the same gap is observed between European countries North (market share above 7%, including 22% for Norway) and those of the South (around 2.5%).

In Eastern Europe, non-rechargeable hybrids accounted for 13% of the market in 2020 compared to 5% in 2019. Contrary to the evolution in Western Europe, the shares of electric cars and plug-in hybrids remain very low and together represent only 2.4% of the market in 2020 (compared to 12.1% in Western Europe).

These observations are in line with the conclusions of the ACEA report «Making the transition to zero-emission mobility» which shows that, despite

the doubling of sales in Europe in 2020, 73% of these are concentrated in 4 countries (France, Germany, the Netherlands and Sweden). The report highlights a link between GDP per capita and the market share of electrified cars. In countries where GDP per capita is above 46,000 euros, this market share is above 15%, while it is less than 3% in countries where GDP per capita is below 17,000 euros. The various national public policies such as financial aid for the purchase of an electrified vehicle or traffic restrictions on polluting vehicles also explain these differences. The ACEA also shows that the number of charging stations is correlated with the development of the electrified car market and that 70% of charging points in Europe are located in only 3 countries (the Netherlands, France and Germany).

# THE PASSENGER CARS IN USE IN EUROPE

As of January 1, 2019, the number of passenger cars in use in Europe increased by 1.5% compared to the previous year and amounted to 298 million units. In Western Europe, where car density is high (533 cars per 1,000 inhabitants on average), the number of vehicles increased by 1% on January 1, 2019, compared to +1.5% on average between 2014 and 2019. In the new state members of the European Union and in Turkey, where motorisation rates are generally lower (480 per 1,000 inhabitants on average), the growth rate of the vehicle fleet is more sustained. It increased by

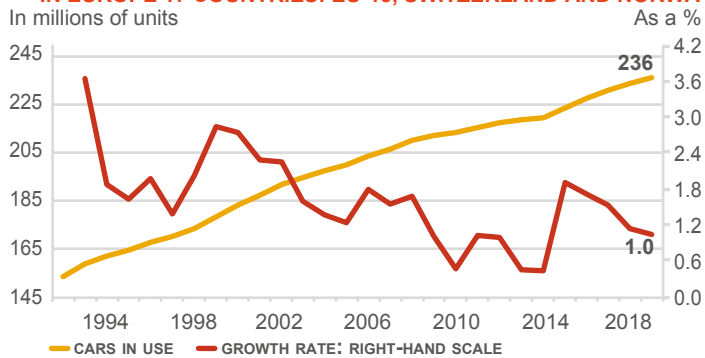
3.5% on January 1, 2019, compared to an average of 4.4% between 2014 and 2019. At the start of 2019, this area represents 21% of the European fleet, compared to 15% in 2005, and several countries now have rates motorisation identical to the countries of Western Europe.

For the first time since 1992, the share of diesel in the fleet fell in Western Europe (-0.5 point) and stood at 42.7%. On the other hand, it increased by 0.6 point on average in the new EU member states and Turkey and stood at 37.1%.

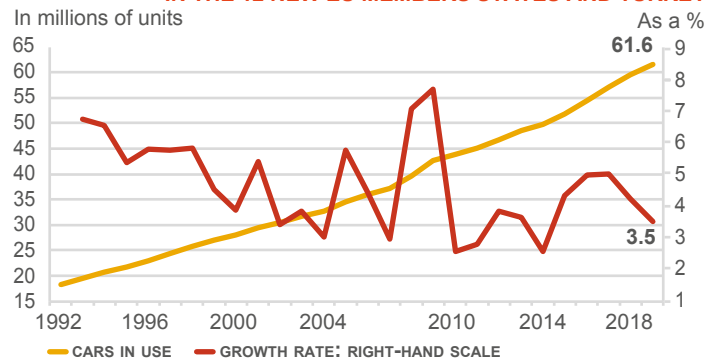
The share of cars over 10 years old in Western Europe continues to increase (+1.5 point over one year) and represented 47.6% of the fleet as of January 1, 2019. This level hides significant disparities between the countries of in Southern Europe, where this share is 66% on average, and the other Western European countries, where it is 33% on average. In the new state members, this percentage is even higher with 76% of the passenger car fleet being more than 10 years old.

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

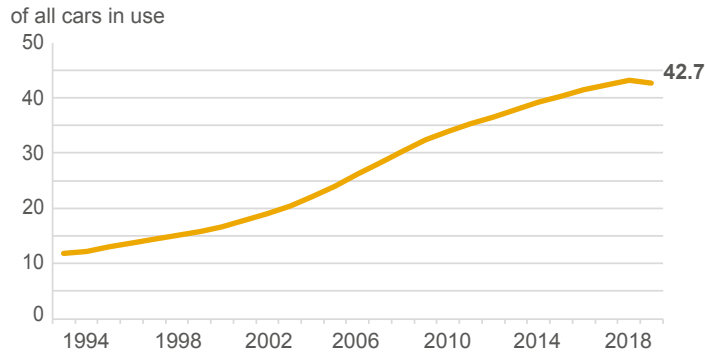
### IN EUROPE 17 COUNTRIES: EU-15, SWITZERLAND AND NORWAY



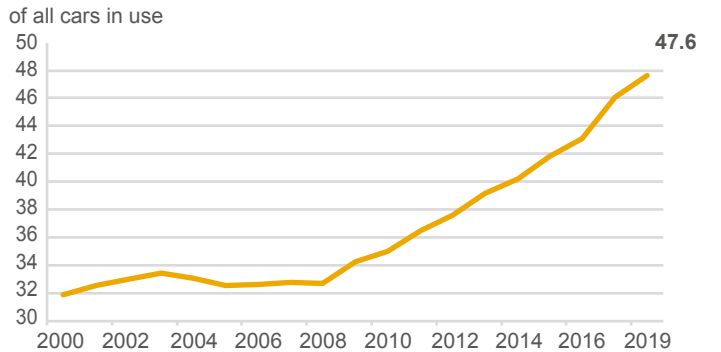
### IN THE 12 NEW EU MEMBERS STATES AND TURKEY



### DIESEL CAR OWNERSHIP IN EU-17



### SHARE OF CARS OVER TEN YEARS OLD IN EU-17



Sources: ACEA, professional organisations

As of January 1, 2019, the passenger car fleet in Western Europe amounted to 236 million. The high equipment rates and the crisis affected the growth of the stock, the average rate of which was 1.9% per year between 1992 and 2009. From 2009, the growth rate slowed down to 1.1% per year on average. As of January 1, 2019, the customer base increased in all European countries, except in France where it fell by 0.3%. In the new member countries and in Turkey, the increase in the number of customers also slowed down, from 5.2% per year before 2009 to 3.7% per year afterwards. As of January 1, 2019, it still grew by 3.5% compared to the previous year.

After increasing by 2 points per year between 2002 and 2009, the share of diesel engines in the Western European fleet has slowed (+1.2 point per year) and fell for the first time in 2019 to 43%. As of January 1, 2019, this motorisation remains the majority in only five Western European countries, including Spain and France. In Germany, this share is low (32%) while it is close to the European average (42%) in the United Kingdom (39%) and

Italy (44%). In the new member countries, it dominates in four countries out of ten but is in the minority in the largest fleets such as Poland (32%), Romania (43%) or the Czech Republic (36%).

After hovering around a third between 2000 and 2009, the share of cars over 10 years old in Western Europe has steadily increased to reach 47.6% on January 1, 2019. This share is particularly high in the countries of Southern Europe where it exceeds 50% in Italy and 60% in Spain and Portugal (84% in Greece). In new entrant countries, where lower-cost demand is mainly satisfied by imports of used vehicles, the share of vehicles over 10 years old is even higher (76% on average).



**-0.5 point**

**Decline in the share of diesel in the passenger car fleet in Western Europe in 2019**



## NEW LIGHT COMMERCIAL VEHICLES IN EUROPE



**40.5 %**

**Share of French groups in sales of light commercial vehicles in Western Europe in 2020**

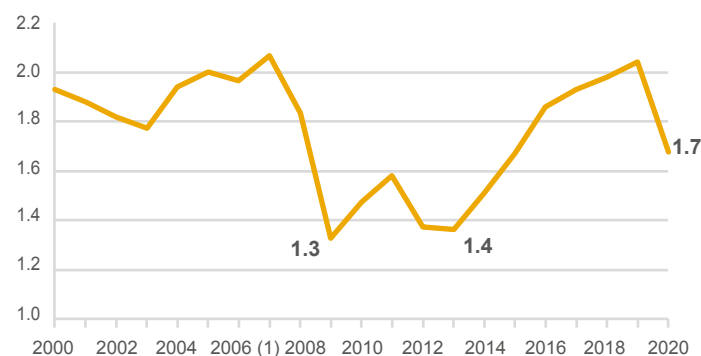
The West European market for light commercial vehicles, badly affected by the 2009 crisis, hovered around 1.5 million units in the following years. From 2014, it progressed steadily until 2019, when it exceeded 2 million units. In 2020, the market fell by 18% to 1.7 million registrations but remained at levels above the low of 2009 (1.3 million).

In all countries, the market for light commercial vehicles fell less sharply than that for individuals, which was more affected by confinements and travel restrictions. These decreases are in a range between -11% in Belgium and -28% in Portugal. In Germany, France and the United Kingdom, the market fell by -12%, -16% and -20% respectively,

but did not fall back to the level of the 2009 crisis. However, only Germany remained above its level before the crisis (2007). Finally, in Italy, Portugal and Greece, the markets fell to levels below 2009.

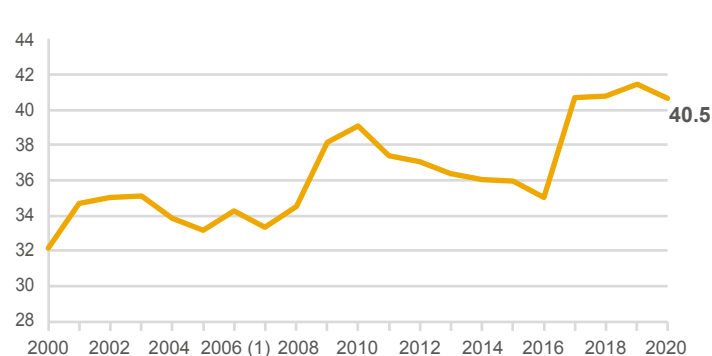
In 2020, French groups are down slightly on the light utility vehicle market to 40.5% market share. This had grown by 8 points between 2007 and 2019, driven in particular by market share gains in the United Kingdom (+2.4 points) and Italy (+1.1 point).

**LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (18 COUNTRIES)**  
In millions of units

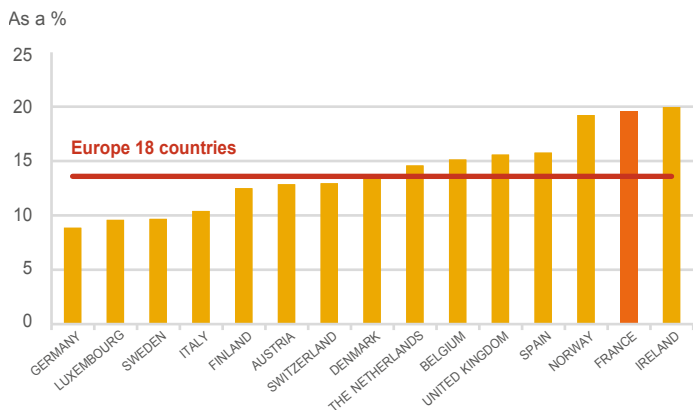


(1) In 2006, there was a change of scope in Spain: see note on page 74.

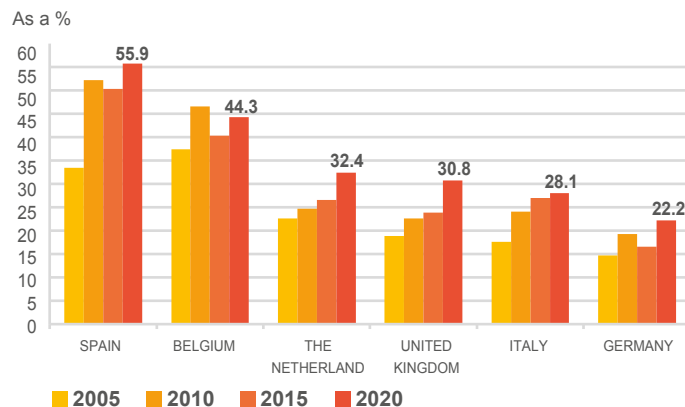
**FRENCH MARKET SHARE**  
As a % of total market



**SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2020**  
As a %



**MARKET SHARE OF FRENCH MANUFACTURERS IN MAJOR EUROPEAN COUNTRIES**  
As a %



Source: CCFA

Tax treatments are not identical in all European countries, so the share of light commercial vehicles (commercial vehicles under 5.1t) in all light vehicles varies from 8.8% in Germany to 19.9% in Ireland. On average, it was 13.6% in Western Europe in 2020.

In volume, France remains the leading European market, with 402,380 units, ahead of the United Kingdom (300,200 units), Germany (272,590 units), Italy (160,446 units) and Spain (158 860 units) which in 2020 ranks 5<sup>th</sup>.

For many years, the renewal of products and their adaptability to current transport, service and mobility needs in different European countries have boosted sales of these vehicles. Since

2014, this market has been growing steadily and French manufacturers have gained market share there compared to 2007. In 2020, the PSA group represents 25.7% of the market share; Stellantis, born from its merger with FCA on January 17, 2021, would have represented 34.6% of the market. In addition, other vehicles sold by Toyota are produced by the group. The Renault group occupies 14.9% of the market and also produces for other brands (Daimler, Nissan, Mitsubishi).

The van segment (Trafic, Master, Expert, Boxer, etc.) represents almost half of sales and that of small vans (Kangoo, Berlingo, etc.), 23%. The other segments are occupied mainly by derivatives of passenger cars and pick-ups.

In 2020, all segments combined, five of the ten best-selling models are French brands (Renault Kangoo, Citroën Berlingo, Peugeot Partner, Renault Trafic and Renault Master).

# HEAVY TRUCK MARKET IN EUROPE

The Western European market for commercial vehicles over 5.1 tonnes fell by 25% in 2020, to 236,000 units, a level which remains above the low of 2009 (207,000 units). Unlike the 1993 crisis, when the market had returned to high levels five years later, that of 2009 resulted in a new balance, at a lower level around 300,000 units. Since 2014, the market has been growing strongly and steadily (+35% between 2014 and 2019), particularly in the countries of the South and in France where growth reached 50%. However, the 2020 crisis has erased

the years of growth with a Western European market that is only 2% above its 2014 level.

All European countries are seeing a sharp drop in their registrations in 2020, between -13% and -35%. In Germany, the leading European market with 30% of volumes sold in Western Europe, registrations fell by 25%. With less dynamic growth than France between 2014 and 2019, the market is even down compared to 2014. In the United Kingdom, the third European market behind France, volumes are also

down compared to 2014. Finally, in France, the strong growth over the 2014-2019 period (+47%) allowed volumes to be maintained above their 2014 level (+11%).

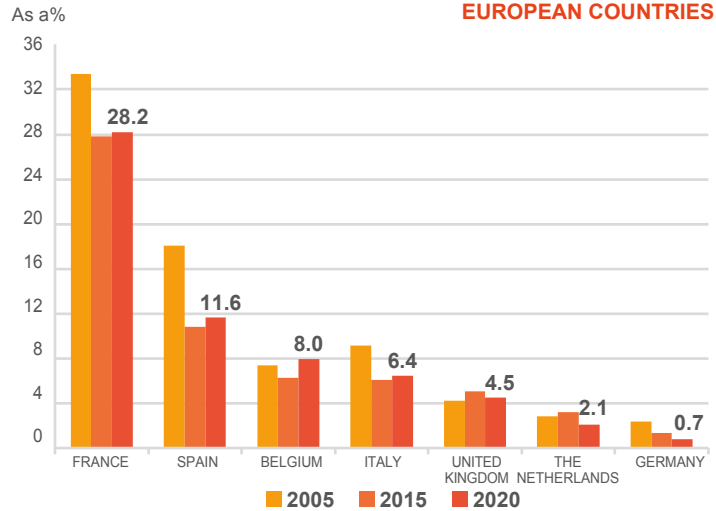
18,000

**Renault Trucks vehicles over 5t registered in Western Europe in 2020**

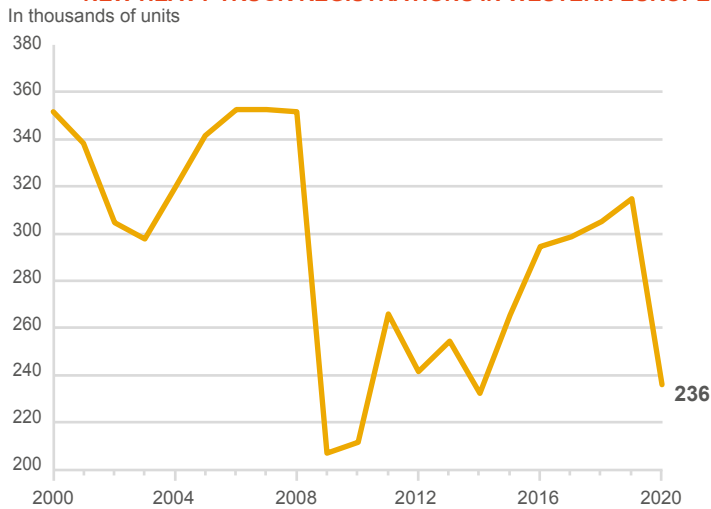
## ► HEAVY TRUCKS MARKET AND PRODUCTION IN WESTERN EUROPE (IN THOUSANDS OF UNITS)

	2010	2015	2019	2020	Change 2020/2019
<b>NEW HEAVY TRUCK REGISTRATIONS</b>					
<b>From 5.1t to 15.9 t</b>	54	48	57	45	-20.9%
<b>16t and more</b>	159	217	257	191	-25.9%
<b>TOTAL</b>	<b>212</b>	<b>265</b>	<b>314</b>	<b>236</b>	<b>-25.0%</b>

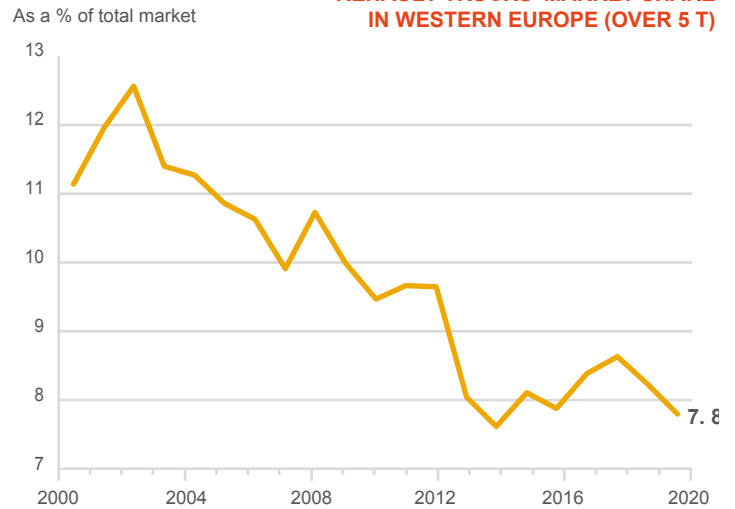
## RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



## NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE



## RENAULT TRUCKS' MARKET SHARE IN WESTERN EUROPE (OVER 5 T)



In Europe, the heavy truck market reached a record level in 2007; the recovery of investment and that of world trade since the second half of 2003 had been factors favorable to this recovery. On the other hand, it suffered greatly from the impact of the financial and economic crisis in 2009.

Heavy truck investment cycles are extensive: the high points of the years 2000, 2006 to 2008 thus represent 75% more than the low point of 1993, i.e. nearly 150,000 additional vehicles. Compared to the two dark years for commercial vehicles, 1993 and 2009, the market recovers more difficultly after the last crisis than in the 1990s. In 2019, with 55,250 units, the French market had however returned to its average level of the years 2006-2008.

The trend towards heavy trucks is slow and steady. Vehicles of 16 tonnes and more (rigids or tractors)

represent more than 8 out of 10 vehicles.

The share of commercial vehicles using alternative energy (gas, electric, hybrid) remains low (about 3.4% of the market in Western Europe), but the energy transition is a growing concern for manufacturers and road transport of goods (targets for reducing CO<sub>2</sub> emissions, traffic restrictions in the city and sustainable urban logistics). The NGV market is the most developed and in some countries (Belgium, Italy, Latvia, Sweden), its market share exceeds 4% in 2020. The market share of electric vehicles remains very low in 2020 (0.4%) but the offer is beginning to expand in the urban delivery segments and will soon be extended to other uses (regional transport, construction).

The international development of Renault Trucks has been affected by the fall in the Southern

European markets, which accounted for more than a quarter of registrations in Western Europe in 2002, compared to 18% in 2020.

Renault Trucks' market share in Western Europe has risen slowly since the low point of 2014 (7.6%) but has fallen since 2018 and stands at 7.8% in 2020.

On the whole of the European market for vehicles over 6 tonnes, the French manufacturer nevertheless recorded a stable market share of 8.5% in 2020. With an unchanged market share in the segment of vehicles over 16 tonnes at 8.8% and a market share of intermediate ranges (6-16 tonnes) at 6.6%, up 0.3 point. Outside Europe, Renault Trucks sells significant volumes in Africa (particularly in Algeria with a 48% market share for vehicles over 16 tonnes) and in the Middle East (Turkey).

# FRENCH GROUPS IN THE NEW MEMBER STATES OF THE EUROPEAN UNION

39%

**Market share of French groups on new light commercial vehicles sold in the new EU member states**

Vehicle production in the new EU countries amounted to 3.6 million units in 2020 (-18% compared to 2019). With the health crisis, the volumes produced fell back

to the level of 2014, but nevertheless remained 18% higher than their level of 2007. Sales of new vehicles fell by 23% to 1.3 million units, a volume of market equivalent to that of 2016. The difference between production and sales of new vehicles is now around 2.2 million vehicles.

French groups have been commercially present in this area for many years and also have industrial facilities there: PSA in Slovakia, in the Czech Republic (with Toyota until December 31, 2020) and in Poland (with

the integration of Opel and soon with the FCA plant, due to the creation of Stellantis); Renault in Slovenia and especially in Romania with Dacia (260,000 units). All of these sites accounted for production of nearly 900,000 units in 2020. Registrations of new light vehicles by French groups in these countries amounted to 312,000 units in 2020, i.e. 24% market share. The market is expected to grow further given the remaining gaps in some of these countries in terms of automobile densities, compared to Western Europe.



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

	2019	2020	Change
<b>VEHICLE PRODUCTION (1)</b>			
Passenger cars	4,158	3,403	-18.2%
Light commercial vehicles	222	179	-19.3%
Heavy vehicles			
<b>ALL VEHICLES</b>	<b>4,379</b>	<b>3,582</b>	<b>-18.2%</b>
<b>NEW VEHICLE REGISTRATIONS (2)</b>			
Passenger cars	1,479	1,139	-23.0%
Light commercial vehicles	177	143	-19.2%
Heavy vehicles (excluded coaches and buses)	69	45	-35.0%
<b>ALL VEHICLES</b>	<b>1,725</b>	<b>1,327</b>	<b>-23.1%</b>

(1) 6 countries.

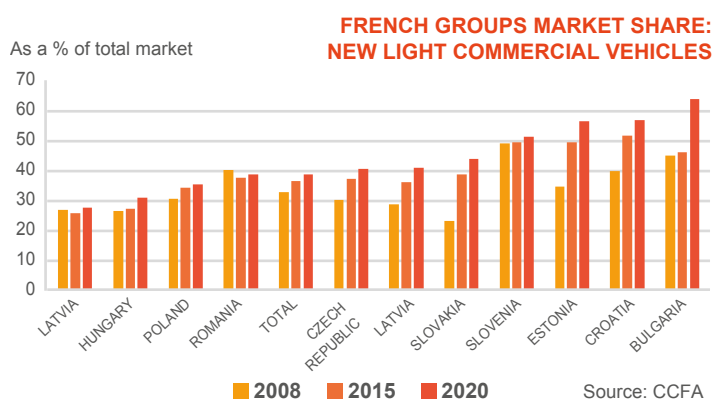
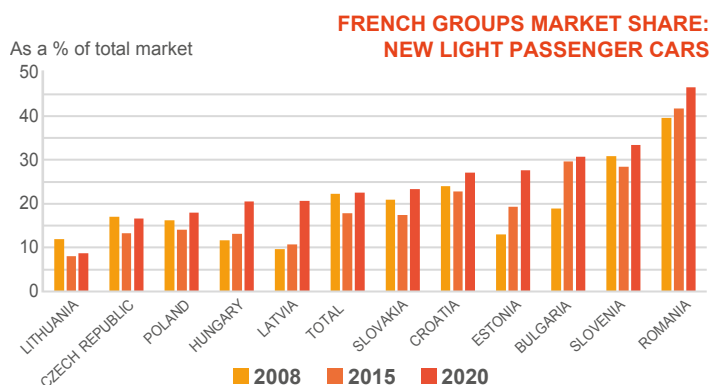
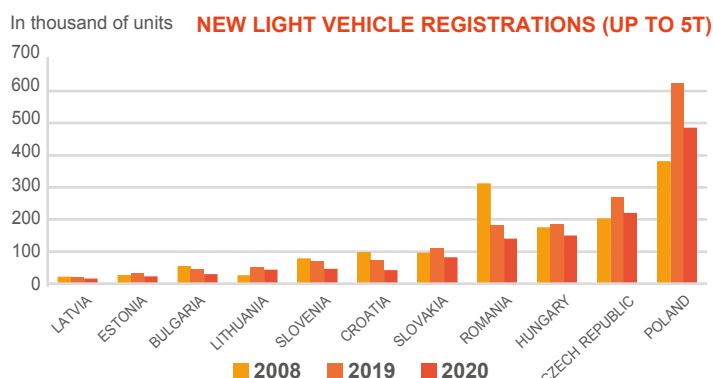
(2) 11 countries, excluding Malta and Cyprus.

Sources: CCFR, OICA

If EU-15 is now seen as an automobile market whose demand mainly concerns renewal, this is not yet the case in all the new EU member countries. The average motorisation rate of 480 private cars per 1000 inhabitants (compared to 533 in Western Europe) hides large disparities between countries. It is below 450 in Latvia, Romania, Hungary, Croatia and Slovakia, but exceeds 550 in Poland, Estonia, Slovenia and the Czech Republic. Poland (38%) and the Czech Republic (18%) together account for 55% of passenger car registrations in the area, followed by Hungary and Romania (11%). For light commercial vehicles, the largest market remains Poland (40%), but it is followed by Hungary, which represents 16% of the market.

In 2020, the automotive markets in the new Member States of the European Union were affected by the health crisis to the same extent as the markets in Western Europe. Passenger car registrations fell by 23% in the region as a whole (compared to -25% for Western Europe). The declines range from -19% in the Czech Republic and Hungary to -30% or more in Slovenia, Croatia and Bulgaria. The light commercial vehicle market fell by 19% (compared to -18% in the 18 Western European countries). The main markets of Poland, the Czech Republic and Hungary fell slightly less than the average (-16%). The industrial vehicle market fell by 35% compared to -25% in Western Europe.

The technical characteristics (displacements, power, bodywork) of passenger cars registered in this zone are close to those of Western Europe, with the exception of those relating to motorisation. Nearly 60% of cars are equipped with a petrol engine (compared to 47% in Western European countries), but this share is tending to decrease (70% in 2019) in favour of new engines. In 2020, sales of electric cars increased by 150%, but their market share remains very low (1.4%) compared to Western Europe (6.7%). Hybrid engines have also developed strongly (+87% in 2020) and reach 14.2% of registrations (compared to 18% in Western Europe) thanks to the segment of non-rechargeable hybrid cars, which weighs the heaviest with 13.2% of the market, compared to 12.6% in Western Europe.



Source: CCFR



# THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2018, the European automotive industry provided employment for 2.7 million people, i.e. 8.5% of industrial jobs in Europe. Jobs are divided between the construction of vehicles which represents 44% of the people employed, the manufacture of automotive equipment (49% of jobs) and the manufacture of bodies and trailers (7% of jobs).

In the 7 countries of Western Europe where the automotive industry is historically present, the workforce in the sector fell sharply between 2005 and 2010 (-270,000 people), while it increased in the 7 new entrants (+190,000). Then, thanks to the growth of

markets and the promotion of products manufactured in this area, the workforce increased by 220,000 people between 2010 and 2018, in particular thanks to Germany (+132,000 people), the United Kingdom (+30,000) and Spain (+22,000), without however returning to their 2005 level (-50,000). As for France, it benefited little from this context (+14,000) due to its reduced competitiveness. In Eastern Europe, the increase in the workforce continued to reach +460,000 people over the period 2005-2018.

In 2018, the value added per person employed amounted to 82,000 euros on average in Europe,

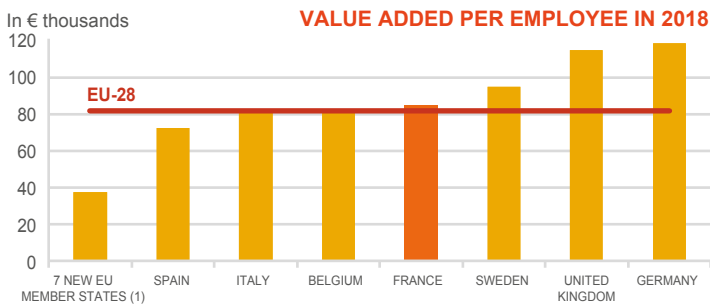
compared to 51,000 euros in 2012. In France, it was 85,000 euros compared to 118,000 euros in Germany. Staff costs per person employed amount to 64,000 euros in France compared to 83,000 euros in Germany, the European average being 53,000 euros. Social charges represent 30% of these expenses in France, compared to 18% in Germany and 21% on average in Europe.

## 2.7 MILLIONS

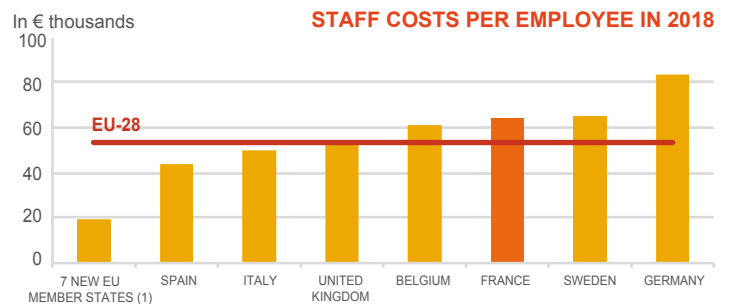
### People employed in the automotive industry in Europe

## ► THE AUTOMOTIVE INDUSTRY IN THE EU 28 IN 2018 (1)

	Units	European Union (28 countries)	Germany	France	United Kingdom	Spain	Italy	Sweden	Belgium	7 new EU member states (1)
People employed	thousands	2,742	919	239	166	162	178	93	30	814
of which automobile assembly	thousands	1,205	577	122	85	72	70	65	16	151
of which body and trailer manufacturers	thousands	180	53	21	21	11	12	5	6	28
of which automotive equipment manufacturing	thousands	1,357	290	96	60	79	96	23	8	635
Sales	€ million	1,193,810	517,179	143,795	88,239	73,488	78,024	50,444	13,895	175,293
Production	€ million	981,854	401,872	102,479	76,217	67,221	65,142	37,227	13,194	169,378
Production/Sales	%	82	78	71	86	91	83	74	95	97
Value added (to factor costs)	€ million	224,882	108,656	20,280	18,965	11,760	14,431	8,764	2,429	29,586
Value added/production	%	23	27	20	25	17	22	24	18	17
Value added per employee	€ thousand base 100: 7 new EU member states	82 225	118 325	85 234	114 314	73 200	81 223	95 260	82 224	36 100
Purchases of goods and services	€ million	985,758	411,002	123,733	71,060	63,642	66,085	44,166	11,844	149,198
Purchases as a % of production	%	100	102	121	93	95	101	119	90	88
Staff expenditures	€ million	145,702	76,300	15,254	8,879	6,975	8,765	6,052	1,823	15,393
Expenses per employee	€ thousand base 100: 7 new EU member states	53 281	83 439	64 338	53 282	43 228	49 260	65 345	61 324	19 100
Gross operating surplus (GOS)	€ million	79,180	32,356	5,027	10,086	4,785	5,666	2,713	605	14,193
GOS/Value added	%	35	30	25	53	41	39	31	25	48



(1) 7 main new entrants: Hungary, Poland, Czech Republic, Romania, Slovakia, Slovenia and Bulgaria.



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

- manufacture of motor vehicles;
- manufacture of bodies and trailers;
- the manufacture of automotive equipment.

The data gathered in this table comes from national business surveys, harmonised by Eurostat. The difficulties encountered at both national and European level, both for the collection and for the standardisation of data, do not allow us to have reliable figures after 2018.

In 2018, France accounted for 9% of the total workforce in the automotive industry in the European Union. Germany accounted for 34% and Spain, Italy and the United Kingdom around 6% each. New member states, represented here by 7 countries (Hungary, Poland,

Czech Republic, Romania, Slovakia, Slovenia and Bulgaria), record a growing share of the total workforce, which reached 30% in 2018.

On average in the European Union, the automotive industry accounts for 8.5% of industrial jobs, but it accounts for 11.2% of jobs in Germany, 13.4% in the Czech Republic, 14.2% in Sweden and 15.5% in Romania and Slovakia.

Automotive industries remain very different depending on the country, in terms of structure and wage costs. In Germany and Sweden, more than 60% of the workforce in the automotive industry is employed in automotive manufacturing. This share is 49% in France, 45% in Spain and 41% in Italy, while it is around 18% in the seven new countries. Expressed in base 100 for the average of the 7 entering countries, the expenditure index per employed person amounts to

338 in France, 345 in Sweden and 439 in Germany, i.e. wage costs which are up to 4 times higher than in Eastern countries.

In addition to direct jobs, the automotive industry also generates indirect jobs which are estimated by ACEA at more than a third of direct jobs. The industrial sector therefore directly and indirectly employs 3.7 million people in Europe, or 11.5% of industrial jobs. By adding all jobs related to the automobile in services (trade, repair, rental, insurance), transport (people and goods) and construction (road maintenance), the sector directly or indirectly employs 14.6 million people, or 6.7% of all jobs in Europe.

## FRENCH AUTOMOBILE GROUPS IN 2020

### PSA Group (Stellantis from 01/17/2021): [www.stellantis.com](http://www.stellantis.com)

In 2020, in the context of a global pandemic, PSA group sales amounted to 2.5 million vehicles. Its market share recovered in the 4th quarter of 2020 in the main regions, with significant growth in Africa and the Middle East.

The PSA group relies on a workforce of more than 224,000 people worldwide, including 51,000 (excluding Faurecia) in France, spread over some twenty sites: assembly plants, engine production (Trémery) and mechanics; R&D centers (Vélizy), spare parts stores (Vesoul). Downstream development is taking place thanks to Distrigo and MisterAuto in the distribution of parts; in the automotive trade, the group is increasing its presence on the second-hand market with AramisAuto. With the Free2Move brand, it develops mobility services, including internationally.

In the technological field, the group has set itself the objective of continuing to improve the CO<sub>2</sub> efficiency of its heat engines and continuing to develop its electric range in all its components and continuing to invest in automation and connectivity. cars. All of its brands now offer either plug-in hybrid or all-electric versions for each new launch.

In 2019, the group invested more than 2.5 billion euros in tangible investments and spent 2.4 billion euros on research and development in 2020.

Until 2021, the international development strategy was essentially based on sustainable and targeted cooperation with other manufacturers. In China, the group cooperates with Dongfeng Motor, with which it is developing a strategic partnership. It continues to set up several production or assembly plants or has projects in markets with development potential (Turkey, Algeria, India with CK Birla). On January 17, 2021, the group merged with Fiat Chrysler Automobiles to create Stellantis, an international company with 400,000 employees made up of 14 brands. The strategy of the new group is being put in place gradually, but the pursuit of electrification remains a central point.

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

In 2020, the Renault group sold 2.9 million vehicles worldwide. After a first half of 2020 where the group's

main markets were severely impacted by the pandemic and the associated containment measures, the second half of the year shows better resilience: the group's sales in Europe remained in line with the markets. On the European electric market, Renault confirms its leadership by doubling its sales of electric vehicles in 2020.

The cooperation initiated in 1999 with Nissan within the Alliance has been optimised and expanded over time with the integration of Mitsubishi in 2016. New synergies (industrial level, electric vehicles, support functions, etc.) and new projects are implemented. The strategic partnership with AvtoVAZ (Lada) has reached a new stage with the integration of the Russian manufacturer into the Renault group. Within the Alliance, the leader/follower concept, which leads to a rationalisation of the financial efforts allocated to developments, continues to be deployed for various technical projects (platforms, components, etc.). Finally, the collaboration with Daimler continues with the production of commercial vehicles in Maubeuge.

The group's priorities in terms of innovation are the electric, connected and autonomous vehicle and mobility services. It also develops partnerships with universities, partner companies and research organisations (CEA). In 2019, Renault introduced hybrid motorisation (E-TECH) in its offer and is experimenting with hydrogen technology in its range of commercial vehicles. The group is also actively working to develop the use of recycled materials and the recycling of end-of-life vehicles. The new Re-factory project in Flins announced in November 2020 is a further step in this direction.

In 2020, the Renault group employs 170,000 people worldwide, including 46,000 in France at some fifteen sites: assembly, engine and mechanical production plants (Cléon, Le Mans); R&D centres (Guyancourt); head office, etc. Its downstream presence is based on Renault Retail Group, which distributes new and used vehicles as well as parts.

In 2020, the Renault group invested 2.7 billion euros in tangible investments and spent 2.6 billion euros on research and development.

At the beginning of 2021, the group presented its new

"Renaultation" strategic plan, which aims to reorient the strategy by moving from volume objectives to value creation. The aim is to restore competitiveness by improving engineering and production efficiency, building on the Alliance's technological mastery and accelerating data, mobility and energy services. The industrial strengths and the electrical leadership in Europe constitute a basis for increasing the profitability of the 4 differentiated units based on the 4 brands: Renault, Dacia-Lada, Alpine and Mobilize.

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

With 41,117 vehicles invoiced worldwide, Renault Trucks experienced a drop in these volumes in 2020 but maintained its market share. Renault Trucks assembles its truck models in France at its factories in Bourg-en-Bresse and Blainville-sur-Orne and relies on partners for local assembly outside Western Europe, including Saudi Arabia.

Part of the Volvo group, which employs 100,000 people worldwide, Renault Trucks has 10,000 employees, four-fifths of whom are in France. In addition to complete vehicle assembly, Renault Trucks has engine assembly and stamping activities in Vénissieux, studies and research in Saint-Priest, and parts reconditioning in Limoges. In addition, in Bourg-en-Bresse, Renault Trucks has created a workshop specialising in the transformation of used trucks: the Used Trucks Factory.

The manufacturer now offers a complete range of alternative energy vehicles (gas, biodiesel, electric) and a range of services including solutions promoting fuel economy (Optifuel Solutions) but also predictive maintenance services (launch of Start & Drive Excellence Predict). It continues to invest massively in electric mobility to be part of a trajectory aiming for a 100% carbon neutral offer from 2040. Since March 2020, it has started the series production of its second generation of electric vehicles in its factory in Blainville-sur-Orne. Along with the Renault Trucks D Z.E., the D Wide Z.E. and the Master Z.E., its range extends from 3.1 to 26 tonnes and meets the urban requirements of delivery, distribution or waste collection.

	Units	PSA group	Renault group
Sales	€ million	60,734	43,474
Capital expenditures	€ million	2,765 (2)	2,708
Research and development expenditure	€ million	2,446	2,569
Net profit	€ million	2,022	-8,046
Employees worldwide (1)	no. of people	224,094	170,158
of which France (Europe)	no. of people	68,000 (3)	46,250
		(159,331)	(69,344)

**394,000**  
people  
Worldwide employees of  
French groups

	Units	PSA group				Renault group			
		Automotive activity: Peugeot, Citroën and Opel/Vauxhall	Automotive equipment: Faurecia	Financing: PSA Finance	Others	Eliminations	Automotive sector	Financial sector	Others
Sales	€ million	47,613	14,654	1,533	-	-	40,317	3,138	19
Operating income	€ million	3,377	315	-	7	-	-1,309	1,007	-35
Capital expenditures (4)	€ million	2,765 (2)	-	-	-	-	2,701	7	-
Employees worldwide (1)	no. of people	109,459	113,931	-	704	-	166,364	3,794	-

(1) On December 31.

(2) 2018 data.

(3) 2019 data.

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

Sources: PSA and Renault Groups annual reports

# FRENCH AUTOMOBILE GROUPS IN 2020

## 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)

### Spain

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

### Italy

- 26 Val di Sangro (PSA-Fiat)

### Poland

- 27 Gliwice (Opel)

### Portugal

- 28 Mangualde

### Czech Republic

- 29 Kolín (PSA-Toyota)

### Romania

- 30 Mioveni (Pitesti) (Dacia)

### Slovenia

- 31 Novo Mesto

### Slovakia

- 32 Trnava

### Russia

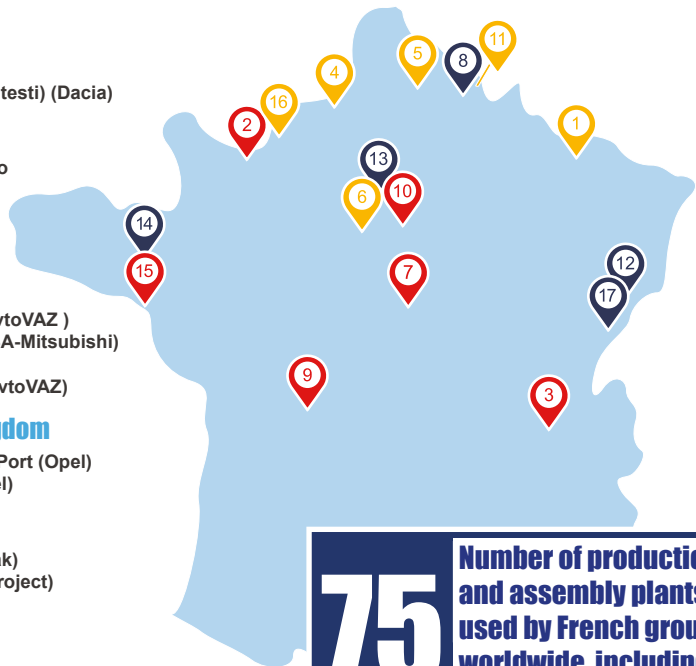
- 33 Izhevsk (AvtoVAZ)
- 34 Kaluga (PSA-Mitsubishi)
- 35 Moscow
- 36 Togliatti (AvtoVAZ)

### United Kingdom

- 37 Ellesmere Port (Opel)
- 38 Luton (Opel)

### Turkey

- 39 Bursa (Oyak)
- 40 Istanbul (project)



# 75

Number of production and assembly plants used by French groups worldwide, including 4 projects



## AMERICA

### Argentina

- 41 Buenos Aires
- 42 Cordoba (Santa Isabel)

### Brazil

- 43 Curitiba
- 44 Porto Real

### Colombia

- 45 Envigado (Medellin)

### Mexico

- 46 Cuernavaca (Nissan)

### Uruguay

- 47 Montevideo (Nordex)

## AFRICA

### Algeria

- 48 Oran (Oued Tlalat)
- 49 Oran (Tafraoui) (project)
- 50 Meftah (BSF Souarki)

### Ethiopia

- 51 Wukro (MIE)

### Kenya

- 52 Thika (URYSIA)
- 53 Thika (CKD by CMC Motors)

### Morocco

- 54 Kenitra
- 55 Casablanca
- 56 Tanger

### Nigeria

- 57 Kaduna (PAN Nigeria Ltd)

### Tunisia

- 58 Tunis (STAFIM)

### Saudi Arabia

- 59 KAEC (CKD by AVI)

## ASIA

### China

- 60 Chengdu (DPCA)
- 61 Shenzhen (SQRI)
- 62 Wuhan (DPCA)
- 63 Wuhan (DFPV2)
- 64 Wuhan (Dongfeng)
- 65 Shenyang (RBJAC)
- 66 Nanchang (JMEV)
- 67 Shiyan (eGT-NEV)

### South Korea

- 68 Busan (Renault Samsung Motors)

### India

- 69 Delhi (HMFCL) (project)
- 70 Chennai (Renault-Nissan)

### Japan

- 71 Mizushima (Mitsubishi)

### Malaysia

- 72 Gurun (Naza Automotive Manufacturing)
- 73 (Tan Chong Motors) (project)

### Pakistan

- 74 Karachi (AI-Futtaim) (project)

### Vietnam

- 75 Chu Lai (Thaco)

## WORLD PRODUCTION OF FRENCH GROUPS



**256**  
million

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

In 2020, the global production of French groups fell by 28% to 5.2 million vehicles. The collapse of the European markets on which they had strengthened in recent years, in particular thanks to external growth operations (integration of Lada into the Renault group on January 1, 2017; integration of Opel into the PSA group on August 1, 2017) strongly affected their production. Between 1996 and 2019, their production had nevertheless increased by 92%, i.e. an average annual growth of 3%, both thanks to the increase in outlets in Europe outside France, then, subsequently, to those outside Europe.

Passenger car production amounted to 4.4 million units, down 28% after an initial decline in 2019 and a record 2018. This level is lower than the trough of 2009 and is back to that observed at the end of

1999-beginning of 2000. The production of light commercial vehicles stood at 791,000 units, i.e. a drop of 23% compared to 2019 but at a level which remains higher to the average for the years 2009-2014 (710,000 units), following the 2009 crisis.

French groups have a great diversity of sites: historic factories (Sochaux, Sandouville), recent factories in emerging countries (Tangiers, Kenitra), large ones (Vigo, Pitesti), those producing a single type of model (Trnava, Novo Mesto) or great diversity (Porto Réal, Togliatti), those of light commercial vehicles or their derivatives (Hordain, Batilly), those of partnerships (Val di Sangro, Chennai) and those of small size.

### ► PRODUCTION OR ASSEMBLY SITES IN 2020

PSA GROUP	
Brands and models	Production or assembly sites in 2020
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, C3-XR / DS: DS3 Crossback	Poissy (France), Trnava (Slovakia), Saragosse (Spain), Porto Real (Brazil), Wuhan (China) (DPCA)
Peugeot: 301 / Citroën: C-Elysée	Vigo (Spain), Wuhan (China) (DPCA)
Peugeot: 308	Sochaux (France), Buenos Aires (Argentina), Wuhan (China) (DPCA)
Peugeot: 2008	Porto Real (Brazil), Chengdu (China) (DPCA), Vigo (Spain)
Peugeot: 3008	Sochaux (France), Malaysia (Naza Automotive Manufacturing), Vietnam (THACO)
Peugeot: 4008	Chengdu (China) (DPCA), Malaysia (Naza Automotive Manufacturing)
Peugeot: 5008	Rennes (France), Chengdu (China) (DPCA), Malaysia (Naza Automotive Manufacturing), Vietnam (THACO)
Citroën: C4, e-C4	Buenos Aires (Argentina), Kaluga (Russia) (PCMA), Madrid (Spain)
Citroën: C4 Cactus, C4 Spacetourer	Madrid (Spain), Vigo (Spain), Porto Real (Brazil)
Citroën: C5, C5 Aircross	Rennes-la-Janais (France), Chengdu (China)
Citroën: C6	Wuhan (China) (DPCA)
DS: DS4, DS7 Crossback	Mulhouse (France), Shenzhen (China)
Peugeot: 408	Buenos Aires (Argentina), Kaluga (Russia) (PCMA), Wuhan (China) (DPCA)
Peugeot: 508	Mulhouse (France), Wuhan (China) (DPCA)
Peugeot: Partner, Rifter / Citroën: Berlingo / Opel: Combo	Vigo (Spain), Mangualde (Portugal), Buenos Aires (Argentina), Kaluga (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)
Peugeot: Boxer / Citroën: Jumper	Italy (Val di Sangro)
Opel: Vivaro, Zafira Life	Hordain (France), Luton (UK)
Opel: Corsa	Saragosse (Spain)
Opel: Astra	Gliwice (Poland), Ellesmere Port (UK)
Opel: Insignia	Rüsselsheim (Germany)
Opel: Crossland	Saragosse (Spain)
Opel: Grandland	Sochaux (France), Eisenach (Germany)
Opel: Mokka	Poissy (France)

Source: PSA Group

RENAULT GROUP	
Brands and models	Production or assembly sites in 2020
Alpine: A110	Dieppe (France)
Renault: Twingo 2, Twingo Electric	Novo Mesto (Slovenia)
Renault: Kwid	Chennai (India), Curitiba (Brazil), Shiyang (China)
Renault: Clio	Bursa (Turkey), Novo Mesto (Slovenia), Oran (Algeria)
Renault: ZOE	Flins (France)
Renault: Captur	Valladolid (Spain), Moscow (Russia), Curitiba (Brazil)
Renault: Logan 2	Casablanca (Morocco), Cordoba (Argentina), Curitiba (Brazil), Envigado (Colombia), Togliatti (Russia) (AvtoVAZ), Pitesti (Romania), Tanger (Morocco), Oran (Algeria)
Renault: Kadjar	Palencia (Spain)
Renault: Koleos	Busan (South Korea) (RSM)
Renault: Duster	Curitiba (Brazil), Envigado (Colombia), Chennai (India), Moscow (Russia), Pitesti (Romania)
Renault: Lodgy / Ludospace	Tanger (Morocco)
Renault: Tribler	Chennai (India)
Renault: Dokker	Cordoba (Argentina), Tanger (Morocco)
Renault: Arkana	Moscow (Russia), Chennai (India), Busan (South Korea)
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)
Renault: Alaskan	Cordoba (Argentina), Barcelone (Spain), Cuernavaca (Mexico)
Dacia: Sandero, Logan 2	Pitesti (Romania), Tanger (Morocco), Casablanca (Morocco), Oran (Algeria)
Dacia: Duster	Pitesti (Romania)
Dacia: Lodgy / Ludospace	Tanger (Morocco)
Dacia: Spring (K-ZE)	Shiyang (China)
RSM: Koleos	Busan (South Korea)
RSM: Talisman	Busan (South Korea)
RSM: XM3 / SM7	Busan (South Korea)
Lada: Kalina, Granta, Granta Hatchback, 4WD	Togliatti (Russia) (AvtoVAZ)
Lada: Vesta	Izhevsk (Russia) (AvtoVAZ)

Source: Renault Group

## MARKETS FOR NEW VEHICLES FROM FRENCH GROUPS

In 2020, the share of outside France in French groups' sales fell by one point in a global passenger car market down 16%. Sales in France have been growing steadily since 2012, but the share of the French market in outlets for French groups is now around 20%. Thus, foreign markets now represent 80% of outlets for French manufacturers, compared to two-thirds in 2000 and less than 60% in 1990.

Between 2013 and 2019, the share of deliveries by French manufacturers to the European Union increased sharply, from 38% to 60%. This is explained both by the partial recovery of the

Southern European markets, the integration of Opel, but also by the fall in part of the world markets. In 2020, this share fell to 48% due to the United Kingdom's exit from the EU but also the sharp drop in EU markets. By adding the flows to the United Kingdom, the share of deliveries to this zone amounts to 55% in 2020, i.e. a decline of 5 points compared to 2019. Conversely, the share of deliveries to the CIS zone (including Turkey) increased in 2020 due to the better resilience of the markets in this area and an increase in registrations in Turkey after two years of decline.



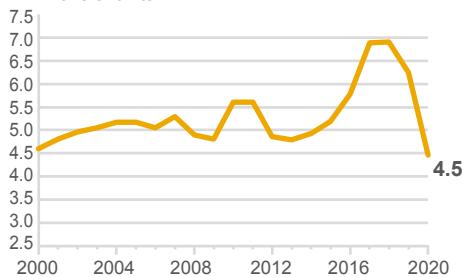
# 78%

Share of outside France  
in French groups' sales

### ► WORLD PRODUCTION OF FRENCH GROUPS

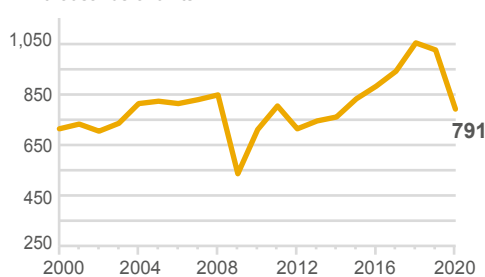
NEW PASSENGER CARS

In millions of units



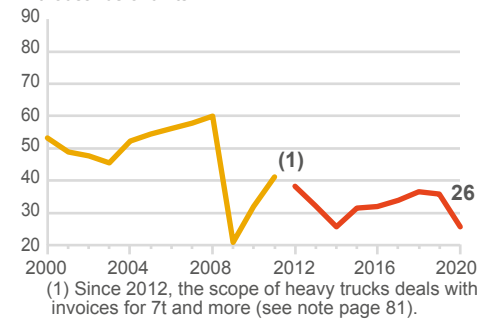
NEW LIGHT COMMERCIAL VEHICLES  
(UP TO 5T)

In thousands of units



NEW HEAVY TRUCKS (OVER 5T)

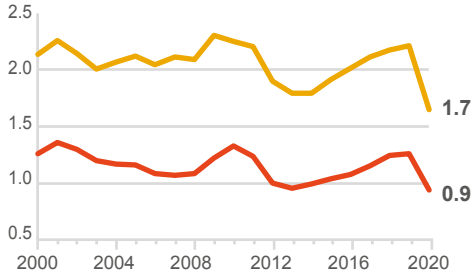
In thousands of units



### ► FRENCH GROUPS' NEW VEHICLES MARKETS

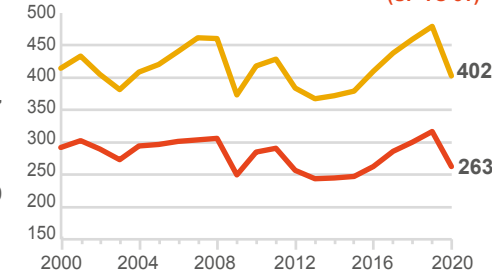
NEW PASSENGER CARS

In millions of units



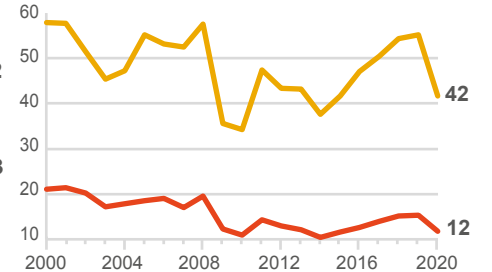
NEW LIGHT COMMERCIAL VEHICLES  
(UP TO 5T)

In thousands of units



NEW HEAVY TRUCKS (OVER 5T)

In thousands of units

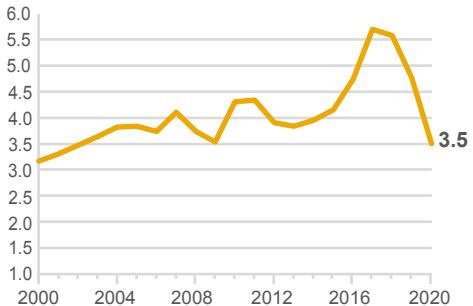


— TOTAL — FRENCH GROUPS

### ► DELIVERIES BY FRENCH GROUP OUTSIDE FRANCE

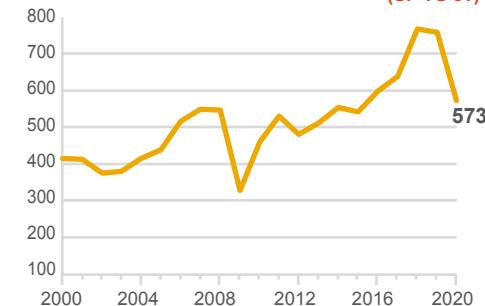
NEW PASSENGER CARS

In millions of units



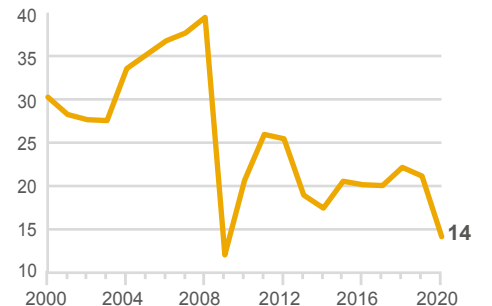
NEW LIGHT COMMERCIAL VEHICLES  
(UP TO 5T)

In thousands of units



NEW HEAVY TRUCKS (OVER 5T)

In thousands of units



Source: CCFA

French groups have developed their activities throughout the world following the opening up and development of markets in emerging countries. 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 to 2.2 and 6.2 million cars respectively in 2019. With the health crisis, registrations in France fell to 1.6 million units

and the global production of French manufacturers to 4.5 million units.

From 2009 to 2015, the impact of the crisis in countries where French groups have a strong presence had affected their deliveries of passenger cars outside France. In 2020, they fell by 26% to 3.5 million units, i.e. 10% below their low point in 2013. Deliveries of light commercial vehicles fell by

24% in 2020 to 573,000 units but this level remains higher than the levels observed before 2016. Finally, deliveries of industrial vehicles fell by 33% in 2020 (14,000 units), i.e. a lowest level since 2009.

## ECONOMIC RATIOS OF THE AUTOMOTIVE SECTOR IN FRANCE

# +70%

**Increase in added value per person employed in automotive manufacturing between 2012 and 2020**

In 2020, the value added per employee in the automotive sector amounted to 93,000 euros, down sharply compared to 2019. The health crisis has brutally slowed down activity, just like what happened in 2009 (financial crisis) and in 2012 (low point in the automotive cycle).

The value added per employee in car manufacturing is higher than in industry. In 2019, it was 105,000 euros against 92,000 euros on average in the industry. Between 2012 and 2019, it almost doubled at current prices, thanks to the growth of the European market and outlets, as well as the internal efforts of manufacturers in terms of productivity.

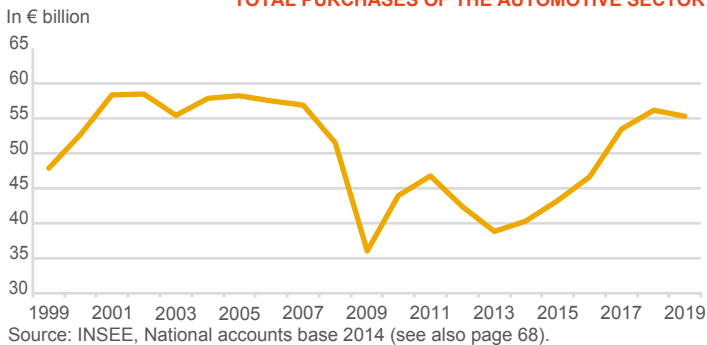
The share of turnover exported in car manufacturing is around 60%, compared to an average of 39% in industry.

At the crossroads of many and various techniques, the automobile requires significant investment: since

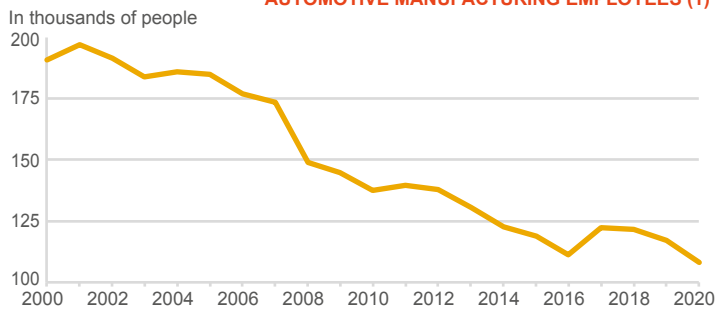
the 2009 crisis, automobile manufacturing devotes an average of 2.4% of its turnover to it each year. This ratio remains high in 2020 (2.8%), in a context of declining turnover and the maintenance of the tangible investments necessary for the energy transition. On average, the automotive industry annually makes about 6% of total industry investment.

In addition, the automotive branch has a significant impact on the other branches, in particular through the purchases it makes. Total purchases by the automotive branch amounted to 55 billion euros in 2019, up 43% since 2013.

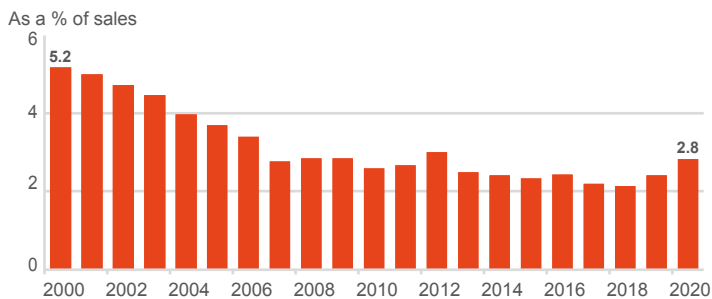
### TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR



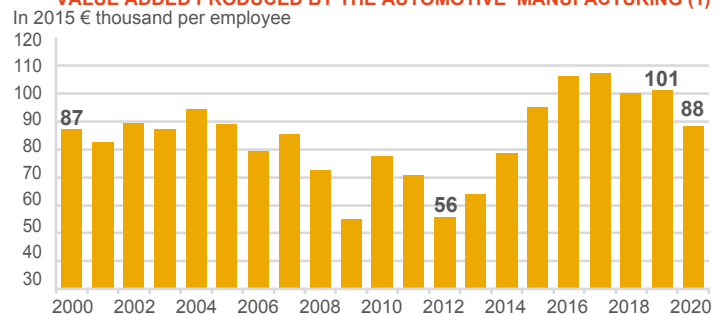
### AUTOMOTIVE MANUFACTURING EMPLOYEES (1)



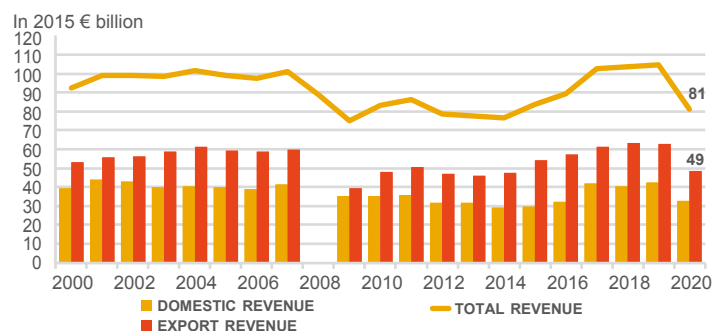
### CAPITAL EXPENDITURE BY THE AUTOMOTIVE MANUFACTURING (1)



### VALUE ADDED PRODUCED BY THE AUTOMOTIVE MANUFACTURING (1)



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



(1) CCFA estimates for 2020: see also pages 88 and 89.  
Source: SESSI, INSEE since 2008

INSEE produces annual business surveys each year, which are one of the main sources of knowledge of French industry. A major overhaul of these surveys has been carried out, with the new ESANE information system. In addition, a new classification of economic activity was introduced at the start of 2008 (see pages 88 and 89).

The automotive industry sector includes companies whose main activity is the construction of motor vehicles, motor vehicle bodies, caravans and leisure vehicles, but also, upstream, the manufacture of automotive equipment. However, some products such as tyres, plastics, capital goods and glass escape classification because

they appear in other classifications of activities (see page 69).

After 2004, in line with the increase in vehicle production, the added value (excluding tax) of car manufacturing, in constant euros and per employee, fell under the impact of various factors: costs linked to new environmental standards, stagnation, then fall in the automotive markets of Western Europe. Then, from 2013, it increased again and almost doubled in 7 years. In order to develop new models and optimise production capacities, automobile manufacturing devoted an average of 2.4% of its turnover to its investments, i.e. more than 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 60%, compared to 39% for the industry as a whole.

# THE AUTOMOTIVE INDUSTRY IN THE REGIONS

By taking into account direct jobs (manufacturers' production and research sites), indirect jobs (suppliers' sites) and induced jobs (generated by the activity of the preceding companies), the

automobile economy often constitutes an essential pillar of the local economy.

# 4.1

**Units of value added in the national economy generated by one unit of value added in the automotive sector**

## ► 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)

(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.

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

	2008	2015	2020
Île-de-France	55,070	41,707	36,477
Auvergne-Rhône-Alpes	27,545	22,219	21,622
Grand Est	39,746	30,107	25,285
Hauts-de-France	38,213	29,713	26,731
Bourgogne-Franche-Comté	29,193	23,008	19,232
Normandie	25,428	18,207	16,957
Pays de la Loire	14,401	12,060	12,849
Nouvelle-Aquitaine	11,609	8,362	7,350
Bretagne	11,629	7,543	5,896
Centre-Val de Loire	6,635	5,088	4,093
Occitanie	6,281	5,785	5,710
Provence-Alpes-Côte d'Azur	1,285	1,176	1,132
Metropolitan France	267,035	204,975	183,334

Source: ACOSS (see page 70)

## ► 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
	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 ripple effects on the rest of the economy. According to INSEE, one unit of added value in the automotive sector generates 4.1 units of added value in the national economy. Thus, the automotive industry has the largest added value multiplier, after aeronautical and space construction. Furthermore, an industrial site generates local economic activity that is not limited to its employees alone (direct employment). Indirect and induced jobs are also created, as shown by various studies by INSEE 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 Ile-de-France Planning and Urban Planning Institute estimates that in 2018, the automotive sector in this region comprised around 73,000 employees in 1,600 establishments; 57% of the workforce works with body builders, 13% with equipment manufacturers, 19% with industrial suppliers and 11% in technological services (design offices and IT services and engineering companies). In the Seine Valley, which brings together the departments in 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 car manufacturing. The broader automotive sector, which includes manufacturing, trade and maintenance-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 automobile construction, 15,000 in the manufacture of automobile equipment and 26,300 in the supply of materials, intermediate products and services. Bourgogne-Franche-Comté, traditionally closely linked to the automotive and metallurgical sectors, had 45,000 non-temporary employees in the automotive sector in 2015, including 14,570 in automotive construction and 14,820 in automotive equipment manufacturing. Despite the absence of major manufacturers established locally, the Center region has 29,000 jobs in the automotive sector where subcontractors, material suppliers and service providers gravitate around world-class equipment manufacturers.

In all of these regions, the number of jobs in the automotive industry has declined over the past twenty years according to ACOSS data. Between 2008 and 2015, the decline was 24% on average in France and 11% between 2015 and 2020.

The research and development activities of the entire automotive industry are located in Île-de-France (eg 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 was carried out by the automotive industry in 2013. In Bourgogne-Franche-Comté, in 2016, the automotive industry accounted for, according to INSEE, 70% of research and development expenditure by mid-sized companies and large companies established locally.

In 2019, 11 Regional Associations of the Automotive Industry (ARIA), regional relays of the PFA, Automotive Industry & Mobilities, bring together companies (manufacturers, equipment manufacturers 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 outlets, emergence of new projects, promotion of the image of the sector in the region. They also cooperate with automotive competitiveness clusters, or even integrate them.

## COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

In a highly competitive global market, French automotive groups must be competitive in their country of origin and face factors common to the entire industry. These include wage costs, the weight of compulsory levies on factors of production and the exchange rate. Others are specific to the automotive sector, such as the opening of the base market to competition. All of these factors weigh on margin rates (ratio between gross operating surplus and gross value added). The latter has an impact on the ability of companies to invest in production (modernisation of sites), product development, research and development in the energy transition, digital technology and new mobility. In order to cope with these current revolutions, investments are set to increase (see pages 24, 28, 88 and 89).

In France, after the 2009 crisis, the government implemented a policy promoting competitiveness; the manufacturers have also activated all the

internal levers for the development of their activity and the maintenance of the industrial and research sites in France. All of these actions have had results, but the French industrial tool retains a degraded economic competitiveness compared, in particular, to its European environment.

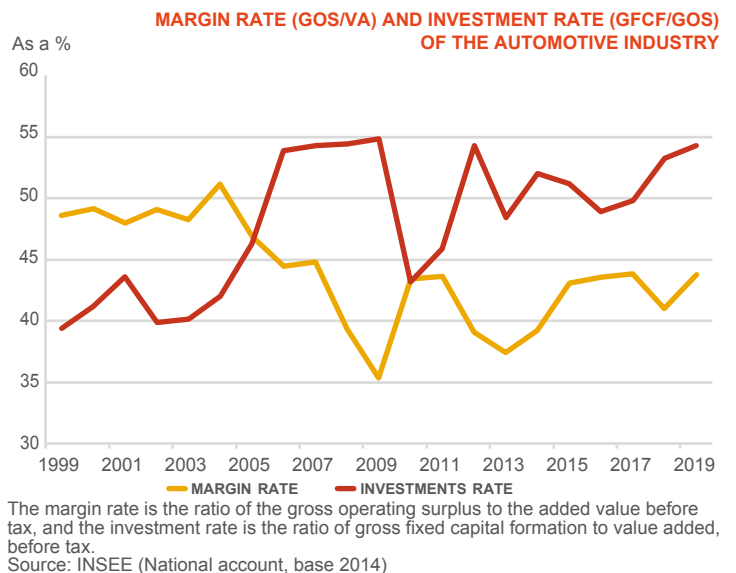
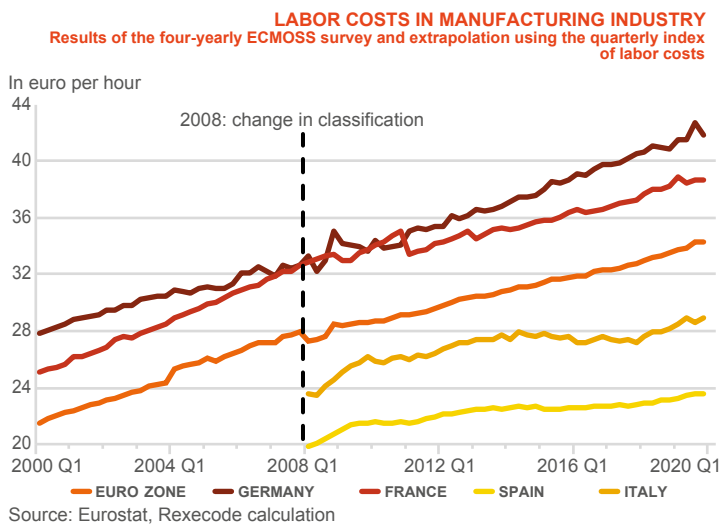
INSEE defines production taxes as all taxes that companies pay as a result of their production activities, regardless of the quantity or value of the goods and services produced or sold. In France, they represent, in 2020, 3.7% of GDP, compared to 1.3% in Italy, 1.1% in Spain and 0.5% in Germany according to Eurostat. The CNI also estimates that more than 20% of the revenue from three (business property tax - CFE, business value added tax - CVAE, corporate social solidarity contribution - C3S) of the five main taxes on production comes from the industry, which represents, in 2020, 13% of the added value of the whole economy. Industry is a sector highly

exposed to international competition and only its investment capacity allows it to strengthen non-price competitiveness.



# 3.7%

**Share of production taxes in GDP in France in 2020, compared to 0.5% in Germany**



Competitiveness is the ability of an industry to compete and grow in markets. It is relative in the sense that it is the result of a confrontation with other players in the sector present on the market.

The French automotive 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 linked in particular to the weight of social charges on the labour factor. Between 2000 and 2009, labour costs in the manufacturing industry moved closer to German costs and moved away from average costs in the euro zone, which penalised the competitiveness of French manufacturers and their suppliers in France.

In 2012, in order to promote the competitiveness of companies, the government introduced the Competitiveness and Employment Tax Credit (CICE), based on the payroll base, excluding wages above 2.5 times the minimum wage. The rate of tax reduction fell from 4% of the gross payroll in 2013 to 7% in 2017. From 2019, the CICE is transformed into a permanent reduction in employers' social security contributions. Nevertheless, the weight of social charges on the

labour factor in France continues to be one of the highest in the European Union, including the euro zone. It is higher than those of the United Kingdom, Italy, Spain, and even 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 also relating to the tax burden on companies could be taken in order to continue to bring the production conditions of the France site closer to those of the euro zone average. In 2020, production capacity utilisation rates fell, affecting the competitiveness of sites in most eurozone countries.

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

Changes in exchange rates can significantly alter the terms of trade because of the significant, and growing, share of production outside the euro area. The latter accounted for 60% of external outlets for passenger cars in 2020, compared to 47% in 2002. In 2020, the euro remains on average at a

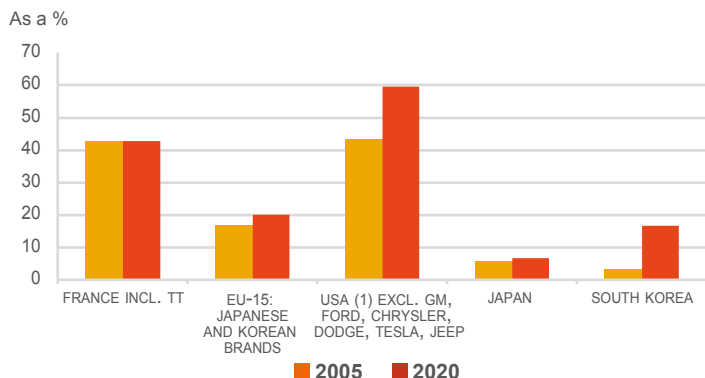
lower level than between 2009 and 2014 against the dollar and the won, but it has risen slightly compared to 2019.

On the other hand, there are factors related to the opening of the market, whether internal or external. In general, the domestic outlet, known as the "base market", constitutes a solid pillar for nurturing, via international development and innovation, growth in external markets. For the French automotive industry, the French market and especially the European market constitute this base market; it is open to competition and non-European manufacturers occupy a significant and constantly growing share. In other car manufacturing countries, such as Japan, market access is more difficult and local manufacturers therefore have a larger base market on which to base their international development.



# COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

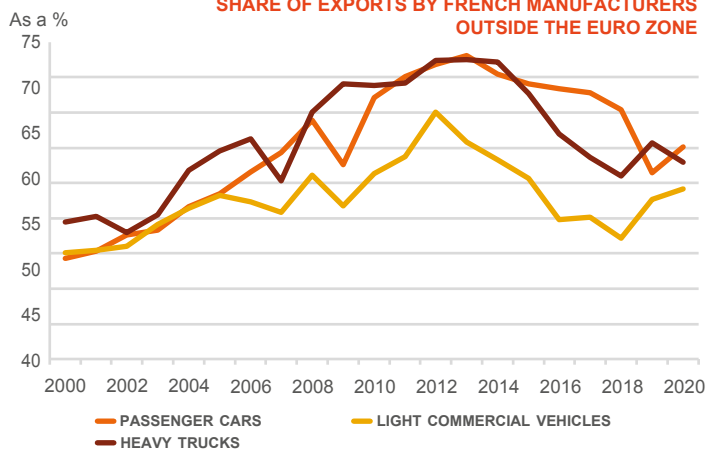
## SHARE OF FOREIGN BRANDS IN PASSENGER CAR MARKETS



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

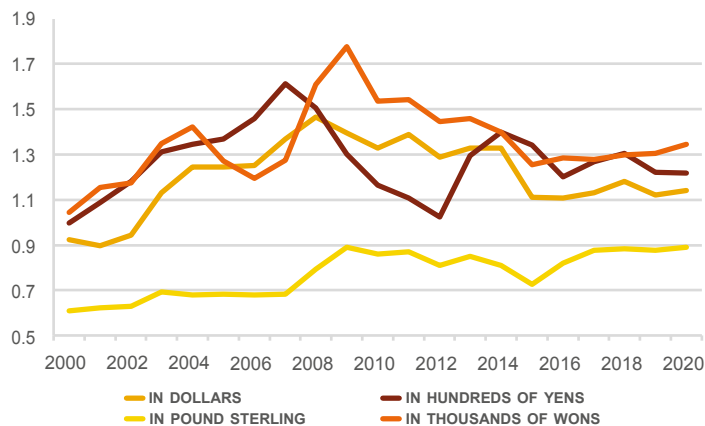


## SHARE OF EXPORTS BY FRENCH MANUFACTURERS OUTSIDE THE EURO ZONE



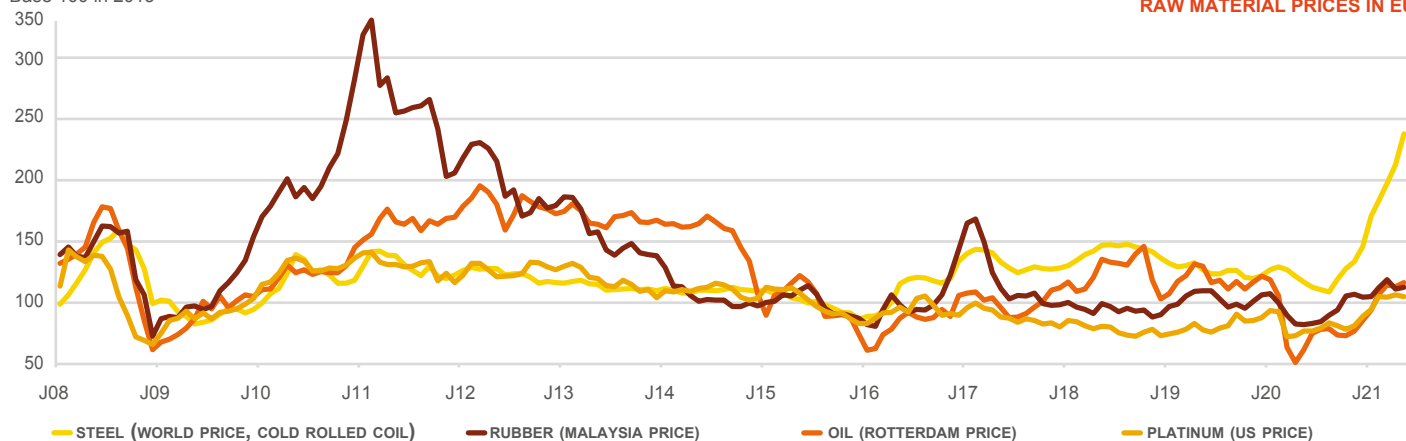
Source: CCFA

## EURO EXCHANGE RATE VARIATION: FOR 1 EURO



Source: BCE

Base 100 in 2015



Source: Rexecode, CCFA calculations

# 60%

**Share from outside the euro zone in the external outlets of French groups**

The prices of raw materials, which can impact the production costs of user companies, experience significant fluctuations, including during the same year. Expressed in euros, the prices of raw materials had experienced significant increases from 2001 to 2012 and the impact of these in the final sales prices had proved difficult, in a context of intense competition and arbitration in terms of consumption. within households. Prices then hit

a low point at the beginning of 2016, then evolved in a contrasting manner depending on the product and fluctuated sharply during the year. Steel and rubber saw their prices increase sharply in 2016 to reach a peak in February 2017. But after this date, the price of rubber fell sharply, while that of steel remained at a high level, reaching a new peak in September 2018, then to decrease during 2019. Conversely, the price of platinum fell continuously until January 2019, then increased steadily throughout the year. Finally, with regard to the price of crude oil, its variations are much more erratic. After falling sharply at the end of 2018, it showed an upward trend during 2019.

In 2020, prices fell sharply again with the slowdown in global activity and reached a low point in April and August for steel. Then from this low point, prices rose continuously, in particular for steel which reached, from January 2021, its highest level ever recorded. The strength of the recovery after the Covid crisis largely explains this price surge.

## CONSOLIDATION OF THE AUTOMOTIVE SECTOR

# 2018

## Signature of the 2018-2022 sector contract

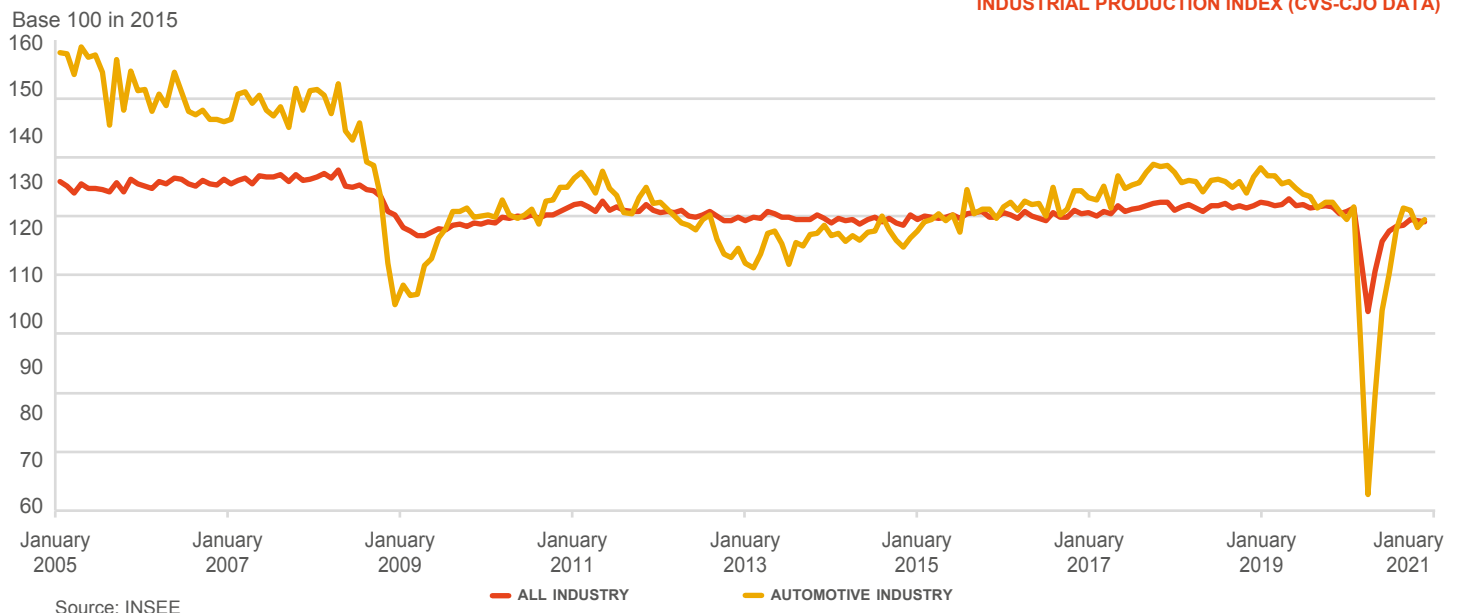
Over the past ten years, the automotive industry has had to consolidate facing several types of events. The first was the 2008-2009 crisis which severely affected European markets and production in France. The automotive industry production index calculated by INSEE fell sharply in 2008. Measured in base 100 in 2015, it fell from 143 in January 2008 to 70 in December and remained at a very low level in 2009 (90 on average per year). Then, it rebounded in 2010-2011 and, after fluctuating around 93 until 2013, it progressed steadily to return above 100 from 2015. Between 2015 and 2018, the production index increased 11% compared to 3% for the industry as a whole. However, in 2020, with the health crisis,

production suffered a shock again, this time on an unprecedented scale. The automotive production index fell by 28% in 2020 compared to 10% for the whole industry.

The sector must also deal with three major disruptions (technological, digital and societal) which are leading to a deep reorganisation of the value chain. Companies must adapt to the reduction in their traditional outlets linked to thermal vehicles and invest in new products by training the workforce in future technologies.

Since 2009, the automotive sector has been structured around the Automotive Industry Platform (PFA), set up by French automotive groups and their suppliers, gathered within the Liaison Committee of Automotive Suppliers (CLIFA). Within the framework of the National Industry Council

(CNI), the Automotive Sector Strategic Committee (CSF) has been set up. The CSF Automobile brings together the entire sector, from upstream to downstream, including employee unions. In the spring of 2018, a new sector contract was signed in order to set the roadmap for the 2018-2022 period. With the 2020 health crisis which impacted the entire economy, including the automotive sector (fall in markets and production, automotive support plan), it became necessary to adapt the CSFA's roadmap in order to strengthen the measures most essential to the transition, while taking into account this new economic context. An amendment to the sector contract was therefore signed in April 2021.



2009 financial and economic crisis had a major impact on the automotive sector, from suppliers (upstream) to the sale/maintenance of vehicles (downstream), including the transport of goods, the manufacturers of goods equipment or business services, including research and development. Due to the contraction of activity, degraded competitiveness and increased competition, the fabric has become fragile. To cope with this context, the PFA then set priorities: "lean manufacturing", tomorrow's skills and professions, better management of communication and the medium and long-term strategy on the competitiveness of manufacturers and from their suppliers.

Since 2010, it has been supported at the regional level by the Regional Automobile Industry Associations (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 Fiber Carbon Economy) and the Factory of the Future. In addition, the PFA works in partnership with the competitiveness clusters. It

is also a stakeholder in the CSF Automotive. The CSF Automotive was created in 2010 within the current CNI, following the Estates General of Industry concluded the same year, which now includes 15 other committees. It brings together automobile and industrial vehicle manufacturers established in the territory, "tier 1" equipment manufacturers and a large number of SMEs and ETIs, automotive suppliers and belonging to different sectors (mechanical, plastics, stamping, foundry, etc.). The downstream of the sector (distribution, repairs) is also present, like the R&D players, in particular the competitiveness clusters and the major public research organisations (IFPEN, IFSTTAR). Branch employee unions also participate.

The PFA entered a new stage at the end of 2017. Its missions relate to the animation of the dynamics of innovation, the action in favour of competitiveness throughout the sector, the work of anticipation in terms of jobs and skills, the expression of the common positions of the sector, coordination of the organisation of trade fairs and sector communication.

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 and ecological transition, creating the ecosystem of the autonomous vehicle and experimenting on a large scale to offer

new mobility services, anticipating the evolution of skills and employment needs, and strengthening competitiveness. of the automotive industry.

In 2020, the health crisis led to a historic decline in economic activity which further weakened companies in the sector and led the government to put in place emergency measures (cash support, employment) and to launch, in May 2020, a vast car support plan to get out of the crisis. An amendment to the strategic sector contract was also signed in April 2021 to take into account the support plan and strengthen actions in favour of ecological transition: additional financial envelopes have been provided by the State, in particular to accelerate the deployment of charging stations. The sector has strengthened its commitments to electrification by, for example, setting a development path for electric light and heavy commercial vehicles. A roadmap for supporting employees has also been put in place.

## RESPONSE FUNDS, RESEARCH TAX CREDIT, FUTURE INVESTMENTS

The automobile requires significant physical investments (production sites, etc.), amortised over long periods. During their design and before marketing, the vehicles also required work over several years in research centres, in a process of permanent progress, in order to be able to respond in particular to societal demands, whether related to safety or the environment (electrification, hydrogen, etc.). Manufacturers must also respond to new digital issues (autonomous and connected cars) and new mobility services. The automotive industry is therefore a capital-intensive industry which, overall, has significant financing needs.

During 2009 financial crisis, this peculiarity weighed on the automotive industry and the public authorities set up structural instruments to promote long-term financing. Created in 2009 under the name of the Automotive Equipment Manufacturers Modernisation Fund, which became the Automotive Future Fund (FAA) in 2015, this fund's mission is to contribute to the development and consolidation of strategic equipment manufacturers for the automotive sector, in order to increase their profitability and help them establish lasting partnerships with manufacturers. In November 2020, this fund entered phase 2

and was integrated into the automotive support plan launched by the government in May 2020 to support the sector in its changes and support it in this period of crisis. Initially endowed with 525 million euros, increased to 600 million by the support plan, this fund will be spread over a period of 15 years in order to be able to respond to the challenges of the sector in the long term. It will also benefit companies that have suffered from the brutal economic consequences of the health crisis, with envelopes ranging from 3 to 50 million euros invested in equity or quasi-equity.

The Research Tax Credit (CIR), a tax measure created in 1983, simplified and amplified by the 2008 Finance Act, makes it possible to make up for the lack of fiscal and social competitiveness of France compared to other major countries in which car manufacturers are present, in particular through their R&D centers. In 2019, 7.4% of the tax credit granted for research benefited the automotive industry and 1.4% for innovation.

The automotive recovery plan also provides public aid of up to 150 million euros to support R&D and innovation. They will be deployed as part of the 4th Investments for the Future Program (PIA) over the

period 2021-2025, in line with the priorities defined within CORAM (Steering Committee for Automotive and Mobility Research). This committee, set up in 2020 as part of the automotive support plan, has drawn up a roadmap which makes it possible to identify priorities in terms of short-term innovation (development of strategic components for the manufacture of electric and plug-in hybrid vehicles) and in the long term (development of hydrogen systems for mobility, development of autonomous and connected vehicles).

# 2015

**First year of existence of the Automotive Future Fund**

# 2020

**Launch of the Automotive Future Fund 2**

### ► INVESTMENT AND SUPPORT FUNDS FOR THE AUTOMOTIVE SECTOR

	Objectives and attributions
<b>Automotive Future Fund 2 (launched in November 2020)</b>	Following on from the FAA launched in 2009, which has come to the end of its investment period, the FAA 2 launched by Renault, PSA and Bpifrance is part of the 2020 recovery plan. Managed by Bpifrance, it aims to accelerate the growth and innovation capacity of French automotive subcontractors. Its total duration will be 15 years and its investment period 5 years. 80% of the Fund, i.e. up to €420 million, will be invested in approximately fifteen subcontractor groups, while the remaining 20%, i.e. up to €105 million, will be invested in funds of funds (private and complementary to the FAA 2).
<b>Support fund for employees in the automotive sector</b>	Intended to finance exceptional support and professional retraining actions for redundant employees in the automotive sector. The resources of the fund consist of financial contributions from the State and voluntary contributions from companies. The management of the fund and the implementation of support and professional retraining measures are entrusted, on behalf of the State, to Pôle Emploi. The support is planned until June 2023.
<b>AMI CORAM 2021 (Call for demonstration within the framework of CORAM)</b>	Subsidies and advances of 30% to 50% (depending on the size of the company) of the amount of the investment for R&D projects that fall within the roadmap of the Automotive and Mobility Research Steering Committee (electric vehicle, hydrogen, innovative materials, circular economy, connected and autonomous vehicles).

Source: Bpifrance

In the context of long-term financing, since its creation, the Strategic Investment Fund (FSI), which became Bpifrance Participations with the creation of the public investment bank Bpifrance, had invested in three companies in the automotive sector. As for the Fund for the Modernisation of Automotive Equipment Manufacturers Rank 1 (FMEA Rank 1) to which the French automotive groups had contributed 400 million euros in addition to the 200 million euros by the FSI, it invested with the Fund for the Modernisation of Automotive Equipment Manufacturers Rank 2 (FMEA Rank 2) in several supplier companies to the automotive industry.

As part of the automotive support plan launched by the State in May 2020 to help the sector restructure and face the economic crisis linked to COVID, two main areas of funding have been announced. The first, the Future Automobile Fund 2, increased to 600 million euros, is dedicated to subcontractors in the continuity of the FMEA. Its purpose is to provide new investment capacities, in equity and quasi-equity, to help French subcontractors cope with the crisis and accelerate their capacity for innovation in key automotive technologies. of the future, connected and carbon-free. The second

major mechanism is the Call for Expression of Interest, which is part of the fourth Investments for the Future Program (PIA4) and will benefit projects selected under CORAM. The financial assistance provided to the projects will depend on the size of the companies and will consist of a grant part and a repayable part.

Previously, the automotive industry had already benefited from other investment programs for the future, including a project that led to the creation in 2014 of an Institute for Energy Transition (ITE) dedicated to individual, carbon-free and sustainable mobility. The VEDECOM institute «Communicating Low-carbon Vehicle and its Mobility», based in the Paris region, aims to become the benchmark for the new e-mobility sector on the themes of electrification, the autonomous and connected vehicle and the new mobility solutions and shared energy. It has been supported by NextMove competitiveness cluster (Mov'eo) since 2010 and belongs to the "Autonomous Vehicle Plan". It brings together around 50 members and partners: major industrial groups including PSA and Renault, SMEs, research centers and laboratories, schools and training centers and local authorities. The budget

is approximately 30 million euros per year.

French car manufacturers are also stakeholders in the Jules Verne Institute for Technological Research (IRT), based in Nantes. Created in 2012 as part of the PIA, its mission is to accelerate innovation and technology transfer to factories in 4 strategic industrial sectors linked to transport, including the automotive industry. Since its existence, 96 projects have been carried out for 203 million euros. In the automotive industry, his work focuses on the development of manufacturing processes for multi-material parts (composite-metallic) and robotic solutions to develop the factory of the future.

In addition, ADEME offers a system for accelerating the development of high-performance innovation ecosystems (transport and sustainable mobility) which results in subsidies and recoverable advances on projects in the R&D phases, up to demonstration.

# RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

## 6.9 billion euros

### Amount of internal and external expenditure on research and development of the automotive sector in 2019

In 2019, the automotive industry was the leading branch in terms of Domestic Research and Development Spending (DRDS) within companies in France, ahead of aeronautical and space construction and the pharmaceutical industry. This innovation expenditure amounted to 4.6 billion euros, i.e. 13% of all companies' DRDS, up 3% compared to 2018. External Research and Development Spending (ERDS) doubled since 2015 and amounted to 2.2 billion euros in 2019.

The 2009 crisis had significantly limited companies' financial resources, yet domestic research and development (R&D) spending had only fallen by 2% in 2009 and 2010, underlining their vital and long-term nature. Since then, they have fluctuated around 4 billion euros and represent around a third of the branch's gross added value.

Manufacturers must invest, not only to satisfy customers and comply with regulatory standards, but also to achieve the objectives related to the energy transition and develop digital technologies for connected and autonomous vehicles and mobility services. Since 2015, total R&D expenditure has increased by 25% and amounted to nearly 7 billion euros in 2019.

Cumulatively over the last 5 years, the sector

has thus spent more than 21.6 billion euros on innovation, which also has a knock-on effect on its suppliers, such as plastics, electronics, etc. The automotive is also the sector that files the largest number of patents and the manufacturers PSA and Renault are still in the list of patent applicants.

In Europe, the automotive sector is also the sector that spends the most on research and development with, according to ACEA figures, 62 billion euros spent in 2019, or 33% of total R&D expenditure.

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

	DRDS in 2019 (2)		ERDS (3) in 2019	
	in € millions	As a % of total	in € millions	As a % of total
<b>Automotive industry</b>	4,647	13%	2,243	16%
<b>Aeronautics and space</b>	3,659	10%	4,353	30%
<b>Specialised, scientific and technical activities</b>	3,359	10%	877	6%
<b>Pharmaceutical industry</b>	2,702	8%	2,289	16%
<b>IT and information services</b>	2,811	8%	260	2%
<b>Chemical industry</b>	1,953	6%	559	4%
<b>Components, electronic cards, computers, peripheral equipment</b>	1,701	5%	165	1%
<b>Manufacture of measuring devices and instruments, testing and navigation, clocks</b>	1,631	5%	350	2%
<b>Publishing, audiovisual, and broadcasting</b>	1,619	5%	354	2%
<b>Manufacture of electrical equipment</b>	1,363	4%	521	4%
<b>Manufacture of machinery and equipment not included elsewhere</b>	1,260	4%	261	2%
<b>Manufacture of communications equipment</b>	874	2%	137	1%
<b>Other sectors</b>	7,506	21%	2,069	14%
<b>TOTAL</b>	<b>35,086</b>	<b>100%</b>	<b>14,439</b>	<b>100%</b>

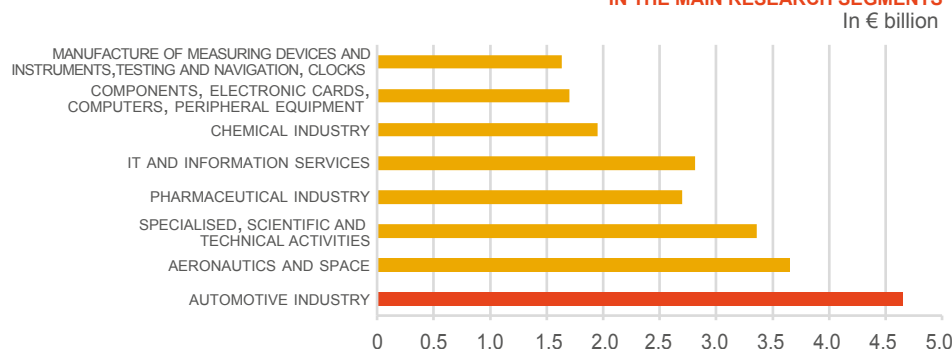
(1) Semi-final data.

(2) DRDS: Domestic Research and Development Spending.

(3) ERDS: External Research and Development Spending.

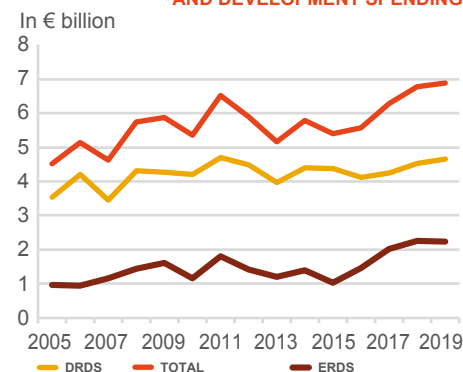
Source: Ministry of Higher Education, Research and Innovation (MESR DGESIP-DGRI SIES)

### TOTAL CORPORATE RESEARCH AND DEVELOPMENT EXPENDITURE IN FRANCE IN 2019 IN THE MAIN RESEARCH SEGMENTS



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

### AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



The Office of Statistical Studies on Research (Ministry of Higher Education, Research and Innovation) conducts surveys on R&D expenditure carried out 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 is broken down into domestic spending (DRDS), which corresponds to work carried out in France, regardless of the origin of the funds, and external spending (ERDS), corresponding to R&D work entrusted to

other companies or to public research organisations; some of the latter expenses may be incurred abroad.

In 2017, 17% of DRDS in the automotive branch carried out by subsidiaries was due to subsidiaries of groups under foreign control (more than 50% of the capital).

In 2019, companies in the automotive sector based in France employed 30,700 full-time equivalent people in

R&D (including 20,100 researchers). These numbers fell by 7% compared to 2003, but the number of researchers increased by 46% over the same period.

According to the National Institute of Industrial Property (INPI), the PSA and Renault groups are still in the top five places in the list of patent applicants in 2020. Of the top ten patent applicants, half are companies in the automotive sector.

## AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

Initiated by the State and local authorities in 2005, the competitiveness clusters bring together companies (large groups and SMEs/ETIs), research units and training centres in a logic of collaborative projects. Companies can belong to several centres with different specialties in order to obtain know-how (example: software skills for the autonomous vehicle). The clusters also offer many services: economic intelligence, assistance with filing patents, networking, etc.

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

Phase IV of the clusters policy was launched in 2019, with a requirement for excellence and a reinforced European ambition. The objectives of phase III are maintained (action centred on the products and services to be industrialised, consideration of economic outlets and employment) but from now on, they must be more closely integrated into the European networks of innovation, where the importance of their size and their interest in merging and getting closer to other structures.

There are four automotive competitiveness clusters. They have developed their areas of work around innovation, skills, networking and the marketing of new solutions. They are associate members of the structure of the automotive sector: the PFA, Automotive Industry & Mobilities. In 2019, they joined forces to form the “auto and mobility” inter-cluster, a benchmark in Europe and

internationally.

In 2020, in the particular context of the health crisis, the clusters continued to ensure the link in terms of research and development between manufacturers, equipment manufacturers, innovative SMEs/ETIs, research laboratories, training organisations and territories, through the organisation of events and webinars.

**1,700** Member establishments of automotive competitiveness clusters in 2020

### ► 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 (2015)</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 (2020)</b>	600	500	250	349
<b>Number of labeled projects since their creation (2020)</b>	405	470	334	310
<b>Number of projects funded since their creation (2020)</b>	275	244	189	-

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

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

Mov'eo cluster (Nextmove since January 1, 2021) covers the Île-de-France and Normandy regions. In 2019, the cluster merged with ARIA Normandie and the Automobility & Vehicles Network in Île-de-France (RAVI) to create the «Mobility Valley», a territory of European excellence where are invented, developed, tested and industrialised solutions to meet the mobility challenges of the future. The 4 innovation drivers are: mobility with a low environmental footprint, safe, autonomous and connected mobility, new mobility services and solutions, industrial and operational excellence.

Vehicle of the Future cluster, historically established in Alsace and Franche-Comté, now extends over the entire territory of the Grand Est and Bourgogne-Franche-Comté cluster. In June 2020, the Vehicle of the Future Cluster completed the merger-absorption of ARIA Champagne-Ardenne and Lorraine, ARIA PerfoEST having already joined the Cluster in 2008. The cluster supports companies in new mobility markets (electric vehicles, hydrogen, autonomous & connected and mobility services) and towards the industry of the future (transformation of the production process) with the mission of stimulating innovation, improving business performance, supporting the upskilling of teams and supporting companies in their development and growth.

The ambition of CARA cluster is to support changes in passenger and goods transport systems in the Auvergne-Rhône-Alpes region. It supports 6 sectors: industrial vehicles, automobiles, cable transport, river transport, active and sustainable mobility and rail. CARA implements collective actions: research and innovation projects, real-life demonstrators, actions for the economic and industrial development of its members. The activity revolves around five research programs: motorisation and driveline, safety and security, vehicle architecture, intelligent transport system, mobility, practices and governance. In this new phase, CARA aims to emphasise the 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), iD4CAR cluster focuses on specific vehicles and sustainable mobility. The four strategic business areas are: vehicle materials and architecture, on-board systems intelligence, vehicles (usages and industrialisation) and digital mobility services and infrastructure. The cluster has also played the role of an ARIA on its geographical perimeter since the beginning of 2017. As part of phase IV of the competitiveness

clusters, ID4CAR is extending its territory of actions by developing in New Aquitaine, in order to strengthen the hub Great West Territory.

Clusters other than those specialising in the automobile may have outlets in this sector. These poles work on materials, rubber, plastic, mechanics or mobility. Polymeris, a new Rubbers, Plastics and Composites competitiveness cluster was born from the merger in 2020 of Elastopôle, dedicated to rubber and polymers, and Plastipolis, dedicated to plastics processing, both anchored in the Auvergne-Rhône-Alpes and Centre-Val-de-Loire. Its two main strategic axes are the industry of the future and the circular economy. Rooted in the Hauts-de-France region, i-TRANS is the transport, mobility and logistics competitiveness cluster. Its action focuses on six priority sectors, including automotive equipment. In 2015, 13% of the employees of member establishments of this cluster worked for the automotive industry.

## FRENCH AUTOMOTIVE FOREIGN TRADE

In 2020, trade and global demand addressed to France are impacted by the health crisis and travel restrictions. At national level, exports fell by 15.9% and imports by 13%.

In this context, exports of automotive products from France fell by 18.5% in 2020 to stand at 41 billion euros. This decline is largely due to the sharp contraction in exports of new passenger cars (-23.5%), while exports of parts and engines fell less sharply (-12.2%). The automotive sector nevertheless remains the 2<sup>nd</sup> largest exporter with 9.7% of total exports, behind the food industry and ahead of aeronautics.

On the import side, they fell by 10.5% for new vehicles and by 22.5% for parts and engines. Imports of new

passenger cars fell less sharply (-8.3%) than those of light commercial vehicles (-14.5%) and industrial vehicles (-21.1%). After two years with a deficit, the balance of the «parts and engines» item is again in surplus, going from -2.3 billion euros in 2019 to +306 million in 2020. Finally, the balance of trade in new light commercial vehicles remains in surplus, as the previous years.

Overall, the balance of the industrial automobile branch recovered slightly in 2020 to stand at -€14.8 billion (compared to -€15.1 billion in 2019).

The year 2020 was also marked by the withdrawal of the United Kingdom from the European Union on January 31. In 2020, France's balance with the

United Kingdom remained in surplus (+1.2 billion euros) but decreased by 0.2% compared to 2019. In value, vehicle exports fell more sharply than imports, especially those of new cars.

**41**  
billion  
euros

**Exports of industrial  
automotive products  
from France in 2020**

### ► 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%
2019	19.9	5.1	4.7	20.4	50.1	1.6	51.7	496.8	10.4%
2020	15.2	4.1	3.6	17.9	40.8	1.4	42.3	418.1	10.1%
Change 2020/2019 as a %	-23.5	-19.3	-23.7	-12.2	-18.5	-12.4	-18.3	-15.8	-
<b>IMPORTS (CIF)</b>									
2010	22.4	2.9	2.4	15.3	43.0	1.2	44.2	458.0	9.6%
2019	32.9	4.5	5.2	22.7	65.3	1.6	66.9	575.7	11.6%
2020	30.1	3.9	4.1	17.6	55.7	1.9	57.6	500.2	11.5%
Change 2020/2019 as a %	-8.3	-14.5	-21.1	-22.5	-14.7	+16.3	-14.0	-13.1	-
<b>BALANCES</b>									
2010	-7.1	-1.2	-0.1	+5.1	-3.4	-0.1	-3.5	-68.2	-
2019	-12.9	+0.6	-0.5	-2.3	-15.2	-0.0	-15.2	-78.9	-
2020	-14.9	+0.3	-0.5	+0.3	-14.8	-0.5	-15.3	-82.1	-

### ► THE AUTOMOBILE EXCHANGES BETWEEN FRANCE AND THE UNITED KINGDOM IN 2020 (IN € BILLION)

	All vehicles			Parts and engines			Industrial automotive sector		
	2019	2020	Change 2020/2019 as a %	2019	2020	Change 2020/2019 as a %	2019	2020	Change 2020/2019 as a %
EXPORTS (FOB)	2.6	1.7	-0.3	1.7	1.5	-0.1	4.3	3.2	-25%
IMPORTS (CIF)	1.9	1.4	-0.3	0.8	0.6	-0.2	2.7	1.9	-27%
Balance	+0.7	+0.3	-0.5	+0.9	+0.9	0.0	+1.6	+1.2	-22%

(1) Not including military equipment.

FOB: Franco on board; transaction value of the goods, including transport and insurance costs up to the border of the exporting country.

CIF: Cost, insurance, freight; transaction value of the goods plus transport costs and insurance up to the border of the importing country.

Sources: customs data processed by the CCFA

Exports from the automotive industry amounted to more than 50 billion euros in the mid-2000s, before falling to 34 billion in 2009 with the crisis. They remained within a range of between 39 and 45 billion euros until 2013, then grew to reach 51 billion in 2018. The year 2019, however, marks a turning point with a decline of 2.1%, which is accentuated with the health crisis (-18.7%). In 2020, exports mainly fell in the 2<sup>nd</sup> quarter before rising again from the third quarter with the resumption of activity, the recovery plan and the purchase aids put in place by several European States after confinement (Germany, Spain, United Kingdom, Italy).

After 2009, exports of passenger cars varied between 13 and 16 billion, following, in particular, the weakness of the markets of Southern Europe where French groups have a strong presence. Then, from 2016, exports returned to strong growth thanks to the dynamism of the European market. They reached 20 billion euros in 2018 but fell back to 15.2 billion euros in 2020. In addition, the difficulties of competitiveness have modified the structure of production in France, which is moving towards cars with higher added value, to the detriment of those of lower range.

After a sharp drop in 2009, exports of light commercial vehicles grew to reach the record level of 5.1 billion in 2019, thanks to the production of new vans in France and the development of production by French groups for partners. In 2020, they fell by 19%, but the balance remains positive with the sharper fall in imports. Exports of heavy trucks also fell in 2020, after a record level of 4.7 billion euros in 2019.

## FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automotive industry are generally European. In 2020, five Western European countries alone represent 64% of the exports of the industrial automobile branch. Among the top 10 customers of French automobile exports, there are also emerging countries in Eastern Europe.

For new passenger cars, the outlets are essentially the four main markets of the European Union (Germany, Spain, Italy, Belgium) and the United Kingdom. In 2020, Germany remains the main importing country, with exports valued at 4.1 billion euros, up 12% compared to 2019. In other countries, exports are down: -30% in Belgium which remains in second place, followed by Italy (-32%), Spain (-45%) and the United Kingdom (-39%), whose export value is slightly less than 1 billion euros. Turkey comes in sixth place with almost 500 million euros of cars exported.

Light commercial vehicles will remain mainly exported to these same five countries in 2020. Germany is in

the lead with 1.2 billion euros, a very slight drop of 2% compared to last year, ahead of Belgium (597 million euros, -21%) and the United Kingdom (367 million euros, -36%). Poland is in sixth place with 215 million euros ahead of China (109 million euros). In 2020, the amount of exports fell by 19% and stood at 4.2 billion euros, i.e. 1 billion less than the record level of 2019.

Exports of heavy trucks and coaches and buses, which had increased by 102% between 2010 and 2019, fell by 24% in 2020. Exports to Germany remained stable and those to Spain and the United Kingdom fell of, respectively, -25% and -17%.

Finally, the top five export destinations for parts and engines are also European. Germany leads with 3.8 billion euros (-10%), followed by Spain (-17%). To the United Kingdom, the third destination country, exports fell by 10% as in 2019 and 2018. Finally, exports to Italy increased sharply between 2010 and 2018 (+56%) but fell in 2020 (-9%).

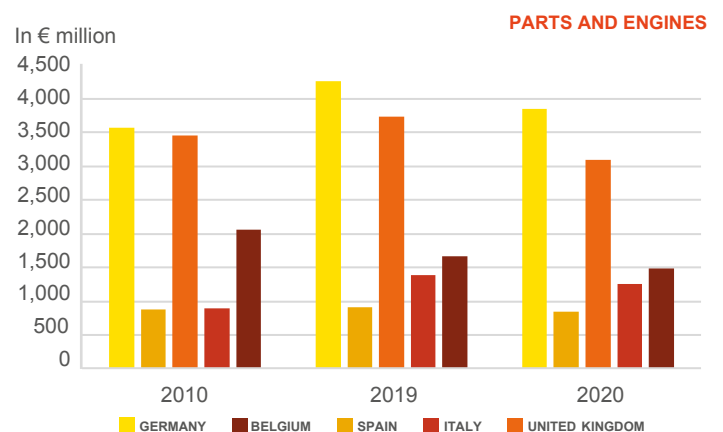
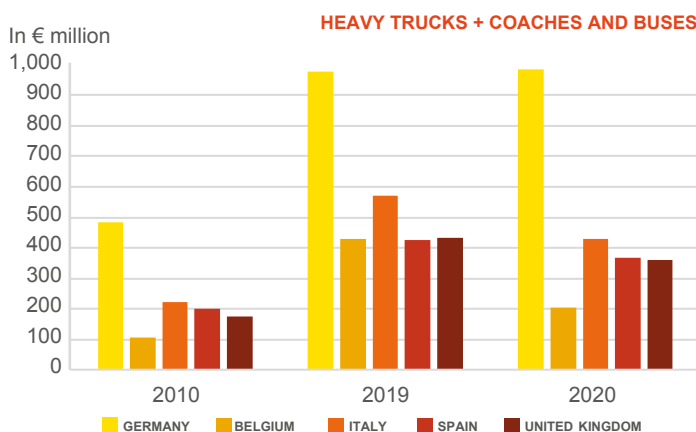
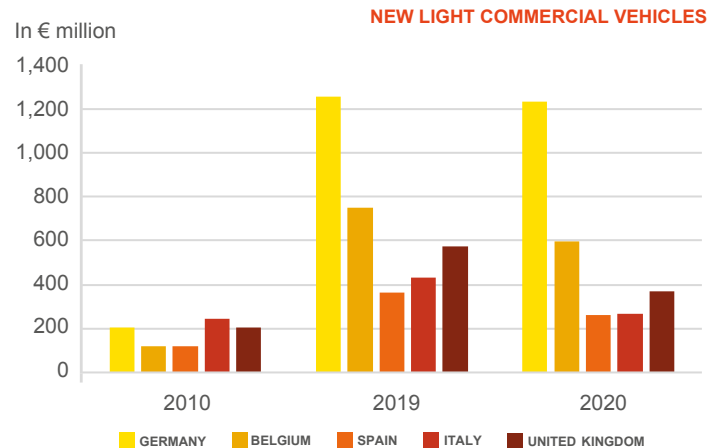
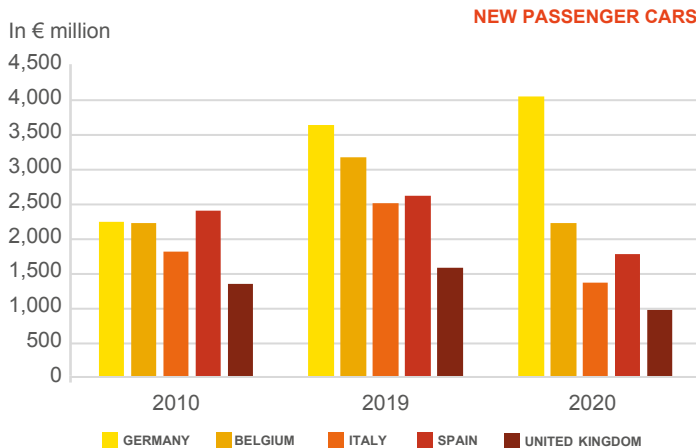
On the import side, there is a greater diversity of supplier countries: Western Europe, mainly, but also Eastern Europe (including Turkey) and Japan. For light vehicles, Spain becomes the leading supplier (7.4 billion euros) ahead of Germany (5.6 billion euros). The United Kingdom, which was a major supplier in 2019, saw its exports decrease and settle at 1.1 billion euros (-34%) placing it in twelfth place. Turkey (1.8 billion euros) and Japan (1.2 billion euros) are also important suppliers. For heavy trucks, Germany is in the lead with imports from this country amounting to 1.6 billion euros.



**Germany**

**Leading commercial partner of the automotive industry in France**

### ► LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE



Sources: Customs data processed by CCFA

## PASSENGER CARS BY ENERGY

Sales of new passenger cars equipped with a diesel engine continued to decline in 2020 (-33% in volume and -4 points of market share) and represented 31% of the market (compared to 73% in 2012). In addition, for the first time since 2012, sales of petrol cars are down (-39%) and their market share is falling sharply, from 58% in 2019 to 48% in 2020, i.e. a drop of 10 points in 1 year.

This break is explained by the strong growth in registrations of alternative energy cars in a sharply declining automotive market in 2020 (-25%). It also announces the decline of combustion engines, which should continue with the objectives set by the European Union to reduce CO<sub>2</sub> emissions from new cars to

zero by 2035, and the establishment of low emission zones. The petrol car market is all the more impacted in the short term as it still remains dominant in 2020 and concerns models that will be able to benefit from alternative engines. Conversely, the diesel car market has already contracted sharply over the past ten years to refocus on the most relevant models.

Sales of alternative energy cars (electric and hybrid) increased by 111% compared to 2019 and represented 21.5% of market share against 7.6% last year. The segment that has grown the most is that of plug-in hybrids, which volumes have tripled and which market share reached 4.5% in 2020, compared to 0.8% in 2019.

At the fleet level, diesel remains dominant with 57% of cars in circulation, but it has been falling steadily since 2015. The number of petrol cars in use (40%) has been growing since 2015 at a slower pace. As for the fleet of alternative energy cars, it emerges with 2.7% of the total.

**-42  
points**

**Decline in the share of new passenger cars with diesel engines registered in France since 2012**

### ► PASSENGER CARS BY ENERGY

	2000	2015	2017	2018	2019	2020	Change 2020/2019 as a %
<b>REGISTRATIONS</b>							
<b>Petrol</b>							
In units	-	741,215	1,006,091	1,191,145	1,290,268	791,026	-39
As a % of total registrations	51%	39%	48%	55%	58%	48%	-10 points
<b>Diesel</b>							
In units	1,046,485	1,097,124	998,116	844,878	755,583	504,178	-33
As a % of total registrations	49%	57%	47%	39%	34%	31%	-3.6 points
<b>Electric</b>							
In units	-	17,268	24,910	31,059	42,764	110,917	+159
As a % of total registrations	-	0.9%	1.2%	1.4%	1.9%	6.7%	4.8 points
<b>Hybrids</b>							
In units	-	61,619	81,559	106,369	125,435	243,675	+94
As a % of total registrations	-	3.2%	3.9%	4.9%	5.7%	15%	9.1 points
<b>including non rechargeable</b>							
In units	-	56,030	69,691	91,841	106,843	169,083	+58
As a % of total registrations	-	2.9%	3.3%	4.2%	4.8%	10%	5.4 points
<b>including plug-in</b>							
In units	-	5,589	11,868	14,528	18,592	74,592	+301
As a % of total registrations	-	0.3%	0.6%	0.7%	0.8%	4.5%	3.7 points
<b>VEHICLES IN USE AS OF DECEMBER 31</b>							
<b>Petrol</b>							
In thousands of units	18,080	13,036	13,816	14,368	14,994	15,201	+1
As a % of total stock	64%	35%	36%	38%	39%	40%	0.7 point
<b>Diesel</b>							
In thousands of units	9,980	23,596	23,682	23,179	22,621	21,941	-3
As a % of total stock	0.0%	63.7%	62%	61%	59%	57%	-1.6 point
<b>Electric</b>							
In units	-	42	82	106	141	245	+74
As a % of total registrations	-	0.1%	0.2%	0.3%	0.4%	0.6%	0.3 point
<b>Hybrids</b>							
In units	-	211	343	444	561	801	+43
As a % of total registrations	-	0.6%	0.9%	1.2%	1.5%	2.1%	0.6 point
<b>including non rechargeable</b>							
In units	-	175	289	377	477	644	+35
As a % of total registrations	-	0.5%	0.8%	1.0%	1.2%	1.7%	0.4 point
<b>including plug-in</b>							
In units	-	36	54	68	85	157	+86
As a % of total registrations	-	0.1%	0.1%	0.2%	0.2%	0.4%	0.2 point
<b>Total</b>	<b>28,060</b>	<b>37,061</b>	<b>38,087</b>	<b>38,254</b>	<b>38,467</b>	<b>38,346</b>	<b>-0.3</b>

Sources: CCFR, MTE/SDES (Ministry of Ecological Transition)

In 2020, France is now at the second place on the European market for new diesel passenger cars, with 504,120 registrations, behind Germany (820,000 units) and ahead of Italy (452,000 units). The diesel engine is favoured by users making significant annual mileages. Diesel market shares are around 20 points higher in registrations of "non-individual" customers (41%) than in purchases by individuals (19%). These figures are also observed in most Western European countries. Conversely, individuals continued to favour petrol vehicles in 2020, which market share is 58% compared to 37% for non-individuals.

With regard to alternative energies, registrations of new hybrid passenger cars amounted to 243,675 units, an increase of 94% (+301% for plug-in hybrids). Those of new electric passenger cars grew by 159%, to reach 110,917 units, which places the French market in second place among European markets behind that of Germany.

At the level of the fleet in France, 57% of cars in circulation on January 1, 2021 were equipped with a diesel engine. This ratio has fallen by more than 6 points since the high point in 2015. The share of petrol

cars in the fleet has been growing since 2015 and now represents 40% of the total (35% in 2015 and 64% in 2000). Alternative energy vehicles represent 2.7% of the total fleet. Electric cars represent only 0.6% (+0.3 point), non-rechargeable hybrid cars 1.7% (+0.4 point) and plug-in hybrid cars 0.4% (+0.2 point).



## ALTERNATIVE ENERGY PASSENGER CARS

The year 2020 was marked by a sharp increase in new passenger cars powered by alternative energies (electric and hybrid). Registrations of electric and hydrogen cars have increased by 160%, those of plug-in hybrid cars by 300% and those of non-rechargeable hybrid cars by 58%.

This growth was driven by the strengthening of the car bonus and the conversion premium, as well as by the diversification of the manufacturers' offer. These measures aim to meet the objectives set by the European Green Pact to reduce CO<sub>2</sub> emissions

### ► RANKING OF THE 10 BEST-SELLING MODELS OF ELECTRIC CARS IN 2020

Rank	Brand	Model	% market
1	RENAULT	ZOE	34%
2	PEUGEOT	208	15%
3	TESLA	MODEL 3	6%
4	HYUNDAI	KONA	5%
5	KIA	NIRO	5%
6	VOLKSWAGEN	ID.3	4%
7	NISSAN	LEAF	3%
8	PEUGEOT	2008	3%
9	DS	DS3CBACK	2%
10	MINI	MINI	2%

### ► RANKING OF THE 10 BEST-SELLING MODELS OF PLUG-IN HYBRID CARS IN 2020

Rank	Brand	Model	% market
1	PEUGEOT	3008	9%
2	RENAULT	CAPTUR	7%
3	DS	DS7	6%
4	VOLVO	XC40	5%
5	CITROEN	C5 AIRCR.	4%
6	PEUGEOT	508	4%
7	MERCEDES	GLC	4%
8	VOLKSWAGEN	GOLF	4%
9	MITSUBISHI	OUTLANDER	4%
10	MERCEDES	CLASSE A	4%

Source: CCFA

from new cars. By 2030, the target would be to reduce these emissions by 55% to arrive, in 2035, at the end of the sale of cars with internal combustion engines. The State, with the automotive sector, has undertaken to implement strong measures to stimulate the market for electrified vehicles. Concerning the deployment of infrastructures, the Advenir program was renewed within the framework of France Relance. These measures, together with the development of low-emission zones, are stimulating demand for electric vehicles among individuals.

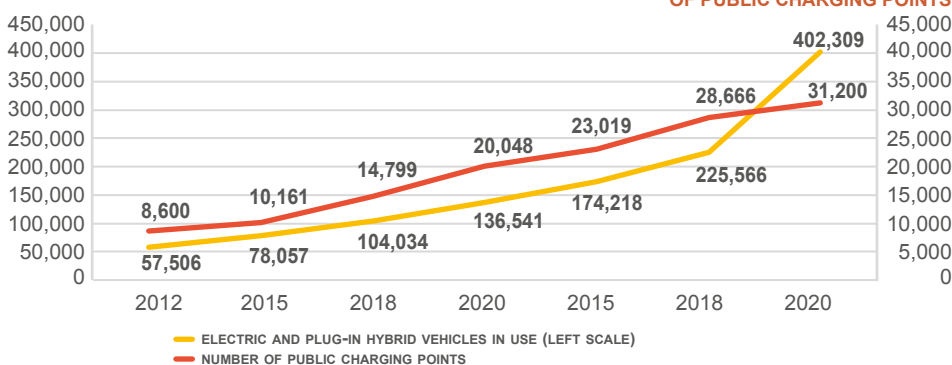


# 54%

Private market share in electric car registrations



EVOLUTION OF THE ELECTRIC AND PLUG-IN HYBRID VEHICLES IN USE AND NUMBER OF PUBLIC CHARGING POINTS



Source: AVERE, MTE/SDES (Ministry of Ecological Transition)

As part of the support plan for the automotive sector presented in May 2020 by the President of the Republic, the amounts of the ecological bonuses and the conversion premium have been revised upwards and extended to a greater number of households. These cumulative devices, with a maximum of 12,000 euros, vary according to the type of vehicle purchased, as well as the reference income of the buyer. In 2020, the ecological bonus was between 2000 and 7000 euros. Slightly lowered from the beginning of August 2020, the conversion premium was between 1,500 and 5,000 euros. In addition, an exceptional bonus on more advantageous terms was granted to 200,000 households between June and August 2020 for the purchase of a new or used vehicle.

Regarding charging infrastructure, the public authorities have undertaken, through the Strategic Contract for the Automotive Sector, to increase the number of charging points to 100,000 by the end of 2021. This equipment is essential for the development of electrified vehicles whose autonomy is limited and the recharging time sometimes long. At the end of 2020, according to AVERE, there were 31,200 public charging points in France for 402,309 electric and plug-in hybrid cars, i.e. 1 point for 13 vehicles. To develop private charging points, the

Advenir program, created in 2016, was renewed at the end of 2019 with a budget of 100 million euros. The objective is to deploy more than 45,000 new charging points in businesses and condominiums by the end of 2023. According to the SOFRES survey, only 7% of users have a terminal at their home and 10% at their place of work. The government has also provided a 100 million euros budget to finance fast charging stations on motorways and the national road network (500 stations equipped with at least 4 terminals with a power of 150 kW each). At the same time, several players in the automotive, energy and retail sectors have committed, through the signing of the "Objective 100,000 terminals" charter, to participating in the deployment of charging points open to the public.

Car manufacturers are offering an increasing number of electric and hybrid models. In 2020, in France, nearly 50 different models of electric cars have already been sold, with Renault and Peugeot dominating the market. Renault almost doubled sales of the ZOE in 2020 (34% of the market) and Peugeot's 208 represented 15% of the electric car market. In the plug-in hybrid market, Peugeot and Renault dominate the market, with the 3008 representing 9% of sales and the Captur (7% of sales). This movement will accelerate because the

two groups have committed to heavy investments to electrify their entire range.

On the buyer side, the main obstacle to the purchase of an electrified vehicle remains the cost of the vehicle, followed by the lack of autonomy and then the lack of charging stations. 65% of respondents consider financial support measures (bonus/penalty/premium) as the first factor impacting their purchasing decision. Similarly, traffic restrictions for polluting vehicles influence purchase intentions, particularly in large cities. Finally, for companies, taxation can be a support tool for the development of electrified vehicles (TVS, depreciation ceiling, etc.). Today, 54% of registrations are made by non-individuals, but on the plug-in hybrid market, non-individuals represent 73% of registrations. On the other hand, for electricity, buyers are mainly individuals (54%).

## NEW CAR REGISTRATIONS BY MODEL, RANGE AND BODY TYPE

The economy and lower range is predominant in France with 59% market share in 2020 (compared to 42% in Western Europe). The 10 best-selling models in France belong to this segment. After reaching its peak in 2010 thanks to the bonus/malus system and the scrapping scheme, the economy and lower range fell in 2011-2012. Then, the renewal of cars in the economy range (108, C1, Twingo, ZOE), the success of sales of models in the existing lower range (208, C3, Clio, Sandero) and the development of the product offer in SUV on this range (C4 Cactus, 2008, Captur, Duster) once again boosted the segment, which stabilised at around 53% market share until 2017. Since 2018, its market share has strongly increased

again (+6 points) to reach 59% (+3 points compared to 2019). The development of models or versions with alternative engines, whether for the non-rechargeable hybrid (Clio), the plug-in hybrid (3008, Captur) or the electric (ZOE, 208, DS3 Crossback), has once again expanded the offer.

Sales by body type show that 4WD and SUV vehicles have continued their strong growth (+30 points of market share since 2010) thanks to the offer in the lower ranges (Captur, 2008, Duster) and lower average (C3 Aircross, C5 Aircross, 3008, 5008, Kadjar) and represent, in 2020, 39.5% of sales (+1.2 point compared to 2019). Sedans, down sharply (from 72% in 2000 to 51% in 2015),

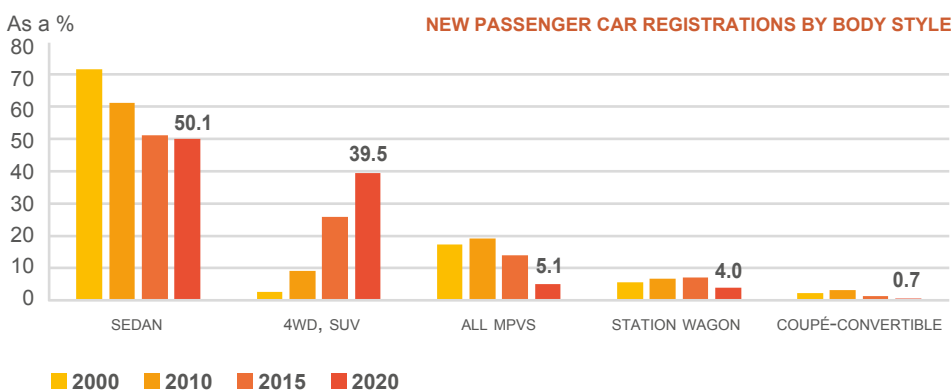
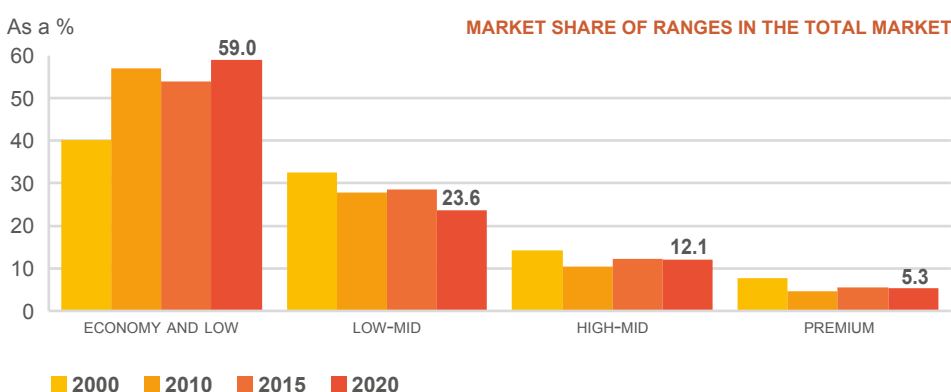
represent half of sales in 2020, slightly up on last year (+0.4 point). Finally, over the same 2010-2020 period, the share of minivans (-14.3 points to 5.1%), station wagons (-3.2 points to 4.0%) and coupé cabriolets (-2.3 points to 0.7%) fell.

**39,5%** Share of new passenger cars registered belonging to the 4WD and SUV bodies

### ► RANKING OF THE MAIN MODELS OF NEW PASSENGER CARS IN 2020

Rank	Brand	Model	% market
1	RENAULT	CLIO	5.8
2	PEUGEOT	208	5.8
3	PEUGEOT	2008	4.1
4	CITROEN	C3	3.5
5	RENAULT	CAPTUR	3.4
6	DACIA	SANDERO	3.2
7	RENAULT	MEGANE	2.8
8	PEUGEOT	3008	2.7
9	RENAULT	TWINGO	2.6
10	RENAULT	ZOE	2.3
11	PEUGEOT	308	2.2
12	TOYOTA	YARIS	2.0
13	DACIA	DUSTER	1.8
14	CITROEN	C3 AIRCR.	1.8
15	CITROEN	C5 AIRCR.	1.6
16	FIAT	500	1.6
17	OPEL	CORSA	1.4
18	MINI	MINI	1.3
19	VOLKSWAGEN	POLO	1.3
20	PEUGEOT	5008	1.2
21	RENAULT	KADJAR	1.2
22	VOLKSWAGEN	GOLF	1.1
23	FORD	FIESTA	1.0
24	PEUGEOT	108	1.0
25	FORD	PUMA	0.9
26	TOYOTA	COROLLA	0.9
27	VOLKSWAGEN	T-ROC	0.9
28	MERCEDES	CLASSE A	0.9
29	TOYOTA	C-HR	0.9
30	VOLKSWAGEN	TIGUAN	0.8

Source: CCFA



### ► NEW PASSENGER CARS REGISTRATIONS BY RANGE

Ranges	2000		2010		2018		2019		2020	
	units	%	units	%	units	%	units	%	units	%
Economy and low ranges	855,161	40.1	1,283,902	57.0	1,195,321	55.0	1,246,492	56.3	973,974	59.0
Low-mid range	695,146	32.6	627,694	27.9	582,054	26.8	557,062	25.2	389,413	23.6
High-mid range	303,028	14.2	234,664	10.4	275,894	12.7	276,406	12.5	199,040	12.1
Premium range	163,293	7.7	105,313	4.7	120,212	5.5	134,319	6.1	87,691	5.3
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>2,173,481</b>	<b>100.0</b>	<b>2,214,279</b>	<b>100.0</b>	<b>1,650,118</b>	<b>100.0</b>

### ► NEW PASSENGER CAR REGISTRATIONS BY BODY STYLE

Bodies	2000		2010		2018		2019		2020	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	1,079,757	49.7	1,094,467	49.4	826,567	50.1
Station wagon	119,739	5.6	153,476	6.8	95,388	4.4	92,487	4.2	66,517	4.0
Coupé-Convertible	50,527	2.4	70,353	3.1	19,933	0.9	21,562	1.0	10,795	0.7
All MPVs	369,434	17.3	430,857	19.1	172,007	7.9	142,540	6.4	84,459	5.1
of which compact MPVs	241,190	11.3	233,363	10.4	111,038	5.1	84,954	3.8	45,931	2.8
4WD, SUV	57,116	2.7	205,106	9.1	788,187	36.3	847,850	38.3	651,752	39.5
Others	9,392	0.4	14,379	0.6	18,209	0.8	15,373	0.7	10,028	0.6
<b>TOTAL</b>	<b>2,133,884</b>	<b>100.0</b>	<b>2,251,669</b>	<b>100.0</b>	<b>2,173,481</b>	<b>100.0</b>	<b>2,214,279</b>	<b>100.0</b>	<b>1,650,118</b>	<b>100.0</b>

Source: CCFA

## USED PASSENGER CARS

Second-hand passenger car registrations amounted to 5.5 million units in 2020, a decline of 3.8%, which remains weak, compared to the collapse of new car registrations (-25%). The ratio between the number of used cars and that of new cars therefore jumped in 2020, from 2.6 in 2019 to almost 3.5 used cars sold for every new car.

According to the Parc Auto survey (page 47), the length of vehicle ownership increased slightly in 2020. Households keep their vehicle for an average of 5.6 years compared to five years in 2010 and four years in 1995.

The share of used car registrations less than five years old remained stable in 2020 (37%), except for the category of less than one year old, which fell by 1 point to 9%. Within the registrations of used cars over ten years old, the category over fifteen years old increased by 2 points, from 19% in 2019 to 21% in 2020.

Diesel cars remain dominant in second-hand registrations with 3.2 million units sold, but their share continues to decline, falling from 61% in 2019 to 57% in 2020. The continued implementation of low emission zones, more unfavourable to diesel vehicles, continues to weigh on sales. Conversely,

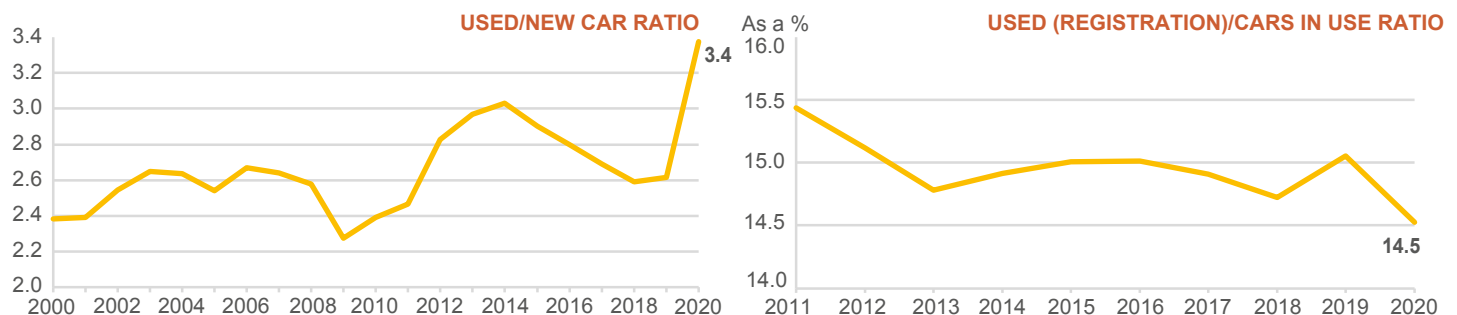
alternative engines benefit from these measures, as well as purchase support schemes (bonus, conversion premium) which stimulate both the new market and the second-hand market. In 2020, registrations of used electric and hybrid cars increased by 46% and 40% respectively. Together, this category now represents 2.6% of the second-hand market, compared to 1.8% in 2019.

# 21%

**Share of used cars  
15 years and older  
registered in 2020**

► USED PASSENGER CARS	Units	2000	2005	2010	2018	2019	2020
<b>REGISTRATIONS</b>							
New passenger cars	thousands	2,134	2,118	2,252	2,173	2,214	1,650
Used cars	thousands	5,082	5,383	5,386	5,632	5,791	5,569
Used/new ratio		2.4	2.5	2.4	2.6	2.6	3.4
Cars less than 5 years old	% used	40	40	37	36	37	37
Cars less than 1 year old	% used	12	10	8	10	10	9
Cars less than 1 year old	% new	29	25	19	26	27	31
Cars 5 to 9 years old	% used	-	25	26	22	21	20
Cars 10 to 14 years old	% used	-	22	21	22	22	22
Cars 15 years old and more	% used	-	13	15	20	19	21
Diesel used cars	thousands	-	2,996	3,558	3,538	3,518	3,200
	% used	-	55.7	66.1	63	61	57
Electric or hybrid used cars	thousands	-	-	6	80	104	146
	% used	-	-	0.1	1.4	1.8	2.6
<b>CARS IN USE (ON 12/31)</b>	<b>thousands</b>	<b>28,825</b>	<b>-</b>	<b>-</b>	<b>38,254</b>	<b>38,467</b>	<b>38,346</b>
<b>USED (REGISTRATIONS) / CARS IN USE RATIO</b>	<b>%</b>	<b>17.6%</b>	<b>-</b>	<b>-</b>	<b>14.7%</b>	<b>15.1%</b>	<b>14.5%</b>

Sources: CCFA, MTE/SDES



The private car is a durable good that the household buys, uses, maintains and possibly resells on the second-hand market.

These second-hand car sales are made through car dealers or directly between individuals. Professionals generally handle "young" second-hand car transactions, that is to say less than 5 years old. It is estimated that about 60% of second-hand transactions are carried out through a professional, the rest being transactions between individuals. But in 2020, according to the Parc Auto survey, sales channels between individuals would have declined in favor of second-hand dealer networks, which are undoubtedly more reassuring in terms of health.

Between 5 and 6 million used cars are exchanged per year and this market is subject to less fluctuation than that of new ones. 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 may nevertheless be affected by measures to stimulate the new home market (bonus/malus system, conversion premium, etc.). In addition, in 2020, it suffered the shock of the health crisis, but to

a lesser extent than the new one, like what happened between 2009 and 2013.

The aging of the fleet and the development of multi-motorisation of households have resulted in an increase in the share of cars over 5 years old in second-hand transactions between 1990 and 2016 (68% in 2016, against 48% in 1990). But, over the past three years, incentives to renew the fleet have increased the share of used cars less than 5 years old and reduced that of the oldest vehicles. Indeed, the market share of used cars aged 15 and over, which had more than doubled since the beginning of the 2000s, particularly after the crisis, fell slightly in 2018 and 2019. In 2020, on the other hand, it increased to again by 2 points to reach 21%.

Used cars less than a year old can be compared to the new market. Indeed, these are often cars first registered by an automotive sector professional (demonstration car or rental car), then sold to individuals. From 2001 to 2009, the share of less than 1 year old in all registrations of second-hand passenger cars steadily decreased, before evolving around 8% between 2010-2016 (12% in 2001).

During the years of the scrapping bonus, the prices of new cars were indeed more competitive. Since then, volumes have increased each year, reaching 593,243 registrations in 2019. But in 2020, automotive professionals affected by the health crisis reduced their purchases, and the share of cars less than 1 year old fell by 1 point to stand at 9% of second-hand car registrations.

The share of diesel in used cars fell to 57% in 2020, a decline of 10 points since 2015, thus reflecting the developments observed in the new market.

In 2020, according to the Parc Auto survey (Kantar TNS), 59% of cars owned or made available to households were purchased second-hand, compared to 51% in 1991. With regard to cars acquired in 2020, this share was 69%.

## REGISTRATIONS OF NEW VEHICLES IN FRENCH OVERSEAS DEPARTMENTS (DOM)

Sales of new vehicles in the five overseas departments fell by 19% in 2020, i.e. a slightly less steep decline than that observed in metropolitan France (-24%). As in metropolitan France, the decline is more marked for passenger cars (-20%) than for light commercial vehicles (-14%). Guadeloupe and Martinique are the departments most affected (-25%), while in the others, the declines ranged between -16% and -6%.

As in metropolitan France, the share of diesel cars continues to decline and now stands at 27% of registrations, down 2 points compared to 2019 (compared to 64% in 2012). The share of electric cars remains low (3% of registrations), except in Reunion where it reached 4.4% in 2020, compared to 6.7% in metropolitan France. For plug-in hybrid vehicles, it is 1.3% compared to 4.5% in metropolitan France.

Sales of light commercial vehicles fell by 14% on average in 2020, after an initial decline of 10% in 2019.

Their share of all sales thus fell to 16%, compared to 19% in metropolitan France.

Registrations of commercial vehicles over 5 tonnes held up better in 2020. Registrations of heavy goods vehicles fell by only 8% and those of coaches and buses even increased by 15% in 2020, thanks in particular to Réunion (+31%). Nevertheless, their share in all registrations remains lower (1.4%) than in metropolitan France (2.3%), given the geographical context.

The share of French groups in the passenger car market has increased to 53% in 2020. In the light commercial vehicle market, the share of French groups has gained nearly 5 points, rising from 57% in 2018 to 62% in 2020, which remains slightly lower than in metropolitan France (about two-thirds of the market). In the narrow industrial vehicle market, Renault Trucks' market share remains at 26% in 2020.

In the context of the health crisis, registrations of used passenger cars held up better than the new market. They only fell by 1% to 126,436 units, i.e. a ratio of 2.4 cars sold used for 1 car sold new against 1.9 in 2019.

On January 1, 2021, the fleet of passenger cars in the overseas departments was 870,761 units according to new estimates from the services of the Ministry for Ecological Transition.



# 3%

**Share of electric cars registered in the overseas departments in 2020**

NEW PASSENGER CARS	2000	2010	2015	2019	2020	Change 2020/2010	Change 2020/2019
GUADELOUPE	13,691	13,438	13,409	16,741	12,230	-9.0%	-26.9%
FRENCH GUIANA	4,031	4,382	4,414	5,450	4,410	0.6%	-19.1%
MARTINIQUE	14,424	13,147	12,931	15,853	11,374	-13.5%	-28.3%
MAYOTTE (1)	-	-	1,083	1,729	1,657	-	-4.2%
REUNION ISLAND	21,463	20,295	22,288	27,556	23,990	18.2%	-12.9%
<b>TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)</b>	<b>53,609</b>	<b>51,262</b>	<b>54,125</b>	<b>67,329</b>	<b>53,661</b>	<b>4.7%</b>	<b>-20.3%</b>
<b>TOTAL DOM USED PASSENGER CARS</b>	<b>ND</b>	<b>104,381</b>	<b>125,457</b>	<b>127,746</b>	<b>127,747</b>	<b>22.4%</b>	<b>0.0%</b>
<b>USED/NEW RATIO</b>		<b>2.0</b>	<b>2.3</b>	<b>1.9</b>	<b>2.4</b>	<b>-</b>	<b>-</b>

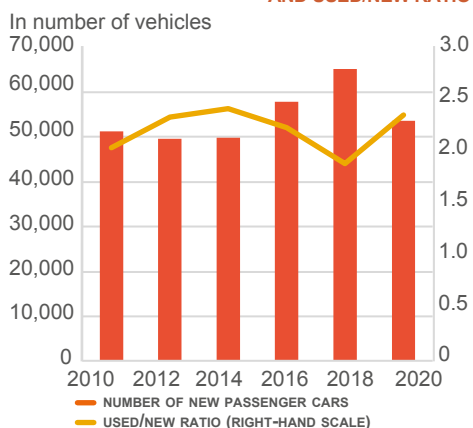
NEW LIGHT COMMERCIAL VEHICLES (UP TO 5T)	2000	2010	2015	2019	2020	Change 2020/2010	Change 2020/2019
GUADELOUPE	2,685	2,394	2,214	2,465	2,131	-11.0%	-13.5%
FRENCH GUIANA	1,143	1,239	1,159	1,311	1,204	-2.8%	-8.2%
MARTINIQUE	2,368	2,016	2,156	2,059	1,828	-9.3%	-11.2%
MAYOTTE (1)	-	-	230	401	330	-	-17.7%
REUNION ISLAND	5,200	4,166	4,975	5,863	4,873	17.0%	-16.9%
<b>TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)</b>	<b>11,396</b>	<b>9,815</b>	<b>10,734</b>	<b>12,099</b>	<b>10,366</b>	<b>5.6%</b>	<b>-14.3%</b>

NEW COMMERCIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5T)	2000	2010	2015	2019	2020	Change 2020/2010	Change 2020/2019
GUADELOUPE	146	135	97	183	153	13.3%	-16.4%
FRENCH GUIANA	66	85	50	88	106	24.7%	20.5%
MARTINIQUE	187	84	128	170	149	77.4%	-12.4%
MAYOTTE (1)	-	-	48	81	84	-	3.7%
REUNION ISLAND	362	293	434	376	390	33.1%	3.7%
<b>TOTAL FRENCH OVERSEAS DEPARTMENTS (DOM)</b>	<b>761</b>	<b>597</b>	<b>757</b>	<b>898</b>	<b>882</b>	<b>47.7%</b>	<b>-1.8%</b>

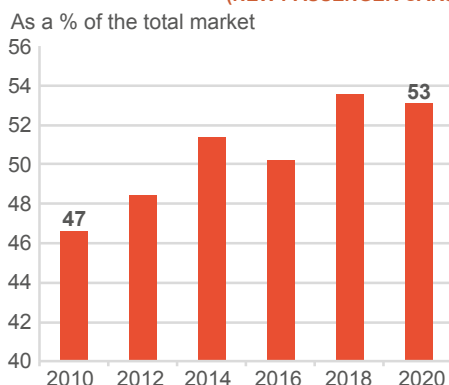
Source: CCFA

(1) Since April 1, 2011

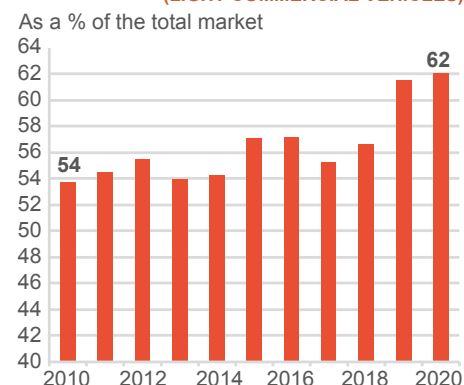
**NEW PASSENGER CAR REGISTRATIONS IN FRENCH OVERSEAS DEPARTMENTS AND USED/NEW RATIO**



**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 2020, registrations of new light commercial vehicles fell by 16% (after +4.5% in 2019) and reached a level of 402,382 units, close to that observed in 2015-2016. The fall in commercial vehicle registrations, during this year marked by the health crisis, was nevertheless less significant than that of passenger cars, which reached -25%.

The share of diesel vehicles remains stable compared to 2019 at 93% (-4 points compared to 2015). The share of electric vehicles reached 2.2% in 2020, up 0.5 point compared to 2019, with 8,780 units sold. French manufacturers are asserting their presence in this electric vehicle segment with a

78% market share, 3 points more than last year, compared to 66% for all energies combined.

The number of new light commercial vehicles in use, estimated at 5.9 million units as of January 1, 2021, is still largely dominated by diesel engines, which represent 95% of vehicles. The fleet of electric light commercial vehicles, although small (48,500 units as of January 1, 2021), increased by 18% compared to last year. The fleet, all energies combined, is made up of more than 50% of vehicles from 2.6 tonnes to 3.5 tonnes.

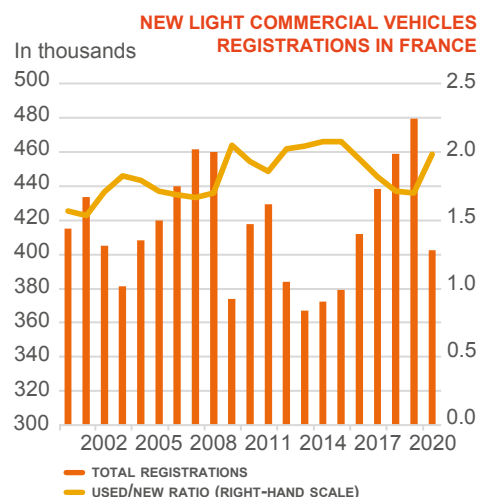


# 46%

**Share of vans in light commercial vehicle registrations**

### ► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY BODY STYLE

BODIES	2000		2010		2015		2019		2020	
	units	%	units	%	units	%	units	%	units	%
Cars derivatives	133,679	32.2	116,582	27.9	85,976	22.7	74,776	15.6	54,913	13.6
Small vans	110,727	26.7	113,152	27.1	99,227	26.2	120,532	25.1	97,487	24.2
Vans	99,953	24.1	136,647	32.7	140,153	36.9	209,299	43.6	184,212	45.8
Mini-buses/coaches	867	0.2	525	0.1	621	0.2	363	0.1	259	0.1
Pickup	6,327	1.5	12,126	2.9	12,877	3.4	15,320	3.2	9,468	2.4
4WD, SUV	4,470	1.1	9,302	2.2	9,908	2.6	11,312	2.4	8,559	2.1
Others	58,943	14.2	29,278	7.0	30,666	8.1	48,147	10.0	47,484	11.8
<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>479,749</b>	<b>100.0</b>	<b>402,382</b>	<b>100.0</b>



### ► LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY WEIGHT

	2005	2010	2020
< 1,5T	3%	4%	1%
1,5T TO < 2,5T	56%	52%	39%
2,5T TO 3,5T	41%	43%	60%
> 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	2020
<b>DIESEL</b>	97%	93%
<b>PETROL</b>	1%	4%
<b>ELECTRIC</b>	1%	2%
<b>OTHERS</b>	0%	1%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

Light commercial vehicles are defined as vehicles of less than 5 tonnes of gross vehicle weight, intended for the transport of goods. In many sectors (agriculture, construction, services, etc.), they are also used to come and go to the workplace, for transfers between sites, for the transport of equipment. They come in different categories: utility derivatives of passenger cars, combispaces, vans, vans, pick-ups and 4WD and SUV.

These vehicles are intensely used vehicles: they cover more kilometres each year (2,000 more on average) than private cars (see the traffic report on page 50). While individuals travel fewer kilometres with their light commercial vehicle, certain sectors are very intensive users: transport, courier, warehousing, as well as specialised activities and the manufacturing industry. These vehicles are mainly used in urban areas or on the road (excluding motorways).

In 2020, van sales, in volume, are down for the first time since 2014 (-12% compared to 2019).

Nevertheless, they are growing in market share and represent 46% of sales of light commercial vehicles (44% in 2019). The second segment is that of vans, which represent just under a quarter of sales, a share slightly down on 2019 (-1 point). Sales of pick-ups, which experienced strong growth between 2015 and 2018 (+75%), collapsed with the introduction in 2019 of the penalty and the TVS for this category of vehicle. Their decline intensified in 2020 with a 38% drop in registrations for a volume of 9,468 units. Finally, utility derivatives of passenger cars represent only 13.6% of sales in 2020 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 will reach 60% of sales in 2020 (+25 points since 2001), while that of 1.5 to 2.5 tonne vehicles has fallen from 59% to 39% over the same period. Since 2010, sales of vehicles from 2.5 to 3.5 tonnes have increased by 34%, while sales of all other categories have declined.

In 2020, registrations of used light commercial vehicles fell by 2.2% compared to 2019, but with 800,000 units, they are at a high level. Since 2000, the number of used commercial vehicles has tripled. For the first time since 2016, the used/new ratio is greater than 2.

Nearly 10% of new registrations of new commercial vehicles are made by private individuals, who favour vans and vans in their purchases as well as pick-ups. As of January 1, 2021, 47% of the portfolio is owned by natural persons (individuals and artisans), 14% by legal persons operating in the construction sector and 8% in the trade sector.

## CHARACTERISTICS OF NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

French groups are traditionally more present on the light commercial vehicle market than on the passenger car market. With the opening of markets in Europe, as for passenger cars, their market share has decreased in France, but has increased among our European neighbours. In 2020, sales by French groups represented 65.3% of the total market for light commercial vehicles in France, down 0.8 point compared to 2019, but at a lower level of 4.5 points compared to 2005. In Europe excluding France, their market share is significant and is consolidating from year to year, rising from 24% in 2011 to 32.7% in 2020.

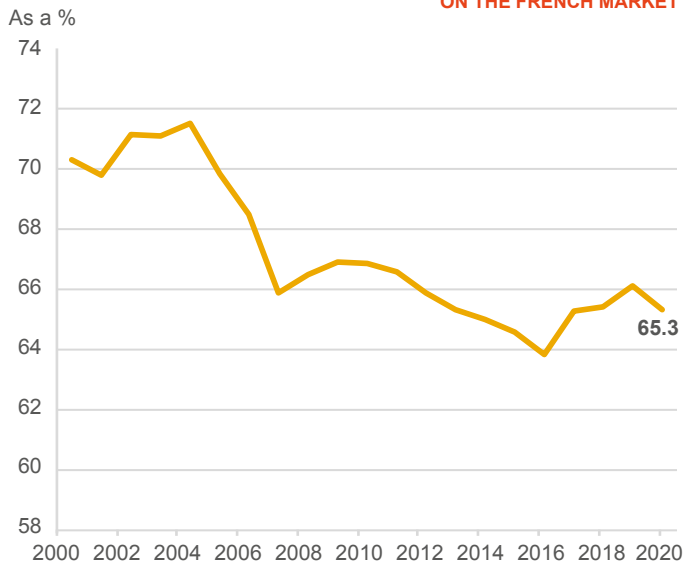
The French groups are reference manufacturers and produce on their sites also for their partners (Renault for Nissan, Daimler and Mitsubishi; and PSA for Toyota and Fiat following the creation of Stellantis). Production in France, entirely carried out by French groups, represents 2% of world production, a stable share despite the crisis, i.e. 390,000 units in 2020, including 47,300 units for partners (i.e. 12% of their production in France).



# 30%

**Share of light commercial vehicles in the production of light vehicles in France**

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

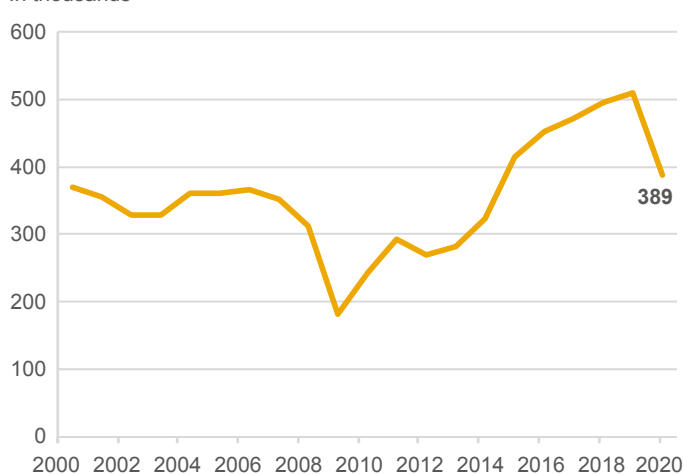


**► RANKING OF MAJOR NEW LIGHT COMMERCIAL VEHICLES IN 2020**

Brand	Model	2020	Market share
RENAULT	KANGOO	32,093	8.0%
RENAULT	MASTER	31,762	7.9%
RENAULT	TRAFIC	25,864	6.4%
CITROËN	BERLINGO	24,931	6.2%
FIAT	DUCATO	24,403	6.1%
PEUGEOT	PARTNER	24,248	6.0%
PEUGEOT	EXPERT	18,592	4.6%
RENAULT	CLIO	18,161	4.5%
CITROËN	JUMPY	14,407	3.6%
PEUGEOT	BOXER	13,095	3.3%
MERCEDES	SPRINTER	13,055	3.2%
CITROËN	JUMPER	10,871	2.7%
FORD	T.CUSTOM	10,663	2.6%
CITROËN	C3	8,809	2.2%
PEUGEOT	208	8,377	2.1%
MERCEDES	VITO	7,895	2.0%
VOLKSWAGEN	TRANSPORT	7,885	2.0%
RENAULT TRUCKS	MASTER RT	7,329	1.8%
FORD	TRANSIT	7,098	1.8%
IVECO	35C16	4,964	1.2%

Source: CCFA

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



Thanks to the success of their models (Renault Kangoo, Citroën Berlingo, Peugeot Partner, Renault Master), French groups are particularly present in the van segment (83% of sales in this market) as well as in passenger car 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, of the 20 best-selling light commercial vehicle models in France in 2020, 13 are models from French

manufacturers.

Light commercial vehicles are vehicles with higher added value, which can be more easily produced in France. Over the past 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, in line with the growth of the French and European market. It first fluctuated between 300,000 and 400,000 units between 2000 and 2008, then

collapsed to 180,000 units in 2009. Since then, it has more than doubled. In 2020, following the crisis, production fell sharply to 390,000 units, i.e. 24% less than in 2019, but remains at a level still higher than that of 2014. It represents 30% of the total production of light vehicles in France, compared to 16% in 2013.

## CHARACTERISTICS OF THE HEAVY TRUCKS MARKET IN FRANCE

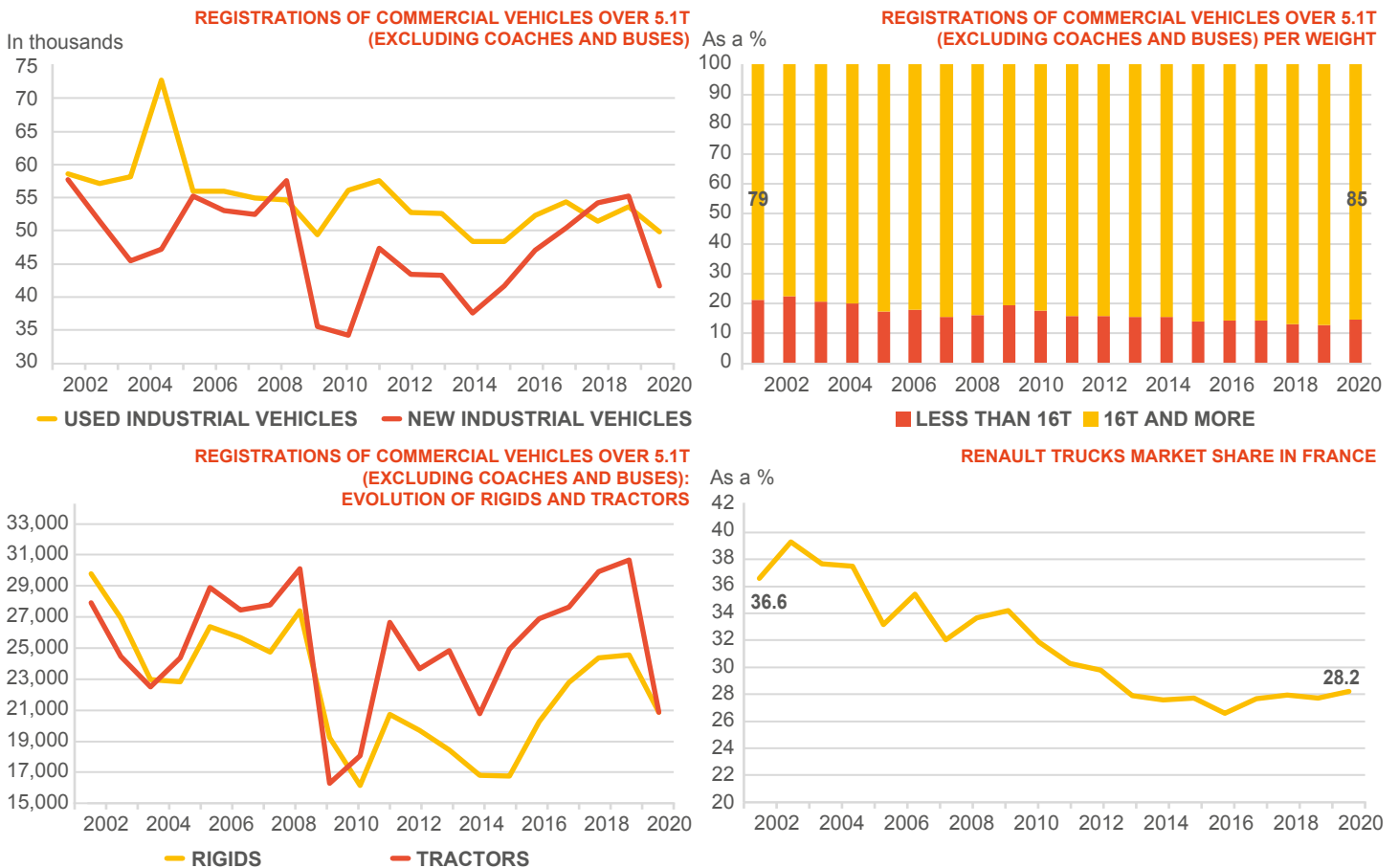
The French market for commercial vehicles over 5.1 tonnes fell by 24.4% in 2020 to 41,730 units. After falling sharply during the 2009-2010 crisis (-40% to 34,000 units), the market recovered slowly but experienced a further decline in 2014 (-13%). Then, from that date, it progressed at a high rate (+8% per year on average, i.e. +50% in five years) to reach more than 50,000 units in 2019, i.e. a level equivalent to the years before the crisis. In 2020, despite the collapse linked to the health crisis, the number of registrations remains higher than the lows of 2009-2010 and 2014.

The tractor market is down 32% in 2020, while that

of rigids is down 15%. Thus, these two markets are at the same volume level at 20,860 units, while that of tractors was historically higher. In 2020, industrial vehicles over 16 tonnes represent 85% of the market. This share has been increasing steadily for twenty years, from 77% in 2002 to 87% in 2019.

Since the end of the 2009-2010 crisis, the used industrial vehicle market has been close in volume to that of new vehicles, with an average ratio of 1.1 used vehicle sold for 1 new vehicle. In 2020, the used vehicle market amounted to 49,800 units, down 7% compared to 2019.

In 2020, Renault Trucks will retain its leading position in France with a market share of 28.2% compared to 27.7% in 2019, an increase of 0.5 point. Its second-hand vehicle market share is 33%.



Heavy duty vehicles are defined as vehicles of more than 5 tonnes of total authorised weight in load, intended to transport goods. A distinction is made between rigids and tractors. They can be delivered with body or come in the form of stand-alone chassis that are later fitted by specialist manufacturers. Each truck is custom built and is therefore a unique product. The rigid truck is manufactured to receive a container or heavy equipment on its chassis and comes in different categories according to its uses: tipper, van, flatbed, refrigerated, tank. The road tractor is intended to "haul" its trailer and is used more for long-distance transport. Tractors used for long journeys are equipped with many devices to improve driver comfort: sleeping berths, storage, touch screens, audio/radio system and even a refrigerator.

The tractor market, which represents approximately 56% of the truck market, is more volatile than that of rigid vehicles. More intensely used, towing vehicles are renewed more

frequently. Thus, the fleet of tractors is twice as young as that of rigids with an average age of 5.5 years and 11 years respectively. However, truck tractor sales are also more affected by the vagaries of the economic climate and road freight transport. In 2009, 2014 and 2020, the market for tractors fell 10 points more than that for rigids.

Renault Trucks' market share in France has held steady since 2013 at around 28% after experiencing higher levels in the 2000s (around 35%). In 2020, in a sharply declining market, it increased by 0.5 point to reach 28.2%. On the rigid market, it averages 35% and exceeds 36% (36.4% in 2020) in the over 16 tonne segment, which represents 2/3 of the rigid market. In the tractor market, Renault Trucks represents 21.2% of registrations in 2020. Finally, in the used truck market, Renault Trucks is also the leader with 33.3% market share in 2020.

The share of alternative energy heavy duty (gas, electric, hybrid) remains very low but nevertheless

reached 3.9% in 2020 (compared to 1.2% in 2019) in particular thanks to the development of the natural gas market for vehicles (3, 2% market share). The offer of electric heavy vehicles has been expanded in recent years to meet environmental requirements in urban areas. Renault Trucks now offers a full range of electric vehicles ranging from 3.1 tonnes to 26 tonnes and meeting the diversity of urban logistics businesses (refrigerated transport, waste collection, distribution). In 2023, a tractor for regional transport and a rigid dedicated to urban construction will complete the range of zero-emission trucks.

## HOUSEHOLD VEHICLES IN USE



# 85%

### Household car ownership rate

In 2020, the household car ownership rate increased slightly again (+0.2 point) to reach 85.2%, excluding heavy commercial vehicles. Households which own more than one vehicle represented 37% of all households, compared

to 30% in 2000, 26% in 1990 and 16% in 1980. Households with 3 or more cars represent 5.3% of all households (see page 93).

94% of households living in rural areas or peri-urban areas (rural areas close to towns) own a vehicle.

In the Paris region, a dense area benefiting from a developed public transport network, the proportion of equipped households is lower at 65.6%; this ratio has not fallen any further in recent years. In other large French cities, the rates remain closer to 80%.

66.4% of low-income households (less than 15,000 euros per year) are equipped with at least one car compared to 62% in 2015.

85.2% of households aged between 65 and 74 and 76% of those over 75 are motorised (75% in 2017). The possession of a driving license and the share of drivers in this age category continue to increase steadily.

The rate of possession of a driving license among individuals aged under 25 has not declined: it is around 65% among 18–21-year-olds and around 84% among 22–25-year-olds. It rises to 90% for those over 75.

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

	1990	1995	2000	2005	2010	2015	2020
<b>By socio-professional category</b>							
Farmers	95.9	98.9	91.1	100.0	92.1	88.0	95.0
Farm workers	74.7	-	-	-	-	-	-
Tradesmen, craftsmen, business owners	95.2	89.4	90.6	91.2	91.1	90.9	84.2
Self-employed professionals, executives	94.4	85.5	84.6	83.7	84.1	83.2	85.8
Middle management	93.3	88.7	90.8	87.6	89.8	88.0	91.3
White collar workers	78.3	75.9	77.5	80.9	82.5	80.1	81.8
Blue collar workers	87.2	89.7	88.7	89.1	91.2	90.9	91.3
Non-working population	54.6	65.8	70.9	72.8	77.1	77.6	81.5
of which retired persons	59.4	70.9	76.0	76.2	80.1	80.6	83.6
<b>By area of residence</b>							
Rural areas	82.1	88.6	91.1	92.4	92.7	92.9	94.0
Towns with fewer than 20,000 inhabitants	76.6	84.7	86.1	88.4	90.2	91.1	91.7
Towns with 20,000 to 100,000 inhabitants	77.3	80	84.2	83.7	87.1	87.8	89.1
Towns with over 100,000 inhabitants	74.2	75.1	76.6	78.5	80.8	81.4	83.8
Greater Paris	77.0						
Inner Paris	47.3	60.8	60.4	61.5	63.6	59.7	65.6
<b>By location of residence</b>							
Town center	-	67.6	69.4	69.2	73.0	71.6	74.5
Suburb	-	79.3	80.5	80.9	83.2	82.1	84.7
Peri-urban area	-	88.5	89.8	91.2	91.6	92.5	93.3
Rural area	-	85.3	90.4	92.6	94.8	94.4	92.4
<b>By age of head of household</b>							
Under 25	-	51.2	49.3	63.3	64.9	74.0	84.5
25 to 34	-	85.1	82.4	82.3	83.9	82.5	87.4
35 to 44	-	86.7	86.3	87.5	88	87.3	87.5
45 to 54	-	87.5	87.4	86.1	88.1	84.7	86.7
55 to 64	-	84.9	87.0	86.7	86.9	85.1	87.0
65 to 74	-						85.2
Over 75	-	61.9	69.0	70.8	76.2	78.6	76.1
<b>VEHICLES WITH A WOMAN AS THEIR MAIN DRIVER</b>							
ALL	76.5	78.4	80.3	81.2	83.5	82.9	85.2

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

The car ownership rate is measured by the percentage of households having at least one car. After several years of decline, it has been rising since 2015 (+2.2 points) to stand at 85.2% in 2020.

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

● According to INSEE, if, in 2019, the 20% of the wealthiest households are equipped with at least one car at 91%, the 20% of the poorest are at 66%; these rates were 89% and 60% respectively in 2004 (INSEE, Surveys on living conditions, 2021).

● Car ownership rates in towns with more than 100,000 inhabitants will stabilise at around 84% in 2020, compared to 75% in 1995. In the Paris metropolitan area, the rate will stabilise at around 65.5%, i.e. a decline of 3 points in 25 years. In the Lille and Marseille conurbations, the rates are rising, after falling in 2018, to stand at 84% and 87% respectively in 2020; they now exceed their previous levels. Finally,

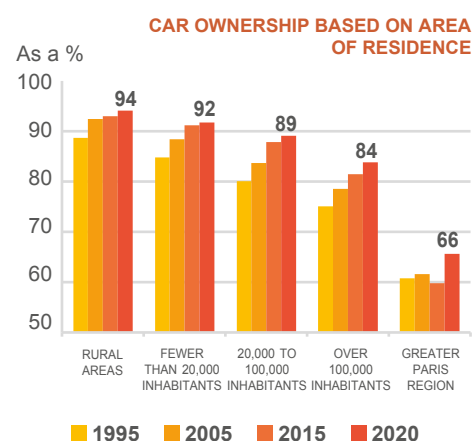
in the Lyon conurbation, the motorisation rate fell by 7 points compared to last year and stands at 76%.

● Rural households, large families, as well as workers and farmers constitute very multi-motorised categories. Their car ownership rate is on average more than 90%.

● The categories of employees and inactive people (including retirees) are relatively less equipped but, since 2000, their car ownership rate has increased steadily (respectively +4.3 and +10.6 points).

From 2010 to 2020, the proportion of households that have “de-motorised” (among those without a vehicle) has increased steadily, by 2 to 3% per year. In 2020, the demotorisation rate decreased by one point and stood at 55%. The main cause of non-motorisation remains the absence of a driving license followed by the absence of need, the preference for public transport, cycling or walking, the high cost of use and the difficulties of parking. Among non-motorised households, 14% of them plan to re-motorise over the

next two years, a stable share compared to last year.





## THE HOUSEHOLD CAR FLEET

After declining steadily from the 2000s, daily car use stabilised at around 72% until 2018. Then it fell in 2019 and 2020. The share of vehicles in the fleet used daily or almost daily increased fell by 5 points between 2018 and 2020, from 72.5% to 67.3%. The proportion of vehicles used for commuting has stabilised at around 52%. In 2020, that of business trips other than home-work journeys amounted to 12.6%, a drop of 2.5 points compared to 2019 in a context of travel restrictions. As for journeys related to education, their share was 22.4%.

The average age of the household fleet and the length of ownership of vehicles tend to increase over the long term. In 2020, the fleet aged slightly compared to last year, it stood at 9 years against 8.9 years in 2019, and the vehicle holding period

was 5.6 years against 5.5 in 2019, 4.4 years in 2000 and 4.1 years in 1995.

The fall in the market share of diesel vehicles in registrations has an impact on the composition of the fleet. The share of diesel in the fleet has been declining for 5 years and reached 52% in 2020, i.e. two points less than in 2019 and almost ten less than in 2015.

The mileage of a fleet vehicle has fluctuated around 104,000 kilometres since 2005, compared to 70,000 kilometres at the beginning of the 1990s. It has been falling slightly for 5 years and stands at 99,670 kilometres in 2020. The mileage of a diesel car will increase in 2020 (129,650 km) in line with the aging of the fleet and will remain 19,000 km higher than

its 2000 level; that of a petrol car, less intensely used, continues to fall to 67,680 km (-15,000 km since 2000).



**Nearly 7 out of 10 Cars are used every day (or almost)**

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

	unités	1990	1995	2000	2005	2010	2015	2020
<b>Total</b>	millions	23.0	25.1	27.4	31.0	33.6	34.1	36.2
<b>Average age</b>	year	5.8	6.6	7.3	7.7	8.0	8.9	9.0
<b>Average ownership period</b>	year	3.7	4.1	4.4	4.7	5.0	5.5	5.6
<b>BREAKDOWN BY AUTOMOTIVE GROUP</b>								
<b>Renault group</b>	%	33.3	33.3	33.3	30.2	28.6	28.3	27.1
<b>PSA group (1)</b>	%	38.3	36.2	35.2	36.4	38.2	36.5	38.5
<b>Foreign brands</b>	%	28.4	30.5	31.4	33.2	33.2	35.2	34.4
<b>BREAKDOWN BY FISCAL POWER</b>								
<b>2 and 3 CV</b>	%	3.4	1.6	0.7	43.3	44.4	49.2	50.9
<b>4 and 5 CV</b>	%	38.4	38.9	40.5	46.6	42.5	39.0	36.6
<b>6 and 7 CV</b>	%	47.1	48.6	50.0	10.1	13.1	11.8	12.5
<b>8 CV and above</b>	%	12.8	10.9	8.8				
<b>BREAKDOWN BY VEHICLE RANGE</b>								
<b>Low range</b>	%	39.4	43.4	45.1	44.5	46.8	49.3	48.5
<b>Low-mid</b>	%	20.8	24.3	27.3	32.2	30.9	29.2	23.6
<b>High-mid</b>	%	26.0	22.2	19.9	16.2	11.5	7.9	5.1
<b>Premium range</b>	%	8.7	7.0	7.0	5.7	5.0	3.0	2.1
<b>Others</b>	%	5.1	3.2	0.8	1.4	5.7	10.6	20.8
<b>Percentage of vehicles purchased new</b>	%	50.4	45.2	43.9	40.1	41.1	41.5	41.5
<b>BREAKDOWN BY TYPE OF FUEL USED</b>								
<b>Premium unleaded - Petrol</b>	%	15.3	38.4	49.1	51.1	40.1	38.8	46.0
<b>Premium leaded - AVSR</b>	%	62.1	28.8	11.9				
<b>Diesel</b>	%	17.2	30.9	38.1	48.9	59.9	61.2	52.0
<b>Kilometres on clock</b>	km	69,500	84,080	93,140	99,460	103,470	105,590	99,670
<b>Percentage of vehicles used on daily or near daily basis</b>	%	75.1	77.4	78.7	75.7	71.8	71.9	67.3
<b>Percentage of vehicles used for travel to and from work</b>	%	55.4	54.3	55.1	55.2	53.7	52.2	52.3

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 CAR PARK survey, conducted by KANTAR TNS every year, provides a detailed description of the vehicle fleet, owned or made available to households.

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

The renewal of the petrol fleet continues with an average age which has fallen by two years since 2014, to reach 8.5 years. The average age of diesel continues to increase and reaches 9.6 years. The weight of vehicles over 5 years old in the fleet has been declining for 2 years and stabilises around 66% in 2020. This is explained by the decline in the share of 5–10-year-olds (-2 points in 3 years), while that of those over 10 years old stabilises at around 33%.

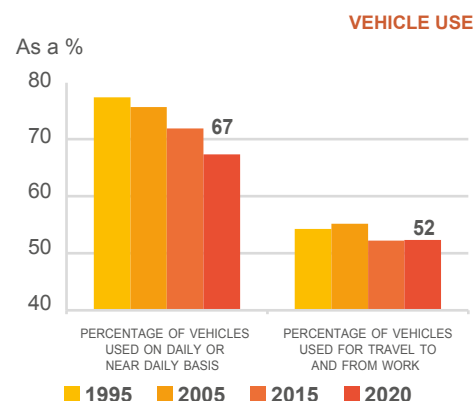
The most common fiscal powers are between 2 and 5 HP. Lower and lower mid-range cars are very popular and their share of the fleet has remained

high compared to higher ranges. In 2020, they represented 49% and 24% of the fleet respectively, compared to 7% for cars in the upper middle range. The share of cars in the miscellaneous range, consisting mainly of 4WD and SUV vehicles, is experiencing strong growth. It stands at 16.7%, more than double their weight in 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 regularly. In 2020, this ratio stood at 16% (compared to 9% in 2016) and 9% (compared to 3% in 2016) respectively. This share is higher in households owning more than 1 vehicle, respectively 24% and 13% for the main car.

Regarding driving frequency, more than 80% of rural and small town dwellers use their vehicle regularly. In the Paris conurbation, this frequency is only 50% and tends to decrease in Paris intra muros and the first ring. Conversely, in other

large cities, use is intensifying: nearly 7 out of 10 households regularly use their car in 2020 and 6 out of 10 in the Lyon area.



## DOMESTIC PASSENGER TRANSPORT

**-24%**

**Decline in domestic passenger transport all modes expressed in passenger-kilometres in 2020**

The mobility of people is a social and economic necessity that allows exchanges between people, sources of wealth and job creation.

The private car, but also the light commercial vehicle, provide door-to-door mobility. They respond to multiple individual constraints (elderly people, children, disabled people, transport of heavy or bulky objects) and provide an appropriate response in sparsely populated residential areas,

or when the flows are not high enough (staggered hours) to that public transport is economically and societal relevant.

Expressed in passenger-kilometres and limited to domestic transport, the road is predominant in the movement of people and its share will increase in 2020 with the health crisis: 85% for private cars (+4 points) and 5% for buses, coaches and trams (-1 point).

All modes combined, domestic passenger transport will drop drastically in 2020 (-24%) and stand at 749.4 billion passenger-kilometres.

Mobility in private cars fell by 19% and is the mode of transport least impacted by travel restrictions. Road public transport will drop by 38% in 2020, including -33% for urban public transport and -38%

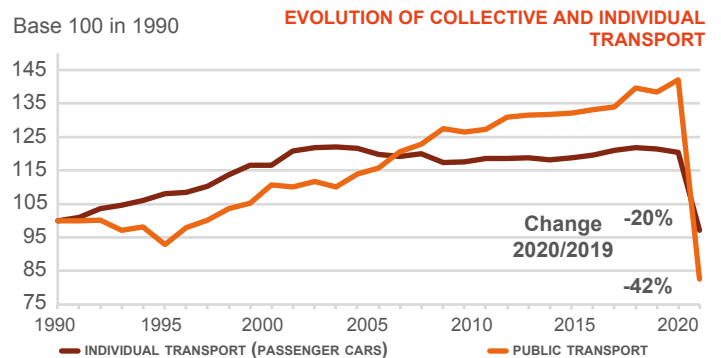
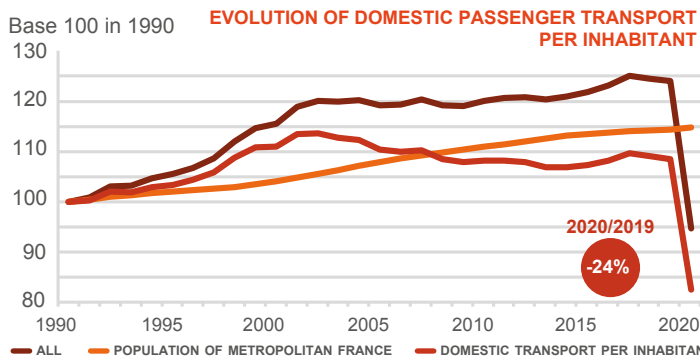
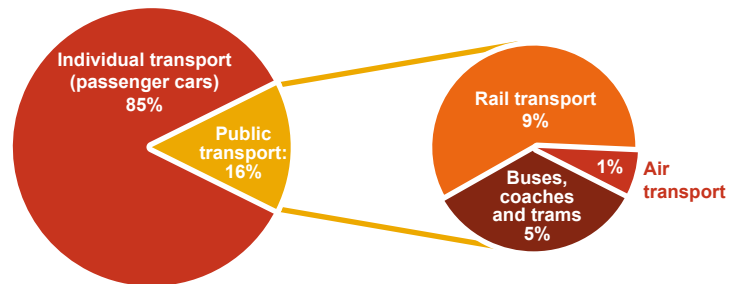
for coaches.

Rail transport, after an increase of more than 4% in 2019, fell by 42%, including -42% for high-speed trains and -45% for trains and RER in Île-de-France.

Finally, air transport has been halved (-55%) and the total number of travellers has reached a historically low level of 54 million, i.e. the lowest number since 1991. Flights between overseas departments are the least impacted (-44%) while the number of metropolitan passengers on international flights fell by 73%, in connection with border restrictions.



### BREAKDOWN OF PASSENGER DOMESTIC TRANSPORT BY MODE IN 2020



Source: MTE/SDES

The mobility of people is obviously linked to the economy, as for the transport of goods, but it also includes a social dimension, namely the meeting between people, which remains essential.

If the transport of goods is more linked to the productive sphere, whether industrial, artisanal or agricultural, the mobility of people covers a much wider economic field. Home-to-work shuttles constitute an important base, but the development of the economy, including the tertiary sector, is also dependent on the mobility of people (health services, leisure, tourism, etc.).

The determinants of the choice of modes of transport are located in the origin-destination, the distance, the times and the individual constraints (volumes transported, timetables, etc.). The

development of new individual transport services also widens the modal choice.

The transport of people requires, for each mode, significant investments, generally amortised over a long period, to build and maintain the infrastructures.

By expressing mobility in passenger-kilometres, light vehicles appear to be dominant in domestic passenger transport. The expression in number of daily journeys, particularly in dense urban areas where public transport and other modes (bicycles, motorbikes, etc.) play an important role, or in passenger-kilometres for long-distance international journeys, shows the field of relevance of each mode and their complementarity.

Domestic passenger transport, expressed in passenger-kilometres relative to the number of inhabitants, grew steadily between 1990 and 2002 (+1.1% per year). Then, due in particular to the rise in fuel prices, a plateau seems to have been reached and an average drop of 0.6% was observed between 2002 and 2013. From 2014, domestic passenger transport per inhabitant increased again, in connection with the increase in individual mobility, but at a low average annual rate (+0.3%), then it fell sharply with the 2020 crisis.

## DOMESTIC FREIGHT TRANSPORT

The transport of goods is the transmission belt of the economy: it makes it possible to physically connect the places of production of the goods to each other, to the places of consumption, then the latter to the places of reprocessing-recycling. In addition to these geographical dimensions linked to land use planning, there is also the notion of time.

Road freight transport meets many criteria involved in the choice of mode. Its share in the transport of goods remains stable (around 86% of tonne-kilometres performed) and distances of less than 300 kilometres predominate, making modal shift more difficult: 53% of tonnes loaded by the French flag are delivered within 50 kilometres in 2018.

Between 2010 and 2015, road freight transport fell by 1.5% on average annually, in line with the decline in activity for the French flag (-2.6%/year), while the foreign flag increased by 0.8% each year. From 2016, the economic recovery fuelled growth, which

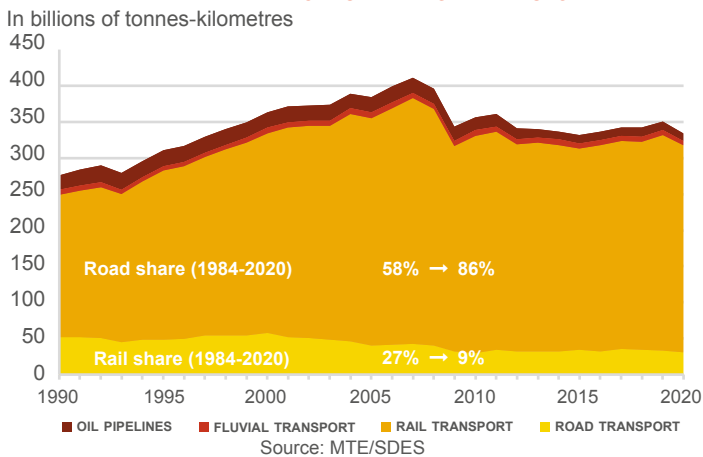
accelerated in 2017. Over the period 2015-2019, road freight transport grew by nearly 4% per year, but the level of activity remained below its level before the 2008 crisis. In 2020, travel restrictions had a strong impact on traffic, but the transport of goods, supported by the trade in basic necessities, only fell by 11% compared to 24% for the passenger transport.

Rail freight transport, after falling in 2018 following the strikes, recovered and grew by 1.7% in 2019. Since the 2009 crisis, it has fluctuated around 33 billion tonne-kilometres, or 60% its 2000 level and its market share stood at 9% in 2019 (compared to 16% in 2000). In 2020, it experienced a drop of 8%, a consequence of the drop in national traffic volumes. As for river transport, after the rebound in 2019 (+10%), it fell by 11%, mainly during the first confinement.

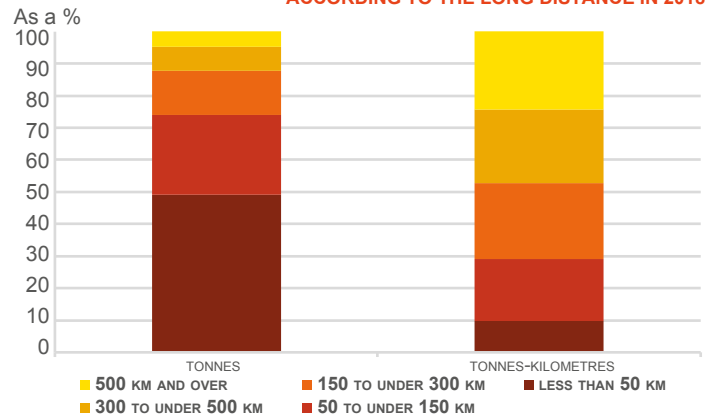


**-11%**  
Decline in inland freight transport measured in tonne-kilometres in 2020

DOMESTIC FREIGHT TRANSPORT IN FRANCE



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



The demand for freight transport is closely linked to the economy of the country and its interactions with others; it corresponds, on the one hand, to the domestic demand of the various economic actors and, on the other hand, to the exports of companies producing in the country. In addition, certain countries such as Germany or France are, by their geographical position, areas where the transit of goods plays a preponderant role. In the road transport of goods, this is reflected in the cabotage phenomenon but also, for several years, in the arrival of foreign players, who are taking increasing market shares from the French flag.

The physical transfer of freight and goods exported by a country is one of the aspects of the competitiveness of the economy. In order to stand up to competition and facilitate export activity, the social and tax burden weighing on the road mode, whether it is common law or specific (fuel tax), must be close to that in force in other European countries.

The destination and the type of freight or goods exchanged are often discriminating criteria in the choice of mode of transport. Liquids can be transported by pipeline, thus avoiding load breaks; the ports are, among other things, used for trade with distant countries.

The domestic demand of the different economic agents relates to a wide variety of commodities or goods. It is satisfied by national (auto)production, or by imports. Transport makes it possible to physically link the places of production with each

other, then with those of consumption and finally with the places of reprocessing-recycling: in France, the interaction with regional planning is all the more significant.

Due to the wide variety of goods and merchandise, many factors come into play and can condition the choice of mode of transport. It's the case for:

- the weight of the goods: car manufacturers mainly have their steel coils transported by rail or river;
- the value of goods and merchandise transported;
- delivery time: perishable foodstuffs, such as fresh produce, must be transported quickly and are therefore mainly transported by road;
- the place of departure and arrival of the goods, both during the production phase (link with land use planning) and during the consumption phase. The latter is mainly located in urban areas, due to the places of residence of households.

In addition, the different modes of transport require infrastructure, which is synonymous with significant investments, generally amortised over a long period, and which must be used wisely. Intensive use, i.e. a massification of flows, is all the more relevant. The same applies if, during a transport chain, several modes are used, in particular due to load breaks between these different modes.

Road freight transport, through its ability to irrigate the capillarity of the road network, its flexibility, its adaptability and its quality of service, meets these numerous criteria, which show that transport is not a homogeneous whole, but a multitude of sub-

markets, which are often not substitutable. Also, modal shift is not possible for a large part of the flows, especially in the last kilometres, or because it would increase transport distances too much. Freight intermodality is based on an economically acceptable cost and efficient changes in modes of transport.

Without taking into account the geographical location of the places of departure and arrival, there are two main units for measuring the freight transport: the tonne measured during loading and tonne-kilometres. The road remains preponderant in the freight transport, with a modal share of 86% of the tonne-kilometres carried out. The Transport Routier de Marchandises (TRM) survey by the Ministry of Transport shows the predominance of distances of less than 300 kilometres: 49% of tonnes transported by the French flag are transported at a distance of less than 50 kilometres and 53% of tonne-kilometres within 300 kilometres.

## ROAD TRAFFIC

Although road traffic, expressed in billions of vehicle-kilometres, increased on average by more than 2% per year between 1990 and 2002, its growth slowed markedly between 2002 and 2012 (+0.6%/year). Then it accelerated again until 2017. Since then, according to the latest data from the Ministry of Energy Transition, road traffic has not progressed. It stagnated in 2018, then fell in 2019 (-0.8%) and finally collapsed in 2020 (-16.9%) following travel restrictions.

Traffic is mainly carried out by light vehicles, which represent 92% of total traffic. In 2018 and 2019, the circulation of private cars under the French flag fell by

around 0.3% each year. This is explained both by the drop in the average journey per vehicle, but also by the stability of the fleet of passenger cars. In 2020, the successive confinements as well as the development of teleworking had a major impact on the journeys of private cars, the circulation of which fell by 17.7%.

The circulation of light commercial vehicles registered in France was less impacted by travel restrictions and fell by 8.4%. That of heavy goods vehicles, which had slowed since 2018 under the effect of the economic slowdown, is also down, but by only 5.9%, supported by the transport of basic necessities.

At the end of 2020, more than 60% of the passenger car fleet met the Crit'Air 1 or 2 sticker. For heavy goods vehicles, the percentage of the fleet complying with EURO V or EURO VI standards now exceeds 65%. Their virtuous presence in traffic is all the more important as they drive more than older vehicles.

**-17%** Decrease in circulation in 2020

### ► OVERVIEW OF ROAD TRAFFIC

	Units	1990	2000	2012	2015	2019	2020	Average annual change as a %		
								2012/1990	2020/2012	2020/2019
<b>TOTAL VEHICLES (ANNUAL AVERAGES)</b>	thousands of vehicles	28,106	33,419	40,611	42,355	44,161	43,679	+1.7	+0.9	-1.1
<b>New passenger cars</b>		23,280	27,926	34,647	36,021	37,549	37,309	+1.8	+0.9	-0.6
<b>Petrol</b>		19,760	18,215	12,800	12,579	14,292	14,599	-2.0	+1.7	+2.1
<b>Diesel</b>		3,520	9,711	21,593	23,058	22,498	21,746	+8.6	+0.1	-3.3
<b>Non rechargeable hybrid</b>		-	-	19	144	414	530	-	+51.9	+28.1
<b>Electric</b>		-	-	7	32	120	180	-	+50.7	+50.4
<b>Plug-in hybrids</b>		-	-	30	33	74	108	-	+17.2	+44.8
<b>Light commercial vehicles (LCV)</b>		4,223	4,859	5,296	5,676	5,930	5,691	+1.0	+0.9	-4.0
<b>Petrol</b>		2,279	1,261	276	242	212	201	-9.1	-3.9	-5.4
<b>Diesel</b>		1,944	3,598	4,994	5,399	5,661	5,426	+4.4	+1.0	-4.2
<b>Electric</b>		-	-	5.7	16.8	37.4	43.0	-	+28.7	+14.9
<b>Poids lourds (&gt;5t)</b>		535	553	582	569	591	589	+0.4	+0.1	-0.3
<b>Bus &amp; cars</b>		68	81	86	88	91	90	+1.1	+0.6	-0.6
<b>KILOMETRES (ANNUAL AVERAGES)</b>	thousands of km									
<b>Passenger cars</b>		13.4	13.5	12.3	12.4	11.9	9.9	-0.4	-2.7	-17.1
<b>Petrol</b>		11.9	10.7	7.9	8.1	8.5	7.3	-1.8	-1.1	-14.5
<b>Diesel</b>		21.3	18.7	14.9	14.7	14.1	11.6	-1.6	-3.1	-17.4
<b>Non rechargeable hybrid</b>		-	-	15.9	16.7	13.7	10.5	-	-5.0	-23.3
<b>Electric</b>		-	-	8.5	9.3	9.0	8.5	-	+0.0	-5.9
<b>Plug-in hybrids</b>		-	-	16.3	15.5	15.3	13.0	-	-2.8	-15.4
<b>Light commercial vehicles (LCV)</b>		14.6	15.7	14.7	14.2	14.0	12.8	+0.0	-1.7	-8.4
<b>Diesel</b>		20.2	18.6	15.3	14.6	14.4	13.2	-1.3	-1.8	-8.4
<b>Electric</b>		-	-	5.2	7.7	7.5	7.3	-	+4.4	-2.8
<b>Heavy trucks (&gt;5t)</b>		42.2	47.8	43.9	43.4	43.7	41.5	+0.2	-0.7	-5.0
<b>Coaches and buses</b>		31.0	30.0	34.1	34.0	33.5	25.9	+0.4	-3.4	-22.9
<b>CONSUMPTION PER VEHICLE</b>	litres/100 km									
<b>Passenger cars: petrol</b>		8.7	8.1	7.6	7.3	6.9	6.8	-0.6	-1.4	-1.1
<b>Passenger cars: diesel</b>		6.7	6.7	6.3	6.1	6.0	5.9	-0.3	-0.8	-0.3
<b>LCV: diesel</b>		9.8	9.4	7.9	8.0	7.8	7.8	-0.9	-0.2	-0.3
<b>Heavy trucks</b>		36.2	36.6	35.0	34.5	33.3	33.0	-0.2	-0.7	-1.0
<b>Buses and coaches</b>		32.0	33.0	32.8	31.8	30.7	30.4	+0.1	-0.9	-1.0
<b>FUEL CONSUMPTION (ALL ROAD TRANSPORT)</b>	millions of litres									
<b>Petrol</b>		23,983	18,395	9,575	9,298	10,618	9,045	-4.1	-0.7	-14.8
<b>Diesel</b>		19,268	32,091	40,397	40,771	39,332	33,206	+3.4	-2.4	-15.6
<b>Total</b>		43,251	50,486	49,972	50,069	49,949	42,250	+0.7	-2.1	-15.4
<b>TOTAL TRAFFIC (1)</b>	billions of vehicles-km	423	521	584	604	615	511	+1.5	-1.6	-16.9
<b>Light vehicles (1)</b>		389	475	536	555	564	465	+1.5	-1.8	-17.6
<b>French passenger cars</b>		311	378	427	445	448	369	+1.5	-1.8	-17.7
<b>French light commercial vehicles</b>		62	76	78	80	83	73	+1.1	-0.8	-12.1
<b>French heavy vehicles (1)</b>		26	34	34	35	37	35	+1.3	+0.1	-5.9

(1) Including vehicles registered abroad.

Source: MTE/SDES/CCTN

Road traffic is estimated by cross-checking information from vehicle counts on the various road networks (national, departmental, local and urban) with the average annual kilometres travelled by vehicles in the fleet and fuel consumption data. It incorporates that of vehicles registered abroad.

In 2020 and 2021, the traffic balance was partially "rebased". It is now mainly based on the new SDES road vehicle directory (RSVERO), which combines information from registration certificates and technical inspections. Thus, the long series since 1990 on the average annual fleet and the average annual route have been reconstituted. Based on this new source of information, the fleet of vehicles registered in France has been reassessed and amounts to 43.7 million vehicles in 2020.

The decline in diesel motorisation, without taking into account non-rechargeable hybrids, will continue in 2020. For light vehicles, its share in the fleet will drop to 63% and its share in traffic to 73%. Within the passenger car fleet, alternative engines (electric, plug-in hybrid) represent 0.8% of the fleet and 0.8% of traffic.

Since 2017, the decline in the average unit consumption of cars has slowed down. The continuous improvement in technical performance is more difficult to offset the impact of the revival of petrol in registrations and the appeal of SUVs. In 2020, the average unit consumption of cars decreased by 1.1% for petrol cars and by 0.3% for diesel cars. It was not affected by the structure of mileage between daily trips and those linked to weekends and holidays, which remained stable.

The heavy vehicle fleet has been growing again since 2015 and grew by 3.4% between 2015 and 2020 after 15 years of decline. For five years, the decline in the unit consumption of heavy goods vehicles has continued, falling by 4.4% between 2015 and 2020. The heavy goods vehicle fleet has also been transformed and includes more than 45% of vehicles meeting the EURO VI standard. This share is even higher within the tractor fleet, with 2 out of 3 vehicles complying with the EURO VI standard. There is also a steady increase in the share of vehicles over 20 tonnes in the heavy goods vehicle fleet, representing 38% of the fleet in 2020 compared to 27% in 2011. The rejuvenation of the vehicle fleet as well as the increase in vehicle carrying capacity contribute to optimizing the energy efficiency of road freight transport.

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

Between 1990 and 2019, the total circulation of French and foreign vehicles on French territory had increased by 45%; their associated CO<sub>2</sub> emissions, net of renewable energies, only increased by 8%. In 2020, with the fall in traffic (-17%), these emissions are down 9% compared to 2019.

Over the long term, various factors are behind the improvement in energy efficiency. Thus, at the level of passenger cars registered in France and in circulation, their average unit consumption since 1990 has fallen by 26%. This downward trend was favoured by the dieselisation of the vehicle fleet, the efforts of manufacturers and drivers and the impact of the bonus/malus system introduced in 2008. The trend was temporarily interrupted in 2017, due to the increase, since 2013, in the share of petrol vehicles which consume more (7.1 l per 100 km for petrol, against 6 l for diesel). In 2018, the consumption of passenger cars fell mainly thanks to the efficiency

gains of gasoline, which were greater than for diesel. But in 2019, the decline was again interrupted with the continuous increase in the share of petrol cars in the fleet (+2 points) and their average annual mileage (+3%).

In 2020, the share of petrol cars continues to increase (+1 point); however, travel restrictions have had a greater impact on private cars whose average annual mileage is less than 10,000 km (-17%), a level not seen since 1990.

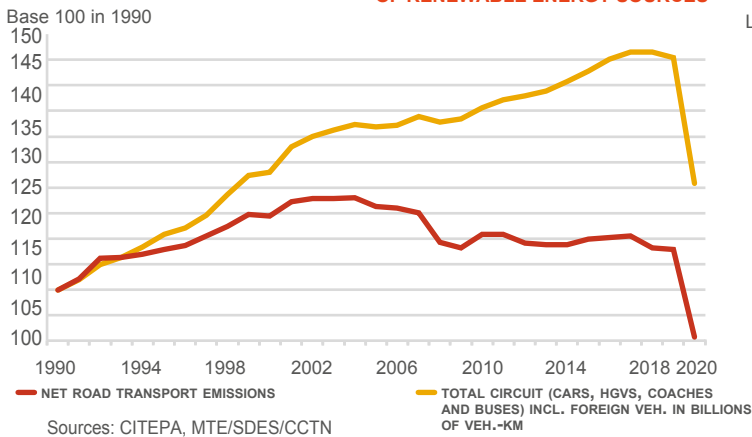
Regarding energy efficiency in the transport of goods, it continues to improve. According to the latest figures, the quantity of CO<sub>2</sub> emitted by an industrial vehicle, when moving one tonne of goods over one kilometre on French territory, fell by 23% between 1990 and 2019. This progress is mainly explained by the improvement of vehicle performance (better engine efficiency, increase in the size of vehicles

allowing massification), optimisation of logistics (increase in the filling rate, reduction in empty returns) and the dissemination of good practices in matters of eco-driving. However, in 2020, due to the drop in the flow of goods, these were less well optimised and the drop in fuel consumption was less marked than that of the tonnes transported.

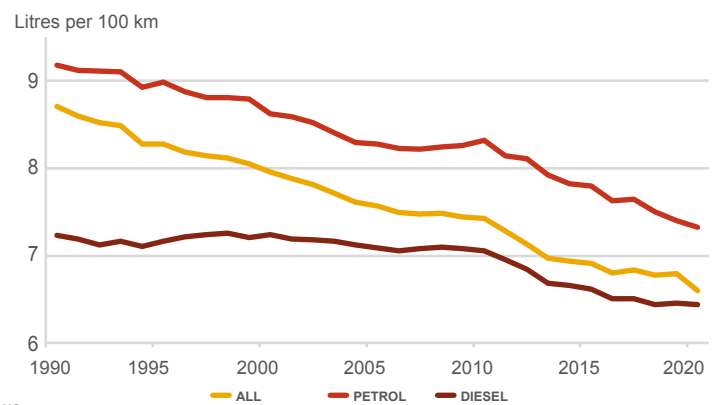
**Reduction in the average unit consumption of a passenger car in circulation since 1990**

**-23%**

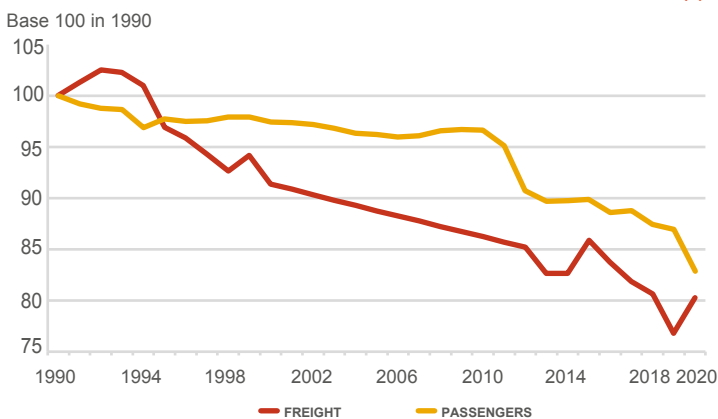
**TRAFFIC IN FRANCE AND CORRESPONDING CO<sub>2</sub> EMISSIONS NET OF RENEWABLE ENERGY SOURCES**



**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 tonne 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/SDES, CCEA calculations



The circulation of private cars results from two components: the car fleet and their average annual mileage. Over a long period, the growth rate of the fleet has slowed considerably, after the phase of access to motorisation. The development of multi-motorisation, then the significant increases in fuel prices, are the main factors linked to the drop in average annual mileage. Since 2012, there has been an increase in the growth rate of the base of 0.8% on average. The average annual mileage, meanwhile, is down, -3% between 2019 and 2012, in a context of a slowdown in the cycle.

In 2020, new estimates from the Interprofessional Center for Atmospheric Pollution Studies (CITEPA) for road transport show net CO<sub>2</sub> emissions from renewable energies of 104 million tonnes compared to 123 in 2019. After the ceiling observed at the start 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. In 2020, following travel restrictions and the development of

teleworking, total road traffic fell by 17%, leading to a drop in CO<sub>2</sub> emissions (-15%).

In 2020, the net CO<sub>2</sub> emissions of renewable energies from road transport were distributed, according to the CITEPA Secten 2021 report, at 55% for cars, 20% for light commercial vehicles and 24% for heavy goods vehicles, buses and cars.

## NEW USES OF THE AUTOMOBILE

The evolution of technology, economic constraints and awareness of environmental issues have encouraged, in several sectors, the development of new consumption and lifestyle trends, which favour use to the detriment of the ownership of goods.

In transport, this trend has materialised through the development of new uses of the automobile, promoting sharing and pooling and based on the use of information and communication technologies. These are in particular carpooling, car-sharing and rental between private individuals.

The shared car makes it possible to reduce the costs of using and maintaining vehicles and to increase, in peri-urban and rural areas, the supply of transport, at a lower cost for the community. In dense areas, it is also a complement to public transport (loads to be transported, staggered timetables) which improves the occupancy rate of

vehicles, with positive effects on the environment and energy consumption.

Among the developments, there is also a strong growth in transport cars with driver (VTC) and the development of new services around mobility (traveller information, route calculations, ticketing, parking assistance).

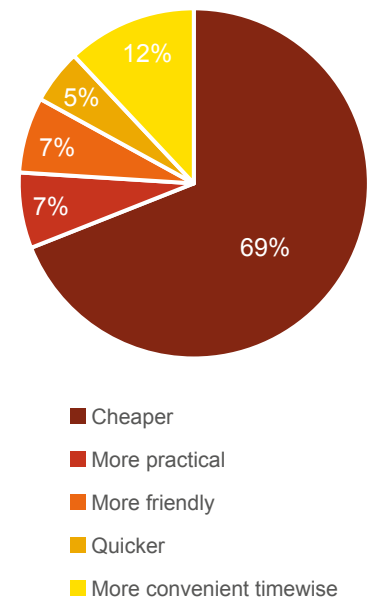
Automotive groups have adapted their offers to these new needs and are positioning themselves as real mobility operators, by creating new entities dedicated to these activities (Mobilize, Free2Move) and by offering a whole range of new services in France and abroad: short rentals, car-sharing for companies or individuals, "free-floating", but also rental services with driver (taxi, VTC) and MAAS (Mobility As A Service) platforms that combine multimodal information and ticketing tools. They have also invested in companies linked to mobility

and connected services: acquisition of TravelCar for PSA, investments in various start-ups (Karoo, iCabbi, Glide) for Renault.

# 10%

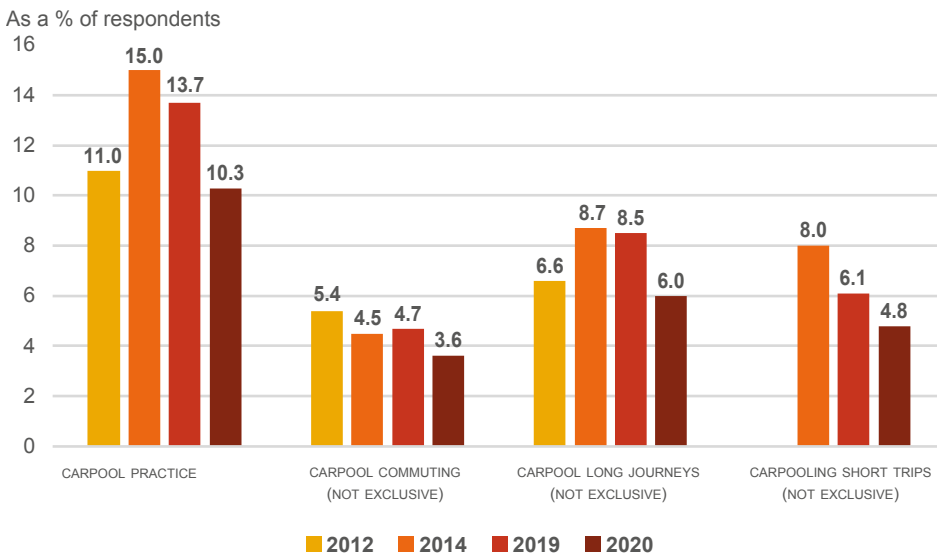
**Of respondents  
carpooled in 2020  
(KANTAR TNS survey)**

### MAIN REASONS FOR CARPOOLING



Source: 6t/ADEME

### CARPOOLING PRACTICE SURVEY OVER LAST 12 MONTHS



Source: PARCAUTO TNS Sofres survey handled by CCFA and IFSTAR

### CARPOOLING

Carpooling is defined in the energy transition law for green growth as "the joint use of a land motor vehicle by a driver and one or more passengers, carried out free of charge, except for the sharing of costs, in the context of a trip that the driver makes on his own account. Their linking, for this purpose, can be carried out against payment" (Art. L. 3132-1). The mobility orientation law (LOM) promulgated at the end of 2019 reinforced support for carpooling by encouraging the creation of lanes reserved for carpoolers, by authorising communities to pay an allowance to drivers or passengers and by creating the sustainable mobility package. This system allows a public or private employer to set up financial assistance for home-work travel for its employees made with modes other than public transport, and in particular with shared modes such as carpooling.

In practice, the diffusion and development of carpooling are still difficult to measure. According to the various surveys, the regular practice of carpooling affects between 5 and 10% of the population in France. In 2020, the practice of carpooling is down due to the pandemic and has been done more with those around you. According to the Kantar TNS Parc Auto survey,

10.3% of respondents made a carpooling trip compared to 13.7% in 2019. In 2020, 3.6% of respondents used carpooling for their home-to-work trips (compared to 4.7% in 2019), 6% for journeys over 100 km (compared to 8.5% in 2019) and 4.8% for journeys under 100 km (compared to 6.1% in 2019). Carpooling was done with friends and family at 94% for home-to-work journeys and 81% for short journeys, compared to 91% and 74% respectively the previous year. The latest study carried out by ADEME shows that carpooling is gradually becoming a transport solution in its own, with the average age of the carpooler increasing (33 years) and a practice that is no longer exclusively that of young urbanites, but which also affects rural communities and older people. The motivation is essentially economic for 69% of carpoolers.

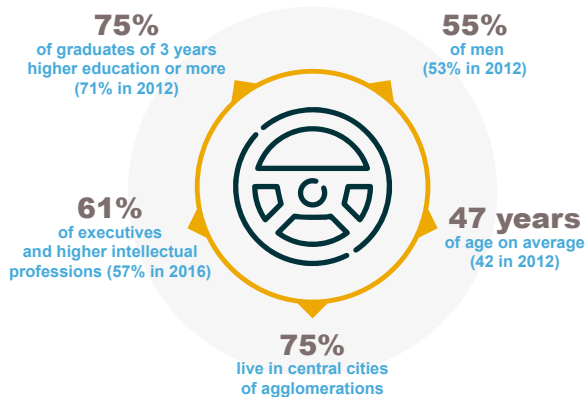
Occasional carpooling, generally carried out over long distances, is the most structured. Connecting platforms secure the transaction between drivers and passengers. The share of long journeys organised with a connection structure increased from 25% in 2012 to 63% in 2019 but fell in 2020 with the health crisis (57.5%). The average distances travelled are approximately 239 km per trip and there are 3.5 people per vehicle on average (BlaBlaCar, Zéro Empty Seats, 2019).

Home-to-work journeys and short journeys take place more with friends or colleagues, but these segments tend to develop in the offer of market players and the State has set itself the objective of tripling by 2024 the number of daily trips made by carpooling.

As part of the inter-company travel plan (PDIE) of Guyancourt Technocentre, Renault offers its employees the use of Klaxit to carpool. 86% of registrants found carpoolers on their route and at their times. In addition, Mobilize Invest supports ECOV, which works with local authorities to build spontaneous and dynamic carpooling lines that are reliable and accessible to everyone in suburban and rural areas. For its part, Free2Move has launched Mobility Card, a universal payment card for employees to simplify the implementation of the mobility package for companies.

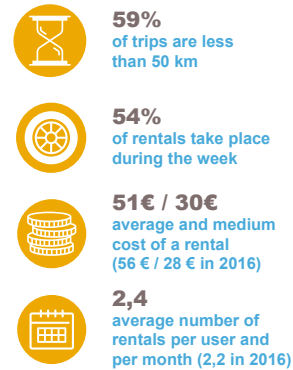
## NEW USES OF THE AUTOMOBILE

### PROFIL OF CAR-SHARING USERS IN 2019

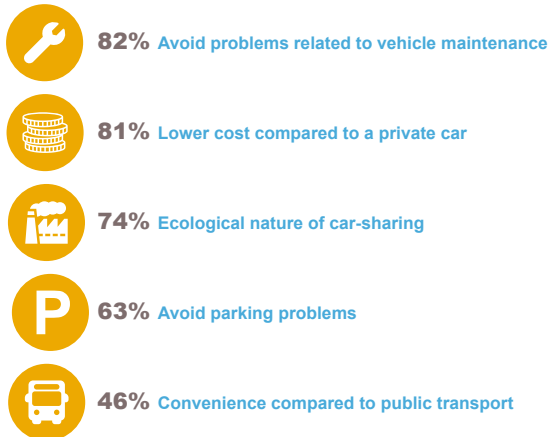


Source: National Survey on car-sharing,6t/ADEME, 2012, 2016, 2019

### CAR-SHARING RENTALS IN 2019



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



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



### CAR-SHARING

The car-sharing activity is defined in the Grenelle II law (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 body or person managing the vehicles. Each subscriber or authorised user can access a driverless vehicle for the route of their choice and for a limited period. A distinction is made between P2P carsharing (rental between individuals) and B2B commercial carsharing (for employees of a company) or B2C (for individuals).

In commercial car-sharing, the service is said to be "looped" when the customer picks up the vehicle at a station and returns to drop it off at the same station. Conversely, in the "direct track" service, the customer can drop off their vehicle at a station other than the departure station or anywhere within a given perimeter. In the latter case, we then speak of "free-floating". These different systems correspond to very different durations of use and needs.

The latest ADEME survey carried out in 2019 reminds us that the loop offer is more extensive and older than that of direct trace. Nevertheless, the free-floating offer has been developing since 2016. It also shows that B2C car-sharing users are older (47 years old on average), more educated (73%

hold a bac +3 or higher) and financially better off than the average population of the large cities in which they reside.

The mobility orientation law, passed at the end of 2019, aims to facilitate the granting by the mobility organising authorities (AOM) of parking spaces reserved for car-sharing vehicles. These reserved parking spaces will be accompanied by a "car-sharing label" granted to vehicles that meet the conditions defined by the AOM (type of vehicles authorised, minimum number of rentals per month, etc.). In addition, as with carpooling, the costs incurred in carsharing can now be covered by the sustainable mobility package.

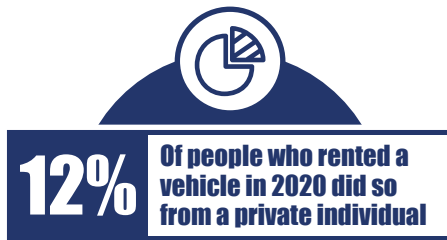
### THE B2C AND B2B OFFER OF FRENCH CAR MANUFACTURERS:

The Renault group offers nearly 10,000 electric vehicles for car-sharing in most European capitals. With the Zity brand (joint-venture with the Ferrovial group), it operates a free-floating car-sharing service with 725 ZOE in Madrid since 2017 and 500 ZOE in Paris since May 2020. With Totem Mobi, it offers Twizy in car-sharing in Marseille and Montpellier. Elsewhere in Europe, it is joining forces with other players to equip car-sharing fleets with

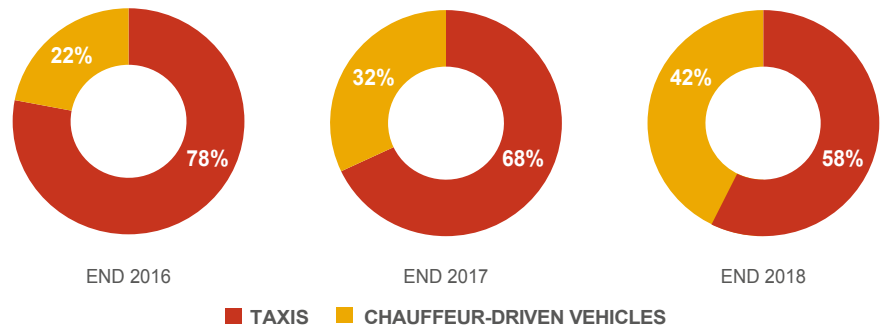
electric vehicles (Fetch Car-Sharing in Amsterdam, Aimo in Stockholm, Green Mobility in Copenhagen). In addition, Renault also offers solutions for its business customers via Glide.io (formerly Renault RC), in order to optimise the utilisation rate of their fleet. Finally, the group has forged partnerships with commercial brands in order to offer the service to their customers.

The Free2Move brand created by PSA and its application of the same name, offer self-service car-sharing services in Paris, Madrid, Lisbon, Washington DC and soon Portland and Denver. More than 500 vehicles are offered in each city. In Paris and the nearby suburbs, the application makes it possible, for example, to locate 600 electric vehicles thanks to a fleet made up of Citroën C-Zéro and Peugeot Ion and supplemented in the spring of 2020 by Citroën's latest innovation: the 100% electric Ami. Free2Move also offers services for companies with a connected fleet management system (Connect Fleet), a car-sharing service (Fleet Sharing) and an advisory service on the electro-compatibility (E-mobility Advisor) of fleets.

## NEW USES OF THE AUTOMOBILE



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



Source: National Observatory of Special Public Transport of People, CGDD, January 2020

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

The VTC activity belongs to the public transport for private individuals (T3P), defined by the transport code, which also includes taxis and motorised vehicles with two or three wheels, commonly called motorbike taxis.

Since their arrival in France in the early 2010s, VTC services have contributed to expanding the mobility offer by offering a passenger transport service with prior order. However, their rapid development raised many questions about their legality and the competition they could offer to taxis, leading the public authorities to review the regulations in force.

Originally, the status of VTC is inherited from the status of "big discount car" and the profession of "Grand Remisier", 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 vehicle with driver. The Thévenoud (2014) and Grandguillaume (2018) laws have made it possible to set new regulations applicable to VTCs, now called "chauffeur-driven transport vehicles", and to specify the contours of the profession.

Thus today the activity of VTC is subject to specific installation and operating conditions which distinguish it from the activity of taxis.

- The vehicle used must meet certain "top-of-the-range" requirements. It must have between four and nine seats (including the driver), be in circulation for less than six years (excluding collector's vehicles) and fulfil certain technical characteristics (size, power).
- The driver must obtain a VTC professional card and register in the national register of VTC operators.
- The reservation of the vehicle by the customer is mandatory. The vehicle can therefore neither park nor drive on public roads in search of customers. Electronic marauding is prohibited and remains reserved for taxis.
- The price of the race is totally free, unlike taxi

fares, which are regulated and set by decree.

The National Observatory for Public-Private Transport, created in 2017 and responsible for establishing an inventory of the sector, has drawn up an initial assessment of the activity. It indicates that the number of VTCs registered in the register amounted to 15,000 in 2016 (22% of the public transport for private individuals offer) and jumped to 43,000 in 2018 for 59,000 taxis (42% of the public transport for private individuals offer). This increase is the consequence of the entry into force of the Grandguillaume law on December 31, 2017 (and extended by 3 months), obliging drivers to register in the register to continue their activity. The observatory also indicates that the VTC offer is the highest in Île-de-France, which includes 80% of the national offer, against a third of the taxi offer.

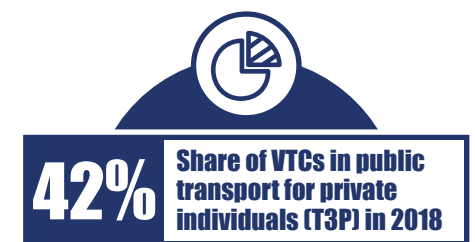
In August 2017, the Renault group acquired Marcel, a VTC operator in Île-de-France, which it operated for three years by offering the first range of 100% electric VTCs. On the Stellantis side, the Free2Move application allows more than 21,000 destinations in 150 countries to find the best VTC offer available.

### RENTAL BETWEEN PRIVATE INDIVIDUALS

More recently, car sharing outside the private sphere has also developed and peer-to-peer car rental services have appeared. Rental is done through specialised websites, connecting people who do not know each other. It allows individuals to share their vehicle for a fee and thus make the ownership and maintenance of their vehicle profitable when it is stationary.

A survey conducted by the CNPA indicates that this activity represented 6% of total short-term rentals (expressed in number of days) in 2016, compared to 3% the previous year, and that 5% of license holders have already used it. Users are young (44% are under 35), less often in working life than customers of traditional agencies (70%, compared to 83%), and less well-off: 47% belong to higher socio-professional categories, i.e. 10 points less than those who use traditional rental.

According to the KANTAR TNS PARC AUTO survey, while rental activity is down in 2020 in a context of low mobility (5% of the sample having used it, compared to 8% in 2019), rentals between individuals have however, increased with 12% of households among those having resorted to renting, against 7% the previous year. However, nine out of ten people still say they are very reluctant to provide or rent a car via a peer-to-peer rental platform.





## THE CONNECTED AND AUTONOMOUS VEHICLE

The connected vehicle is based on communication and information sharing between vehicles (VTV) or between vehicles and the road or communication infrastructure (VTX), thanks to wireless connectivity systems. Various services are offered to users: entertainment (via Bluetooth or 4G), geolocation data (GNSS systems), real-time traffic information, calculation of energy consumption. In addition, the development of advanced electronic assistance and driving assistance systems (ADAS) integrated into vehicles make it possible to perceive the immediate environment of vehicles through sensors and make driving easier (parking assistance) and safer (intelligent speed adaptation, warning systems in case of loss of attention). In addition, certain safety devices will be made mandatory by European regulations. The progressive development of connectivity and automation technologies should eventually allow the deployment of highly automated vehicles.

From a technical and technological point of view, 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 today) and automation systems allowing the driver to delegate the driving task to the system (levels 3 to 5 which are not yet on the market except for a few hundred level 3 vehicles authorised in Japan since 2021).

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

The UNECE regulation on automated lane-keeping systems (known as "ALKS") adopted on June 24, 2020, is the first technical regulation on level 3 automation. It establishes the strict technical and safety requirements for the "ALKS" function, which is a low-speed driving delegation system that can be activated by the driver only on eligible separate carriageway lanes and in traffic jams. It keeps the vehicle in its lane at a maximum speed of 60 km/h, by lateral and longitudinal control for a long period and without driver intervention. The entry into force of this regulation in January 2021 is an important step towards the introduction of autonomous vehicles.

The connected and autonomous vehicle will make it possible to develop new uses linked to driving and road safety (warning systems, information feedback), geared towards the vehicle itself (maintenance and repair services), relating to the road infrastructure (traffic management or the infrastructure itself) or to the driver (insurance services or infotainment services). A clear distinction can be made between the use of data to serve objectives of general interest (smooth traffic, improve road safety and the environmental footprint, manage infrastructures) and their use for the development of commercial services. New transport services could also be developed thanks to vehicle automation: automatic valet parking,

flow management in logistics centers or areas, urban shuttles. In the long-distance road transport of goods, "platooning" experiments consist of driving trucks in a convoy without a driver, behind a vehicle at the head of the platoon.

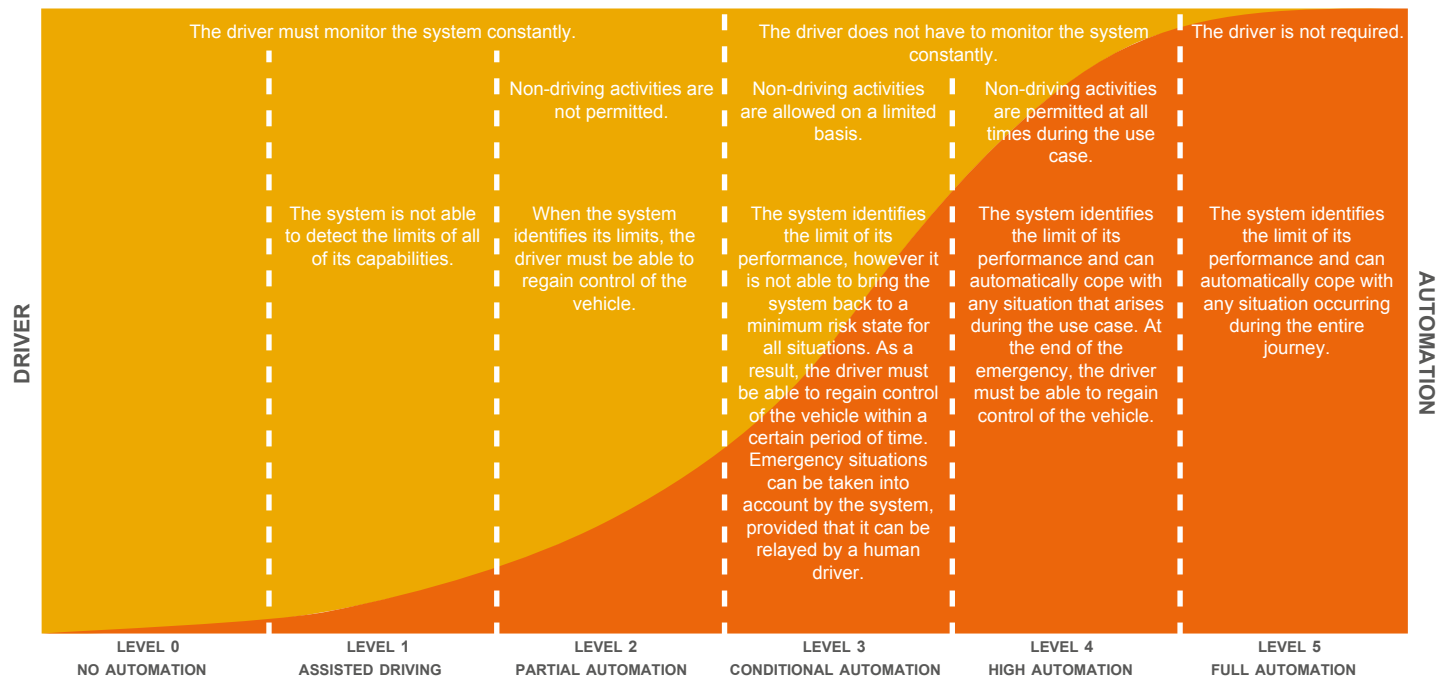
In the coming years, manufacturers plan to deploy several level 3 use cases: autonomous driving in traffic jams (traffic jam Chauffeur), on the highway (Highway Chauffeur) and automated parking. The deployment of transport of several people by robot-taxi (without driver) on well-defined routes is already being tested (ENA Project).

**110 000**  
million euros

**Mobilised for the SAM project**



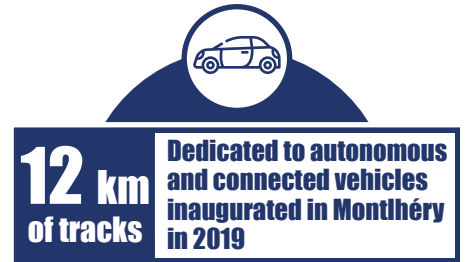
### LEVELS OF DRIVING AUTOMATION



Automation levels were defined by SAE J3016.

## THE CONNECTED AND AUTONOMOUS VEHICLE

### DIFFERENT TYPES OF USE



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

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:

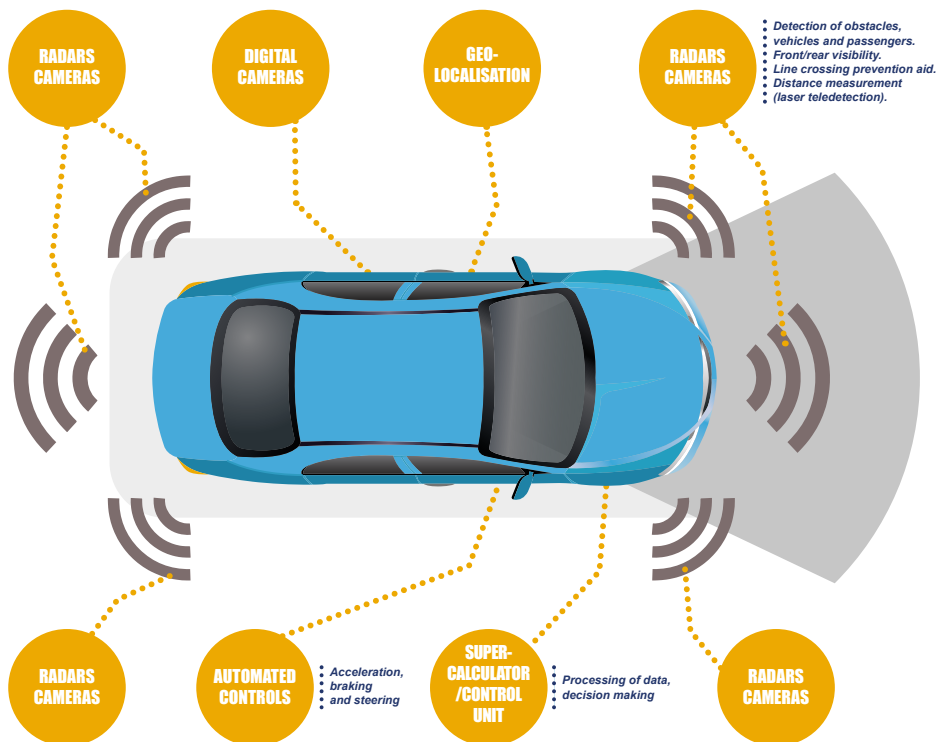
- Every moving vehicle must have a driver (§ 8.1); every driver shall at all times be able to control his vehicle (§ 8.5); a driver of a vehicle shall at all times minimise any activity other than driving (§ 8.6);
- Every driver of a vehicle shall in all circumstances have his vehicle under control (§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

### Government support for the development of autonomous and connected vehicles

The French Government has embarked on an ambitious process for the development of automated vehicles with the objective of French leadership based on three principles: safety, progressiveness and acceptability. The national strategy for the development of autonomous vehicles launched in May 2018 aims to allow the circulation of automated vehicles on public roads by the end of 2022.

The mobility orientation law (LOM law) published in December 2019 has made it possible to adopt various structuring provisions for the development of automated mobility. In particular, it provided for the issuance of an order on criminal liability in the event of the circulation of an autonomous vehicle and its conditions of use. This was published in April 2021 and clarified in a decree of June 29, 2021. Thus, the criminal liability of the driver of a vehicle using an automated driving system will not be incurred during an offense, if during this incident the system exercises dynamic control of the vehicle. The ordinance also sets out the respective responsibilities of the driver and the manufacturer or designer of these systems and the obligations to inform drivers. By September 2022, it will allow the deployment of transport systems up to the highest levels of automation, on predefined routes or areas, on which their safety has been demonstrated.

The Future Investment Program (PIA) set up by the State to finance innovative investments has made it possible, within the framework of PIA3,



to launch two national experimental programs (SAM and ENA) and PIA4, launched on January 8, 2021, will reserve 12.5 billion euros to finance investments in emerging and priority sectors, including sustainable mobility. The "digitalisation and decarbonisation of mobility" strategy notably plans to support automated road transport solutions for passengers or goods.

### Connected and autonomous vehicle experiments and tests

#### The general framework

In France, the regulatory framework for experiments was established by the ordinance of August 3, 2016, which requires prior authorisation from the Minister responsible for transport, the circulation, on an experimental basis, of vehicles with partial or total delegation of driving on a lane open to public traffic. This framework was supplemented by the law of May 22, 2019, known as the Pact, which authorises experiments with

vehicles with the highest levels of automation with an adapted liability regime, and by the Mobility Orientation Law project aimed at the framework circulation of autonomous vehicles. In 2021, the framework has evolved to open experiments to driverless vehicles on board, delivery vehicles and vehicles in convoy. Since the end of 2014, more than 140 authorisations for experiments have been issued. As of October 20, 2021, 22 experiments are taking place across the country and 12 experimentation requests are being examined.

## THE CONNECTED AND AUTONOMOUS VEHICLE

### The France Autonomous Vehicles program

As part of the France Autonomous Vehicles experimentation program which accompanies the national strategy, a call for projects for the experimentation of the autonomous road vehicle (EVRA), was launched in June 2019 for experiments covering the main use cases of mobility of people and urban delivery. In April 2019, the Government presented the two projects selected (SAM and ENA) to carry out 16 experiments with autonomous vehicles in real conditions and throughout the territory (rural and urban areas).

**The SAM (Safety and Acceptability of Driving and Autonomous Mobility) project, coordinated by the PFA, brings together players from the various sectors concerned by autonomous mobility: manufacturers, transport operators, local authorities, infrastructure managers, research laboratories with a shared vision of the issues and results for the production of shared knowledge. 15 territories are partners, bringing together 21 routes or experimental areas.**

**The ENA project (Autonomous Shuttle Experiments) piloted by Gustave Eiffel University and launched in 2019, is experimenting with an automated shuttle service in addition to existing urban transport, and a service in sparsely populated rural areas.**

### SCOOP / C-ROADS / InterCor projects

Co-funded by the European Commission, the SCOOP project, launched in 2014, aims to pilot the deployment of cooperative intelligent transport systems, i.e. systems based on the exchange of information between connected vehicles and between the vehicle and the road. The vehicles are equipped with sensors which detect events (slippery road, impact, sudden braking, etc.) and on-board units which transmit the information to the vehicles upstream (V2V) as well as to the manager (V2I) via units in roadside. The manager can also transmit information (construction sites, etc.) to the units on board the vehicles (I2V). The project brings together many public and private partners around the ministry in charge of transport, which coordinates it: local authorities, road managers, car manufacturers PSA and Renault, universities and research centers as well as foreign partners (Spain, Portugal, Austria). Between 2016 and 2018, SCOOP deployed 3,000 vehicles on 2,000 km of roads spread over five sites: Île-de-France, A4, Isère, Bordeaux ring road and Brittany. The objectives were to improve road safety and operating personnel, more efficient traffic management, reduction of emissions and optimisation of infrastructure management costs. At the end of 2019, the results of the project were presented and show that user acceptability still needs to be improved, in particular on the security dimension and informational consistency.

Following the SCOOP project, other projects such as C-Roads or InterCor were launched in order to extend the SCOOP services to other regions on a French and European scale. Thus in 2020 in Europe, 6,000 km are covered by ITS G and 10,000 km by cellular. On January 5, 2021, the COOPITS application was deployed in the Bordeaux conurbation. It allows the road user to receive information directly from the road manager and promotes eco-driving while respecting the user's privacy.

### Test centers for autonomous and connected vehicles

Funded thanks to the PIA and the Ile-de-France Region, a test center for autonomous and connected cars, TEQMO was inaugurated in June 2019 by UTAC in Monthéry. Composed of 12 km of test tracks associated with modern laboratories, it is aimed at all players involved in driving and connectivity technologies (manufacturers, equipment manufacturers, software suppliers, telecom operators). UTAC and TEQMO thus become a major tool for the development of autonomous and connected vehicles, by creating a French solution in the face of international competitors. In addition, Transpolis, with which Renault Trucks is associated, is a city-laboratory dedicated to innovation and safety. Transpolis now has two test centers in Ain, covering an area of 130 hectares.

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



Source: ACEA

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

Many projects have been launched on several sites in France to carry out use case tests for automated vehicles with 5G technology. The fifth generation of mobile networks (5G) should allow the improvement of existing services and the development of new services with better speed and greater capacity. For example, the "5G OpenRoad" project, which brings together private and public partners, provides for open road trials to test use cases for autonomous vehicles and provide services on board connected vehicles. At European level, many projects have also been launched: 5GMED: 21 European players brought together to test and deploy 5G on road and rail between France and Spain.

### The question of access to vehicle data

The increased use of automated vehicles will develop the data produced for various uses with a significant impact on the development of mobility services. The rules concerning the management of data linked 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 (GDPR), which came into force in May 2018, makes it possible to strengthen the protection of users' personal data. The mobility orientation law also established rules for making certain data available to public authorities or infrastructure managers.

Many projects (MOSAR, 3SA, SVR, EVA, CTI, etc.) have been launched over the past five years in order to meet cybersecurity challenges with security at the vehicle level but also at the infrastructure and centralised control level according to different scenarios.

In addition, European regulation on cybersecurity and cooperative intelligent transport systems are also significant contributions. This system is supplemented by "flexible" rules of law with the CNIL's compliance pack on connected vehicles in the process of evolution and technical standardisation (ISO).

The "Extended Vehicle" (ExVe) is a concept that car manufacturers, along with major equipment manufacturers and independent distributors, have

wanted to standardise at international level (ISO) since 2014. This concept reflects the concern to take into consideration the extension of the field of action of the vehicle, now very connected (mobility services, diagnosis maintenance repair, entertainment...), with the impacts that such an extension supposes in terms of integrity and security of the system.

The extended vehicle standards set up a system allowing a consistent, accountable and interoperable management of vehicle data:

- Consistent, because they establish a common standard that all companies must respect and because they avoid a multiplication of heterogeneous technical access systems, which would lead to a multiplication of risks in terms of the safety of goods and people.
- Responsible, because they limit the compromise of the vehicle's services (steering, braking, etc.) in all life situations encountered, regardless of the external solicitations, including those for malicious purposes (cyber security issue).
- Interoperable, because the establishment of a standard applied and carried at the international level allows cross-border data management systems to be compatible with each other.

Connected technologies and autonomous driving are preparing new mobility scenarios and the establishment of an expanded economic and legal system in which car manufacturers have a decisive place (see Deloitte/ Fréget report of January 2020). The development of artificial intelligence has a key place in contributing to innovation and the digital and ecological transformation of the automotive sector.

## PASSENGER TRANSPORT PRICE INDEXES

In 2020, the price index for personal vehicles (purchases and use) fell by 2.1% (compared to +1.1% in 2019), in line with the sharp drop in fuel prices (-11%) which is impacting the “use expenses” item (-3.2%), while the prices of “vehicle purchases” remained stable (+0.4% after +0.6% in 2019).

In road passenger transport, after two years of slowdown, prices rebounded by 3% in 2020, in particular due to the acceleration in prices in coach transport and despite the drop observed in private passenger transport (taxis, VTC). Thus, in 2020 as in 2019, the two components of road passenger transport are changing in contrasting ways, but cumulatively over the 2 years, prices have increased in the same way by around 4.5%. Finally, in air transport as in rail transport, prices collapsed by 4.4% and 5.3% respectively.

Over the last twenty years, the price indexes of the different modes of passenger transport have evolved in very different ways. Since 2000, the real price indexes, i.e. corrected by the general consumer price index, have increased by 22% in private passenger transport (taxis, VTC) and by 9% for personal vehicles, but fell by 11% for other road passenger transport (buses, coaches) and by 4% in air transport. In rail passenger transport, real prices increased by 19% between 2000 and 2015, but have been falling for 5 years, with a price collapse in 2020 linked to tariff adjustments after confinement.

**-2.1%  
AND  
+3%**

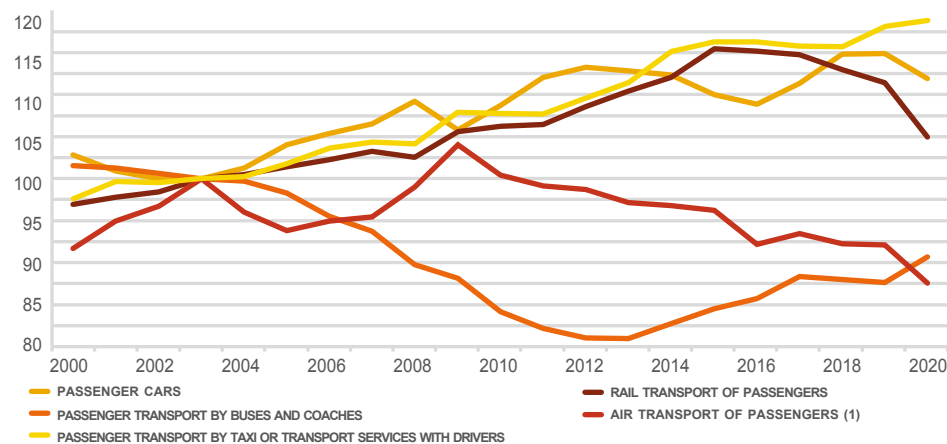
**Respective variations in 2020 of the price indexes linked to personal vehicles and road passenger transport**

### ▶ ANNUAL VARIATION IN PRICE INDEXES 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%
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%
2020	-2.1%	-5.3%	3.0%	4.0%	1.1%	-4.4%

### PASSENGER TRANSPORT MODES REAL PRICE INDEXES

Base 100 in 2003



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

Source: INSEE

The price indexes for the different modes of passenger transport show price trends including all taxes. Thus, for air travel, airport taxes are included; similarly for the other modes, the charges related to the infrastructure are only shown up to what can be incorporated in the sale price. In addition, only the part paid directly by the household is monitored. For example, if a region or a local authority decides, within the framework of a regional planning policy or social measures, to subsidise part of the costs linked to transport, a reduction will be recorded in household expenditure. Fuel surcharges are incorporated into the monitoring of the passenger air transport index.

The rail transport and road passenger transport

indexes mainly concern only interurban links. The index on personal vehicles was established taking into account both the purchases part, but also the use part of personal vehicles. To find the changes in the real prices of these main modes of transport, these various indexes are corrected by the general consumer price index in the graph above.

After remaining close to their 1995 level, the real price indexes for 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%), except for the years 2014 to 2016. The decline observed in 2020 is also an exception.

The real rail transport index has grown by 19% since 2000 but has been falling for 5 years. That of road passenger transport (coaches and buses) fell sharply until 2013, but has been increasing steadily since that date, the decline being 12% over the period 2000-2020, while that of private passenger transport (taxis, VTC) is growing continuously (+22%). Finally, the real air transport price index continues its decline that began in 2009.

## FREIGHT TRANSPORT PRICE INDEXES

In 2020, freight transport prices are increasing in maritime, rail and air transport, but on reduced volumes due to the health crisis. In road transport, prices fell by 0.9%. The decline was more marked in short-distance road transport (-2.3%) than in intercity (-0.6%), while international prices increased by 0.8%. Finally, in the river sector, prices fell by 0.6% in 2020.

Since 2006, the road freight transport price index has risen steadily: +16% in total, i.e. an average of +1.1% per year. The price index for international road transport rose more than that for local or interurban road transport. Over the same period, the price indexes for river transport and air transport experienced more erratic trends; phases of increases between 2006 and 2013 and a downward trend since, with the exception of air freight which rebounded in 2020. This surge in prices is explained by the strong tensions on freight transport capacities following the

virtual shutdown air traffic. Passenger flight restrictions have limited air cargo carrying capacity due to the "mixed" organisation of aircraft carrying both cargo and passengers.

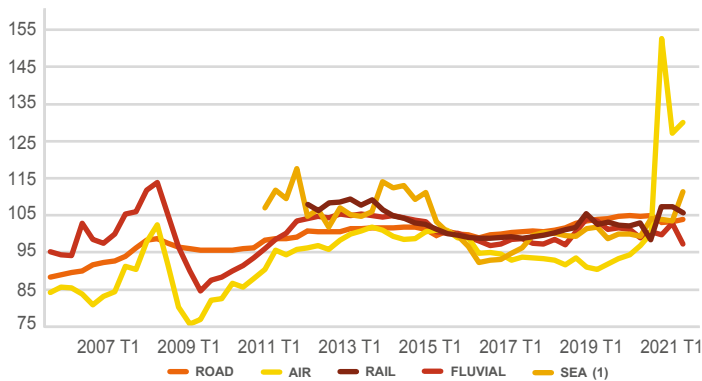
In rail transport, the price index has only been disseminated since 2014, with a history dating back to the first quarter of 2012. Over the observation period 2012-2020, there is a 3% drop in prices, mainly due to a decline in national rail prices until 2019 (-7%), while international rail prices increased by 9%. In 2020, prices will rise sharply on national rail, while they will fall internationally. Since the opening to competition in 2006, the new operators have developed and now represent 40% of the volumes transported, i.e. a level comparable to that of Germany.

**-0,9%**  
et  
**+2%**

**Respective changes  
in road and rail freight  
transport price indexes  
in 2020**

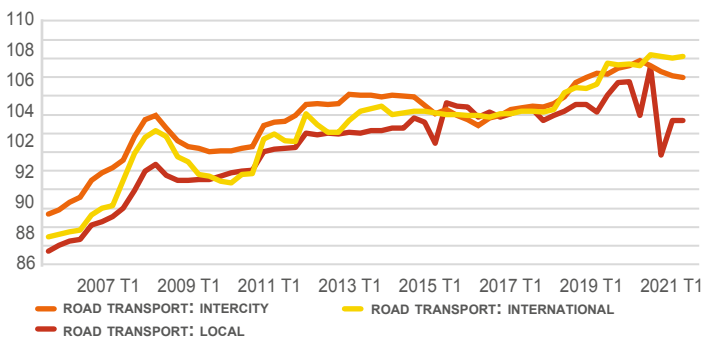
### FREIGHT TRANSPORT INDEXES IN FRANCE

Base 100 in 2015



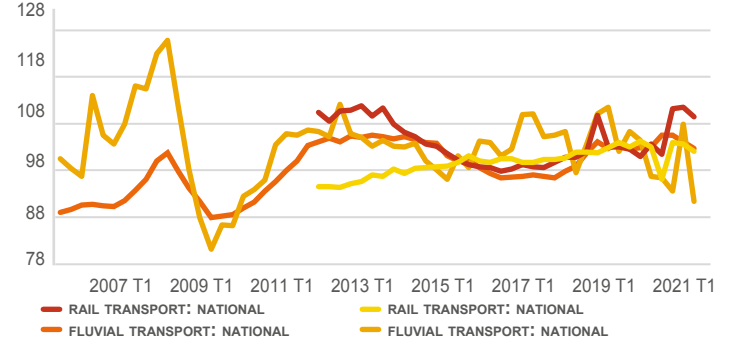
### FREIGHT TRANSPORT INDEXES IN FRANCE: ROAD

Base 100 in 2015



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

Base 100 in 2015



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

The freight transport price indexes are calculated by the SDES statistical service of the Ministry in charge of Transport. For road, river and rail transport, the indexes are developed using the so-called representative services methodology, defined by the loading and unloading locations, the type of goods and the characteristics of the contract between the shipper and the carrier. Price statements are made quarterly. In road and river transport, only activities carried out on behalf of others by companies domiciled in France, whose main activity is freight, are monitored.

For rail transport, the price index, monitored since the 1<sup>st</sup> quarter of 2012, is based on 111 representative transport services, entrusted by

a sample of shippers to rail transport operators.

For air freight, the index consists of freight transport services departing from France by air waybill. The service is defined by the place of unloading and by the airline in charge of the shipment. The index is developed using the so-called unit value methodology, which incorporates the fuel and security surcharges paid to the airline providing the transport. This price index is linked to the high volatility of fuel prices.

For maritime transport, the price index is made up of transport services on behalf of third parties carried out by companies registered in France whose activity is maritime freight (bulk and ferry). It

is based on international price indexes, unit prices and tariffs. This price index is very volatile, linked to the evolution of bulk prices.

For road freight, intra-annual variations are less significant than for river or air transport, even if fuel represents on average 20% of the total costs of road freight transport, as shown by the CNR survey (see page 61).

## THE COST OF HOUSEHOLD CAR MOBILITY

According to the latest "Family budget" survey of 2017, metropolitan households devote on average 15% of their budget to cars. This budget varies from 20% among rural households to only 9% in the Paris conurbation and represents more than half (57%) of expenses related to the use of the vehicle (fuel, repairs, maintenance, tolls, insurance). These user expenditures 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 (against 7.4% for the 5<sup>th</sup> quintile). The item that weighs the heaviest within this set is the fuel item, which represents 4% of the total and reaches 6% in rural areas, compared to only 2% in the Paris

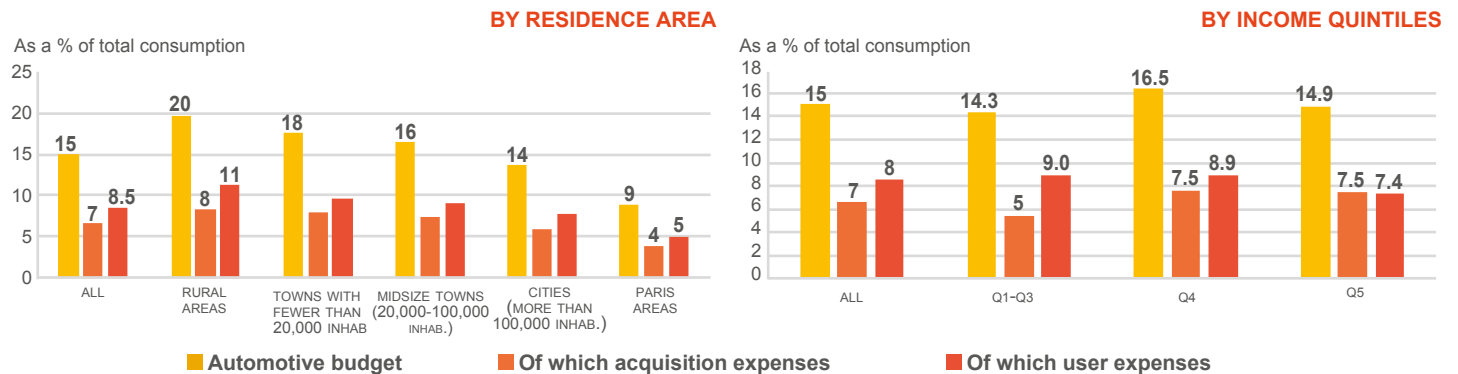
agglomeration. The least well-off households (Q1-Q3) also devote a larger share of their budget to this item (4.3%) than the richest households who belong to the 5<sup>th</sup> quintile (3.3%). Finally, the breakdown by socio-professional category also shows significant contrasts in terms of automobile expenditure. The category of executives and employees, who frequently hold jobs in the tertiary sector in urban areas, devote a lower share of their budget to cars (respectively 13% and 15%). Conversely, the category of farmers, workers and tradesmen, less present in urban areas and more forced to use their vehicle to work, devote 18% of their budget to cars.



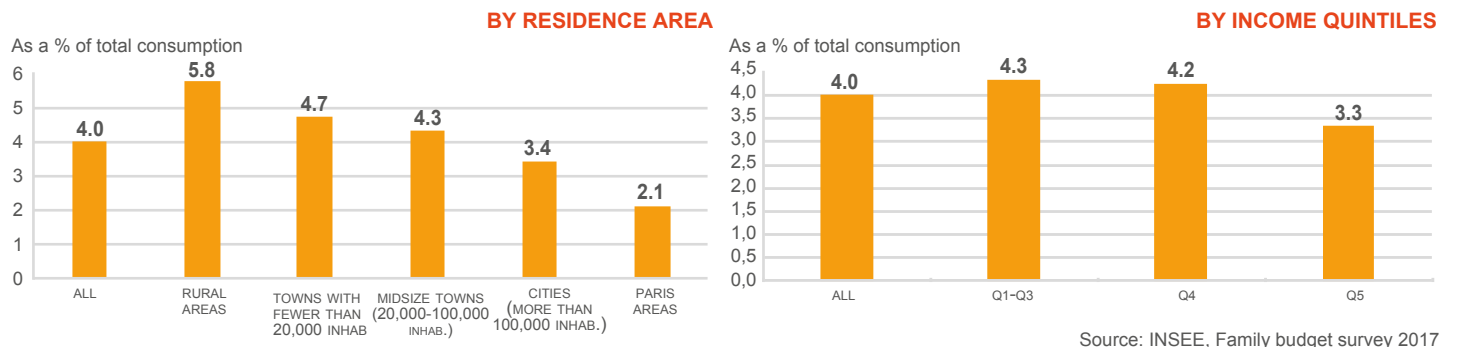
# 6%

**Weight of fuel expenditure in the budget of rural households according to the "Budget de famille 2017" survey**

### ► AUTOMOTIVE BUDGET IN 2017



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



Source: INSEE, Family budget survey 2017

The "Family budget" survey conducted on average every five years by INSEE provides an estimate of the average consumption of the various goods and services and makes it possible to compare the consumption structures of the various categories of households according to the different characteristics of these last: socio-professional category, age, income, category of municipality of residence, etc.

Concerning automotive items, there are two important differences compared to the national accounts (page 61). In the treatment of transport insurance expenses, their entirety is considered in the surveys, whereas only the service (expenses less reimbursements) is counted at the macroeconomic level.

Regarding second-hand vehicle expenditure, all of it is counted in the surveys, whereas at the macroeconomic level, it mainly corresponds to the margins of professionals involved in a transaction and does not take into account exchanges between individuals.

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. Expenditures 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 acquisition item accounts for less than half of the total (43%) ranging from 5% of the budget for the 60% of households with the lowest incomes (Q1-Q3) to nearly 8% for the 5<sup>th</sup> quintile. Conversely, the "use expenditure" item 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 linked to the weight of the fuel item for which the poorest households devote 1 point more to it in their budget than the wealthiest households.

The same phenomenon is observed for transport-related insurance, 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 for the use of their vehicles, in proportion to their consumption, more taxes than households belonging to the richest quintile.

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

## COST PRICE OF ROAD FREIGHT TRANSPORT



# 13%

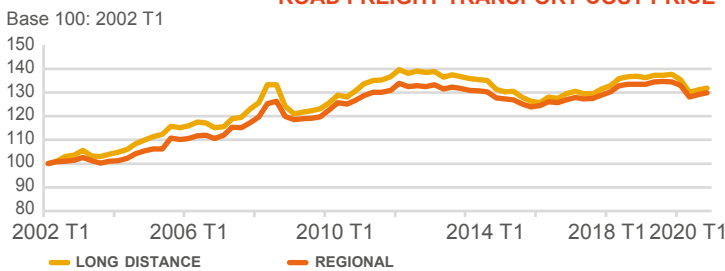
**Share of equipment ownership in the CNR index of long-distance road freight transport costs in 2020**

The synthetic indexes calculated by the National Road Committee (CNR) in 2020 indicate that the cost price of long-distance and regional road freight transport fell by 3.6% and 3.2% respectively. This development is linked to the sharp fall in the price of crude oil and therefore the cost of professional diesel, which weighs between 15 and 20% of the cost of road freight transport.

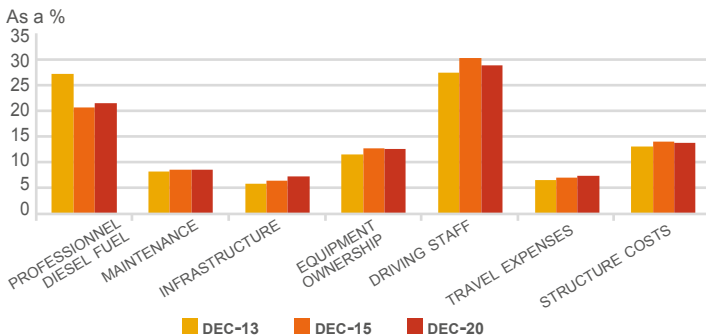
On the other hand, the CNR specifies that these synthetic indexes are constructed from sources that cannot measure the effects of a sudden crisis, such as that of covid-19, and that these changes are temporary and could be rectified later. Indeed, the CNR hypothesises that the

companies may have suffered additional costs of different kinds which cannot yet be objectively observed. These additional costs are of four types: additional cost of sanitary measures (purchase of masks and gel), payment of a bonus for drivers in activity during confinement, effect of the drop-in activity on fixed costs, increase in journeys at empty. By taking hypotheses on the intensity of these factors, the CNR estimates that a company suffering from all four factors would then record an inflation in the cost price of its vehicles, excluding diesel, of +6.8% in 2020. However, these assessments are not representative statistics. Subsequent surveys will provide a better understanding of the impact of the crisis on the cost.

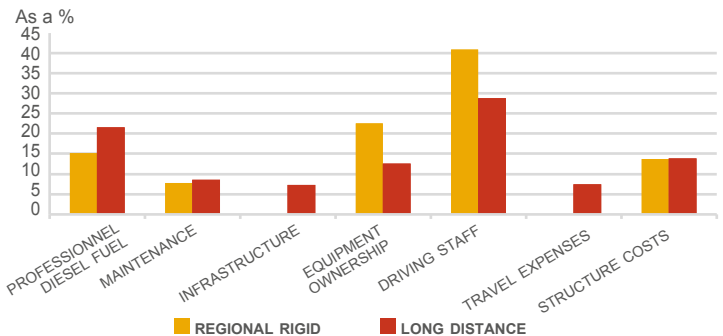
### ROAD FREIGHT TRANSPORT COST PRICE



### ROAD FREIGHT COST STRUCTURE FOR LONG DISTANCE



### ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2020



Source: CNR

The National Road Committee (CNR) publishes, among other things, two indexes reflecting the evolution of the cost of road freight transport carried out on behalf of third parties and relating to long distance or regional transport.

Long distance corresponds to national or international transport carried out by means of articulated sets up to 44 tonnes, the operating constraints of which make it impossible or uncertain for the driver to return daily to his home.

Regional transport, carried out using carrier vehicles with a total weight of between 3.5 and 19 tonnes, corresponds to transport within a region and neighbouring regions and whose operating conditions allow the driver to return daily to his home.

The cost structure resulting from the CNR's annual survey depends both on the evolution of each of the components, but also on the associated operating conditions (mileage travelled, number of hours worked). Thus, a position may see its weight in the structure vary differently from what the evolution of its unit cost may suggest. Here we are mainly interested in the evolution of the cost structure because it better reflects the reality experienced by carriers.

The CNR now takes into account, in the calculation of its indexes, the CICE since 2013, the year of its entry into force, in order to make them comparable

with the post-2019 period. The CICE is indeed transformed from January 1, 2019, into permanent reduction in employers' social security contributions.

In long-distance road freight transport, the largest item of expenditure is driving personnel, whose share has remained stable since 2013, at around 29%. The second item of expenditure, the ratio of professional diesel amounted to 27% of the cost price in 2013 before decreasing by 7 points until 2015, then increasing again to oscillate at approximately 24% the following three years. In 2020, the share of commercial diesel fell by 3 points to 21.5% of the total.

The share of equipment owned (road tractor and semi-trailer) has remained stable, at a level slightly above 12% since 2016, after two years of increase, following the rise in the price of new vehicles, linked to the entry in application of the EURO VI environmental standard on January 1, 2014 (approximately 10%) and the new mandatory safety equipment. The impact of these increases is diluted in the calculation of the cost of ownership by the gradual renewal of vehicles (approximately 1/6 of the fleet per year) and by the slight drop in price observed on semi-trailers. Furthermore, in 2020, interest rates remain at historically low levels. The emergence of new, more expensive engines will require appropriate financing support, so as not to stray too far from overall market costs.

The maintenance cost index, which includes tyres and vehicle repairs, has remained stable at 8.2% since 2016 and increased to 8.6% in 2020. Tyre prices have been on the rise between 2013 and 2015, before approaching 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 in 2020 (+0.3 point), to reach 7.4% of the total cost.

In regional transport, the costs related to driving personnel weigh more than in long-distance transport. They amount to 40.8% of the total in 2020. The weight of professional diesel comes second in the cost price of regional transport with 22.6%. Ownership of equipment, the third item of expenditure, amounted to 22.6% of costs in 2020. Lastly, repair maintenance costs stood at 7.7% of the total in 2020.

## CAR PRICE INDEXES

In 2020, consumer prices slowed for the second consecutive year (+0.5%, after +1.1%) with the fall in energy and transport services prices.

Within automobile expenditure, the prices of new automobiles slowed in 2020 to +0.4%, after +0.7% in 2019. On the other hand, the price index for spare parts, accessories and maintenance-repair of vehicles continued to increase in 2020, at +2.9%, after an increase of +2.7% in 2019.

This index groups together various components which evolve in a contrasting manner. The cost of maintenance-repair, which includes the value of the service (cost of labour and supplies), increased further in 2020 to +3.2%, i.e. an increase of 54% since 2005 (of which 60 % for labour), while the price index for spare parts and accessories slowed (+0.9% in 2020) and remained stable over the period 2005-2020 (+1%).

With the collapse in demand for petroleum products linked to the health crisis, the prices of petroleum products fell sharply and led to a drop in the prices of finished products, such as fuels, the prices of which fell by 11.9% in 2020.



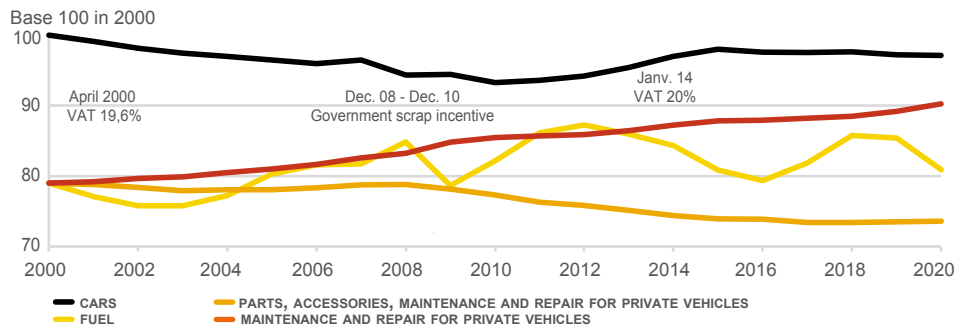
**-12%** Lower fuel prices in 2020

### ► 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
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%
2020	0.5%	0.4%	2.9%	0.9%	3.2%	-11.9%

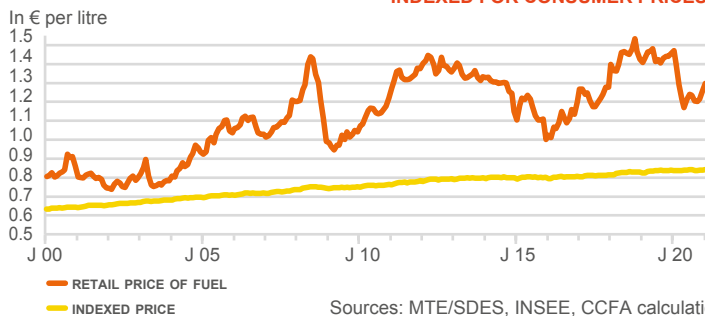
Sources: INSEE, CCFA calculations

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



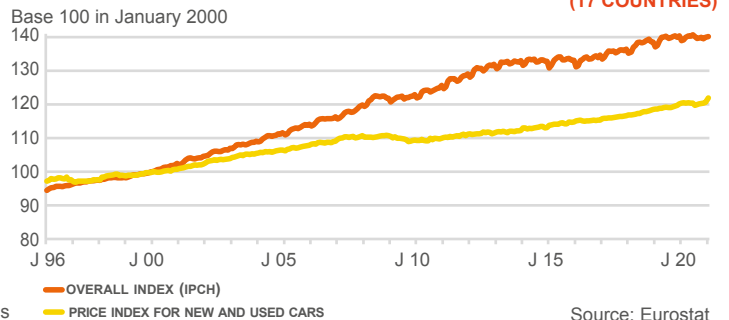
Source: INSEE

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



Sources: MTE/SDES, INSEE, CCFA calculations

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



Source: Eurostat

In 2020, the quality of the consumer price index was affected by the health crisis, which led to the suspension of price collection for several months of the year and the unavailability for sale of certain products impacting the structure of consumption.

The new car price index compares the prices of a range of cars of similar technical characteristics, so as not to take into account price increases resulting from improvements in quality or equipment, nor from the evolution of the sales structure. It takes into consideration the rebates offered periodically (excluding gentlemen's agreement), as well as the bonus/penalty system.

In the graph above, the prices of the main automotive-related items are expressed in real terms, i.e. corrected by the general consumer price index.

Over the period 1992-2010, the real price of new cars fell regularly, under the continuous effect of competition and occasional market support measures (bonus/penalty system and scrapping bonus since 2008). Nevertheless, the tightening of the ecological bonus/penalty scales, the implementation of new standards making pollution control systems more expensive and the addition of new elements intended to improve road safety have contributed to the growth in prices since 2011.

For the "parts, accessories, maintenance and repair services" item, the real price index has been growing since 2000, but it is "maintenance and repair services" that are driving the index up due to the rise in labor (labour cost, skills development, shortage of skilled labour). Conversely, the real price of parts and accessories tends to decline over a long period.

In the euro zone (19 countries), Eurostat calculates a price index for the purchase of new and used cars; the data between the different countries is harmonised. Since 1996, the evolution of this index, compared to that of the general price index, shows a phenomenon of strong pressure on prices linked, as in France, to the intensity of competition and the constraint on household purchasing power. In 2020, the general price index gained 38% compared to 2000, while that of new and used car purchases only increased by 20%.



## HOUSEHOLD CAR CONSUMPTION

# 8.6%

**Share of car-related expenditure in household consumption expenditure in 2020**

In 2020, the health crisis and the measures put in place to deal with it (confinements, curfews, closure of shops) led to a historic drop in household consumption expenditure (-7.1%) despite the increase in the purchasing power (+0.4% after +2.6% in 2019). This is holding up thanks to the resilience of gross disposable income (+1% in value against +3.4% in 2019) and the slowdown in consumer spending prices (+0.6%, after +0.8% in 2019), due to lower energy prices. This

slight increase in purchasing power, combined with the decline in consumption, led to an exceptional increase in the household savings rate, which rose from 15% in 2019 to 21.4% in 2020.

The decline in household consumption is particularly marked in services (transport, leisure, catering and accommodation), as well as for goods in the sectors affected by the restrictive measures (clothing, automotive).

Vehicle purchases, impacted by travel restrictions and the closure of car dealerships, fell by 16% in value, to 42 billion euros, or 30% of car spending. Car purchases (new and used), which represent 84% of the total, fell by

19%, with a more marked decline for new cars (-20%) than for used cars (-17%). Conversely, spending on cycles rose very sharply (+24%).

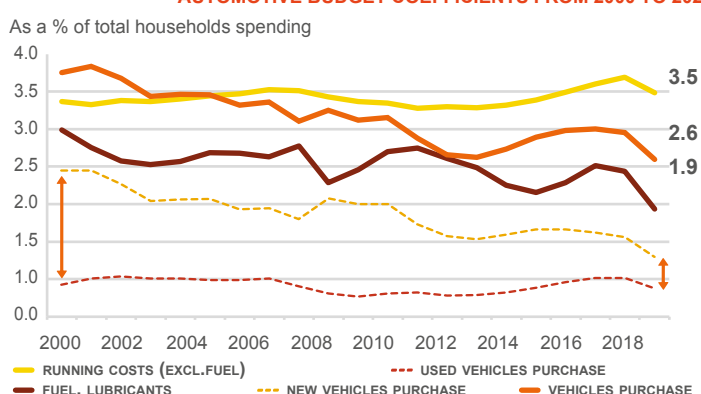
Expenditure on maintenance-repairs also fell (-6%), but to a lesser extent, thanks to the essential nature attributed to these services during the confinement allowing them to open, and due to an aging fleet. They now account for 30% of total automotive expenditure, compared to 23% in 2000. Finally, fuel purchases fell by 24%, to 31 billion euros, due to travel restrictions and lower fuel prices.

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

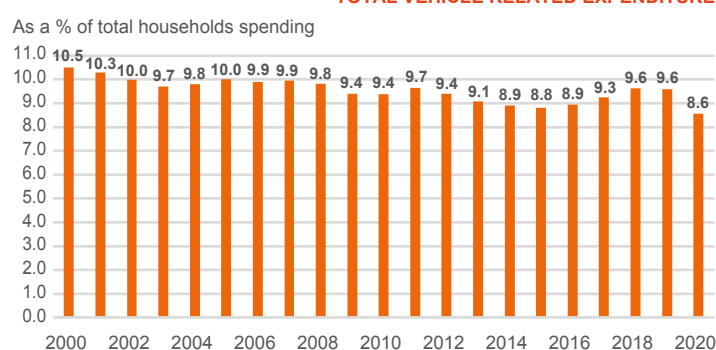
	Units	2000		2010		2019 (1)		2020 (1)		change 2020/2019
<b>VEHICLE PURCHASES</b>	€billion	37.5	3.8%	44.2	3.1%	49.3	3.0%	41.6	2.5%	-16%
New and second-hand cars (including tax on registration certificates)		33.7	3.4%	39.1	2.8%	43.1	2.6%	34.9	2.1%	-19.0%
of which new cars		24.5	2.4%	28.3	2.0%	26.1	1.6%	20.8	1.2%	-20.1%
of which used cars		9.2	0.9%	10.9	0.8%	17.0	1.0%	14.1	0.8%	-17.2%
Caravans, motorcycles, bicycles		3.8	0.4%	5.0	0.4%	6.2	0.4%	6.7	0.4%	+6.8%
<b>RUNNING COSTS</b>	€billion	63.5	6.4%	82.5	5.8%	102.5	6.1%	86.8	5.2%	-15.3%
Maintenance, repairs, spare parts and accessories		24.3	2.4%	34.2	2.4%	43.8	2.6%	41.0	2.5%	-6.2%
of which automotive equipment manufacturing		11.1	1.1%	16.9	1.2%	22.7	1.4%	21.4	1.3%	-5.9%
of which automotive service		9.2	0.9%	11.9	0.8%	15.3	0.9%	14.4	0.9%	-5.9%
Fuel and lubricants		29.9	3.0%	34.8	2.5%	40.8	2.4%	31.0	1.9%	-24.1%
<b>INSURANCE</b>	€billion	3.9	0.4%	6.1	0.4%	8.4	0.5%	8.7	0.5%	+4.0%
<b>TOTAL CONSUMER SPENDING ON CARS AND MOTORCYCLES</b>	€billion	105.0	10.5%	132.8	9.4%	160.2	9.6%	137.0	8.2%	-14.4%
Public transport	€billion	15.3	1.5%	24.1	1.7%	31.8	1.9%	15.0	0.9%	-52.7%
<b>TOTAL HOUSEHOLDS SPENDING</b>	€billion	1,000	100%	1,415	100%	1,672	100%	1,601	100%	-4.2%
Number of households (metropolitan France)	thousand	24,256		27,227		29,336		29,512		+0.6%
Spending on passenger cars per household	euros	4,327		4,876		5,460		4,644		-14.9%
Spending on passenger cars per vehicle-owning household	euros	5,388		5,840		6,424		5,463		-14.9%

(1) These data are provisional and may be readjusted for three years.  
Source: INSEE - Household consumer spending, 2020 - base 2014

### AUTOMOTIVE BUDGET COEFFICIENTS FROM 2000 TO 2020



### TOTAL VEHICLE RELATED EXPENDITURE



According to national accounts data, which are based on different concepts from those used in the Family Budget survey (see page 60), households spent 137 billion euros on their individual transport in 2020, i.e. a decline of 14% compared to 2019. Public transport services, for their part, fell by more than 50% to 15 billion euros.

The share of car consumption in national actual consumption, called the «car budget coefficient», thus fell to 8.2% in 2020, compared to 9.6% in 2019. Since the 2009 crisis, this coefficient has generally fluctuated around 9%, while it varied between 9% and 11% over the previous period

(1990-2009).

Prior to 2003, the leading item of automobile expenditure was vehicle purchases, which represented between 3.5% and 4.5% of actual household consumption. It now represents around 3% (2.6% in 2020 and 2.2% for cars alone) and comes in second place behind vehicle use expenses (excluding fuel). The downward trend in purchases of new vehicles weighs on this budget coefficient, with purchases of new cars now representing only 60% of car purchases, against 82% in 1990.

Within user expenditure, the budget coefficient for “vehicle maintenance – repair”, which has been rising since 2014, remains stable in 2020, thanks to the much less steep fall in this expenditure item compared to the other items. The amount of these expenditures amounts to 41 billion euros.

Finally, the weight of the “fuel” item has fluctuated a lot in recent years in line with the evolution of energy prices. In 2020, with the decline in prices and consumption in volume, the associated budget coefficient fell by 0.5 point, from 2.4% in 2019 to 1.9%. Fuel expenditure thus amounts to 31 billion euros.

## AUTOMOBILE FINANCING

In 2020, consumer credit was strongly impacted by the health crisis, despite interest rates still historically low. The cumulative production of new loans fell by 6% at the end of December, i.e. the largest drop recorded since the 2008 crisis. With now nearly 65% of new cars financed on credit by households, the decline in registrations has reflected in a sharp drop in the number of new car financing transactions declared by the ASF in 2020: -25% for allocated credit and -18% for rental formulas.

The share of car loans allocated in the financing of new car purchases by individuals continues to decrease in favour of rental formulas. Leasing has now become the dominant credit financing method (72% in 2020 compared to 14% in 2010), ahead of assigned car loans (27% in 2020 compared to 49% in 2010) and personal loans. Within rental, Rental with Option to Purchase (LOA) largely dominates (90% of financing by rental), while Rental Without Option to Purchase (LSOA) remains marginal for households.

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 on the rise (+28% between 2013 and 2019), despite the decline observed in 2020 (-12%). Rental formulas are also being developed for used cars. Since 2016, the number of funding applications has more than tripled according to ASF figures.

Credit financing of business equipment with new vehicles (passenger cars, light commercial vehicles and industrial vehicles) also suffered from the health crisis, but to a lesser extent, with a 10% drop in the number of financing files in 2020. Unlike households, companies favour LSOA, which represents 64% of rental formulas and in particular Long-Term Rental (95% of LSOA formulas). The LOA represents only 35% of new vehicle financing files.



**72%** Share of leasing with or without purchase option in credit financing of new cars purchased by households in France in 2020

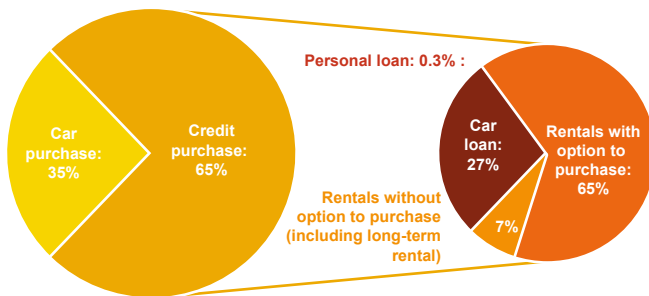
**INTEREST RATES OF NEW CONSUMER LOANS TO INDIVIDUALS (NOT INCLUDING OVERDRAFTS, ANNUAL INTEREST RATE)**



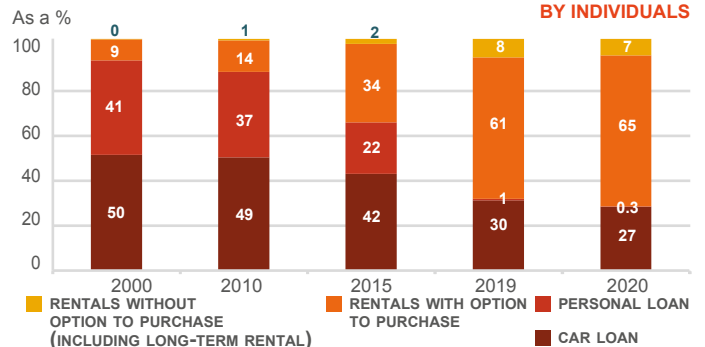
**TOTAL AMOUNTS OVER TWELVE MONTHS OF NEW CONSUMER LOANS TO INDIVIDUALS (EXCEPT OVERDRAFTS)**



**FINANCING THE PURCHASE OF A NEW CAR BY INDIVIDUALS IN 2020**



**CHANGES IN CREDIT FINANCING OF NEW CARS PURCHASED BY INDIVIDUALS**



Source: ASF, CCFA calculations

Car buyers, new or used, have recourse to financing if they cannot or do not want to buy cash.

Four funding options are available to them:

- Personal or bank loans granted by a bank or credit institution. The borrower is free to use his credit as he sees fit.
- Affected automobile credit or conventional credit; it is granted by financial companies, subsidiaries of manufacturers and importers, or by financial companies independent of manufacturers, but subsidiaries of financial or banking groups. It is used for a specific purchase.
- Rental with purchase option (LOA) also called leasing, rental with promise of sale or leasing; it is a consumer credit that allows you to have the disposal of a car against the payment of monthly instalments during the lease period, which can be up to eighty-four months, i.e. seven years; the

purchase option can be exercised during the lease or at its end.

- Leasing without purchase option (LSOA) combines financial leasing and long-term leasing. These are operations without the possibility for the tenant to become the owner at the end of the contract.

Results from various sources (professional associations, registration statistics, surveys, etc.) make it possible to estimate the use of credit by households buying a new car.

In 2020, the financing of new or used vehicles was strongly affected by the health crisis and the decline in registrations. However, this has not changed the distribution of private car financing methods by households or businesses. Affected car loans, already in sharp decline for more than 10 years, suffered more from the crisis than rental formulas.

For new cars purchased by households, the number of affected loans fell by 26%, while the contraction in LOA operations was less severe (-12%). For companies, the decline is respectively -47% for assigned credits and -14% for LOA. The LSOA, the dominant mode of financing for businesses, held up better with a drop of only 5%.

## TRADE AND REPAIR OF AUTOMOBILES AND MOTORCYCLES

Motor trade turnover amounted to 87 billion euros in 2020, a decrease of 12.3% compared to the record level of 2019. However, it remains much higher than during the last crisis in 2013, where it had fallen to 74 billion euros. The sector, considered non-essential, was particularly affected by the closure of factories and concessions during the first confinement.

Vehicle maintenance and repair, which had been growing slightly since 2018 (+3.4% in 2019, after +4.8% in 2018) fell by 5.7% and fell back to its 2016 level. Although repair services remained open all year, activity was impacted by the drop in road traffic linked to travel restrictions, thus reducing visits to workshops, from 2.7 on average in 2019 to 1.6 in 2020 (Kantar TNS Car Park survey).

Turnover in the automotive equipment retail trade fell by 5.8% in 2020. This decline has been observed since 2017 (-11% since that date), but it was accentuated in 2020 by the reduction in the frequency of accidents

linked to the drop in road traffic.

Finally, the fuel retail trade fell by 25.9%, after an increase of more than 7% in 2018, and stood at 13 billion euros in 2020. This decline is explained both by a volume effect linked to traffic restrictions, but also by the fall effect in the price of a barrel of Brent.

According to data from INSEE-Esane, the operating margin rate (gross operating surplus / value added at factor cost) of motor vehicle trade rose sharply between 2015 and 2018, from 15 to 22%. The investment rate (tangible investment / value added excluding tax) rose from 11% to 21%. In motor vehicle maintenance and repair, these two indicators remained stable at around 19% and 12% in 2018.

Since the 1990s, automobile distribution has experienced a continuous movement of concentration, linked to increased geographical coverage and the development of multi-branding. In 2020, the 100

largest automobile distribution groups sold more than 1.1 million new vehicles, or 68% of volumes, up 10 points compared to 2019. They achieved a turnover of 44, 6 billion euros (62% of total automotive trade), down "only" 6% compared to 2019. These distributors withstood the crisis particularly well thanks to their various activities (maintenance-repair, spare parts) and their presence on the second-hand market. The 10 largest distributors alone account for 21% of volumes sold (compared to 17% in 2019) and 23% of automotive sales, with 9 out of 10 groups now posting sales of more than 1 billion euros, compared to just one. in 2015.

### ► LIGHT VEHICLE SALES NETWORKS IN FRANCE ON JANUARY 1, 2021

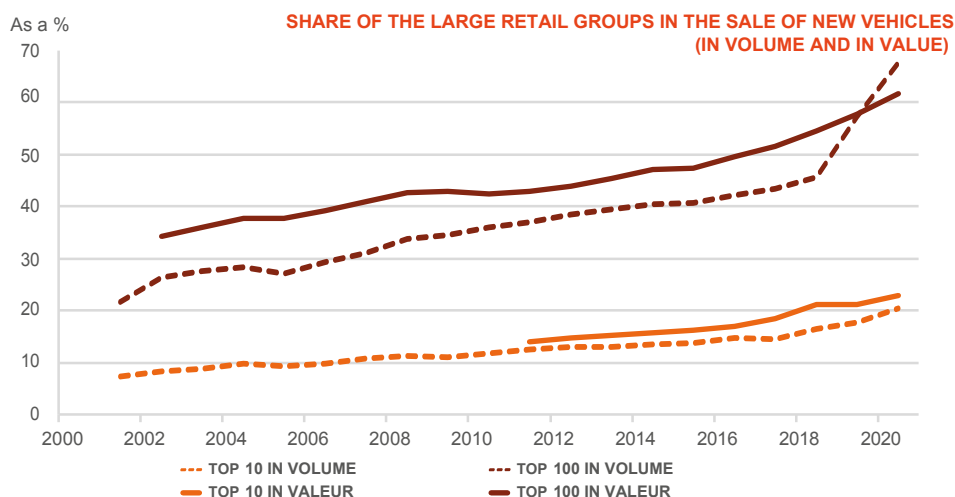
Brands	Primary dealership in 2021
Renault	619
Peugeot	409
Citroën	399
Opel	232
DS	164
Volkswagen	326
Toyota	265
Ford	238
Kia	217
Suzuki	209
Nissan	203
Fiat	191
Hyundai	196
Mercedes-Benz	169
BMW	162
Other Japanese brands	431
Other Korean brands	70
Other brands	1,567
<b>TOTAL</b>	<b>6,067</b>

Source: Argus

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

Activity	2010	2013	2015	2018	2019 (sd)	2020 (p)	Change 2020/2019
Motor vehicle sales	76.9	73.7	80.8	94.8	98.7	86.6	-12.3%
Automotive maintenance and repairs	20.5	20.1	20.0	21.3	22.1	20.8	-5.7%
Retail sales of automotive equipment	6.5	7.8	7.4	7.7	7.6	7.2	-5.8%
Motorcycle sales and repairs	4.0	3.6	3.6	4.2	4.4	4.4	-0.9%
Retail fuel sales	15.6	18.8	16.2	18.2	17.5	13.0	-25.9%
<b>TOTAL</b>	<b>123.5</b>	<b>124.1</b>	<b>128.0</b>	<b>146.2</b>	<b>150.4</b>	<b>132.0</b>	<b>-12.3%</b>

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



To guarantee a high level of quality in sales and after-sales, the distribution networks of automotive brands are based on the selection of distributors and repairers capable of applying the requirements of the latter and of customer service. The cooperation between the manufacturers, their distributors and their authorised repairers makes it possible to ensure, in addition to maintenance and repair, the warranty service, the safety of users, the preservation of the environment, the availability of spare parts and information on technical developments.

As of January 1, 2021, the primary network made up of the subsidiaries of manufacturers and dealers includes 6,067 points of sale, out of a total of 13,536 points of sale in France.

In terms of car repair, there are also independent networks (in 2017: 14,500 MRA - Automobile Repair Mechanics, 1,270 auto centers and 860 quick repair centers). According to 2016 data, manufacturer networks (authorised dealership repairers and agents) represent 35% of the repair market share, MRAs, 32%, auto centres, 15%, tyre repairers, 8% and quick repairers, 6%.

**87**  
billion  
euros

Turnover including VAT  
of the motor vehicle  
trade in France in 2020.

# CIRCULAR ECONOMY

According to ADEME, the circular economy can be defined as an economic system of exchange and production which, at all stages of the life cycle of products (goods and services), aims to increase the efficiency of the use resources and reduce environmental impact.

The circular economy of the automobile concerns the vehicle (passenger cars, vans and now trucks) and its 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. More than 1.6 million ELVs were taken care of by the approved sector in 2019, compared to 1.1 million in 2017. The bonus systems for conversion or scrapping lead to better care of vehicles by the centers approved treatment.

ADEME measures the rate of reuse and recovery of ELVs. This ratio is the sum of the rate of reuse

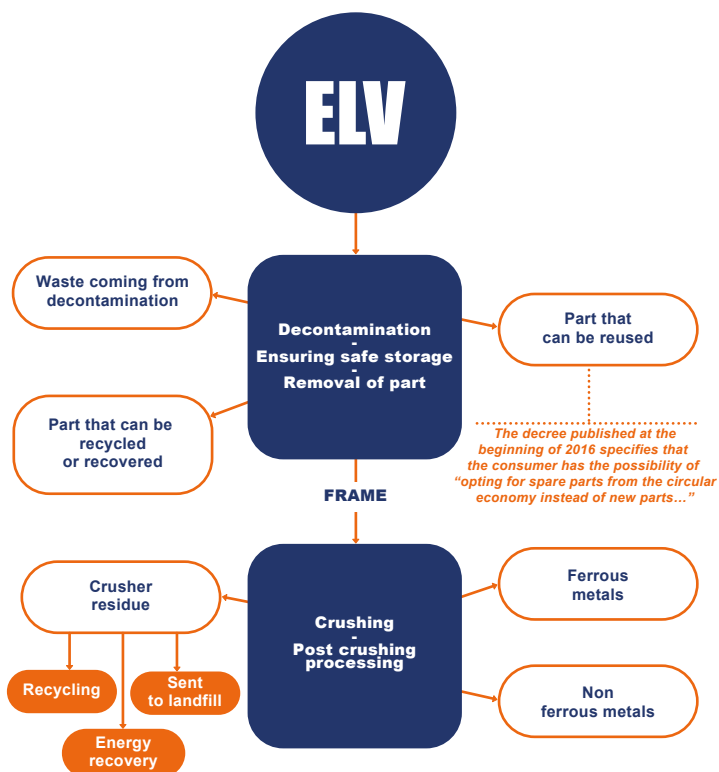
and recycling and that of energy recovery. This rate has increased by 13 points since 2010.



More than  
**1.6**  
million

Number of ELVs  
supported in 2019

## ► SIMPLIFIED CHART OF PROCESSING OF AN ELV



Source: ADEME

In France, more than 1.6 million end-of-life vehicles were taken care of by the sector in 2019 and treated by around 1,635 approved establishments: ELV centres. Their average age was 19.2 years in 2019. According to ADEME, the average mass of a passenger car is just over one tonne in 2019 (1,118 kg). It is growing slowly but steadily (it stood at 974 kg in 2010).

The resale of used spare parts contributes to the achievement of recycling rates and contributes to the economic balance of the automotive industry. The second-hand parts market now represents 4 to 5% of the repair parts market.

The level of collection and processing of ELVs and automotive components is linked to the situation of the market for new vehicles, the economic context, the establishment over the given period of a support system for the withdrawal of old vehicles from the fleet and to technical progress reducing the frequency of replacement of components.

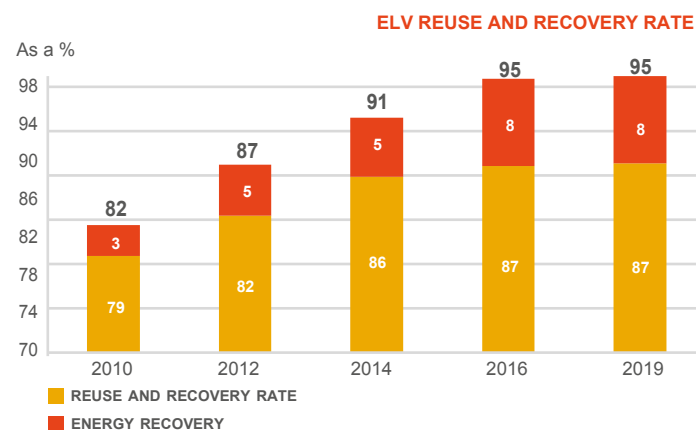
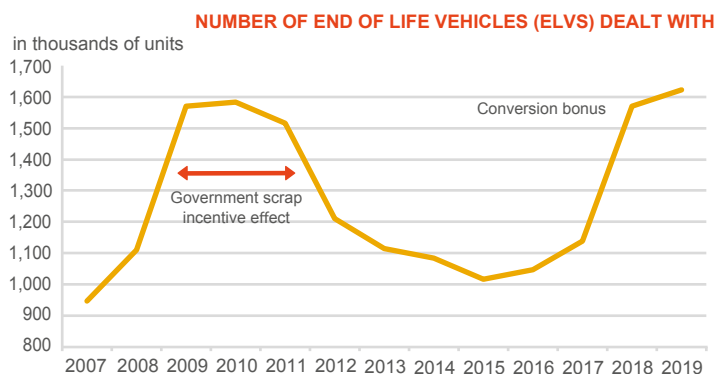
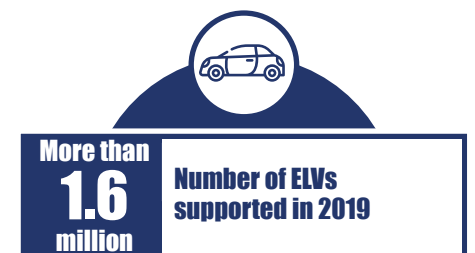
The processing of end-of-life vehicles must comply with performance levels defined by the European directive of September 18, 2000. Since 2015, the objective has been 95% reuse and recovery, including 85% recycling and reuse. Some sites already exceed this level.

In 2019, the material breakdown of an ELV shows in particular: 75% metals (ferrous metals: 70%, non-ferrous metals: 4% and electrical harnesses: 1%), 12% plastics, 3% glass and 2% of textiles. 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.

Certain consumable parts (oils, batteries, etc.) of the vehicles are also recycled during the life of the vehicle. In addition, car manufacturers plan to use an increasing share of recycled materials, including certain plastics such as polypropylene.

The maintenance of vehicles in the fleet generates an average of more than 200,000 tonnes of used engine oil each year. The recycling of these oils, which are collected by approved collectors, absolutely requires that they are never mixed with other liquids (water, cooling liquids, solvents, etc.). The oils are then either regenerated when possible (75% of volumes) or recovered for energy.

In 2019, the collection of automotive accumulators (battery intended to power a vehicle starting, lighting or ignition system) decreased by 7.7% compared to 2018, with 153,570 tonnes collected. The recycling efficiency of lead-acid batteries reached 86%.



The collection of the automotive tyre sector (light vehicles and heavy goods vehicles) amounted to 478,000 tonnes in 2019, an increase of 4.5% compared to 2018. The collection rate amounted to 93.7% (i.e. +1.3 point compared to 2018). The recovery rate for car tyres has now increased to 100%. In 2019, around 46% of these tyres were intended for energy recovery (substitute fuel in cement plants, for example), 37.4% for material recovery, half of which for granulation (sports fields, street furniture), 16.1% to reuse (12.3% for second-hand resale and 3.7% for retreading) and 0.8% to public works.

Retreading is the technique of giving a used tyre a new tread. In 2019, the automotive tyre retreading market fell by 2%, including a 4% decline for light vehicles. These retreads are increasingly facing competition from low-cost new tyres from overseas. For trucks however, nominative retreading (the tyre belongs to you and you have it retreaded) is mainly used and is not taken into account in these figures.

## CIRCULAR ECONOMY

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

The decree of May 30, 2016, specifies that the parts resulting from the circular economy are the components and elements marketed by the approved ELV centres and the components and elements reconditioned by the manufacturer (constructor for example), according to precise specifications, either by the manufacturer or in a controlled workshop, under the name standard exchange (decree of October 4, 1978).

Vehicles are marketed by producers (manufacturers and importers) via a network of distributors. At the end of its life, the vehicle must be returned to an approved ELV centre so that it can be treated according to precise specifications allowing compliance with health and environmental rules. This is responsible for cleaning it up (removal of fluids - fuel oils, brake fluid, air conditioning, etc. -, batteries and securing pyrotechnic devices) and dismantling parts for second-hand resale or recycling, then sends the carcass obtained to one of the

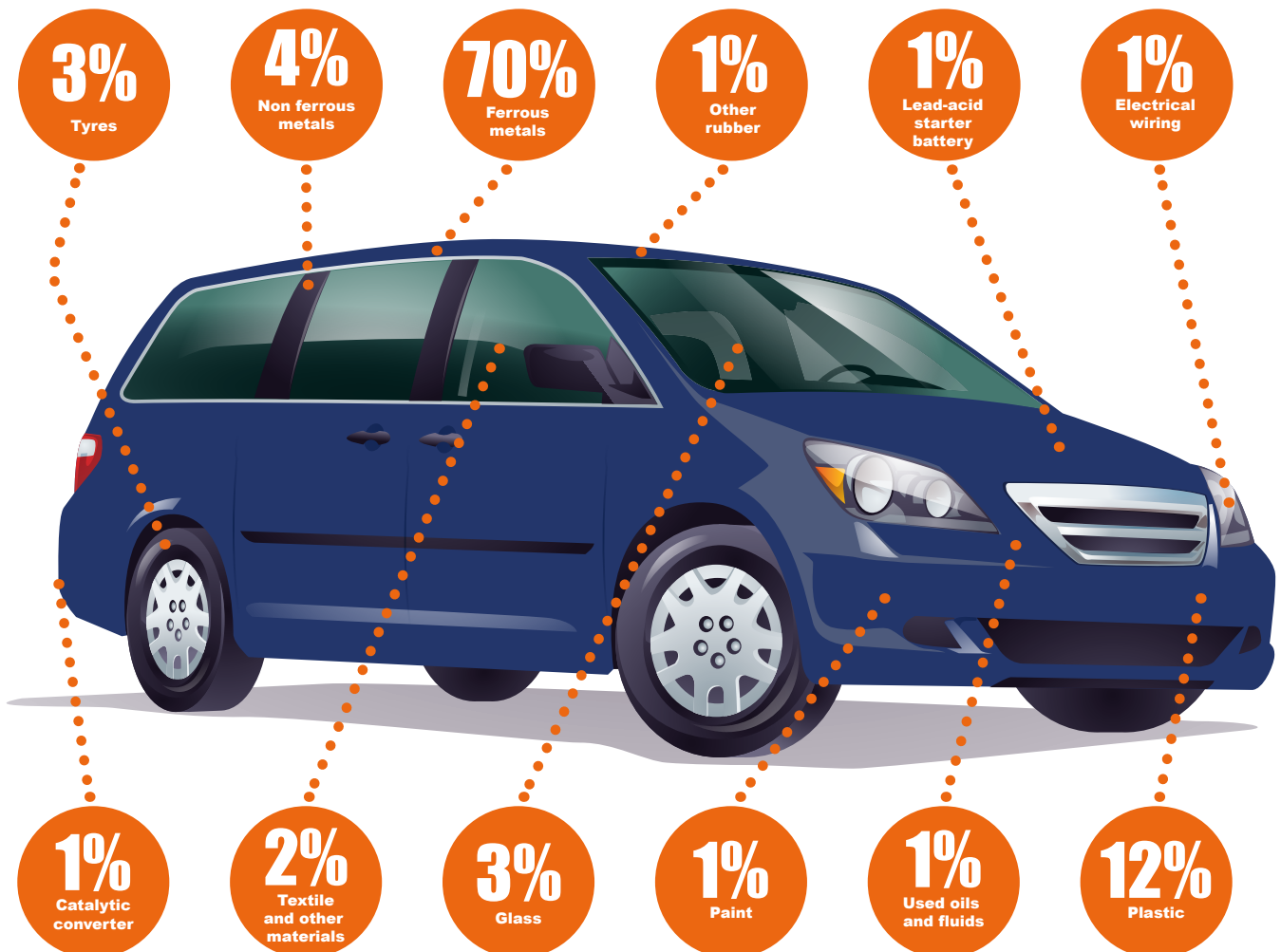
59 approved shredders (2019 data, ADEME). These grind the vehicle to separate the different materials that compose it. The latter, when they are sorted, can be used again to manufacture other products (recycling). If the components are neither reused nor recycled, they can be recovered for energy (heat, cogeneration).



**95%** Automotive reuse and recovery rate in 2019



### ► COMPOSITION OF AN END OF LIFE VEHICLE IN 2019



Source: ADEME

## AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT



# +42%

**Increase in total purchases of the automotive branch between 2013 and 2019**

The production of the automotive branch amounted to 69 billion euros in 2019, a decrease of 1% compared to the previous year and an increase of 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 accounted for as 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 2019, they fell by 2% compared to the previous year for an amount of 55 billion euros, but have increased by 42% since 2013.

Since 2010, VA has fluctuated around €13 billion, i.e. a level close to that observed in the mid-2000s. It increased by 3% in 2019.

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 in this period when European markets in 2019 are approaching their pre-crisis level. The margin rate (ratio between gross operating surplus and VA) has fluctuated around 43% since 2015 and reached 44% in 2019.

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

		2000	2005	2010	2015	2018	2019 (1)
<b>PURCHASES FROM OTHER INDUSTRIES</b>	%	71.7	76.3	75.6	72.4	71.6	71.1
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	18.6	19.0	19.2
manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	3.3	3.5	3.5
manufacture of electrical equipment	%	3.1	3.4	3.5	3.4	3.4	3.3
manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	11.8	12.1	12.4
Other industries (including coking and refining)	%	35.8	39.8	39.7	37.4	36.3	35.9
metallurgy and metalworking	%	16.0	16.7	17.5	16.2	15.9	15.5
manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	9.6	9.2	8.8
other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.3	4.2	4.4
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	1.7	1.7
wood, paper and printing industries	%	1.4	1.4	1.6	1.4	1.3	1.3
Extraction, energy and water industries	%	1.6	1.5	2.0	2.0	1.9	2.0
electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	1.2	1.2	1.3
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	1.2	1.0
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	0.9	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	7.5	7.4
legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.2	2.2	2.1
scientific research and development	%	0.0	0.0	0.0	0.0	0.0	0.0
other specialised, scientific and technical activities	%	2.8	2.7	2.7	3.0	3.0	2.9
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	14.0	13.7
<b>PURCHASES WITHIN THE INDUSTRY</b>	%	28.3	23.7	24.4	27.6	28.4	28.9
Total industry production at base prices	Current € billion	70.3	75.6	58.3	56.5	69.5	69.0
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0	100.0
Total purchases (2)	Current € billion	52.8	58.2	43.9	43.2	56.1	55.3
As a % of production at base prices	%	75.1	77.0	75.4	76.6	80.8	80.1
Value added by the industry	Current € billion	17.5	17.4	14.4	13.2	13.3	13.7
As a % of production at base prices	%	24.9	23.0	24.6	23.4	19.2	19.9
Gross operating surplus (GOS)	Current € billion	-	-	-	5.7	5.5	6.0
As a % of value added (margin rate)	%	-	-	-	43.0	40.9	43.7

(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)

29% of total purchases by the automotive branch, which represent more than three quarters of its production, are made by the branch itself, compared to 23% in 2012, and the remaining 71% by other branches.

Purchases from “other industries” amount to 36% of all purchases, of which metallurgy and

the manufacture of metal products remain the leading suppliers (16% of total purchases, down slightly but steadily).

Purchases from machinery and equipment manufacturers (excluding electrical, electronic and IT products) account for 12% of total automotive industry purchases.

In the 2014 base, where research and development expenditure is accounted for in GFCF, the automotive industry devotes 14% of its purchases to the tertiary sector, against 13% in 2010. Part of these purchases is intended in particular for business support activities (whose ratio fluctuates around 7.5%).

## OEMS AND INDUSTRIAL SUPPLIERS TO THE AUTOMOTIVE INDUSTRY

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

The evolution of automotive construction involves the sector of equipment manufacturers and other suppliers, such as plastics processing, industrial rubber, foundry, industrial metal services, etc.

In the 2018-2022 Automotive Sector Strategic Contract, the number of employees in the entire sector is estimated at 400,000 people and the turnover at 155 billion euros.

According to Eurostat, the automotive industry and the French equipment industry respectively rank second and third in Europe in terms of turnover. The automotive sector has experienced an exceptional period in recent years. According to the study by the Metallurgy Observatory (impacts of changes in automobile construction on employment and skills), the sector lost 30% of its jobs between 2010 and 2019, affecting subcontractors in contrasting ways. The energy transition will result in major changes to the detriment, for example, of the metallurgy sectors, and to the benefit of the IT and electronics sectors.

### ► 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 study by the Direction Générale des Entreprises, published in 2015, estimates that the automotive industrial sector (excluding research and development and other services) employed in 2012, 441,000 «full-time equivalent» employees, including 211,000 in the core and 230,000 in the periphery (see table above). It also estimated the turnover of the entire sector at more than 140 billion euros (155 billion in 2018) and its added value at more than 20 billion euros. Moreover, the export rate of the sector is higher than that of the manufacturing industry (43% against 34%). Within the automotive sector, this ratio is higher for the core (56%) than for the periphery (35%).

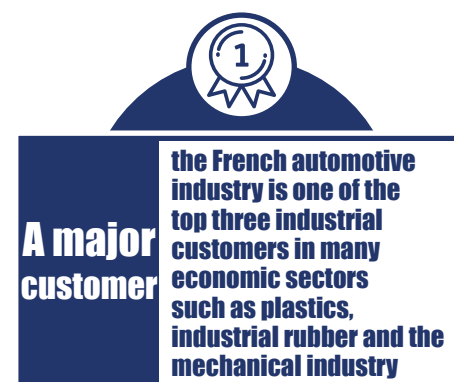
According to data from the FIEV (Federation of Equipment Industries for Vehicles), the workforce of equipment manufacturers amounted to 62,053 employees at the end of 2020, a drop of 12% compared to 2019 (and 27% compared to 2011), for a turnover of 13 billion euros (55% for export), down 29% compared to 2019. The equipment manufacturers target two types of market: the original equipment, whose equipment is intended

for assembly lines, and that of aftermarket or spare parts. The share of turnover generated from original equipment in France or for export represents just over 80% of the total.

The outsourcing process has resulted in even greater recourse to suppliers, whose services represent a high and growing share of the cost price of manufacturing a vehicle (around 85% according to the FIEV).

In recent years, among other automotive suppliers, nearly one-fifth of plastics and electronic equipment business has been automotive. In addition, 10% of the domestic mechanical engineering market was intended for the automotive industry. For forging and foundry, this share was around 50%. This ratio was 70% in the polymers and rubbers sector. In addition, according to the Interim Observatory, the automotive industry (excluding suppliers) represents on average 4.5% of job volumes (in full-time equivalent). In 2020, this figure fell to 2.9%.

The French automotive industry still relies on its



## EMPLOYMENT

In a broad sense, 2.2 million people had their jobs provided by the car in 2020, i.e. more than 8% of the employed working population.

Strictly speaking, the automotive industry employed 215,000 people, i.e. around 7% of salaried employment in the whole of industry (including extractive industries, food industries and industrial companies), which has been falling steadily since years.

After the 2009 crisis, the lack of competitiveness

continued to weigh on automotive industrial activities, including those upstream. However, it eased off with the rise of the market. Regarding use, the businesses are by nature less sensitive to it, through their links with the vehicle fleet, which continues to progress; nevertheless, the number of jobs fell slightly with the crisis, but in recent years a plateau seems to have been reached. These changes already include the first impacts of the ecological and digital transition, which will modify professions and skills (see page 68). In 2020, the health crisis weighed on activity, but its

effects on employment were limited by the support mechanisms put in place by the government in the various automotive-related sectors.

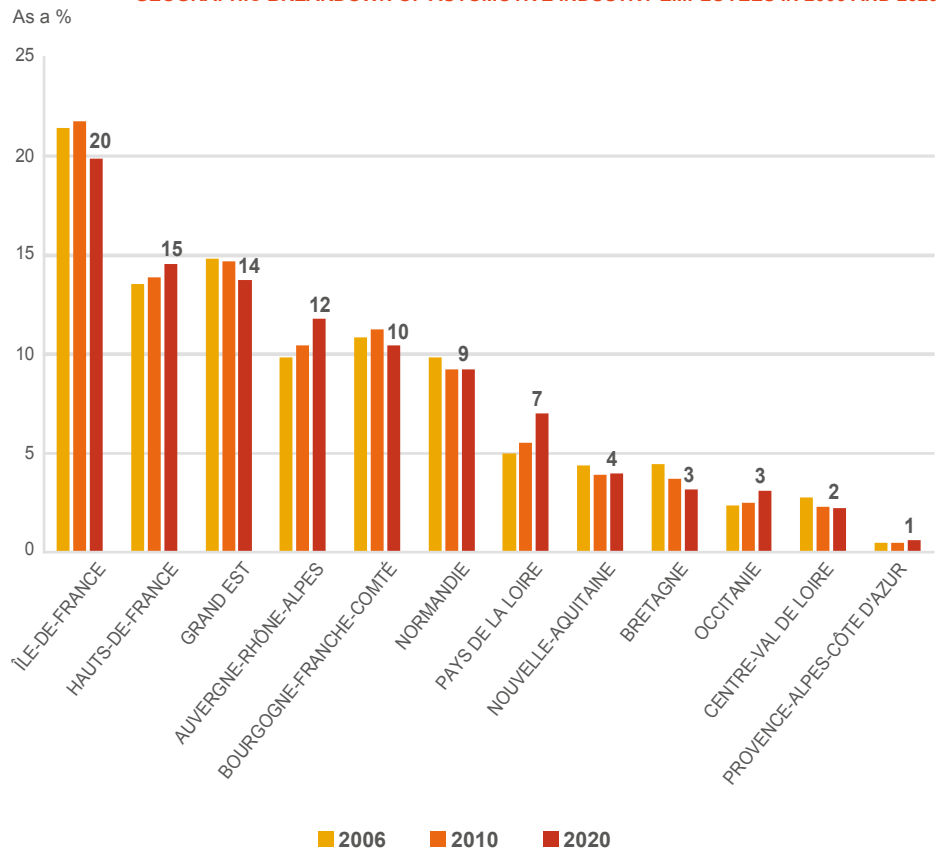
# 8%

**Share of the working population employed in France linked to the automotive sector (direct, indirect and road transport-related jobs)**

### ► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2020 (IN THOUSANDS OF PEOPLE)

	2020
Production operations	431
Raw materials and services	215
Manufacturing and energy sector	136
Services	78
<b>Automotive industry</b>	<b>216</b>
Automotive manufacturing	108
Equipments, accessories	86
Bodywork, trailers, caravans	22
<b>Cars use</b>	<b>546</b>
Sales, repairs, automotive equipment sales, vehicle inspections, short-term rentals, breakers and recycling	420
Insurance, experts, financing, long-term rental, etc.	90
Others (fuel retailing, self-employed, etc.)	28
Motor sport, media, publishing, other	8
<b>Transports</b>	<b>1,212</b>
Road transport (passengers and freight, outsourced and in-house), related services	1,061
Police, health, education, non-commercial administration	31
Road building and maintenance	120
<b>Total jobs related to the automotive industry</b>	<b>2,188</b>

### GEOGRAPHIC BREAKDOWN OF AUTOMOTIVE INDUSTRY EMPLOYEES IN 2006 AND 2020



Sources: CCFa, DGE, INSEE, SDES, FNTF, URF, CNPA

Source: ACOSS

The automotive industry, one of the main contributors to industrial production in France, generated around 430,000 jobs, through its production and its purchases from other branches (source ESANE). It should be recalled that, from now on, the workforce linked to the automotive industry is excluding temporary workers, the latter now being counted in purchases at the service level. The number of temporary workers concerned in full-time job equivalent (FTE) amounted on average to around 21,000 people between 2011 and 2015, which corresponded to years of low production in France. However, this figure can reach 35,000 people when production is at a high level (DARES source). In addition, following the change in nomenclature (see pages 88-89), the workforce of automotive suppliers now includes those from manufacturers of automotive seats and those of electrical equipment for motors and

vehicles, which previously figured in purchases at the level of manufacturing and energy industry.

The use of the automobile concerned 546,000 jobs, which are linked in particular to the sectors of services linked to vehicles (sale, repair, trade in automobile equipment, rental, etc.), fuels and recycling (oils, demolition, etc.). These figures correspond both to employees, but also to individual entrepreneurs (or self-employed).

Finally, road transport (passengers and goods) and their infrastructure employed around 1.2 million people thanks to the maintenance of urban public transport, taxis and VTC, but also essential road transport of goods even in times of health crisis. On the infrastructure side, the good performance of orders

from public authorities and the support mechanisms have maintained activity and employment.

According to ACOSS data, Île-de-France represents 20% of salaried employees in the automotive industry (manufacturers, equipment manufacturers and bodybuilders) in 2020. The other main regions of the automotive industry are Hauts-de-France (15%), which passed in front of the Grand Est (14%), Auvergne-Rhône-Alpes (12%), passing in front of Bourgogne-Franche-Comté (10%), followed by Normandy (9%), Pays de la Loire (7%). This geographical distribution is reflected in the figures on the employment of equipment manufacturers in France in 2020, published by the FIEV.



# THE FRENCH AUTOMOTIVE INDUSTRY

→ ANALYSIS & STATISTICS  
2021 EDITION



**5.3**  
million  
vehicles

Produced by French  
manufacturers  
worldwide



**79%**  
of  
vehicles

Produced by French  
manufacturers are  
sold abroad



**€6.9**  
billion

French automotive  
industry research  
and development  
budget in 2019



**€41**  
billion

French exports of  
industrial automotive  
products



**85%**

Share of domestic  
travel in France  
using passenger  
cars



**86%**

Share of domestic  
freight transport in  
France by road





## REGISTRATIONS

► **NEW PASSENGER CAR REGISTRATIONS BY GROUP IN THE EUROPEAN UNION (1) + EFTA (2) + UNITED KINGDOM**  
(IN THOUSANDS OF UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2005 (3)	2010	2015	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	2,111	1,849	1,480	1,472	1,886	2,499	2,467	1,718
	13.6%	13.4%	10.4%	9.7%	12.1%	16.0%	15.6%	14.4%
Renault group	1,635	1,416	1,350	1,516	1,612	1,621	1,647	1,218
	10.5%	10.2%	9.5%	10.0%	10.3%	10.4%	10.4%	10.2%
FCA group (Stellantis from 17/01/2021)	1,085	1,080	871	993	1,044	1,017	940	697
	7.0%	7.8%	6.1%	6.6%	6.7%	6.5%	6.0%	5.8%
Ford group	1,269	1,128	1,031	1,049	1,043	1,009	993	683
	8.2%	8.2%	7.3%	6.9%	6.7%	6.5%	6.3%	5.7%
General Motors	1,590	1,196	943	994	600	4	3	0
	10.2%	8.6%	6.6%	6.6%	3.8%	0.0%	0.0%	0.0%
Volkswagen group	3,041	2,984	3,516	3,641	3,712	3,726	3,857	3,036
	19.5%	21.6%	24.8%	24.1%	23.8%	23.9%	24.4%	25.4%
Daimler group	830	676	839	954	1,011	983	1,030	776
	5.3%	4.9%	5.9%	6.3%	6.5%	6.3%	6.5%	6.5%
BMW group	772	753	936	1,032	1,043	1,032	1,047	847
	5.0%	5.4%	6.6%	6.8%	6.7%	6.6%	6.6%	7.1%
Nissan	361	407	560	561	575	497	395	288
	2.3%	2.9%	3.9%	3.7%	3.7%	3.2%	2.5%	2.4%
Toyota-Lexus-Daihatsu	852	629	603	651	730	758	796	692
	5.5%	4.5%	4.3%	4.3%	4.7%	4.9%	5.0%	5.8%
Other Japanese brands	911	718	695	754	766	800	819	524
	5.8%	5.2%	4.9%	5.0%	4.9%	5.1%	5.2%	4.4%
Hyundai-Kia	569	614	854	937	985	1,033	1,061	841
	3.7%	4.4%	6.0%	6.2%	6.3%	6.6%	6.7%	7.0%
Volvo	249	231	285	290	301	322	341	297
	1.6%	1.7%	2.0%	1.9%	1.9%	2.1%	2.2%	2.5%
Tata group	128	100	179	233	237	236	224	161
	0.8%	0.7%	1.3%	1.5%	1.5%	1.5%	1.4%	1.3%
Other brands (including MG-Rover, Saab)	168	53	46	41	65	71	163	160
	1.1%	0.4%	0.3%	0.3%	0.4%	0.5%	1.0%	1.3%
<b>TOTAL EU + EFTA + UK</b>	<b>15,572</b>	<b>13,832</b>	<b>14,189</b>	<b>15,118</b>	<b>15,610</b>	<b>15,607</b>	<b>15,782</b>	<b>11,940</b>
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		<b>-5.0%</b>	<b>9.3%</b>	<b>6.7%</b>	<b>3.4%</b>	<b>10.0%</b>	<b>4.4%</b>	<b>-23.5%</b>

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

	2005 (3)	2010	2015	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	389	344	354	380	461	533	557	459
	18.1%	21.9%	19.5%	18.9%	22.1%	24.7%	25.1%	25.3%
Renault group	331	266	299	328	338	349	362	275
	15.4%	17.0%	16.5%	16.3%	16.2%	16.2%	16.3%	15.1%
FCA group (Stellantis from 17/01/2021)	284	233	229	270	265	266	206	168
	13.2%	14.9%	12.7%	13.4%	12.7%	12.3%	9.3%	9.2%
Ford group	235	171	268	319	332	355	351	298
	10.9%	10.9%	14.8%	15.8%	15.9%	16.5%	15.8%	16.4%
General Motors	153	78	104	106	58	0	0	0.2
	7.1%	5.0%	5.7%	5.3%	2.8%	0.0%	0.0%	0.0%
Volkswagen group	212	185	218	243	251	267	271	218
	9.9%	11.8%	12.0%	12.1%	12.0%	12.4%	12.2%	12.0%
Daimler group	166	140	172	186	198	201	222	199
	7.7%	8.9%	9.5%	9.2%	9.5%	9.3%	10.0%	10.9%
Nissan	103	43	50	66	68	62	57	37
	4.8%	2.7%	2.7%	3.3%	3.3%	2.9%	2.6%	2.1%
Toyota-Lexus-Daihatsu	65	39	41	40	52	56	55	56
	3.0%	2.5%	2.3%	2.0%	2.5%	2.6%	2.5%	3.1%
Other Japanese brands	81	38	37	41	40	40	43	29
	3.8%	2.4%	2.0%	2.1%	1.9%	1.9%	1.9%	1.6%
Hyundai-Kia	52	6	4	7	6	5	4	2
	2.4%	0.4%	0.2%	0.4%	0.3%	0.2%	0.2%	0.1%
Other brands (including MG-Rover, Saab)	78	27	35	26	20	24	89	77
	3.6%	1.7%	1.9%	1.3%	0.9%	1.1%	4.0%	4.2%
<b>TOTAL EU + EFTA + UK</b>	<b>2,149</b>	<b>1,569</b>	<b>1,813</b>	<b>2,011</b>	<b>2,089</b>	<b>2,157</b>	<b>2,218</b>	<b>1,819</b>
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Year-on-year change</b>		<b>8.8%</b>	<b>-9.8%</b>	<b>10.9%</b>	<b>3.9%</b>	<b>3.3%</b>	<b>2.8%</b>	<b>-18.0%</b>

(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 + Maserati + Chrysler + Jeep + Dodge. Iveco which is part of the CNH group was included in the group before 2019.

Ford group = Ford Europe + Ford USA + others Ford

General Motors = Opel/Vauxhall (until July 31, 2017) + GM Daewoo + Cadillac + Chevrolet + GMC.

Volkswagen group = Volkswagen + Audi + Porsche + Seat + Skoda + Bentley + Lamborghini + Bugatti + MAN + Scania

Daimler group = Mercedes-Benz + smart + Fuso.

BMW group = BMW + Mini + Rolls-Royce

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

Tata group = Jaguar + Land-Rover + Tata

The scope of the groups reflects their situation as at 01/01/2021.



## REGISTRATIONS

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

	2000	2005	2010	2015	2017	2018	2019	2020
Germany	3,378,343	3,318,259	2,916,259	3,206,042	3,441,261	3,435,778	3,607,258	2,917,678
Austria	309,427	307,915	328,563	308,555	353,320	341,068	329,363	248,740
Belgium	515,204	480,088	547,340	501,066	546,558	549,632	550,003	431,491
Denmark	112,688	146,881	153,583	206,999	221,592	218,358	225,410	198,162
Spain	1,381,515	1,528,877	982,015	1,034,232	1,234,932	1,321,437	1,258,251	851,210
Finland	134,646	147,949	107,346	108,844	118,529	120,480	114,188	96,430
<b>France</b>	<b>2,133,884</b>	<b>2,117,561</b>	<b>2,251,669</b>	<b>1,917,226</b>	<b>2,110,748</b>	<b>2,173,481</b>	<b>2,214,279</b>	<b>1,650,118</b>
Greece	290,222	269,728	141,501	75,804	88,083	103,431	114,226	80,977
Ireland	230,989	171,741	88,445	124,804	131,332	125,557	117,109	88,324
Iceland	-	-	-	14,008	21,324	17,976	11,719	9,369
Italy	2,415,600	2,237,272	1,961,578	1,575,614	1,971,204	1,910,610	1,916,865	1,381,646
Luxembourg	41,896	48,517	49,726	46,473	52,775	52,786	54,923	45,104
Norway	97,376	109,907	127,754	150,686	158,650	147,929	142,381	141,405
The Netherlands	597,640	465,160	482,527	448,925	414,306	443,531	445,217	355,595
Portugal	257,834	206,488	223,464	178,503	222,129	228,327	223,799	145,136
United Kingdom	2,221,670	2,439,717	2,030,846	2,633,503	2,540,617	2,367,147	2,311,140	1,631,064
Sweden	290,529	274,301	289,684	345,108	379,393	353,729	356,036	292,024
Switzerland	316,519	264,941	292,453	321,669	311,996	299,135	311,256	236,703
<b>TOTAL EUROPE (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>14,318,749</b>	<b>14,210,392</b>	<b>14,303,423</b>	<b>10,801,176</b>

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

	2000	2005	2010	2015	2017	2018	2019	2020
Germany	1,023,997	1,404,479	1,220,675	1,534,990	1,330,413	1,103,886	1,146,454	829,959
	30.3%	42.2%	41.9%	47.9%	38.7%	32.1%	31.8%	28.4%
Austria	191,402	199,908	167,106	179,821	175,456	140,051	125,794	91,083
	61.9%	64.9%	50.9%	58.3%	49.7%	41.1%	38.2%	36.6%
Belgium	290,301	348,630	415,728	299,357	253,243	194,941	168,378	133,079
	56.3%	72.6%	76.0%	59.7%	46.3%	35.5%	30.6%	30.8%
Denmark	14,898	35,356	72,670	64,095	77,572	72,090	58,706	53,772
	13.2%	24.1%	47.3%	31.0%	35.0%	33.0%	26.0%	27.1%
Spain	734,256	1,036,789	693,905	647,108	597,439	474,231	348,909	239,445
	53.1%	67.8%	70.7%	62.6%	48.4%	35.9%	27.7%	28.1%
Finland	-	25,110	44,574	38,857	36,279	28,768	21,091	13,702
	-	17.0%	41.5%	35.7%	30.6%	23.9%	18.5%	14.2%
<b>France</b>	<b>1,046,485</b>	<b>1,466,296</b>	<b>1,593,173</b>	<b>1,097,124</b>	<b>998,116</b>	<b>844,830</b>	<b>755,583</b>	<b>504,178</b>
	<b>49.0%</b>	<b>69.2%</b>	<b>70.8%</b>	<b>57.2%</b>	<b>47.3%</b>	<b>38.9%</b>	<b>34.1%</b>	<b>30.6%</b>
Greece	2,006	4,189	5,661	47,792	39,022	36,900	30,390	22,340
	0.7%	1.6%	4.0%	63.0%	44.3%	35.7%	26.6%	27.6%
Ireland	23,259	36,953	55,016	88,618	85,630	68,238	53,259	36,561
	10.1%	21.5%	62.2%	71.0%	65.2%	54.3%	45.5%	41.4%
Islande	-	-	-	6,677	8,949	6,883	3,521	1,849
	-	-	-	47.7%	42.0%	38.3%	30.0%	19.7%
Italy	812,203	1,308,548	901,310	872,493	1,109,747	975,833	763,629	454,835
	33.6%	58.5%	45.9%	55.4%	56.3%	51.1%	39.8%	32.9%
Luxembourg	21,110	36,561	37,403	32,694	28,474	24,759	22,961	16,592
	50.4%	75.4%	75.2%	70.4%	54.0%	46.9%	41.8%	36.8%
Norway	8,761	43,146	95,733	61,482	36,613	26,352	22,744	11,683
	9.0%	39.3%	74.9%	40.8%	23.1%	17.8%	16.0%	8.3%
The Netherlands	134,426	123,990	98,477	129,804	72,451	57,391	32,608	13,011
	22.5%	26.7%	20.4%	28.9%	17.5%	12.9%	7.3%	3.7%
Portugal	62,417	131,731	149,046	121,650	136,203	123,039	89,411	47,738
	24.2%	63.8%	66.7%	68.2%	61.3%	53.9%	50.9%	32.8%
United Kingdom	313,149	897,887	936,448	1,275,411	1,067,506	747,574	560,145	283,817
	14.1%	36.8%	46.1%	48.4%	42.0%	31.6%	24.2%	17.4%
Sweden	18,325	26,527	147,802	198,956	183,723	131,505	114,803	55,229
	6.3%	9.7%	51.0%	57.7%	48.4%	37.2%	32.2%	18.9%
Switzerland	29,466	75,247	88,760	124,898	113,007	89,891	79,533	52,468
	9.3%	28.4%	30.4%	38.8%	36.2%	30.1%	25.6%	22.2%
<b>TOTAL EUROPE (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>6,349,843</b>	<b>5,147,162</b>	<b>4,397,919</b>	<b>2,861,341</b>
<b>Diesel share in Europe</b>	<b>32.1%</b>	<b>49.5%</b>	<b>51.8%</b>	<b>51.7%</b>	<b>44.3%</b>	<b>36.2%</b>	<b>30.0%</b>	<b>26.4%</b>
<b>Year-on-year change</b>	<b>+10.7%</b>	<b>+2.2%</b>	<b>+6.9%</b>	<b>+5.9%</b>	<b>-8.1%</b>	<b>-18.9%</b>	<b>-16.6%</b>	<b>-34.9%</b>

(1) Including Iceland since 2015

Source: ACEA

## 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	2017	2018	2019	2020
Germany	electric	0	160	12,319	24,294	34,360	60,527	188,581
		0.0%	0.0%	0.4%	0.7%	1.0%	1.7%	6.5%
	hybrid	3,559	10,174	32,714	84,135	129,334	240,697	502,056
		0.1%	0.3%	1.0%	2.4%	3.8%	6.7%	17.2%
Austria	electric	0	112	1,677	5,433	6,754	9,242	15,972
		0.0%	0.0%	0.5%	1.5%	2.0%	2.8%	6.4%
	hybrid	460	1,248	3,514	8,296	9,417	16,540	32,051
		0.1%	0.4%	1.1%	2.3%	2.8%	5.0%	12.9%
Belgium	electric	0	47	1,358	2,712	3,648	8,830	14,976
		0.0%	0.0%	0.3%	0.5%	0.7%	1.6%	3.5%
	hybrid	471	4,073	10,711	24,283	25,049	34,092	70,271
		0.1%	0.7%	2.1%	4.4%	4.6%	6.2%	16.3%
Denmark	electric	2	50	4,468	692	1,524	5,575	8,032
		0.0%	0.0%	2.2%	0.3%	0.7%	2.5%	4.1%
	hybrid	5	148	2,657	8,192	12,412	17,330	16,159
		0.0%	0.1%	1.3%	3.7%	5.7%	7.7%	8.2%
Spain	electric	0	69	1,461	3,920	6,130	10,048	17,925
		0.0%	0.0%	0.1%	0.3%	0.5%	0.8%	2.1%
	hybrid	908	6,253	20,547	58,312	80,311	114,953	148,200
		0.1%	0.6%	2.0%	4.7%	6.1%	9.1%	17.4%
France	electric	6	184	17,268	24,910	31,059	42,764	110,917
		0.0%	0.0%	0.9%	1.2%	1.4%	1.9%	6.7%
	hybrid	2,857	9,655	61,619	81,559	106,369	125,372	243,464
		0.1%	0.4%	3.2%	3.9%	4.9%	5.7%	14.8%
Italy	electric	28	112	1,452	2,020	4,998	10,671	32,493
		0.0%	0.0%	0.1%	0.1%	0.3%	0.6%	2.4%
	hybrid	1,132	4,841	26,262	66,443	86,837	116,187	251,708
		0.1%	0.2%	1.7%	3.4%	4.5%	6.1%	18.2%
Norway	electric	7	355	25,779	33,025	46,092	60,315	75,333
		0.0%	0.3%	17.1%	20.8%	31.2%	42.4%	53.3%
	hybrid	337	3,144	15,704	49,803	43,070	37,869	45,317
		0.3%	2.5%	10.4%	31.4%	29.1%	26.6%	32.0%
The Netherlands	electric	0	96	3,204	7,959	23,985	61,547	72,860
		0.0%	0.0%	0.7%	1.9%	5.4%	13.8%	20.5%
	hybrid	2,940	16,099	56,261	20,651	25,637	36,928	65,733
		0.6%	3.3%	12.5%	5.0%	5.8%	8.3%	18.5%
United Kingdom	electric	0	167	9,934	13,591	15,474	37,782	108,148
		0.0%	0.0%	0.4%	0.5%	0.7%	1.6%	6.6%
	hybrid	5,766	22,148	64,692	106,334	139,496	252,494	294,652
		0.2%	1.1%	2.5%	4.2%	5.9%	10.9%	18.1%
Sweden	electric	1	9	2,880	4,217	7,078	15,595	27,968
		0.0%	0.0%	0.8%	1.1%	2.0%	4.4%	9.6%
	hybrid	1,947	3,628	14,478	34,648	44,449	57,870	105,565
		0.7%	1.3%	4.2%	9.1%	12.6%	16.3%	36.1%
Switzerland	electric	13	199	3,777	4,726	5,161	13,143	19,485
		0.0%	0.1%	1.2%	1.5%	1.7%	4.2%	8.2%
	hybrid	1,413	4,210	8,400	11,717	15,185	26,990	44,611
		0.5%	1.4%	2.6%	3.8%	5.1%	8.7%	18.8%
TOTAL WESTERN EUROPE (17 then 18 countries) (1)	electric	57	1,611	87,206	131,101	193,493	350,335	714,197
		0.0%	0.0%	0.7%	0.9%	1.4%	2.4%	6.6%
	hybrid	23,210	90,198	333,028	583,131	759,984	1,138,660	1,911,110
		0.2%	0.7%	2.5%	4.1%	5.3%	8.0%	17.7%

(1) Including Iceland since 2015.

## 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	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	1,930	2,012	1,776	1,410	1,785	2,338	2,302	1,617
	13.1%	13.8%	13.7%	10.1%	12.5%	16.5%	16.1%	15.0%
Renault group	1,559	1,442	1,305	1,369	1,445	1,439	1,436	1,063
	10.6%	9.9%	10.1%	9.8%	10.1%	10.1%	10.0%	9.8%
FCA group (Stellantis from 01/17/2021)	1,575	951	1,035	959	1,001	966	877	638
	10.7%	6.5%	8.0%	6.9%	7.0%	6.8%	6.1%	5.9%
Ford group	1,248	1,210	1,063	975	965	931	917	635
	8.5%	8.3%	8.2%	7.0%	6.7%	6.6%	6.4%	5.9%
General Motors	1,720	1,539	1,119	919	554	4	3	0
	11.7%	10.6%	8.6%	6.6%	3.9%	0.0%	0.0%	0.0%
Volkswagen group	2,776	2,743	2,757	3,277	3,317	3,305	3,437	2,701
	18.8%	18.9%	21.3%	23.5%	23.2%	23.3%	24.0%	25.0%
Daimler group	811	819	662	919	969	938	984	735
	5.5%	5.6%	5.1%	6.6%	6.8%	6.6%	6.9%	6.8%
BMW group	499	761	735	995	1,000	993	1,001	807
	3.4%	5.2%	5.7%	7.1%	7.0%	7.0%	7.0%	7.5%
Nissan	392	342	384	527	538	458	364	266
	2.7%	2.4%	3.0%	3.8%	3.8%	3.2%	2.5%	2.5%
Toyota-Lexus-Daihatsu	576	793	582	572	632	647	673	574
	3.9%	5.5%	4.5%	4.1%	4.4%	4.6%	4.7%	5.3%
Other Japanese brands	701	820	651	666	671	691	697	453
	4.8%	5.6%	5.0%	4.8%	4.7%	4.9%	4.9%	4.2%
Hyundai-Kia	303	530	539	829	865	903	919	727
	2.1%	3.6%	4.2%	5.9%	6.0%	6.4%	6.4%	6.7%
Volvo	230	243	222	276	286	304	321	279
	1.6%	1.7%	1.7%	2.0%	2.0%	2.1%	2.2%	2.6%
Tata group	112	125	97	226	230	227	216	155
	0.8%	0.9%	0.7%	1.6%	1.6%	1.6%	1.5%	1.4%
Other brands (including MG-Rover, Saab)	304	207	47	50	62	66	155	151
	2.1%	1.4%	0.4%	0.4%	0.4%	0.5%	1.1%	1.4%
<b>TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)</b>	<b>14,738</b>	<b>14,536</b>	<b>12,975</b>	<b>13,970</b>	<b>14,319</b>	<b>14,210</b>	<b>14,303</b>	<b>10,801</b>
	100%	100%	100%	100%	100%	100%	100%	100%
<b>Year-on-year change</b>	<b>-2.1%</b>	<b>-1.4%</b>	<b>-5.0%</b>	<b>5.8%</b>	<b>2.5%</b>	<b>-0.8%</b>	<b>0.7%</b>	<b>-24.5%</b>

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

	2000	2005	2010	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	349	370	326	352	430	496	521	430
	18.1%	18.4%	22.1%	18.9%	22.3%	25.0%	25.5%	25.7%
Renault group	272	296	251	300	307	313	328	249
	14.1%	14.7%	17.0%	16.1%	15.9%	15.8%	16.1%	14.9%
FCA group (Stellantis from 01/17/2021)	275	256	214	238	234	234	181	150
	14.2%	12.8%	14.5%	12.8%	12.1%	11.8%	8.9%	9.0%
Ford group	180	225	161	299	311	331	326	275
	9.3%	11.2%	10.9%	16.1%	16.1%	16.7%	16.0%	16.4%
General Motors	92	146	75	99	54	0	0	0
	4.8%	7.3%	5.1%	5.3%	2.8%	0.0%	0.0%	0.0%
Volkswagen group	202	189	170	227	234	247	250	202
	10.5%	9.4%	11.6%	12.2%	12.1%	12.4%	12.2%	12.1%
Daimler group	178	152	133	177	189	189	212	190
	9.2%	7.6%	9.0%	9.5%	9.8%	9.5%	10.4%	11.3%
Nissan	100	101	41	63	65	59	48	48
	5.2%	5.1%	2.8%	3.4%	3.4%	3.0%	2.4%	2.9%
Toyota-Lexus-Daihatsu	69	62	37	36	46	50	43	30
	3.6%	3.1%	2.5%	1.9%	2.4%	2.5%	2.1%	1.8%
Other Japanese brands	102	85	36	38	37	37	40	26
	5.3%	4.2%	2.4%	2.1%	1.9%	1.9%	2.0%	1.6%
Hyundai-Kia	44	48	5	6	6	5	3	2
	2.3%	2.4%	0.4%	0.3%	0.3%	0.2%	0.2%	0.1%
Other brands	69	76	26	25	19	23	88	73
	3.6%	3.8%	1.8%	1.4%	1.0%	1.2%	4.3%	4.3%
<b>TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)</b>	<b>1,931</b>	<b>2,004</b>	<b>1,475</b>	<b>1,860</b>	<b>1,933</b>	<b>1,984</b>	<b>2,041</b>	<b>1,676</b>
	100%	100%	100%	100%	100%	100%	100%	100%
<b>Year-on-year change</b>	<b>5.6%</b>	<b>3.8%</b>	<b>11.1%</b>	<b>11.1%</b>	<b>3.9%</b>	<b>2.6%</b>	<b>2.9%</b>	<b>-17.9%</b>

(1) Including Iceland since 2015

(2) Prior to 2019, IVECO was included in the group.

The scope of the groups reflects their situation as at 01/01/2021 (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	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	99	73	61	101	161	165	102
	9.5%	8.5%	5.3%	7.8%	11.6%	11.2%	8.9%
Renault group	193	112	141	167	182	211	155
	18.7%	13.0%	12.3%	13.0%	13.0%	14.2%	13.6%
FCA group (Stellantis from 01/17/2021)	50	45	34	43	51	65	59
	4.8%	5.3%	3.0%	3.3%	3.6%	4.4%	5.2%
Ford group	59	65	73	78	78	77	48
	5.7%	7.5%	6.3%	6.0%	5.6%	5.2%	4.3%
General Motors	132	76	75	46	0	0	0
	12.7%	8.9%	6.5%	3.6%	0.0%	0.0%	0.0%
Volkswagen group	257	226	361	396	421	422	338
	24.8%	26.4%	31.4%	30.6%	30.1%	28.5%	29.7%
Daimler group	11	13	35	42	45	46	41
	1.1%	1.6%	3.0%	3.3%	3.2%	3.1%	3.6%
BMW group	11	17	37	42	40	46	40
	1.0%	2.0%	3.2%	3.3%	2.8%	3.1%	3.5%
Nissan	19	23	34	38	39	30	22
	1.8%	2.6%	3.0%	2.9%	2.8%	2.0%	1.9%
Toyota-Lexus-Daihatsu	60	47	77	98	111	122	118
	5.8%	5.5%	6.7%	7.6%	8.0%	8.3%	10.3%
Other Japanese brands	91	67	89	95	109	122	71
	8.7%	7.9%	7.7%	7.4%	7.8%	8.2%	6.3%
Hyundai-Kia	39	75	108	120	130	141	114
	3.8%	8.7%	9.4%	9.3%	9.3%	9.6%	10.0%
Volvo	7	9	14	15	18	20	19
	0.6%	1.1%	1.2%	1.2%	1.3%	1.3%	1.6%
Tata group	2	3	6	7	8	8	5
	0.2%	0.3%	0.5%	0.5%	0.6%	0.5%	0.5%
Other brands (including MG-Rover, Saab)	7	6	5	4	5	5	7
	0.7%	0.7%	0.4%	0.3%	0.4%	0.4%	0.6%
<b>TOTAL NEW EU MEMBER STATES</b>	<b>1,035</b>	<b>857</b>	<b>1,148</b>	<b>1,291</b>	<b>1,397</b>	<b>1,479</b>	<b>1,139</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>15.9%</b>	<b>12.5%</b>	<b>8.2%</b>	<b>5.9%</b>	<b>-23.0%</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	2016	2017	2018	2019	2020
PSA group (Stellantis from 01/17/2021)	20	18	27	31	37	36	30
	13.6%	19.5%	18.1%	19.9%	21.5%	20.5%	20.5%
Renault group	35	15	29	30	36	34	26
	24.4%	16.3%	19.0%	19.3%	20.9%	19.0%	19.0%
FCA group (Stellantis from 01/17/2021)	21	19	32	31	32	34	18
	14.7%	19.8%	21.1%	20.0%	18.5%	19.1%	19.1%
Ford group	14	10	20	20	24	25	22
	9.8%	10.1%	13.2%	13.0%	13.7%	13.8%	13.8%
General Motors	8	3	7	4	0	0	0
	5.2%	3.2%	4.6%	2.7%	0.0%	0.0%	0.0%
Volkswagen group	21	14	15	17	20	21	16
	14.7%	14.9%	10.1%	10.9%	11.3%	12.1%	12.1%
Daimler group	10	7	10	10	11	14	13
	6.8%	7.9%	6.6%	6.2%	6.5%	7.7%	7.7%
Nissan	2	2	3	3	3	2	1
	1.4%	2.5%	2.0%	1.8%	1.5%	1.3%	1.3%
Toyota-Lexus-Daihatsu	2	2	4	6	6	7	8
	1.6%	2.2%	2.7%	3.7%	3.6%	4.1%	4.1%
Other Japanese brands	3	2	3	2	3	3	2
	2.3%	2.1%	1.7%	1.6%	1.6%	1.7%	1.7%
Hyundai-Kia	5	1	1	1	1	0	0
	3.2%	0.7%	0.4%	0.4%	0.3%	0.2%	0.2%
Other brands (including MG-Rover, Saab)	4	1	1	1	1	1	8
	2.5%	0.8%	0.6%	0.5%	0.6%	0.6%	4.4%
<b>TOTAL NEW EU MEMBER STATES</b>	<b>145</b>	<b>95</b>	<b>151</b>	<b>156</b>	<b>173</b>	<b>177</b>	<b>143</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>8.9%</b>	<b>3.5%</b>	<b>10.9%</b>	<b>2.0%</b>	<b>-19.2%</b>

(1) New EU member states not including Cyprus and Malta, including Croatia.

(2) Not including Bulgaria in 2005.

(3) Prior to 2019, IVECO was included in the group.

The scope of the groups reflects their situation as at 01/01/2021 (see page 74).

## REGISTRATIONS

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

	2000	2005	2010	2015	2017	2018	2019	2020
Germany	212,290	202,372	202,446	243,305	275,050	290,155	309,963	272,588
Austria	27,243	28,878	28,130	33,013	40,348	43,769	43,578	36,634
Belgium	54,090	62,672	56,006	65,179	80,933	83,023	86,672	77,111
Denmark	33,092	58,076	16,848	33,177	37,081	35,037	34,529	31,116
Spain	299,246	387,203	116,770	155,400	199,661	215,227	215,784	158,863
Finland	15,056	16,211	11,550	11,986	16,054	16,401	15,611	13,729
<b>France</b>	<b>414,966</b>	<b>420,065</b>	<b>417,612</b>	<b>379,428</b>	<b>438,654</b>	<b>459,140</b>	<b>479,784</b>	<b>402,383</b>
Greece	23,008	23,374	10,935	5,756	6,769	7,059	8,144	7,003
Ireland	41,474	37,073	10,486	23,837	24,207	25,444	25,330	21,716
Iceland	-	-	-	1362	2,172	1,977	1,451	1,050
Italy	225,517	207,067	177,887	134,265	194,947	182,587	189,245	160,446
Luxembourg	3,083	3,064	3,291	4,016	4,908	4,921	5,308	4,804
Norway	31,627	37,021	30,422	34,394	37,453	38,907	39,313	33,609
The Netherlands	96,570	66,232	49,863	57,921	73,633	79,339	76,458	60,638
Portugal	152,836	66,774	45,756	30,996	38,715	39,394	38,546	27,637
United Kingdom	245,163	330,436	231,539	380,996	369,788	367,129	376,386	300,199
Sweden	31,854	35,098	38,543	45,124	55,640	56,867	54,127	31,239
Switzerland	24,121	22,428	26,507	34,297	36,890	37,505	40,659	35,064
<b>TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)</b>	<b>1,931,236</b>	<b>2,004,044</b>	<b>1,474,591</b>	<b>1,674,452</b>	<b>1,932,903</b>	<b>1,983,881</b>	<b>2,040,888</b>	<b>1,675,829</b>

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

	2000	2005	2010	2015	2017	2018	2019	2020
Germany	96,830	88,364	75,014	85,002	88,071	90,117	93,714	70,437
Austria	8,508	8,235	5,138	7,151	8,041	8,094	7,946	5,605
Belgium	11,061	11,657	7,133	8,188	9,952	10,803	11,518	7,534
Denmark	4,597	5,902	2,682	4,687	4,950	4,917	4,951	5,036
Spain	33,700	39,753	13,215	22,043	24,190	23,587	24,019	18,604
Finland	3,072	3,492	2,368	2,400	3,182	3,226	3,237	2,620
<b>France</b>	<b>57,918</b>	<b>55,281</b>	<b>34,221</b>	<b>41,714</b>	<b>50,419</b>	<b>54,284</b>	<b>55,215</b>	<b>41,729</b>
Greece	1,633	1,589	1,081	439	426	315	402	545
Ireland	4,666	4,621	1,011	1,867	2,275	2,152	2,223	1,953
Iceland	-	-	-	183	391	399	273	178
Italy	38,388	35,313	17,532	15,020	24,121	25,264	23,413	20,037
Luxembourg	1,451	1,394	803	1,089	1,234	1,290	1,290	1,024
Norway	3,564	4,952	3,126	4,366	5,097	5,658	6,117	4,686
The Netherlands	16,835	13,405	9,390	13,546	14,490	15,822	15,192	10,288
Portugal	7,403	4,588	3,116	3,956	5,236	5,073	4,920	3,543
United Kingdom	51,864	53,344	27,988	44,364	45,501	43,544	48,535	32,918
Sweden	5,549	5,688	4,605	5,289	6,662	6,690	7,165	5,364
Switzerland	4,733	3,817	3,388	4,079	4,605	4,474	4,405	3,821
<b>TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)</b>	<b>351,772</b>	<b>341,395</b>	<b>211,811</b>	<b>265,383</b>	<b>298,843</b>	<b>305,709</b>	<b>314,535</b>	<b>235,922</b>

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

	2000	2005	2010	2015	2017	2018	2019	2020
Germany	5,684	4,891	4,697	5,476	6,026	6,010	6,124	6,044
Austria	706	565	733	878	1,215	1,107	1,146	854
Belgium	974	754	909	778	715	976	1,250	727
Denmark	419	315	450	269	298	231	184	60
Spain	2,738	3,655	2,119	2,537	3,448	3,244	3,147	2,069
Finland	0	252	300	330	347	306	518	249
<b>France</b>	<b>4,320</b>	<b>4,776</b>	<b>5,382</b>	<b>6,724</b>	<b>5,979</b>	<b>5,842</b>	<b>6,417</b>	<b>5,791</b>
Greece	374	575	325	44	67	147	202	185
Ireland	121	271	47	313	339	441	442	129
Iceland	-	-	-	34	37	64	48	14
Italy	4,152	4,514	3,931	2,163	3,007	4,118	3,988	2,932
Luxembourg	108	147	173	247	235	207	263	197
Norway	427	708	1,052	660	723	733	2,013	1,177
The Netherlands	949	1,134	524	332	870	541	910	639
Portugal	806	620	418	199	305	458	567	395
United Kingdom	4,496	4,630	3,203	3,931	3,706	3,499	3,100	2,100
Sweden	1,071	1,021	1,302	1,172	1,141	804	1,150	1,588
Switzerland	491	457	476	689	641	629	568	586
<b>TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)</b>	<b>27,836</b>	<b>29,285</b>	<b>26,041</b>	<b>26,776</b>	<b>29,099</b>	<b>29,357</b>	<b>32,037</b>	<b>25,736</b>

(1) Including Iceland since 2015.

## REGISTRATIONS

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

	2005	2010	2015	2017	2018	2019	2020
Bulgaria	-	15,646	24,256	33,265	37,506	39,419	27,214
Croatia	70,541	38,587	35,715	50,769	60,041	62,938	36,084
Estonia	19,640	10,295	21,033	25,618	26,297	27,585	19,278
Hungary	198,982	43,476	77,171	116,265	136,601	157,906	128,031
Latvia	16,602	6,365	13,766	16,698	16,878	18,233	13,516
Lithuania	10,467	7,970	17,071	25,836	32,382	46,388	40,338
Poland	235,522	333,490	352,378	487,593	531,335	553,942	428,527
Czech Republic	151,699	169,580	230,857	271,595	261,437	249,915	202,971
Romania	215,554	106,333	81,162	105,083	130,919	161,562	126,351
Slovakia	57,125	64,033	77,979	96,105	98,195	101,568	76,305
Slovenia	59,324	61,142	59,664	62,522	65,115	59,862	40,200
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>749,361</b>	<b>818,330</b>	<b>991,052</b>	<b>1,291,349</b>	<b>1,396,706</b>	<b>1,479,318</b>	<b>1,138,815</b>

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

	2005	2010	2015	2017	2018	2019	2020
Bulgaria	-	3,211	4,875	5,129	4,699	4,366	3,018
Croatia	7,671	2,845	6,909	8,535	9,149	9,143	7,025
Estonia	2,944	1,406	3,962	4,834	5,070	4,487	3,332
Hungary	20,479	9,337	17,719	20,200	23,053	26,410	22,305
Latvia	1,753	649	2,473	2,337	2,447	2,783	2,178
Lithuania	3,371	1,044	2,533	3,410	3,884	4,606	3,103
Poland	35,985	42,852	55,207	59,170	67,263	68,010	57,286
Czech Republic	16,024	11,318	17,595	19,529	20,456	20,612	17,331
Romania	35,842	10,404	13,471	16,898	18,870	19,122	14,754
Slovakia	14,428	6,953	7,321	7,584	9,048	8,534	6,392
Slovenia	6,897	4,744	6,686	8,742	9,021	8,653	6,275
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>101,881</b>	<b>91,918</b>	<b>138,751</b>	<b>156,368</b>	<b>172,960</b>	<b>176,726</b>	<b>142,999</b>

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

	2005	2010	2015	2017	2018	2019	2020
Bulgaria	-	18,857	29,131	38,394	42,205	43,785	30,232
Croatia	78,212	41,432	42,624	59,304	69,190	72,081	43,109
Estonia	22,584	11,701	24,995	30,452	31,367	32,072	22,610
Hungary	219,461	52,813	94,890	136,465	159,654	184,316	150,336
Latvia	18,355	7,014	16,239	19,035	19,325	21,016	15,694
Lithuania	13,838	9,014	19,604	29,246	36,266	50,994	43,441
Poland	271,507	376,342	407,585	546,763	598,598	621,952	485,813
Czech Republic	167,723	180,898	248,452	291,124	281,893	270,527	220,302
Romania	251,396	116,737	94,633	121,981	149,789	180,684	141,105
Slovakia	71,553	70,986	85,300	103,689	107,243	110,102	82,697
Slovenia	66,221	65,886	66,350	71,264	74,136	68,515	46,475
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>851,242</b>	<b>910,248</b>	<b>1,129,803</b>	<b>1,447,717</b>	<b>1,569,666</b>	<b>1,656,044</b>	<b>1,281,814</b>

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

	2005	2010	2015	2017	2018	2019	2020
Bulgaria (2)	-	1,000	1,500	1,900	2,100	2,200	1,500
Croatia	1,463	599	1,044	1,479	1,543	1,741	1,000
Estonia	927	502	934	1,207	1,171	1,207	697
Hungary	4,400	2,408	6,045	6,238	6,580	5,776	3,639
Latvia	1,284	520	1,372	1,670	1,709	1,169	764
Lithuania	2,297	1,355	3,633	7,205	8,694	7,688	4,379
Poland	11,079	11,611	23,226	28,216	30,371	28,758	20,759
Czech Republic	8,200	5,750	12,416	10,725	10,897	10,889	8,552
Romania	5,019	2,686	6,485	6,360	7,693	7,740	4,838
Slovakia	3,754	2,870	4,637	4,588	4,581	3,691	2,181
Slovenia	1,635	985	2,025	2,521	2,833	2,456	1,380
<b>TOTAL NEW EU MEMBER STATES (1)</b>	<b>33,500</b>	<b>29,700</b>	<b>63,317</b>	<b>72,109</b>	<b>78,172</b>	<b>73,315</b>	<b>49,689</b>

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

(2) CCFA estimates.

# WORLDWIDE PRODUCTION OF FRENCH GROUPS AND PRODUCTION IN FRANCE

## ► WORLD PRODUCTION OF LIGHT VEHICLES BY FRENCH GROUPS (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
Citroën	1,168,470	1,379,082	1,452,847	1,153,855	1,054,146	1,053,240	980,758	699,087
DS	-	-	-	103,342	51,473	53,746	62,601	40,735
Peugeot	1,708,968	1,996,284	2,152,331	1,702,393	2,126,674	1,756,034	1,455,444	1,112,263
Opel	-	-	-	-	400,324	988,462	920,314	611,467
Others	-	-	-	22,191	17,125	16,508	17,092	13,852
<b>PSA group (1)</b>	<b>2,877,438</b>	<b>3,375,366</b>	<b>3,605,178</b>	<b>2,981,781</b>	<b>3,649,742</b>	<b>3,867,990</b>	<b>3,436,209</b>	<b>2,477,404</b>
Renault	2,356,616	2,326,359	2,099,027	2,255,701	2,792,190	2,643,374	2,610,246	1,817,712
Alpine	-	-	-	-	117	3,304	4,244	1,279
Dacia	55,183	172,021	341,090	570,533	690,170	737,346	696,018	508,249
Renault Samsung Motors	14,517	118,438	276,169	206,418	264,020	215,851	143,143	107,814
Lada	-	-	-	-	407,092	521,079	407,963	364,062
<b>Renault group</b>	<b>2,426,316</b>	<b>2,616,818</b>	<b>2,716,286</b>	<b>3,032,652</b>	<b>4,153,589</b>	<b>4,120,954</b>	<b>3,861,614</b>	<b>2,799,116</b>
<b>TOTAL (2)</b>	<b>5,303,754</b>	<b>5,992,184</b>	<b>6,321,464</b>	<b>6,014,433</b>	<b>7,794,624</b>	<b>7,964,877</b>	<b>7,271,006</b>	<b>5,256,602</b>

## ► PRODUCTION OF LIGHT VEHICLES IN FRANCE (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<b>Total passenger cars</b>	<b>2,879,810</b>	<b>3,112,961</b>	<b>1,924,131</b>	<b>1,563,184</b>	<b>1,754,263</b>	<b>1,773,748</b>	<b>1,665,787</b>	<b>927,718</b>
Including PSA group and Renault group	2,765,803	2,803,891	1,665,797	1,241,794	1,436,389	1,440,700	1,375,463	719,418
Including Smart	101,365	77,015	97,373	93,357	84,368	84,500	67,300	20,300 (3)
Including Toyota	-	180,643	158,512	228,033	233,506	248,548	223,024	188,000
<b>Total Light Commercial Vehicles</b>	<b>409,966</b>	<b>382,201</b>	<b>262,479</b>	<b>414,676</b>	<b>471,456</b>	<b>495,941</b>	<b>509,563</b>	<b>388,655</b>
Including PSA group and Renault group	370,538	361,521	243,029	414,676	471,456	495,941	509,563	388,655
Including Fiat	39,428	20,680	19,450	-	-	-	-	-
<b>Total Light Commercial Vehicles</b>	<b>3,289,776</b>	<b>3,495,162</b>	<b>2,186,610</b>	<b>1,977,860</b>	<b>2,225,719</b>	<b>2,269,689</b>	<b>2,175,350</b>	<b>1,316,373</b>
Including PSA group and Renault group	3,136,341	3,165,412	1,908,826	1,656,470	1,907,845	1,936,641	1,885,026	1,108,073

## ► PRODUCTION OF HEAVY-DUTY VEHICLES IN FRANCE (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<b>Renault trucks (4)</b>	<b>87,719</b>	<b>54,501</b>	<b>31,874</b>	<b>31,598</b>	<b>34,026</b>	<b>36,621</b>	<b>35,950</b>	<b>25,740</b>
Scania	10,710	9,391	9,594	n/a	n/a	n/a	n/a	n/a
<b>Coaches and buses</b>	<b>535</b>	<b>3,687</b>	<b>3,475</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
Including Heuliez bus	-	291	451	n/a	n/a	n/a	n/a	n/a
Including Iveco bus (5)	-	2,869	2,473	n/a	n/a	n/a	n/a	n/a
Including Evobus	535	527	551	n/a	n/a	n/a	n/a	n/a

## ► VEHICLES INVOICED BY RENAULT TRUCKS (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<b>TOTAL</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>46,973</b>	<b>49,930</b>	<b>54,868</b>	<b>54,098</b>	<b>40,389</b>
16 t and more	-	-	-	26,111	28,327	30,521	30,002	20,760
7 to < 16 t	-	-	-	5,487	5,699	6,100	5,948	4,980
< 7 t	-	-	-	15,375	15,904	18,247	18,148	14,649

## ► RENAULT TRUCKS RANGE

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

(1) On 01/17/2021, the PSA group and the FCA group (which produced 3.4 million vehicles in 2020) merge to create the Stellantis group

(2) Excluding double counting. See page 84.

(3) June 2021 estimates

(4) In 2001, Renault's truck activities were merged with those of AB Volvo. From 2012, the scope of industrial vehicles covers invoices of 7 tonnes and more.

(5) Irisbus until 2013

Source: CCFA

# WORLD PRODUCTION BY FRENCH GROUPS

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

	2000	2005	2010	2015	2017	2018	2019	2020
Citroën	976,232	1,173,706	1,272,385	967,886	850,146	849,030	788,127	538,568
DS	-	-	-	103,342	51,473	53,746	62,601	40,735
Peugeot	1,522,051	1,808,984	1,942,079	1,494,318	1,895,812	1,510,163	1,213,885	916,387
Opel	-	-	-	-	364,689	884,279	804,805	529,216
PSA group (1)	2,498,283	2,982,690	3,214,464	2,565,546	3,162,120	3,297,218	2,869,418	2,024,906
Renault	2,043,815	1,924,574	1,796,321	1,868,031	2,365,765	2,172,934	2,152,285	1,486,511
Alpine	-	-	-	-	117	3,304	4,244	1,279
Dacia	42,603	152,150	323,386	542,325	655,686	702,034	668,584	481,118
Renault Samsung Motors	14,517	118,438	276,169	206,418	264,020	215,851	143,143	107,814
Lada	-	-	-	-	407,092	521,079	407,963	364,062
Renault group	2,100,935	2,195,162	2,395,876	2,616,774	3,692,680	3,615,202	3,376,219	2,440,784
<b>TOTAL</b>	<b>4,599,218</b>	<b>5,177,852</b>	<b>5,610,340</b>	<b>5,182,320</b>	<b>6,854,800</b>	<b>6,912,420</b>	<b>6,245,637</b>	<b>4,465,690</b>
of which production in France	2,765,803	2,803,891	1,665,797	1,241,794	1,436,389	1,440,700	1,375,463	719,418
Citroën	504,323	605,988	468,398	204,040	55,047	35,731	119,364	87,054
DS	-	-	-	80,980	45,363	49,412	62,282	40,388
Peugeot	1,094,756	1,155,292	722,214	607,150	884,415	897,497	804,101	347,979
Opel	-	-	-	-	28,820	72,110	85,841	33,684
PSA group (1)	1,599,079	1,761,280	1,190,612	892,170	1,013,645	1,054,750	1,071,588	509,105
Renault	1,166,724	1,042,611	475,185	349,624	422,627	382,646	299,631	209,034
Alpine	-	-	-	-	117	3,304	4,244	1,279
Renault group	1,166,724	1,042,611	475,185	349,624	422,744	385,950	303,875	210,313

(1) On 01/17/2021, the PSA group and the FCA group (which produced 3.4 million vehicles in 2020) merge to create the Stellantis group.

## ► PASSENGER CAR PRODUCTION BY MODEL IN 2020 (IN UNITS)

Brands/Models	World Production	Production in France	Production outside France
<b>PSA group</b>	<b>2,024,906</b>	<b>509,105</b>	<b>1,515,801</b>
<b>Citroën</b>	<b>538,568</b>	<b>87,054</b>	<b>451,514</b>
C-ZERO	964	0	964
C1	39,986	0	39,986
C3, C3 Picasso	175,778	0	175,778
C3 Aircross	74,257	0	74,257
C4, C4 Aircross, C4 Cactus	70,050	0	70,050
C-ELYSEE	17,354	0	17,354
C5, C5 Aircross	88,218	79,460	8,758
C6	1,217	0	1,217
BERLINGO	58,555	0	58,555
SPACETOURER	11,083	7,594	3,489
Others	1,106	0	1,106
<b>DS</b>	<b>40,735</b>	<b>40,388</b>	<b>347</b>
DS3 Crossback	14,535	14,535	0
DS7 Crossback	25,947	25,600	347
Others	253	253	0
<b>Peugeot</b>	<b>916,387</b>	<b>347,979</b>	<b>568,408</b>
ION	79	0	79
108	43,337	0	43,337
208	230,807	6,738	224,069
2008	205,649	0	205,649
301	11,197	0	11,197
308	94,033	91,979	2,054
3008	151,315	148,733	2,582
5008	59,581	55,164	4,417
408	7,957	0	7,957
4008	5,690	0	5,690
508	30,505	25,600	4,905
RIFTER	49,570	0	49,570
PARTNER	1,985	0	1,985
TRAVELLER	13,588	8,671	4,917
Others	11,094	11,094	0

Note: Renault also produced 2,548 Twizy at its plants in Valladolid (Spain) and Busan (South Korea).

Stellantis produced 4,262 Ami Ones in Morocco.

Source: CCFA

Brands/Models	World Production	Production in France	Production outside France
<b>OPEL</b>	<b>529,216</b>	<b>33,684</b>	<b>495,532</b>
CORSA	221,991	0	221,991
CROSSLAND	94,822	0	94,822
ASTRA / ZAFIRA LIFE	87,542	7,544	79,998
GRANDLAND	78,546	25,930	52,616
INSIGNIA / CASCADA	21,634	0	21,634
COMBO	22,311	0	22,311
Others	2,370	210	2,160
<b>Renault group</b>	<b>2,440,784</b>	<b>210,313</b>	<b>2,230,471</b>
<b>Renault</b>	<b>1,486,511</b>	<b>209,034</b>	<b>1,277,477</b>
TWINGO	84,031	0	84,031
CLIO	308,604	0	308,604
KWID	122,501	0	122,501
KADJAR	65,286	0	65,286
CAPTUR	231,117	0	231,117
ZOE	92,628	92,628	0
LOGAN / SANDERO	168,295	0	168,295
DUSTER	89,935	0	89,935
MEGANE	177,080	35,690	141,390
FLUENCE	0	0	0
KOLEOS	0	0	0
TALISMAN	8,523	8,523	0
ESPACE	4,841	4,841	0
ARKANA	56,080	0	56,080
KANGOO	27,145	27,145	0
Others	50,445	40,207	10,238
<b>Alpine</b>	<b>1,279</b>	<b>1,279</b>	<b>0</b>
<b>Dacia</b>	<b>1,279</b>	<b>1,279</b>	<b>0</b>
LOGAN / SANDERO	481,118	0	481,118
DUSTER	225,757	0	225,757
DOKKER	183,286	0	183,286
LODGY	45,123	0	45,123
<b>Renault Samsung Motors</b>	<b>26,952</b>	<b>0</b>	<b>26,952</b>
KOLEOS	107,814	0	107,814
TALISMAN / SM6	62,196	0	62,196
XM3	8,024	0	8,024
<b>Lada</b>	<b>37,594</b>	<b>0</b>	<b>37,594</b>
GRANTA / GRANTA HATCHBACK	364,062	0	364,062
VESTA	148,721	0	148,721
4WD	54,131	0	54,131
OTHERS (KALINA, others)	34,782	0	34,782
<b>TOTAL</b>	<b>126,428</b>	<b>0</b>	<b>126,428</b>

## WORLD PRODUCTION BY FRENCH GROUPS

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

	2000	2005	2010	2015	2017	2018	2019	2020
Citroën	192,238	205,376	180,462	185,969	204,000	204,210	192,631	160,519
Peugeot	186,917	187,300	210,252	208,075	230,862	245,871	241,559	195,876
Opel	-	-	-	-	35,635	104,183	115,509	82,251
Others	-	-	-	22,191	17,125	16,508	17,092	13,852
PSA group (1)	379,155	392,676	390,714	416,235	487,622	570,772	566,791	452,498
Renault (2)	312,801	401,785	302,706	387,670	426,425	470,440	457,961	331,201
Dacia	12,580	19,871	17,704	28,208	34,484	35,312	27,434	27,131
Renault group	325,381	421,656	320,410	415,878	460,909	505,752	485,395	358,332
Renault Trucks	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>939,824</b>	<b>1,052,457</b>	<b>1,025,369</b>	<b>790,912</b>
of which production in France (3)	370,538	361,521	243,029	414,676	471,456	495,941	509,563	388,655
Citroën	53,561	58,223	42,882	41,471	40,876	42,405	31,826	16,111
Peugeot	67,629	68,166	38,514	39,058	58,073	72,704	60,488	37,275
Opel	-	-	-	-	8,707	24,067	44,809	36,959
Others	-	-	-	22,191	16,747	16,508	17,092	13,852
PSA group (1)	121,190	126,389	81,396	102,720	124,403	155,684	154,215	104,197
Renault	240,985	225,648	161,633	311,956	355,760	364,324	382,165	304,376
Renault group (2)	240,985	225,648	161,633	311,956	355,760	364,324	382,165	304,376
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Others	42	24	-	-	-	-	-	-

(1) On 01/17/2021, the PSA group and the FCA group (which produced 3.4 million vehicles in 2020) merge to create the Stellantis group.

(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 2020 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
<b>PSA group</b>	<b>452,498</b>	<b>104,197</b>	<b>348,301</b>
<b>Citroën</b>	<b>160,519</b>	<b>16,111</b>	<b>144,408</b>
C3	6,376	0	6,376
C4	721	0	721
BERLINGO	62,236	0	62,236
JUMPY	35,648	16,111	19,537
JUMPER	55,538	0	55,538
<b>Peugeot</b>	<b>195,876</b>	<b>37,275</b>	<b>158,601</b>
208	7,824	6,428	1,396
308	3,216	3,216	0
PARTNER	74,453	0	74,453
EXPERT	48,861	27,631	21,230
BOXER	59,797	0	59,797
Others	1,725	0	1,725
<b>Opel</b>	<b>82,251</b>	<b>36,959</b>	<b>45,292</b>
COMBO	28,662	0	28,662
MOVANO	19,918	19,918	0
ZAFIRA / VIVARO	33,671	17,041	16,630
Others	13,852	13,852	0
<b>Renault group</b>	<b>358,332</b>	<b>304,376</b>	<b>53,956</b>
<b>Renault</b>	<b>331,201</b>	<b>304,376</b>	<b>26,825</b>
DOKKER / LUDOSPACE	8,526	0	8,526
KANGOO	73,195	73,195	0
TRAFIC	102,179	102,179	0
MASTER	134,414	129,002	5,412
Others (Alaskan, Triber)	12,887	0	12,887
<b>Dacia</b>	<b>27,131</b>	<b>0</b>	<b>27,131</b>
LUDOSPACE	27,131	0	27,131
<b>TOTAL (1)</b>	<b>790,912</b>	<b>388,655</b>	<b>402,257</b>

(1) Excluding Opel's double count production in 2020.

Source: CCFA

## WORLD PRODUCTION BY FRENCH GROUPS

### ► PRODUCTION OF COMMERCIAL VEHICLES (INCLUDING COACHES-BUSES) BY WEIGHT AND ENERGY SOURCE (IN UNITS)

		2000	2005	2010	2015	2017	2018	2019	2020
Less than 3,5t		577,926	670,654	531,452	588,686	666,597	742,675	708,800	521,245
	E	55,883	39,019	61,998	46,973	86,109	nd	nd	31,115
	D	521,229	631,499	469,178	537,345	573,437	nd	nd	476,462
	EL	814	136	276	4,368	7,051	9,565	13,057	13,668
From 3,5t to 5,1t		134,973	153,162	179,672	243,427	273,227	309,782	316,569	269,667
	E	1,724	719	0	0	0	0	0	0
	D	133,249	152,443	179,672	243,427	273,227	309,455	316,215	269,348
	EL	-	-	-	-	-	327	354	319
From 5,1t to 12t	D	13,593	11,820	2,453	n/a	n/a	n/a	n/a	n/a
From 12t to 16t	D	5,009	5,685	3,066	n/a	n/a	n/a	n/a	n/a
From 16t to 20t	D	7,304	7,115	4,484	n/a	n/a	n/a	n/a	n/a
More than 20t	D	6,255	9,647	5,543	n/a	n/a	n/a	n/a	n/a
Tractors	D	20,998	20,237	16,328	n/a	n/a	n/a	n/a	n/a
Coaches - Buses		2,938	-	-	-	-	-	-	-
	D	2,606	-	-	-	-	-	-	-
	G	332	-	-	-	-	-	-	-
	EL	-	-	-	-	-	-	-	-
Total gasoline		57,607	39,738	61,998	46,973	86,109	n/a	n/a	31,115
Total diesel		710,243	838,446	680,724	n/a	n/a	n/a	n/a	n/a
Total electric		814	136	276	4,368	7,051	9,892	13,411	13,987
Total NGV or LPG		332	-	-	-	-	-	-	-
<b>TOTAL</b>		<b>768,996</b>	<b>878,320</b>	<b>742,998</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>

E: Petrol. D: Diesel. EL: Electric. G: NGV or LPG.

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

	2000	2005	2010	2015	2017	2018	2019	2020
<b>Cars derivatives</b>								
Citroën	29,449	26,227	14,972	11,715	11,900	9,773	11,237	7,097
Peugeot	41,451	38,133	33,403	19,122	18,643	17,198	16,486	11,040
Opel	-	-	-	-	994	3,689	-	507
PSA group (1)	70,900	64,360	48,375	30,837	31,537	30,660	27,723	18,644
Renault-Dacia	60,320	55,009	48,167	40,158	33,041	32,703	0 (3)	352
<b>Total</b>	<b>131,220</b>	<b>119,369</b>	<b>96,542</b>	<b>70,995</b>	<b>64,578</b>	<b>63,363</b>	<b>27,723</b>	<b>18,996</b>
<b>Small vans</b>								
Citroën	100,832	97,954	98,042	90,957	92,950	87,752	73,702	62,236
Peugeot	70,443	70,480	97,608	95,144	99,590	97,140	95,144	74,453
Opel	-	-	-	-	5,865	14,494	36,481	28,662
PSA group (1)	171,275	168,434	195,650	186,101	198,405	199,386	205,327	165,351
Renault-Dacia	147,670	118,404	97,142	117,863	126,400	106,460	157,896	108,852
<b>Total</b>	<b>318,945</b>	<b>286,838</b>	<b>292,792</b>	<b>303,964</b>	<b>324,805</b>	<b>305,846</b>	<b>363,223</b>	<b>274,203</b>
<b>Vans</b>								
Citroën	61,957	81,195	67,448	83,297	99,150	106,685	107,692	91,186
Peugeot	75,023	78,687	79,241	93,809	112,629	131,533	129,929	108,658
Opel	-	-	-	-	28,776	86,000	79,028	53,082
Others	-	-	-	22,191	17,125	16,508	17,092	13,852
PSA group (1)	136,980	159,882	146,689	199,297	257,680	340,726	333,741	266,778
Renault	104,811	228,372	148,404	224,799	263,506	269,228	278,581	236,593
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Sovam-Etalmobil	42	24	-	-	-	-	-	-
<b>Total (2)</b>	<b>250,154</b>	<b>397,738</b>	<b>295,093</b>	<b>424,096</b>	<b>512,479</b>	<b>585,887</b>	<b>585,505</b>	<b>476,554</b>
<b>Others (Pick-ups, 4WD, others)</b>								
Peugeot	-	-	-	-	-	-	-	1,725
Renault-Dacia-Samsung	12,580	19,871	26,697	33,058	37,962	97,361	48,918	12,535
<b>Total</b>	<b>12,580</b>	<b>19,871</b>	<b>26,697</b>	<b>33,058</b>	<b>37,962</b>	<b>97,361</b>	<b>48,918</b>	<b>14,260</b>
<b>TOTAL</b>	<b>712,899</b>	<b>823,816</b>	<b>711,124</b>	<b>832,113</b>	<b>939,824</b>	<b>1,052,457</b>	<b>1,025,369</b>	<b>784,013</b>

(1) On 01/17/2021, the PSA group and the FCA group (which produced 3.4 million vehicles in 2020) merge to create the Stellantis group.

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

(3) Cars derivatives have been accounted for in cars.

Source: CCFA





## FRENCH EXPORTS OF AUTOMOTIVE PRODUCTS

### ► THE 25 MAIN DESTINATION COUNTRIES FOR AUTOMOTIVE EXPORTS FROM FRANCE IN 2020

(IN MILLIONS OF EUROS AND AS A % OF THE TOTAL)

New passenger cars		
Total	15,239	100%
Germany	4,062	27%
Belgium	2,236	15%
Italy	1,782	12%
Spain	1,369	9%
UK	977	6%
Turkey	494	3%
Poland	479	3%
The Netherlands	372	2%
Switzerland	299	2%
Portugal	295	2%
Sweden	259	2%
Denmark	219	1%
Algeria	203	1%
Austria	193	1%
Japan	167	1%
Slovakia	152	1%
Norway	137	1%
Egypt	120	1%
Ireland	117	1%
Czech republic	104	1%
United States	96	1%
Hungary	91	1%
Slovenia	89	1%
Romania	84	1%
South Korea	71	0.5%

New light commercial vehicles		
Total	4,146	100%
Germany	1,231	30%
Belgium	597	14%
UK	368	9%
Italy	267	6%
Spain	259	6%
Poland	215	5%
Switzerland	109	3%
The Netherlands	97	2%
Austria	95	2%
Denmark	82	2%
Australia	82	2%
Sweden	75	2%
Portugal	57	1%
South Korea	56	1%
Norway	51	1%
Turkey	50	1%
Slovenia	46	1%
Hungary	45	1%
Morocco	42	1%
Czech republic	41	1%
Ireland	37	1%
Algeria	33	1%
Romania	30	1%
Slovakia	18	0%
Bulgaria	16	0.4%

New heavy commercial vehicles and coaches and buses		
Total	3,576	100%
Germany	984	28%
Spain	430	12%
Italy	368	10%
UK	362	10%
Belgium	204	6%
Poland	113	3%
Switzerland	81	2%
Turkey	75	2%
The Netherlands	74	2%
Algeria	67	2%
Portugal	63	2%
Romania	61	2%
Ireland	52	1%
Morocco	51	1%
Czech republic	42	1%
Russia	41	1%
Austria	36	1%
Saudi Arabia	30	1%
Austria	28	1%
Lithuania	28	1%
Sweden	26	1%
Hungary	26	1%
Botswana	24	1%
Bulgaria	23	1%
Israel	22	0.6%

Total Equipment (Chassis, Engines, Parts and Accessories)		
Total	17,886	100%
Germany	3,853	22%
Spain	3,099	17%
UK	1,486	8%
Italy	1,261	7%
Belgium	851	5%
Slovakia	683	4%
Turkey	576	3%
Poland	551	3%
Sweden	437	2%
Romania	399	2%
Czech republic	370	2%
United States	323	2%
Portugal	299	2%
Russia	287	2%
The Netherlands	281	2%
China	257	1%
Hungary	235	1%
Brazil	215	1%
Switzerland	204	1%
Morocco	202	1%
Austria	168	1%
South Korea	164	1%
Algeria	145	1%
Slovenia	144	1%
Argentina	101	0.6%

Source: Customs data processed by 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 'entreprise' 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	2017	2018	2019	2020 (1)
<b>PHYSICAL DATA</b>								
Employees (2)	units	190,830	-	-	-	-	-	-
Employees on 12/31 (excluding temporary staff)	units	-	137,527	118,952	122,340	121,566	116,999	108,000
Production in France (only light vehicles since 2012)	thousands	3,348	2,229	1,978	2,226	2,270	2,175	1,316
Production per employee	units	17.5	16.2	16.6	18.2	18.7	18.6	12.2
<b>FINANCIAL DATA</b>								
Net sales	€ million	73,684	78,969	83,969	104,037	106,995	109,274	85,000
Export sales	€ million	42,290	45,526	54,290	61,853	65,279	65,310	51,000
Exports as a % of total sales	%	57.4%	57.6%	64.7%	59.5%	61.0%	59.8%	60.0%
Value added value before tax	€ million	13,282	10,112	11,332	13,264	12,544	12,333	10,000
Value added / sales	%	18.0%	12.8%	13.5%	12.7%	12.5%	11.3%	11.8%
Value added per employee	€ thousand	70	74	95	108	103	105	93
Social costs	€ million	2,153	2,302	2,072	2,340	2,420	2,318	-
Social costs per employee	€ thousand	11.3	16.7	17.4	19.1	19.9	19.8	-
Wages and salaries	€ million	5,093	5,696	5,186	5,773	5,761	5,695	-
Wages and salaries per employee	€ thousand	26.7	41.4	43.6	47.2	47.4	48.7	-
Personnel costs	€ million	7,246	7,999	7,258	8,114	8,181	8,013	-
Personnel costs per employee	€ thousand	38.0	58.2	61.0	66.3	67.3	68.5	-
Personnel costs / value added	%	54.6%	79.1%	64.0%	61.2%	65.2%	65.0%	-
Gross operating surplus	€ million	5,201	1,340	3,293	4,246	3,467	3,424	-
Gross operating surplus / value added	%	39.2%	13.3%	29.1%	32.0%	27.6%	27.8%	-
Interest expense	€ million	1,178	2,862	2,337	890	1,504	1,668	-
Interest expense / value added	%	8.9%	28.3%	20.6%	6.7%	12.0%	13.5%	-
Interest income	€ million	2,508	2,191	2,523	4,176	2,565	2,862	-
Interest income / value added	%	18.9%	21.7%	22.3%	31.5%	20.4%	23.2%	-
Net interest income	€ million	1,330	-671	186	3,286	1,061	1,194	-
Net interest income / value added	%	10.0%	-6.6%	1.6%	24.8%	8.5%	9.7%	-
Cashflow	€ million	5,499	1,078	3,291	5,076	4,335	4,285	-
Cashflow / value added	%	41.4%	10.7%	29.0%	38.3%	34.6%	34.7%	-
Taxes, payments, assimilated payments	millions €	-	-	822	982	951	945	-
Net income	€ million	2,851	293	1,244	3,587	2,663	2,064	-
Net income / sales	%	3.9%	0.4%	1.5%	3.4%	2.5%	1.9%	-
Capital expenditure	€ million	3,807	-	-	-	-	-	-
Gross fixed investments exclusive of contributions	€ million	-	2,078	1,959	2,273	2,293	2,643	2,400
Capital expenditure / sales	%	5.2%	2.6%	2.3%	2.2%	2.1%	2.4%	2.8%
Capital expenditure / value added	%	28.7%	20.6%	17.3%	17.1%	18.3%	21.4%	24.0%

(1) CCFA estimates based on FIEV, INSEE, OPCO2i / Observatoire de la Métallurgie data.

(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	2017	2018	2019	2020 (1)
<b>PHYSICAL DATA</b>								
	units	243	639	611	541	548	537	-
No. of companies (>20 employees up to 2007)	units	94,171	-	-	-	-	-	-
Employees (2)	units	-	61,759	81,309	96,633	95,732	92,544	86,000
<b>EMPLOYEES ON 12/31 (EXCLUDING TEMPORARY STAFF)</b>								
Financial data	millions €	17,766	16,056	22,157	31,621	32,001	30,317	23,000
Sales before tax	millions €	7,512	7,865	11,159	15,387	15,332	14,722	-
Export sales	%	42.3%	49.0%	50.4%	48.7%	47.9%	48.6%	-
Exports as a % of total sales		-	51%	55%	55%	54%	53%	53%
Exports as a % of production (source: FIEV)	millions €	4,643	3,885	5,664	7,803	7,844	7,647	5,800
Value added before tax	%	26.1%	24.2%	25.6%	24.7%	24.5%	25.2%	25.2%
Value added / sales before tax	thousands €	49	63	70	81	82	83	67
Value added per employee before tax	millions €	902	937	1,357	1,765	1,822	1,781	-
Social costs	thousands €	9.6	15.2	16.7	18.3	19.0	19.2	-
Social costs per employee	millions €	2,213	2,302	3,186	4,180	4,280	4,206	-
Wages and salaries	thousands €	23.5	37.3	39.2	43.3	44.7	45.5	-
Wages and salaries per employee	millions €	3,115	3,239	4,543	5,946	6,102	5,987	-
Personnel costs	thousands €	33.1	52.4	55.9	61.5	63.7	64.7	-
Personnel costs per employee	%	67.1%	83.4%	80.2%	76.2%	77.8%	78.3%	-
Personnel costs / value added	millions €	1,206	412	818	1,427	1,333	1,266	-
Gross operating surplus	%	26.0%	10.6%	14.4%	18.3%	17.0%	16.6%	-
Gross operating surplus / value added	millions €	440	177	301	1,778	1,190	1,884	-
Interest expense	%	9.5%	4.6%	5.3%	22.8%	15.2%	24.6%	-
Interest expense / value added	millions €	337	217	661	2,460	2,547	2,275	-
Interest income	%	7.3%	5.6%	11.7%	31.5%	32.5%	29.7%	-
Interest income / value added	millions €	-103	40	360	682	1,357	391	-
Net interest income	%	-2.2%	1.0%	6.4%	8.7%	17.3%	5.1%	-
Net interest income / value added	millions €	889	341	1,188	2,261	1,984	2,098	-
Cashflow	%	19.2%	8.8%	21.0%	29.0%	25.3%	27.4%	-
Cashflow / value added	millions €	-	-	316	446	431	412	-
Taxes, payments, assimilated payments	millions €	-92	-17	702	1,562	1,937	2,064	-
Net income	%	-0.5%	-0.1%	3.2%	4.9%	6.1%	6.8%	-
Net income / sales	millions €	1,024	-	-	-	-	-	-
Capital expenditure	millions €	-	413	856	1,004	1,056	1,081	-
Gross fixed investments exclusive of contributions	%	5.8%	2.6%	3.9%	3.2%	3.3%	3.6%	-
Capital expenditure / sales	%	22.0%	10.6%	15.1%	12.9%	13.5%	14.1%	-

(1) CCFA estimates based on FIEV, INSEE, OPCO2i / Observatoire de la Métallurgie data.

(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	2017	2018	2019	2020
Alpine	-	-	-	-	7	1,156	3,172	744
Dacia	-	9,760	104,641	97,441	117,865	140,326	138,977	97,170
Renault	602,415	546,227	497,820	382,504	416,577	406,222	407,134	314,630
<b>Renault group</b>	<b>602,415</b>	<b>555,987</b>	<b>602,461</b>	<b>479,945</b>	<b>534,449</b>	<b>547,704</b>	<b>549,283</b>	<b>412,544</b>
Citroën	261,508	275,053	301,607	201,065	201,373	213,844	235,110	162,688
DS	-	-	26,539	30,257	21,323	24,004	26,845	22,182
Opel (1)	-	-	-	-	27,016	71,619	66,901	43,801
Peugeot	397,547	385,739	400,663	327,393	366,872	389,518	379,582	301,935
<b>PSA group (2)</b>	<b>659,055</b>	<b>660,792</b>	<b>728,809</b>	<b>558,715</b>	<b>616,584</b>	<b>698,985</b>	<b>708,438</b>	<b>530,606</b>
Bolloré	0	0	0	1,191	56	104	1	0
Others France	63	148	56	50	101	123	121	73
<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>1,151,190</b>	<b>1,246,916</b>	<b>1,257,843</b>	<b>943,223</b>
Alfa Romeo	12,774	13,847	13,033	6,353	9,208	8,332	3,938	2,372
Chrysler	4,827	5,066	880	0	0	0	0	0
Fiat	95,983	46,157	72,717	54,443	68,196	78,226	71,666	42,360
Jeep	3,001	3,525	1,177	8,585	10,892	13,191	11,541	6,381
Lancia	5,864	4,414	3,368	1,469	34	1	1	0
Maserati	-	174	162	508	711	606	420	135
<b>FCA group (2)</b>	<b>122,449</b>	<b>73,241</b>	<b>91,337</b>	<b>71,358</b>	<b>89,041</b>	<b>100,356</b>	<b>87,566</b>	<b>51,248</b>
Audi	34,937	44,311	50,936	58,734	65,690	51,582	57,532	45,360
BMW	31,576	40,508	46,074	53,558	61,309	57,537	58,751	45,478
Chevrolet	1,043	7,940	21,247	121	138	92	52	1
Daewoo	11,731	2	0	0	0	0	0	0
Daihatsu	1,043	-	1,083	0	0	0	0	0
Ford	117,061	103,597	114,810	80,729	84,382	82,633	78,838	55,219
Honda	8,716	8,883	11,251	7,325	8,491	8,309	8,196	5,802
Hyundai	11,019	27,396	18,785	23,968	29,570	35,542	39,970	34,585
Infiniti	-	-	267	1,139	1,985	945	216	1
Jaguar	1,939	2,118	1,126	1,530	3,541	4,580	3,561	1,309
Kia	2,631	18,073	24,055	29,146	37,235	42,313	45,056	39,052
Lada	1,867	1,671	346	3	0	0	0	0
Land Rover	7,570	6,946	2,735	8,846	9,079	6,803	7,878	5,456
Lexus	-	-	1,921	4,457	5,390	6,101	7,159	5,913
Mazda	6,366	11,440	10,232	8,418	11,778	11,129	12,596	8,890
Mercedes-Benz	43,389	54,779	45,612	55,376	68,007	65,808	70,214	52,570
Mini	-	12,627	18,007	22,512	26,431	27,378	27,158	21,881
Mitsubishi	5,575	6,758	3,514	3,936	2,378	4,879	7,207	5,012
Nissan	31,330	40,858	54,084	74,102	71,492	59,606	42,313	32,963
Opel (1)	133,576	106,462	94,877	64,170	45,548	-	-	-
Porsche	825	2,404	2,073	4,943	5,457	4,567	5,572	4,878
Rover	13,474	1,980	0	0	0	0	0	0
Saab	3,265	2,701	574	0	0	0	0	0
Seat	40,562	32,744	30,645	22,009	24,714	31,219	37,148	26,676
Skoda	11,570	15,044	18,533	21,759	26,799	31,423	36,498	29,875
Smart	6,645	12,649	6,408	8,107	8,162	7,446	10,494	1,692
Ssangyong	19	3,972	451	636	669	301	157	177
Subaru	2,312	1,464	1,146	841	721	720	510	125
Suzuki	11,355	21,125	22,070	18,506	25,043	27,241	30,758	19,651
Tesla	-	-	11	708	1,368	1,252	7,442	7,372
Toyota	43,698	87,500	65,390	71,755	88,662	97,286	101,730	89,727
Volkswagen	152,868	136,011	146,538	144,103	139,360	140,313	149,105	97,784
Volvo	6,777	11,096	11,841	13,876	16,219	18,349	21,696	16,412
<b>TOTAL FOREIGN (2)</b>	<b>872,351</b>	<b>900,634</b>	<b>920,342</b>	<b>877,325</b>	<b>959,558</b>	<b>926,565</b>	<b>956,436</b>	<b>706,895</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>2,110,748</b>	<b>2,173,481</b>	<b>2,214,279</b>	<b>1,650,118</b>
of which Temporary Transit	-	49,772	39,011	31,665	31,762	32,112	30,326	11,826
<b>FRENCH GROUPS AS A %</b>	<b>59.1%</b>	<b>57.5%</b>	<b>59.1%</b>	<b>54.2%</b>	<b>54.5%</b>	<b>57.4%</b>	<b>56.8%</b>	<b>57.2%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>40.9%</b>	<b>42.5%</b>	<b>40.9%</b>	<b>45.8%</b>	<b>45.5%</b>	<b>42.6%</b>	<b>43.2%</b>	<b>42.8%</b>

(1) Opel has belonged to the PSA group since August 1, 2017. Thus, the registrations of this brand are presented at PSA over the period from 08/01/2017 to 12/31/2017.

(2) On 01/17/2021, the PSA group and the FCA group merge to create the Stellantis group.

(3) Including others.

## ► USED PASSENGER CAR REGISTRATIONS (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<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>5,678,595</b>	<b>5,632,361</b>	<b>5,790,612</b>	<b>5,569,298</b>
Used/new ratio	2.4	2.5	2.4	2.9	2.7	2.6	2.6	3.4

## ► USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<b>TOTAL ALL CATEGORIES</b>	<b>651,033</b>	<b>718,948</b>	<b>806,398</b>	<b>789,073</b>	<b>797,223</b>	<b>785,852</b>	<b>817,285</b>	<b>799,287</b>
Used/new ratio	1.6	1.7	1.9	2.1	1.8	1.7	1.7	2.0

Source: CCFA

## REGISTRATIONS

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

## ► NEW DIESEL PASSENGER CAR REGISTRATIONS BY BRAND (1) (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
Citroën	138,628	185,733	228,977	113,446	85,109	65,796	80,631	58,229
DS	-	-	14,864	15,281	9,031	11,160	10,774	7,786
Peugeot	206,153	275,898	307,518	190,548	178,061	159,139	149,244	114,763
Opel (2)	-	-	-	-	9,126	17,112	11,252	12,196
Dacia	-	-	53,737	54,326	51,174	62,022	53,487	33,255
Renault	257,909	373,738	352,530	233,998	220,723	185,026	157,234	117,563
<b>FRENCH GROUPS (3)</b>	<b>602,690</b>	<b>835,369</b>	<b>957,626</b>	<b>607,599</b>	<b>553,224</b>	<b>500,255</b>	<b>462,622</b>	<b>343,792</b>
Alfa Romeo	7,444	10,857	8,432	2,995	4,726	4,474	2,904	1,833
Audi	25,901	39,420	45,201	44,445	41,495	26,682	21,291	12,322
BMW-Mini	21,065	36,859	50,906	57,145	54,330	41,650	39,102	24,458
Chrysler-Dodge-Jeep	4,161	6,561	2,863	7,183	7,969	9,226	4,746	2,199
Fiat-Lancia	38,337	27,223	28,240	16,935	18,066	16,891	8,297	3,163
Ford	58,896	76,494	89,334	41,986	38,903	28,192	16,098	11,432
Honda	413	4,473	5,029	4,364	3,205	2,546	482	153
Hyundai	5,510	22,137	13,174	15,069	13,230	12,113	13,568	3,827
Jaguar-Land Rover	5,656	8,172	3,551	9,403	11,897	9,696	5,169	1,874
Kia	1,200	10,610	15,428	15,870	16,548	15,092	10,751	5,469
Mazda	3,204	6,061	6,768	4,802	4,353	3,234	2,893	1,547
Mercedes-Benz	30,007	44,165	41,460	47,646	53,274	49,361	48,424	29,399
Mitsubishi	3,227	4,798	3,102	2,053	1,062	827	75	0
Nissan-Infiniti	15,533	23,499	35,092	46,879	43,815	27,170	18,245	8,809
Opel (2)	63,726	75,957	63,751	29,335	16,232	-	-	-
Seat	27,861	26,421	25,462	10,683	7,456	8,357	10,841	5,777
Skoda	7,741	12,391	14,781	12,930	13,908	14,651	15,392	12,709
Suzuki	3,165	11,979	9,263	4,359	2,448	1,468	63	0
Toyota-Lexus	12,282	54,639	35,744	17,879	6,582	2,908	1,474	1,495
Volkswagen	89,487	107,005	118,702	80,893	68,608	55,744	60,158	28,323
Volvo	4,786	10,270	11,614	12,747	13,602	13,461	12,735	5,418
<b>TOTAL FOREIGN (3)</b>	<b>443,795</b>	<b>631,303</b>	<b>635,547</b>	<b>489,525</b>	<b>444,893</b>	<b>344,575</b>	<b>292,961</b>	<b>160,386</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>998,117</b>	<b>844,830</b>	<b>755,583</b>	<b>504,178</b>
of which Temporary Transit	-	37,259	34,432	27,141	20,180	19,471	17,563	6,971
% diesel	49.0%	69.2%	70.8%	57.2%	47.3%	38.9%	34.1%	30.6%
<b>FRENCH GROUPS AS A %</b>	<b>57.6%</b>	<b>57.0%</b>	<b>60.1%</b>	<b>55.4%</b>	<b>55.4%</b>	<b>59.2%</b>	<b>61.2%</b>	<b>68.2%</b>
<b>TOTAL FOREIGN AS A %</b>	<b>42.4%</b>	<b>43.0%</b>	<b>39.9%</b>	<b>44.6%</b>	<b>44.6%</b>	<b>40.8%</b>	<b>38.8%</b>	<b>31.8%</b>

## ► REGISTRATIONS OF NEW ELECTRIC AND PLUG-IN HYBRID PASSENGER CARS BY BRAND(1) (IN UNITS)

	2010	2014	2015	2016	2017	2018	2019	2020
Citroën	27	154	397	1,210	881	1,140	727	5,155
DS	0	0	0	0	0	0	314	7,245
Peugeot	30	163	725	1,196	1,039	1,344	781	28,947
Opel (2)	-	-	-	-	0	0	1	3,116
Dacia	0	0	0	0	0	0	0	1,722
Renault	13	5,975	10,408	11,404	15,245	17,038	18,817	45,953
Bolloré	0	1,170	1,191	944	56	104	1	0
<b>FRENCH GROUPS (3)</b>	<b>70</b>	<b>7,471</b>	<b>12,721</b>	<b>14,754</b>	<b>17,236</b>	<b>19,629</b>	<b>20,641</b>	<b>92,138</b>
Audi	0	161	1,129	851	815	538	765	5,492
BMW-Mini	50	654	1,125	2,904	4,534	5,726	6,882	13,039
Chrysler-Dodge-Jeep	0	0	0	0	0	0	0	1,475
Fiat-Lancia	0	0	0	0	0	0	0	1,761
Ford	0	11	1	0	0	0	0	2,112
Hyundai	0	1	10	162	665	1,457	2,789	6,637
Jaguar-Land Rover	0	0	0	0	0	731	2,340	2,366
Kia	0	63	485	1,160	1,097	1,370	3,298	7,502
Mercedes-Benz	0	23	245	735	2,762	1,489	1,034	11,665
Mitsubishi	7	820	961	429	572	1,304	3,118	2,642
Nissan-Infiniti	0	1,616	2,298	4,025	2,530	4,758	3,893	3,512
Porsche	0	77	505	507	710	1,187	1,442	2,938
Smart	34	509	336	26	1,145	1,599	2,219	1,687
Tesla	11	328	708	945	1,368	1,252	7,442	7,372
Toyota-Lexus	82	94	68	36	405	281	288	234
Volkswagen	0	462	2,141	1,845	1,941	1,902	1,391	11,031
Volvo	0	186	125	810	1,044	2,374	3,806	7,301
<b>TOTAL FOREIGN (3)</b>	<b>196</b>	<b>5,026</b>	<b>10,146</b>	<b>14,436</b>	<b>19,588</b>	<b>25,968</b>	<b>40,715</b>	<b>93,370</b>
<b>TOTAL ALL CATEGORIES</b>	<b>266</b>	<b>12,497</b>	<b>22,867</b>	<b>29,190</b>	<b>36,824</b>	<b>45,597</b>	<b>61,356</b>	<b>185,508</b>
Share of electric and plug-in hybrid registrations	0.0%	0.7%	1.2%	1.4%	1.7%	2.1%	2.8%	11.2%
<b>FRENCH GROUPS AS A %</b>	<b>26.3%</b>	<b>59.8%</b>	<b>55.6%</b>	<b>50.5%</b>	<b>46.8%</b>	<b>43.0%</b>	<b>33.6%</b>	<b>49.7%</b>

(1) For the groups constitution, see page 74. From 17/01/2021, the PSA group and the FCA group form the Stellantis group.

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

(3) Including others.

Source: CCFA

## REGISTRATIONS

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

	2000	2005	2010	2015	2017	2018	2019	2020
<b>Renault group</b>	-	-	5,434	2,594	1,492	1,262	1,572	1,206
Dacia	139,752	140,059	135,591	124,634	137,927	140,822	147,826	121,837
Renault	139,752	140,059	141,025	127,228	139,419	142,084	149,398	123,043
<b>PSA group (1)</b>	<b>77,048</b>	<b>73,166</b>	<b>70,579</b>	<b>59,295</b>	<b>68,979</b>	<b>72,504</b>	<b>74,026</b>	<b>60,937</b>
Citroën	-	-	259	489	259	222	179	200
DS	-	-	-	-	3,232	6,191	7,442	7,448
Peugeot	74,950	73,778	72,228	59,649	73,628	78,532	85,360	70,643
Opel (2)	151,998	146,944	143,066	119,433	146,098	157,449	167,007	139,228
Others France	40	10,076	528	905	896	911	869	640
<b>FRENCH GROUPS</b>	<b>291,790</b>	<b>297,079</b>	<b>284,619</b>	<b>247,566</b>	<b>286,413</b>	<b>300,444</b>	<b>317,274</b>	<b>262,911</b>
Fiat (1)	25,253	12,497	34,659	32,071	36,693	38,381	37,572	33,333
Ford	18,110	19,695	20,437	22,534	28,810	31,788	32,798	28,170
Hyundai	588	1,380	237	195	227	331	347	247
Isuzu	108	1,370	1,961	2,024	1,858	2,360	2,495	932
Iveco	16,534	15,721	11,610	11,414	14,356	16,468	17,031	14,309
Jeep	-	146	287	1,268	1,183	1,725	1,794	630
Land Rover	1,857	1,256	1,550	2,591	463	648	625	431
Mercedes	23,139	18,973	19,051	18,643	19,890	20,491	23,385	23,301
Mitsubishi	3,392	1,350	2,639	1,836	1,858	2,099	1,756	1,516
Nissan	5,197	9,746	7,307	7,260	10,111	9,850	8,167	6,117
Opel (2)	7,561	12,617	7,195	6,782	4,339	-	-	-
Toyota	1,771	2,587	4,013	5,210	6,927	7,805	8,542	6,712
Volkswagen	13,819	10,043	13,249	16,375	21,080	21,414	21,182	16,941
<b>TOTAL FOREIGN (3)</b>	<b>123,176</b>	<b>122,986</b>	<b>132,993</b>	<b>131,860</b>	<b>152,241</b>	<b>158,696</b>	<b>162,480</b>	<b>139,478</b>
<b>TOTAL ALL CATEGORIES</b>	<b>414,966</b>	<b>420,065</b>	<b>417,612</b>	<b>379,426</b>	<b>438,654</b>	<b>459,140</b>	<b>479,749</b>	<b>402,382</b>
FRENCH GROUPS AS A %	70.3%	70.7%	68.2%	65.2%	65.3%	65.4%	66.1%	65.3%
TOTAL FOREIGN AS A %	29.7%	29.3%	31.8%	34.8%	34.7%	34.6%	33.9%	34.7%

## ► REGISTRATIONS OF NEW INDUSTRIAL VEHICLES BY BRAND (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
Renault Trucks	20,818	18,339	10,908	11,568	13,954	15,156	15,308	11,770
<b>FRENCH GROUPS</b>	<b>20,992</b>	<b>18,465</b>	<b>10,964</b>	<b>11,584</b>	<b>13,963</b>	<b>15,167</b>	<b>15,323</b>	<b>11,783</b>
DAF	4,365	6,321	4,464	4,723	6,118	6,829	7,295	5,599
Iveco	6,998	5,901	4,003	4,783	5,417	5,243	4,248	4,044
MAN	3,498	4,545	2,729	4,581	5,058	5,998	6,095	4,128
Mercedes-Benz	9,976	9,325	5,229	6,128	7,526	7,965	7,513	5,674
Scania	4,963	4,417	2,553	4,359	5,512	5,864	7,038	4,770
Volvo Trucks	6,739	5,870	3,938	5,219	6,321	6,699	7,018	5,131
<b>TOTAL FOREIGN</b>	<b>36,924</b>	<b>36,819</b>	<b>23,257</b>	<b>30,132</b>	<b>36,465</b>	<b>39,117</b>	<b>39,892</b>	<b>29,946</b>
<b>TOTAL ALL CATEGORIES</b>	<b>57,916</b>	<b>55,284</b>	<b>34,221</b>	<b>41,716</b>	<b>50,428</b>	<b>54,284</b>	<b>55,215</b>	<b>41,729</b>
FRENCH GROUPS AS A %	36.2%	33.4%	32.0%	27.8%	27.7%	27.9%	27.8%	28.2%
TOTAL FOREIGN AS A %	63.8%	66.6%	68.0%	72.2%	72.3%	72.1%	72.2%	71.8%

## ► REGISTRATIONS OF USED INDUSTRIAL VEHICLES (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
<b>TOTAL</b>	<b>59,056</b>	<b>55,975</b>	<b>56,142</b>	<b>48,381</b>	<b>54,399</b>	<b>51,474</b>	<b>53,527</b>	<b>49,825</b>
Used/new ratio	1.0	1.5	1.6	1.1	1.1	0.9	1.0	1.2

## ► REGISTRATIONS OF NEW COACHES AND BUSES PER GROUP (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2017	2018	2019	2020
Renault	1,633	39	-	-	-	-	-	-
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	2,419	2,523	2,862	2,731
Evobus (2)	-	888	1,433	2,050	1,672	1,704	1,444	1,599
VGF group (3)	-	404	559	589	475	584	942	674
Bova	-	198	116	-	-	-	-	-
Temsa	-	301	309	146	235	258	150	191
Van Hool	230	238	169	98	108	113	157	96
Yutong	-	-	-	96	127	55	20	8
Irizar	-	-	-	38	77	46	202	27
Isuzu	-	-	-	8	53	117	122	61
Otokar	-	-	105	187	197	163	193	201
Others	-	237	384	548	943	605	842	492
<b>TOTAL</b>	<b>-</b>	<b>4,773</b>	<b>5,382</b>	<b>6,724</b>	<b>5,979</b>	<b>5,842</b>	<b>6,417</b>	<b>5,791</b>

(1) On 01/17/2021, the PSA group and the FCA group merge to create the Stellantis group.

(2) 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.

(3) Including others.

Source: CCFA

## VEHICLE OWNERSHIP

### ► MOTORISATION RATE IN EUROPE

NUMBER OF CARS PER 1,000 INHABITANTS

	2014	2015	2016	2017	2018	2019
Germany	550	555	557	563	569	575
Belgium	493	497	501	505	507	508
Spain	474	481	493	508	526	533
France	481	564	569	574	573	570
Greece	467	470	475	480	481	489
Hungary	314	324	337	354	372	390
Italy	610	614	624	636	645	655
The Netherlands	487	493	497	503	511	517
Poland	526	545	571	593	617	642
Portugal	431	437	445	466	487	506
Czech republic	470	490	509	529	547	562
Romania	246	259	277	305	330	355
Sweden	475	479	484	485	481	478
<b>EUROPEAN UNION</b>	-	<b>553</b>	<b>554</b>	<b>558</b>	<b>564</b>	<b>569</b>
Norway	497	502	507	512	514	520
Switzerland	544	547	549	549	550	535
<b>EFTA</b>	<b>526</b>	<b>529</b>	<b>533</b>	<b>535</b>	<b>536</b>	<b>529</b>
Russia	284	284	289	294	301	303
Turkey	129	136	144	151	153	152
United Kingdom	507	517	526	527	526	528
<b>EUROPE</b>	-	<b>553</b>	<b>554</b>	<b>558</b>	<b>564</b>	<b>569</b>

Source: ACEA, Vehicles in use Europe 2021

### ► TOTAL VEHICLES IN USE (ON JANUARY 1, 2021)

(IN THOUSANDS)

	All fuels	Diesel	Others
<b>Passenger cars</b>			
5 HP and less	18,524	9,121	9,403
From 6 HP to 10 HP	17,741	11,859	5,882
11 HP and more	2,081	1,049	1,032
<b>Total passenger cars</b>	<b>38,346</b>	<b>22,029</b>	<b>16,317</b>
<b>Light commercial vehicles (LCV)</b>			
Less than 2.5t	2,250	2,045	205
From 2.5t to 3.5t	3,650	3,617	33
From 3.6t to 5t	17	15	2
<b>Total LCV up to 5t (1)</b>	<b>5,917</b>	<b>5,677</b>	<b>240</b>
<b>Total passenger cars and LCVs</b>	<b>44,263</b>	<b>27,706</b>	<b>16,557</b>
<b>Heavy trucks over 3.5t</b>			
<b>Rigids</b>			
From 3.5t to less than 12t	79	78	1
From 12t to less than 20t	147	146	1
20t and more	141	140	1
<b>Total rigids</b>	<b>367</b>	<b>364</b>	<b>3</b>
<b>Tractors</b>	<b>216</b>	<b>214</b>	<b>3</b>
<b>Total heavy trucks</b>	<b>583</b>	<b>577</b>	<b>6</b>
<b>Coaches and buses</b>	<b>94</b>	<b>66</b>	<b>27</b>
<b>Total commercial vehicles over 3.5t</b>	<b>677</b>	<b>643</b>	<b>33</b>
<b>Total commercial vehicles all weights (excluded buses)</b>	<b>6,594</b>	<b>6,321</b>	<b>273</b>
<b>Total all vehicles</b>	<b>44,940</b>	<b>28,350</b>	<b>16,590</b>

(1) Including unknown weights.

Sources: MTE/SDES, CCFA estimates

### ► VEHICLE OWNERSHIP

	unité	2000	2005	2010	2015	2018	2019	2020
Households without a vehicle	%	19.7%	18.8%	16.5%	17.1%	15.1%	15.0%	14.8%
Households with a vehicle	%	80.3%	81.2%	83.5%	82.9%	84.9%	85.0%	85.2%
Households with one vehicle	%	50.7%	46.4%	47.6%	48.4%	48.4%	48.3%	48.2%
Households with two vehicles	%	25.4%	29.4%	30.7%	29.4%	31.2%	31.5%	31.7%
Households with three or more vehicles	%	4.2%	5.4%	5.2%	5.1%	5.3%	5.2%	5.3%
Households without any vehicle	%	58%	51%	45%	55%	56%	56%	55%
Average age of the vehicle	year	7.25	7.71	8.0	8.9	9.1	8.9	9.0
Average ownership period	year	4.43	4.73	5.0	5.5	5.6	5.5	5.6
Used passenger cars	%	56.1	59.9	58.9	58.5	58.5	58.0	59.0
Total average kilometres	km	13,670	12,960	12,240	11,710	11,900	11,900	11,865
Petrol average kilometres	km	11,690	10,090	8,440	8,030	8,290	8,850	7,190
Diesel average kilometres	km	18,240	16,330	14,720	13,990	14,540	14,410	11,950
<b>Domestic passenger road transport</b>								
By passenger car	billions of passenger-km	766.5	788.1	779.9	787	799	791	639
By coach-bus	billions of passenger-km	49.7	50.3	54.4	58.4	62.80	61.23	37.90
Total traffic	billions of passenger-km	913.9	942.5	949.6	964.4	985.1	981.2	749.4
Road transport as a % of total traffic	%	89.3	88.9	87.9	87.6	87.4	86.9	90.4
<b>Annual change</b>								
By passenger car	%	-0.0	-0.1	+0.8	+0.7	-0.3	-0.9	-19.2
By coach-bus	%	+2.8	+0.3	+1.7	+1.5	+0.7	-2.5	-38.1

Sources: KANTAR TNS PARC AUTO and MTE/SDES

### ► CARS IN USE ON JANUARY 1 DEPENDING ON ENGINE (IN THOUSANDS)

	2015	2019	2020	2021
Electric and hydrogen	26	106	141	245
Petrol	13,120	14,756	15,354	15,758
Diesel	23,631	23,263	22,500	22,029
Gas	165	142	135	154
Plug-in hybrids	19	56	73	157
Others	16	13	12	4
<b>All</b>	<b>36,977</b>	<b>38,336</b>	<b>38,215</b>	<b>38,346</b>

### ► CARS IN USE ON JANUARY 1 DEPENDING ON CRIT'AIR STICKER (IN THOUSANDS)

	2015	2019	2020	2021
Crit'Air E	26	106	141	245
Crit'Air 1	2,922	7,042	8,433	9,571
Crit'Air 2	9,383	12,807	13,355	13,907
Crit'Air 3	12,644	10,644	9,866	9,243
Crit'Air 4	5,732	4,290	3,682	3,221
Crit'Air 5	2,192	1,250	977	769
Unknown and unclassified	4,078	2,197	1,761	1,391
<b>All</b>	<b>36,977</b>	<b>38,336</b>	<b>38,215</b>	<b>38,346</b>

Source: MTE/SDES

## POLLUTANT EMISSIONS AND CO<sub>2</sub>

### ► EVOLUTION OF EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 AND 2020

	1990	2000	2005	2010	2015	2019	2020 (1)	Change 2020/1990	Change 2020/2019
<b>POLLUTING EMISSIONS FROM THE ROAD (IN THOUSANDS OF TONNES)</b>									
SO <sub>2</sub>	143.2	23.0	4.2	0.8	0.8	0.8	0.7	-100%	-16.0%
CO	5,588	2,407	1,327	646	345	260	210	-96%	-19.2%
NOx	1,237	936	754	585	507	401	309	-75%	-23.1%
NMVOOC	909	431	226	104	59	44	37	-96%	-16.6%
Lead (in tonnes)	3,902	30	27	28	28	29	24	-99%	-16.1%
PM10: particles	74	67	52	42	32	26	20	-72%	-19.9%
<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	100	-10%	-16.3%
CO <sub>2</sub> from combustion of biomass	0	1	2	7	8	9	8	-	-11.4%

(1) Estimates.

Source: CITEPA/Secten data, 2021 edition

### ► CO<sub>2</sub> EMISSIONS IN METROPOLITAN FRANCE BY BUSINESS SECTOR (IN MILLIONS OF TONNES OF CO<sub>2</sub> AND AS % OF TOTAL EXCLUDING LULUCF)

	1990	2000	2010	2015	2019	2020 (1)	2020/1990
Energy processing	68.8	63.5	58.8	40.0	36.0	32.1	-53%
	17%	16%	16%	12%	11%	12%	
Manufacturing industry	108.9	106.6	83.2	72.6	78.0	70.0	-36%
	28%	26%	22%	22%	25%	25%	
Waste treatment	1.9	1.4	1.3	1.3	1.1	1.1	-44%
	0%	0%	0%	0%	0%	0%	
Residential/Tertiary	85.3	88.0	93.9	74.0	63.1	58.1	-32%
	22%	22%	25%	23%	20%	21%	
Agriculture/Forestry	11.6	12.5	11.9	12.0	11.0	10.8	-7%
	3%	3%	3%	4%	3%	4%	
Transport	119.1	135.9	129.7	128.2	126.5	104.5	-12%
	30%	33%	34%	39%	40%	38%	
of which road	112.1	128.0	123.4	122.2	120.0	100.4	-10%
	28%	31%	33%	37%	38%	36%	
of which other transport	6.6	7.9	6.3	6.0	6.5	4.1	-38%
	2%	2%	2%	2%	2%	1%	
<b>TOTAL EXCLUDING LULUCF (2)</b>	<b>395.7</b>	<b>407.8</b>	<b>378.8</b>	<b>328.0</b>	<b>315.7</b>	<b>276.7</b>	<b>-30%</b>
<b>LULUCF (2)</b>	<b>-29.1</b>	<b>-26.0</b>	<b>-44.0</b>	<b>-39.0</b>	<b>-38.4</b>	<b>-38.5</b>	
<b>TOTAL WITH LULUCF (2)</b>	<b>366.6</b>	<b>381.8</b>	<b>333.4</b>	<b>293.5</b>	<b>277.2</b>	<b>238.2</b>	<b>-35%</b>

(1) Estimates.

(2) LULUCF: Land Use, Land Use Change and Forestry.

Source: CITEPA/CORALIE/Secten format 2021 edition

### ► AVERAGE CO<sub>2</sub> EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE (IN GRAMS OF CO<sub>2</sub> PER KM)

	2000	2005	2010	2015	2018	2019	2020	2020/2000
<b>FRANCE</b>								
Petrol	168	159	130	116	116	116	109	-59
Diesel	155	149	130	111	112	113	107	-48
<b>TOTAL FRANCE</b>	<b>162</b>	<b>152</b>	<b>130</b>	<b>111</b>	<b>112</b>	<b>112</b>	<b>97</b>	<b>-65</b>
<b>EUROPEAN UNION</b>								
Italy	161	149	134	115	n/a	n/a	n/a	-
Spain	162	150	140	115	n/a	n/a	n/a	-
United Kingdom	180	169	145	121	n/a	n/a	n/a	-
Germany	179	170	152	128	n/a	n/a	n/a	-
<b>EU 15 COUNTRIES AVERAGE</b>	<b>171</b>	<b>161</b>	<b>141</b>	<b>119</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>-</b>

Source: ADEME (September 2021)



## AUTOMOTIVE TAXES AND DUTIES

### ► ROAD FUEL CONSUMPTION, PRICES AND TAXES

	UNITS	2000	2005	2010	2011	2015	2017	2018	2019	2020
<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	8,582	6,292	6,201	6,015	5,916	5,019
Premium unleaded 95-E10	millions de litres	-	-	1,379	1,754	3,198	3,938	4,518	5,381	4,734
% of total petrol	%	-	-	12.7%	17.0%	33.6%	38.8%	42.9%	47.6%	48.5%
<b>Total petrol</b>	<b>millions of litres</b>	<b>18,253</b>	<b>14,529</b>	<b>10,880</b>	<b>10,337</b>	<b>9,510</b>	<b>10,140</b>	<b>10,533</b>	<b>11,296</b>	<b>9,753</b>
Diesel	millions of litres	32,373	36,744	39,749	40,327	41,187	41,058	39,794	39,048	32,778
<b>TOTAL ROAD FUEL</b>	<b>millions of litres</b>	<b>50,627</b>	<b>51,273</b>	<b>50,629</b>	<b>50,664</b>	<b>50,697</b>	<b>51,198</b>	<b>50,326</b>	<b>50,345</b>	<b>42,531</b>

Source: CPDP

	UNITS	2000	2005	2010	2011	2015	2017	2018	2019	2020
<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	1.54	1.42	1.44	1.57	1.57	1.42
Tax as a %	%	69	65	60	56	61	62	61	61	65
Petrol	euros/litre	1.12	1.18	1.35	1.51	1.35	1.38	1.50	1.51	1.38
Tax as a %	%	69	67	61	57	63	59	54	62	66
Diesel	euros/litre	0.85	1.02	1.15	1.34	1.15	1.23	1.44	1.44	1.26
Tax as a %	%	62	57	54	49	59	61	59	59	65

Source: DGEC

### ► AUTOMOTIVE TAXES AND DUTIES (IN € MILLION)

	2000	2005	2010	2015	2017	2018	2019	2020
Tax on road-use oil products (including VAT)	30,630	32,205	32,324	36,294	39,239	42,763	43,070	35,159
Tax on vehicle registration certificates	1,373	1,623	1,917	2,086	2,229	2,326	2,296	2,091
Automotive insurance tax	3,429	4,057	4,126	4,662	4,938	5,102	5,269	5,406
Road Tax	539	145	0	0	0	0	0	0
Tax on company cars	644	867	992	753	638	751	768	801
Tax based on number of axles	223	205	168	169	100	102	104	101
Fixed rate police and traffic fines	720	1,266	1,255	1,562	1,758	1,677	1,586	1,517
Driver's licence tax	14	4	1	11	10	10	10	10
Regional development tax	442	499	539	555	516	472	523	458
Government royalty	132	154	186	326	351	348	355	360
General tax on polluting activities (TGAP)	-	20	500	600	600	407	426	345
VAT on spending to acquire vehicles (passenger cars)	6,603	7,693	8,171	8,709	10,110	10,324	10,886	8,519
VAT on repairs, maintenance, MoTs and driving licences	4,324	5,898	7,133	8,081	9,027	9,568	9,875	9,102
<b>Automotive taxes and duties (including VAT)</b>	<b>49,073</b>	<b>54,636</b>	<b>57,313</b>	<b>63,809</b>	<b>69,517</b>	<b>73,851</b>	<b>75,168</b>	<b>63,870</b>
of which specific automotive taxation	-	37,200	37,300	40,800	44,900	47,900	47,494	40,901
of which tax on fuels: TICPE and VAT on TICPE	-	28,900	28,200	31,500	35,477	38,189	37,594	31,224
<b>ADDITIONAL INFORMATION (In € million)</b>								
Freeway tolls (excl. VAT)	4,457	6,410	8,110	9,390	10,170	10,470	10,860	9,000
Freeway tolls (incl. VAT)	5,330	7,666	9,700	11,268	12,204	12,564	13,032	10,800
<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>13,800</b>	<b>14,100</b>	<b>14,300</b>	<b>13,531</b>

(1) Depending on the agrofuel incorporation rate.

(2) APU: Public administration; total expenditure on transport is equal to current expenditure and investment expenditure; the figure presented may include double counts and is therefore an upper bound.

(3) Estimate.

Sources: Tax Directorate, CCFA, URF, MTE/SDES, Commission des Comptes des Transports de la Nation

## USEFUL ADDRESSES

### ► FRENCH AUTOMOTIVE MANUFACTURERS

#### PSA Group (Stellantis from 01/17/2021)

2, boulevard de l'Europe  
78300 Poissy  
Tel.: 01 61 45 45 45  
[www.stellantis.com/fr](http://www.stellantis.com/fr)

#### 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](http://www.alpinecars.com)

### ► 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) – MOBILIANS

43 bis, route de Vaugirard  
CS 80016  
92197 Meudon  
Tel.: 01 40 99 55 00  
[www.mobilians.fr](http://www.mobilians.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 Monthléry cedex  
Tel.: 01 69 80 17 00  
[www.utacceram.com](http://www.utacceram.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.avere-france.org](http://www.avere-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.ifpenergiesnouvelles.fr](http://www.ifpenergiesnouvelles.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.ifstar.fr](http://www.ifstar.fr)

### CARA

1, boulevard Edmond Michelet  
69372 Lyon Cedex 08  
Tel.: 04 51 08 40 20  
[www.cara.eu](http://www.cara.eu)

### Next move

Head office – Rouen office  
Innovapôle 76  
50, rue Ettore Bugatti  
76800 Saint-Etienne du Rouvray  
Tel.: 02 35 65 78 17  
[www.nextmove.fr](http://www.nextmove.fr)

### 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  
68060 Mulhouse Cedex  
Tel.: 03 89 32 76 44  
[www.vehiculedefutur.com](http://www.vehiculedefutur.com)

The CCFA provides statistics and information on the automotive world, available on its website [www.cdfa.fr](http://www.cdfa.fr)  
Contact: [ecostats@ccfa.fr](mailto:ecostats@ccfa.fr)



