THE FRENCH AUTOMOTIVE INDUSTRY

CCFA

→ ANALYSIS & STATISTICS 2023 EDITION

8.4 million vehicles — Produced by the Stellantis and Renault groups worldwide in 2022

13% — Market share of electric cars in France in 2022

€5,3 billion — Research and development spending by the automotive sector in France in 2021

€50 billion — Exports of industrial automotive products from France in 2022

82% — Share of domestic passenger transport in France carried out by private cars

85% — Share of internal goods transport in France carried out by road

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“The French Automotive Industry – Analysis and Statistics” can be downloaded from the CCFA website for €5 excluding tax, which will be fully donated to an organisation focusing on industry training for young people.“

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A WORD FROM THE PRESIDENT

Although the automotive sector made a significant recovery in 2023 compared with 2022, it still remains at an historical low for the fourth consecutive year. Following the health crisis in 2020, the semi-conductor crisis in 2021, the war in Ukraine and supply and logistics difficulties in 2022, 2023 was a year marked by inflationary pressures and a drop in consumer confidence. Nevertheless, the high level of outstanding orders at the end of 2022 allowed the flow of registrations to be maintained, despite a drop in the number of orders taken in 2023. Looking ahead to 2024, in a context still marked by the energy transition, it is important not to stray too far from the trajectories of market electrification to achieve the objectives of decarbonising transport.

As far as the analysis of 2022 figures is concerned, world automobile production increased by 6%, after a 3% increase in 2021. Production amounted to 85 million vehicles. This volume is gradually approaching the 92 million recorded in 2019 and 95.5 million in 2018. After a weak recovery in 2021, due to the shortage of electronic components and uncertainties linked to the health crisis, 2022 continued to be marked by shortage issues and «zero Covid» measures in China, compounded by the rising costs of raw materials and energy, as well as the war in Ukraine.

In a context that is still highly favourable to Asian markets, the Renault and Stellantis groups, which are firmly established in Europe (30% of the European light vehicle market), have nevertheless continued to develop opportunities in other areas, such as South America and Africa.

In 2022, the Renault and Stellantis groups produced 8.4 million light vehicles, amounting to 10% of world automobile production.

The energy transition is underway and the popularity of electric vehicles is increasing. In Europe, the market share of battery-powered electric cars has reached 15% and 33% for hybrids (rechargeable and non-rechargeable). The Renault and Stellantis groups have kept up with demand with more launches of electric or hybrid versions.

Car mobility suffered the effects of lockdowns in 2020 as new habits such as working from home emerged. From 2021, however, people's requirements for moving between home, work and leisure activities resumed. Fuel consumption approached 2019 levels, a testimony to the resilience of this mode of transport. In France, despite the context of high fuel prices, road transport still accounted for 82% of personal journeys and 85% of tonnages transported for goods in 2022.

In this ongoing context of uncertainty and instability, Renault and Stellantis are continuing to seek the generation of value by applying sustainable development strategies. They must adapt to various changes in the value chain, both upstream and downstream, to face up to the following three disruptions.

- The energy transition is taking us towards decarbonisation throughout the entire lifecycle. Firstly, this means developing sales of battery-powered or hydrogen-powered electric vehicles, which need to be made more affordable for customers. In 2022, government grants provided effective support and will continue to be useful in future to pursue trajectories resulting from the Green Deal. Government subsidies have allowed the creation of battery production sites as part of a vertical integration strategy; this will force manufacturers to adapt their strategies to cover their future requirements for metals due to electrification, in order to ensure the availability of raw materials and secure their supply. They will also need to reduce their carbon footprint linked with materials and components for vehicles and develop the circular economy in all its forms.

- The digital transition has led to increasing connectivity, services and driving assistance tools. Connectivity and active safety equipment is present in almost every new model released by manufacturers. The Renault and Stellantis groups are recruiting a number of specialist engineers and developing partnerships with other parties involved in these sectors in order to reinforce their expertise in these new areas of the automotive industry (electronics, software, artificial intelligence, etc.).

- The service transition is still emerging, mobilising numerous projects and research. The production of new services is expanding slowly and the stakeholders, in particular those linked to manufacturers, are becoming more established.

With the shortage of electronic components, significant variations in energy and raw material prices, high interest and inflation rates, revised outlooks, etc., we are still in the midst of a period of general uncertainty. Yet manufacturers must continue to invest to satisfy customers and adapt their industrial processes to manufacture electric vehicles, meet regulatory standards (environmental, for instance), as well as to prepare for digital and service transitions. Total R&D spending in France held up during the Covid crisis, rising to almost 5.3 billion euros in 2021. According to the INPI (French Industrial Property Institute), half of the top ten patent applicants came from the automotive industry in 2021.

Competition is still just as intense within the global automotive industry, but the competitiveness of French manufacturers on their national territory must remain stable. Despite the French government's best efforts, competitiveness remains below the European average and it is necessary to pursue the reduction of manufacturing taxes to allow the sector to switch to the production of electric vehicles in a relatively short space of time. It will also be necessary to provide support for companies and employees as they deal with the transformation, by offering training and by making the sector more attractive.

The Renault, Stellantis and Renault Trucks groups are adapting in order to hold their own in the passenger car, light commercial vehicle, and industrial vehicle markets. They are unfailingly producing, transforming, innovating, and investing.

We hope you enjoy reading this newsletter!
JEAN-LUC BROSSARD

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 2022, 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 - Elanova).

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 MOBILIANS, which brings together the business of vehicle trade, 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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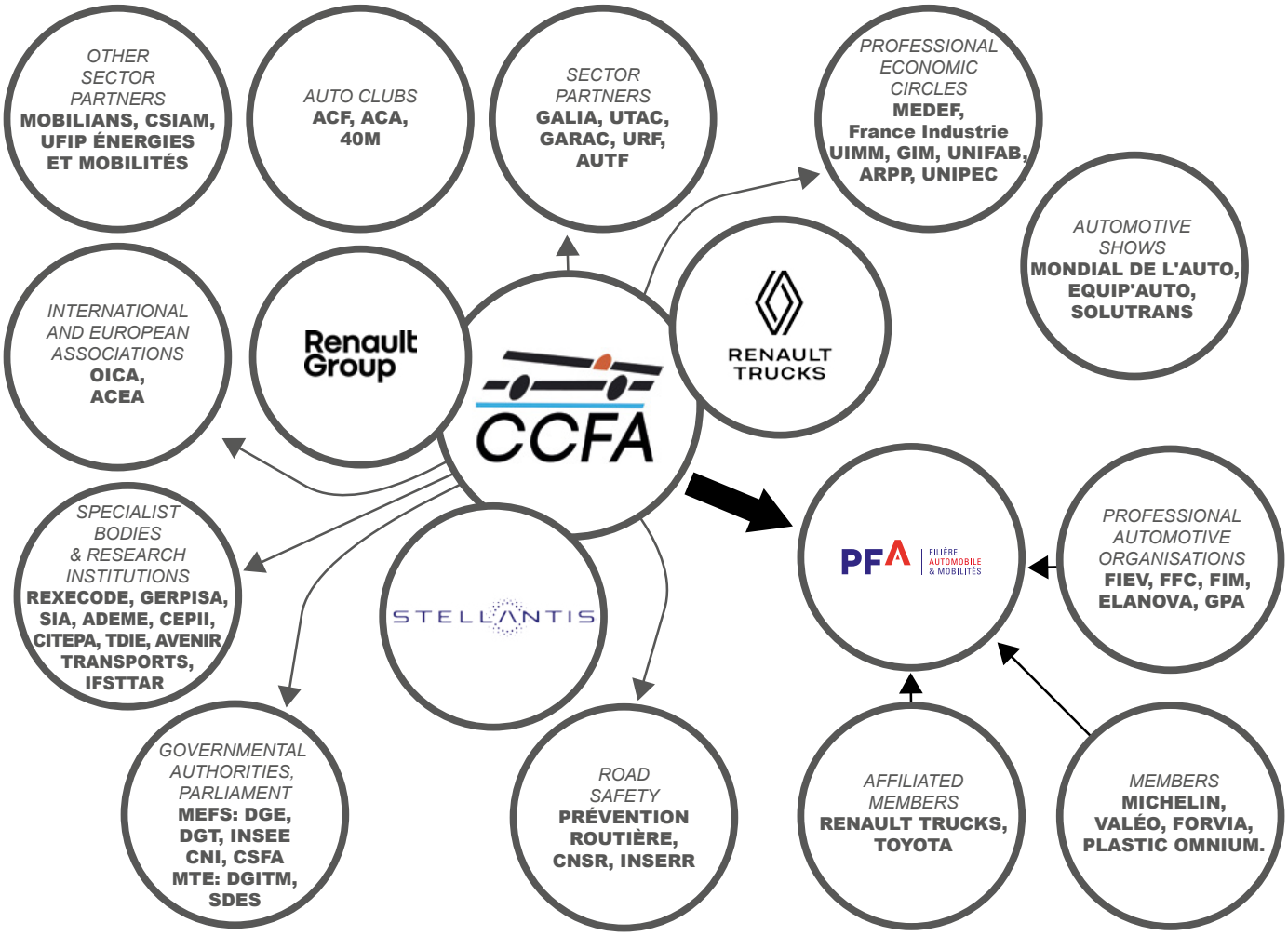
THE CCFA AND ITS PARTNERS IN 2022



► INTERNATIONAL AND EUROPEAN MANUFACTURERS ASSOCIATIONS:

OICA: Organisation Internationale des Constructeurs d'Automobiles
ACEA: Association des Constructeurs Européens d'Automobiles

► INDUSTRY PARTNERS:

GALIA: Groupement pour l'Amélioration des Liaisons dans l'Automobile
UTAC: Union Technique de l'Automobile, du Motocycle et du Cycle
GARAC: Ecole Nationale des Professions de l'Automobile
URF: Union Routière de France
AUTF: Association des Utilisateurs de Transport de Fret
MOBILIANS: Organisation professionnelle de la distribution et des services de l'automobile, du véhicule industriel, des cycles et motocycles
UFIP-E&M: Union Française des Industries Pétrolières
CSIAM: Chambre Syndicale Internationale de l'Automobile et du Motocycle

► 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
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
TDIE: Transports, développement intermodalité et environnement
IFSTTAR: Institut français des sciences et technologies des transports, de l'aménagement et des réseaux

► AUTO CLUBS

ACF: Automobile Club de France
ACA: Automobile Club Association
40M: 40 millions d'Automobilistes

► GOVERNMENTAL AUTHORITIES, PARLIAMENT:

CNI: Conseil National de l'Industrie
CSF: Comité Stratégique de Filière
MEFS: Ministère de l'Économie, des Finances et de la Souveraineté industrielle et numérique
MTE: Ministère de la Transition écologique et de la Cohésion des territoires

► 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
UNIPEC: Union Intersyndicale pour les élections consulaires
UNIFAB: Union des Fabricants pour la protection internationale de la propriété intellectuelle
ARPP: Autorité de Régulation Professionnelle de la Publicité

► OPROFESSIONAL AUTOMOTIVE ASSOCIATED ORGANISATIONS:

FFC: Fédération Française de la Carrosserie
FIEV: Fédération des Industries d'Equipements pour Véhicules
FIM: Fédération des Industries Mécaniques
ELANOVA: Centre pour la valorisation et l'excellence du caoutchouc
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

FACED WITH INFLATIONARY PRESSURES AND THE INTENSIFICATION OF SHORTAGES, PARTICULARLY OF SEMI-CONDUCTORS, THE AUTOMOTIVE INDUSTRY HAS NOT BEEN ABLE TO REVIVE ITS BUSINESS ACTIVITY

European markets, which had started to recover in 2014 after the 2009 crisis, collapsed in 2020 due to the health crisis. They have not been able to bounce back since then, due to the shortage of semi-conductors starting in 2021, followed by the consequences of the war in Ukraine in 2022. The automotive industry has had to deal in particular with the worsening of shortages of certain inputs and price increases for energy and raw materials. Registrations of private vehicles in Western Europe dropped for the third consecutive year, falling to levels that were lower than had been seen for decades (29% drop compared to 2019).

There are contrasting situations in markets outside Europe. North American markets have seen a drop in the number of registrations, whilst Asian markets, boosted by the growth of Chinese and Indian markets, are expanding. These contrasting performances between zones, as well as geopolitical tensions, explain the decline in deliveries outside Europe (12% decrease) for the Stellantis (excluding FCA) and Renault groups.

► KEY DATA (IN THOUSANDS)

	1997	2007	2019	2021	2022	Change 2022/2021	Change 2022/2019
World production: Stellantis (excluding FCA) (1), Renault group, Renault Trucks	**4,046**	**6,188**	**7,271**	**5,181**	**4,983**	**-4%**	**-31%**
Passenger cars	3,472	5,301	6,246	4,286	4,162	-3%	-33%
Light commercial vehicles	507	830	1,025	895	822	-8%	-20%
Total light vehicles	3,979	6,131	7,271	5,181	4,983	-4%	-31%
Commercial vehicles	36	58	n/a	n/a	n/a	-	-
Production in France: Stellantis (excluding FCA), Renault group, Renault Trucks	**2,525**	**2,573**	**1,885**	**1,124**	**1,110**	**-1%**	**-41%**
Passenger cars	2,235	2,165	1,375	690	738	+7%	-46%
Light commercial vehicles	258	352	510	433	373	-14%	-27%
Total light vehicles	2,493	2,518	1,885	1,124	1,110	-1%	-41%
Commercial vehicles	30	55	n/a	n/a	n/a	-	-
Deliveries outside France: Stellantis (excluding FCA), Renault group, Renault Trucks	**2,822**	**4,697**	**5,536**	**4,350**	**3,796**	**-13%**	**-31%**
Passenger cars	2,526	4,110	4,756	3,410	3,010	-12%	-37%
Light commercial vehicles	276	549	758	920	761	-17%	0%
Total light vehicles	2,802	4,659	5,515	4,330	3,771	-13%	-32%
Commercial vehicles	20	38	21	20	25	+27%	+20%
Deliveries outside Europe (17 countries): Stellantis (excluding FCA), Renault group, Renault trucks	**659**	**2,110**	**2,513**	**2,254**	**1,985**	**-12%**	**-21%**
Passenger cars	563	1,914	2,276	1,785	1,516	-15%	-33%
Light commercial vehicles	88	178	227	460	457	-1%	+102%
Total light vehicles	651	2,092	2,503	2,245	1,973	-12%	-21%
Commercial vehicles	8	18	11	9	12	+41%	+17%
Registrations in France: all brands	**2,068**	**2,629**	**2,756**	**2,142**	**1,927**	**-10%**	**-30%**
Passenger cars	1,713	2,110	2,214	1,659	1,529	-8%	-31%
Light commercial vehicles	313	461	480	433	348	-20%	-27%
Total light vehicles	2,026	2,571	2,694	2,092	1,877	-10%	-30%
Commercial vehicles	39.3	52.5	55.2	44.1	44.0	0%	-20%
Coaches and buses	3.1	5.5	6.4	6.5	5.4	-16%	-15%
Registrations of Stellantis, Renault group, Renault Trucks in Europe 17 countries	**3,300**	**3,906**	**4,613**	**4,124**	**3,546**	**-14%**	**-23%**
Passenger cars	2,841	3,181	3,738	3,200	2,848	-11%	-24%
Light commercial vehicles	432	690	849	901	672	-25%	-21%
Total light vehicles	3,273	3,871	4,587	4,101	3,520	-14%	-23%
Commercial vehicles	27	35	26	23	26	+13%	0%

(1) The FCA group, a member of Stellantis, produced 3.4 million vehicles worldwide in 2022.

While global GDP grew by 3% in 2022, the automotive business has not recovered in all parts of the world. The start of the war in Ukraine exacerbated the supply chain problems that had existed since the resumption of activity post-Covid and fuelled inflationary pressures. Global production at Renault and Stellantis (excluding FCA) dropped by 4%. It is now 31% lower than it was in 2019.

In France, economic activity grew by 2.5% in 2022 but, like in other parts of the world, the automotive sector was affected by the shortage of semi-conductors, inflation and supply and logistics problems. The automotive market receded by 8% for private vehicles and by 20% for light commercial vehicles. Registrations of light vehicles are on average 30% lower than in 2019. In this inflationary context, household vehicle purchases have dropped by 2.1%. Road traffic, on the other hand, increased in 2022 by 9.1% but remains slightly lower than it was in 2019.

-28% **Volume of vehicles registered in Western Europe compared to 2019**

THE SHARE OF STELLANTIS AND RENAULT IN THE GLOBAL MANUFACTURE OF VEHICLES AMOUNTED TO ALMOST 10% IN 2022

	Units	2019	2021	2022	Change 2022/2021
Market share of Stellantis (1) and the Renault group (light vehicles)					
In France	%	58.5%	60.8%	58.1%	-2.6 points
In Europe (17 countries) excluding France	%	22.1%	27.3%	24.8%	-2.5 points
In Europe (17 countries)	%	28.1%	33.0%	30.2%	-2.8 points
Market share of Renault Trucks (new industrial vehicles)					
In Europe (17 countries)	%	8.2%	8.5%	9.4%	+0,9 points
Weight of the Stellantis (1) and Renault groups in global production					
Particular Cars	%	9.3%	-	-	-
Commercial vehicles	%	4.2%	-	-	-
Total	%	7.9%	10.9%	9.9%	-0,9 points
French automotive foreign trade					
Exports	€ billion	51.7	48.6	52.8	+8.6%
Imports	€ billion	66.9	69.3	75.2	+8.5%
Balance	€ billion	-15.2	-20.6	-22.4	-2,9 Mds €
Weight of the automobile in foreign trade in goods					
Exports	%	10.4%	9.9%	9.0%	-0.9 points
Imports	%	11.6%	11.6%	9.7%	-1.9 points
Global data from the Stellantis and Renault groups					
Turnover	€ billion	130.3	198.3	226.0	+13.9%
Investments	€ billion	5.7	4.8	n/a	-
Workforce	Thousands of people	388	438	381	-13.0%
Workforce in the automotive sector in France					
Automobile industry	Thousands of people	232	225	214	-4.9%
Share in manufacturing industry	%	7%	7%	7%	0.0 point
Automotive-induced jobs (including the automobile industry)	Thousands of people	2,219	2,234	2,275	+1.8%
As a share of the employed active population	%	8%	8%	8%	0.0 point

(1) Excluding FCA before 2021.

In Western Europe, in a light vehicle market that receded by 6% in 2022, Stellantis and Renault group now have a market share of 30%, when the entire Stellantis group is considered.

In Eastern Europe, registrations dropped sharply (by 25%), after a slight increase in 2021. Deliveries from Renault and Stellantis (excluding FCA) in this zone suffered the same drop (see page 86).

The Chinese market share and its rate of change explain evolutions in the overall Asian market. In Asia, the increase in registrations is fuelled by China (2.1% growth) and its vast market. India also saw strong growth in the number of registrations in 2022 (25.7% increase). The growth in the Asian market overall was therefore at 4.3%, which is the strongest increase across all regions worldwide. However, opportunities for French groups in Asia have been divided by three since 2018, including due to deliveries to Iran halting, as well as the severe drop in deliveries to China, where strategies have been readjusted.

In Latin America, markets grew by 2.8% in 2022 and Stellantis (excluding FCA) and Renault deliveries increased by around 8%.

Lastly, the African automotive market receded by 3.8% in 2022. South Africa, which accounts for 40% of the volume, enjoyed growth of 17.5%, to the benefit of Stellantis (excluding FCA) and Renault, which increased their deliveries to this market by almost 40% in 2022. On the other hand, the automotive markets in North Africa receded by 10% in 2022, leading to a drop in deliveries from the Stellantis (FCA) and Renault groups (5% decrease).

GLOBAL VEHICLE PRODUCTION

Global vehicle production increased by 6% in 2022 (after +3% in 2021), to stand at 85 million units, a level which remains down 8% compared to 2019. After a year 2021 which rebounded weakly due to the shortage of electronic components and uncertainties linked to the health situation, the year 2022 remained marked by shortage problems and "zero Covid" measures in China, to which were added, the increasing costs of raw materials and the war in Ukraine.

In thousands	2021	2022	Change 2022/2021	Base level 100 = 2019
EUROPE	**16,381**	**16,230**	**-0.9**	**75.2**
WESTERN EUROPE	**9,627**	**10,087**	**4.8**	**74.1**
Germany	3,309	3,678	11.2	74.3
Belgium	261	277	5.9	96.8
Spain	2,098	2,219	5.8	78.6
France	1,352	1,383	2.3	63.7
Italy	797	796	-0.1	87.0
Portugal	290	322	11.2	93.3
United Kingdom	932	877	-6.0	63.5
Sweden*	258	239	-7.4	85.6
CENTRAL AND EASTERN EUROPE AND TURKEY	**6,753**	**6,143**	**-9.0**	**77.2**
CEE members of the EU	3,514	3,728	6.1	85.1
Russia	1,567	608	-61.2	35.4
Turkey	1,276	1,353	6.0	92.6
AMERICA	**16,191**	**17,756**	**9.7**	**88.1**
Canada	1,115	1,229	10.2	64.1
Mexico	3,195	3,509	9.8	87.4
USA	9,157	10,060	9.9	92.4
South America	2,724	2,958	8.6	88.6
ASIA-OCEANIA	**46,769**	**50,021**	**7.0**	**101.4**
ASEAN (1)	3,543	4,381	23.6	105.7
China	26,122	27,021	3.4	104.9
South Korea	3,462	3,757	8.5	95.1
India	4,399	5,457	24.0	120.6
Japan	7,837	7,836	-0.0	80.9
AFRICA	**907**	**1,024**	**12.8**	**91.9**
TOTAL	**80,248**	**85,030**	**6.0**	**92.2**

(1) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
* Passenger cars only
Source: OICA

Even if it has not returned to pre-crisis volumes, global production increased in most areas, particularly in Asia and America, while it fell in Europe, mainly due to the fall in production in Russia. Asian production, which now accounts for 59% of global production, increased by 7% in 2022, contributing 4 points to global growth. The Americas zone, which represents 20% of total volumes, saw its production increase by 3.2%, contributing 2 points to growth. Finally, in Europe, production declined in 2022, although at a lower rate (-0.9%) than the previous year (-3.3%) and mainly due to the negative contribution from Russia.

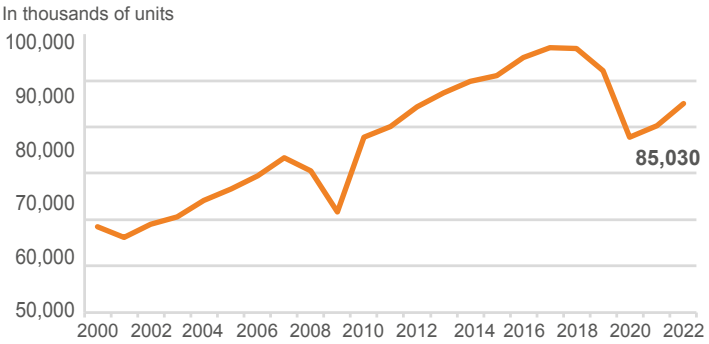
Within Asia, even if China alone represents 1/3 of global production, in 2022, it contributed less to volume growth than India (1.1 points compared to 1.3 points). Indeed, Chinese vehicle production only increased by 3.6%, compared to 24% in India. In America, production growth is around 10%, both in North America and South America.

In Western Europe, production has recovered in most countries and increased by 4.8% in 2022. It increased sharply in Germany and Portugal (+11.2%), more moderately in Spain (+5.8%) and in France (+2.3%); it remained stable in Italy but continued to fall in the United Kingdom (-6%). However, production has not returned to its 2019 level, unlike other areas, which constitutes a difficulty for European manufacturers. In Central and Eastern Europe (including Turkey), production declines by 9% in 2022, but is mainly impacted by the Russian situation with volumes down 61% in this country, while they increase in the Czech Republic, Poland, Romania and Hungary. Finally, in Africa, the number of vehicles produced increased by 12.8%.

In most countries around the world, production levels observed in 2022 remain lower than their 2019 levels, with the exception of emerging Asian countries (China, India, ASEAN). But, compared to the years before the 2009 crisis, mature countries (Western Europe, Japan) recorded an even greater production deficit, ranging from 30% in Japan to 40% in Germany and Italy, 50% in France and the United Kingdom and up to 70% in Belgium. The CEECs, like most emerging countries, have conversely seen their production volumes increase compared to this period.

+9% **Increase in global vehicle production since 2020**

EVOLUTION OF GLOBAL VEHICLE PRODUCTION SINCE 2000



In Europe, production fell by 0.9% in 2022, standing at 16.2 million vehicles, i.e. 20% of the total. The decline is mainly marked in Central and Eastern Europe (-9%) due to the negative contribution of Russia (-1.2 points) which only produced 600,000 vehicles in 2022 instead of 1.6 million in 2021. In Western Europe, production increased by 4.8%, driven by Germany. This produced 3.7 million vehicles in 2022 (+11.2%) and thus contributes 0.5 points to the increase in global production. Spain (2.2 million units) is also recovering its production (+6%) while conversely, the United Kingdom continues to lose volumes (-6%) with only 877,000 vehicles produced in 2022. France is in an intermediate position with vehicle production up 2.3% to 1.4 million.

On the American continent, production represents 17.8 million vehicles in 2022 (20% of the total) and increases by almost 10% compared to 2021 thanks to the increase in volumes produced in the United States (+9.9%), but also in Canada (+10.2%), Mexico (+9.8%) and South America (+8.6% with 2.9 million vehicles). Production continues to grow strongly in Argentina (+24%), while in Brazil, which accounts for 80% of the region, growth slowed to 5% in 2022 after 12% in 2021.

Asia-Oceania produced 50 million vehicles in 2022, up 7% compared to 2021, i.e. less growth than that of the American continent. China, which remains the heavyweight in this zone with 27 million vehicles produced, has in fact been impacted by its zero Covid policy. Its production only increased by 3.4%. India, on the other hand, rebounded for the second consecutive year (+24%), with production now reaching 5.4 million vehicles. The emerging ASEAN countries are also contributing positively to the growth of the area in 2022. Thailand (+12%) and Indonesia (+31%) are the largest producers with respectively 1.7 and 1.1 million of vehicles produced in 2022. Finally, if Japanese production stagnates at 7.8 million vehicles, that of South Korea increases by 8.5% to 3.7 million, and also contributes to the growth of the zone.

GLOBAL VEHICLE PRODUCTION

Since the beginning of the 2000s, global vehicle production has experienced contrasting phases of development. Between 2000 and 2010, it increased by 20 million vehicles, mainly thanks to the development of the automotive industry in emerging countries such as Central and Eastern Europe or China. The latter, by multiplying its production by ten, gains more than 15 million vehicles in ten years. In Central and Eastern Europe and Turkey, production also doubled during the 2000s. Conversely, in mature countries, activity contracted during this period, falling from 48 million to 40 million vehicles. In 2010, mature countries (Western Europe, NAFTA, Japan and South Korea) only represented 52% of world production, compared to 82% ten years earlier.

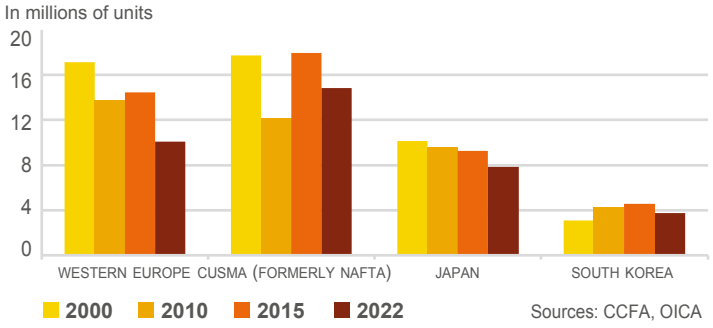
Then, between 2010 and 2018, automobile production became dynamic again in all areas and gained 20 million vehicles. If mature countries produce 5 million more vehicles during this period, emerging countries increase their production by 15 million vehicles and in 2016, their weight in global production exceeds that of mature countries. China, whose production increased by 10 million units between 2010 and 2018, represents 30% of global production in 2018, compared to 3.5% in 2000.

In 2019, the slowdown in trade and growth weighed on automobile production, which fell for the first time. In 2020, it is the health crisis that will bring global production back to its 2010 level of 78 million vehicles. In two years, production will have fallen by 20 million units, split half between developed and emerging countries. In 2021, the semiconductor crisis will not allow a real rebound in global production (+3%), particularly in mature areas, particularly affected by supply and logistics problems (-750,000 vehicles), while that emerging countries are resisting (+8%) and gaining market share (57% of global production).

The situation in 2022 remains fragile given the persistence of problems linked to COVID, logistics and the supply of electronic components, but also with the appearance of new tensions linked to the war in Ukraine. Global production increases by 6%, mainly thanks to the American continent (+10%) and Asia (+7%), while Europe (-1%) is particularly affected by the fall in production in Russia (-60%).

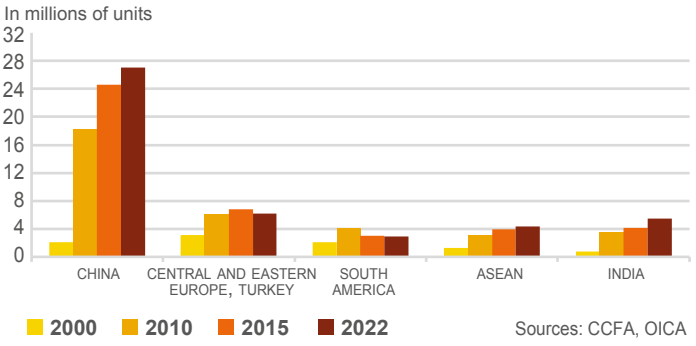
Thus, over 2010-2022 period, global automobile production increased by more than 7 million units with a gain of 11 million for emerging countries, compared to a loss of 3.6 million units in mature countries. Western Europe is losing the greatest number of vehicles (-3.7 million). Japan and South Korea lost 1.8 million and 0.5 million units respectively. Only North America, thanks to Mexico (+50%) and the USA (+30%), saw its production increase (+22%) over this period. In emerging areas, China, which produces 8.8 million more units, contributes significantly to growth. India is also progressing, especially over the last two years, and reaching a record production level in 2022 (5.5 million units). The ASEAN countries are also experiencing a marked increase (+50%) in their production in 2021 and 2022. Only South America, despite growth in its production in 2021 and 2022, is not returning to the volumes of 2010.

MATURE REGIONS AND COUNTRIES



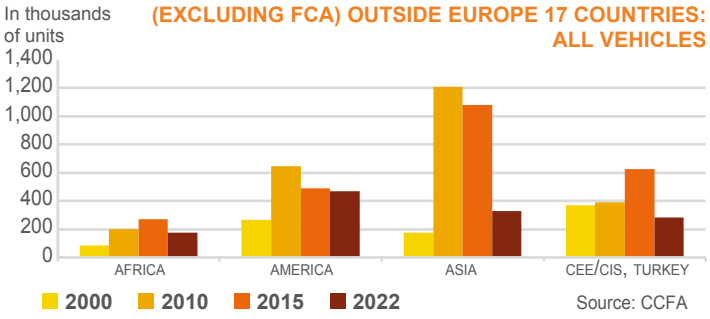
Sources: CCFA, OICA

EMERGING REGIONS AND COUNTRIES



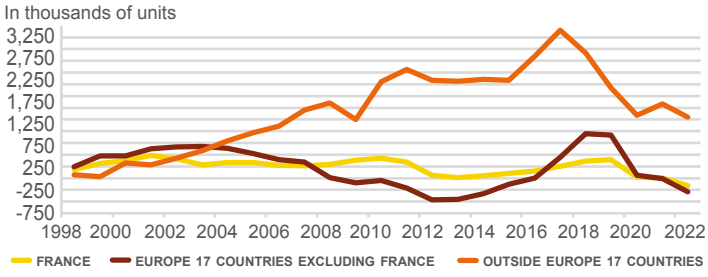
Sources: CCFA, OICA

MARKETS OF RENAULT AND STELLANTIS GROUPS (EXCLUDING FCA) OUTSIDE EUROPE 17 COUNTRIES: ALL VEHICLES



Source: CCFA

EVOLUTION COMPAREDTO 1997 OF THE WORLD MARKETS OF THE RENAULT GROUP AND STELLANTIS (EXCLUDING FCA)



Source: CCFA

The Renault group and Stellantis (excluding FCA) have experienced, since 2017, very significant fluctuations in their deliveries outside Europe 17 countries linked to the economic and geopolitical context (Iran, Russia), but also to their still fairly weak presence in markets in strong demand growth and very competitive (China, India, Asean). The integration of new brands into the Renault and PSA groups in 2017 or new partnerships also impacted delivery volumes to Europe 17 countries. In 2020, deliveries contracted sharply with the decline in global demand and production and increased weakly in 2021 due to the limited recovery of global markets. The year 2022 will see a further drop in deliveries (-13%) to all areas. To Europe, the sluggish market and the intensity of competition resulted in a decline in deliveries. This is just as marked for countries outside Europe 17, particularly for geopolitical reasons (Russia).

57% **Share of emerging zones and countries in global vehicle production**

THE WORLD RANKING OF CAR MANUFACTURERS

Global production increased by 6% in 2022, reaching 85 million vehicles. The world's top five manufacturers have produced almost half (45%), a relatively stable figure since 2016. In order to strengthen their competitiveness, manufacturers are increasing cooperation in different forms. PSA merged in 2021 with FCA to create Stellantis, which in 2022 is in fifth place with 6 million vehicles produced. Renault is in thirteenth place but relies on its alliance with Nissan and Mitsubishi. Together, they produced more than 6.6 million vehicles in 2022.

In 2022, the ranking of the top three global manufacturers remains the same as in 2020 and 2021. With growth in produced volumes of around 5%, the top three vehicle manufacturers have managed to maintain their place on the podium. The Toyota group is on the top step with 10.6 million vehicles produced, followed by the Volkswagen group with 8.7 million vehicles and Hyundai-Kia with 6.8 million units produced. In fourth place, the GM group, whose production increased by almost 9% in 2022 to reach 6 million vehicles, returned to its 2020 production level.

Other manufacturers experience contrasting situations which depend more on their strategy than on their country of origin. Indeed, the areas of establishment having greatly diversified over the last twenty years, automobile manufacturers have become strongly internationalised and continue to develop their industrial sites outside their area of origin. Thus, European, American, Japanese and Korean manufacturers, who produced more than 60% in their area in 2000, now produce between 30 and 40% of their volumes there. Even manufacturers from emerging countries, like Geely or Tata, carry out a large part of their production outside their countries of origin (37 and 59% respectively in 2020). The various cooperations between manufacturers are accelerating this internationalisation phenomenon.

65% **Weight of the top five manufacturers in global vehicle production in 2022**

► GLOBAL VEHICLE PRODUCTION IN 2022 (1)
(IN THOUSANDS)

Rank	Group	2021	2022	% Change
1	TOYOTA	10,076	10,611	5.3
2	VOLKSWAGEN	8,283	8,717	5.2
3	HYUNDAI-KIA	6,510	6,850	5.2
4	GM (2)	5,596	6,094	8.9
5	**STELLANTIS (FCA-PSA)**	**6,049**	**6,003**	**-0.8**
6	FORD (2)	3,942	4,231	7.3
7	HONDA	4,136	3,870	-6.4
8	NISSAN (2)	3,587	3,251	-9.4
9	SUZUKI	2,876	3,172	10.3
10	SAIC	2,890	2,812	-2.7
11	MERCEDES-BENZ GROUP	2,330	2,456	5.4
12	BMW	2,522	2,400	-4.8
13	**RENAULT**	**2,622**	**2,386**	**-9.0**
14	GEELY	2,200	2,300	4.5
15	BYD	748	1,882	151.7
16	CHANGAN	1,786	1,850	3.5
17	TESLA	930	1,370	47.2
18	CHERY	905	1,218	34.6
19	GREAT WALL	1,292	1,112	-13.9
20	DONGFENG MOTOR	1,053	1,098	4.3
21	MAZDA	1,075	1,092	1.6
22	TATA	838	1,087	29.7
23	MITSUBISHI	1,049	1,012	-3.5
24	BAIC	987	947	-4.1
25	SUBARU	745	849	14.0
26	ISUZU	555	721	29.9
27	GAC	457	669	46.4
28	FAW	781	537	-31.2
29	DAIMLER TRUCKS	455	520	14.2
30	IRAN KHODRO	417	500	20.0
31	CHINA NATIONAL HEAVY DUTY TRUCK	407	482	18.4
32	MAHINDRA	349	456	30.7
33	SAIPA	309	371	20.0
34	ANHUI JAC AUTOMOTIVE	527	349	-33.7
35	VOLVO-UD TRUCKS-**RENAULT TRUCKS**-MACK	207	238	15.2
36	PACCAR	163	186	14.3
ALLIANCE RENAULT-NISSAN-MITSUBISHI		**7,259**	**6,649**	**-8.4**

Note: Production by Chinese manufacturers does not include that of joint ventures.
(1) Vehicles include passenger cars, light commercial vehicles, trucks and coaches and buses. Double counting may exist between manufacturers.
(2) The production of GM, Ford and Nissan integrates their activities in China.
Sources: OICA, annual reports, CCFA estimates July 2023

In 2022, the health situation and supply problems have further weighed on automobile production, but the results are very contrasting according to the groups and no longer just according to the zones. Automotive groups mainly or exclusively oriented towards the production of electric vehicles, like Tesla and BYD, have experienced the strongest growth.

The Toyota group remained at the top of the ranking in 2022 and largely consolidated its position ahead of the Volkswagen group. With production up more than 5.3%, the group produced more than 10.6 million vehicles, almost 1.9 million more than its second-place competitor, the Volkswagen group.

The Hyundai-Kia group maintains its third place acquired in 2020 thanks to production up 5.2%. Other Asian manufacturers have more contrasting performances. Suzuki maintains its position thanks to strong growth in its production for the second consecutive year, totaling an increase of 23% in two years. Conversely, Honda and Nissan both fell for the second year by -6.4% and -9.4% respectively.

As for the European groups, Stellantis, which brings together fourteen brands, lost a place in the ranking and takes fifth position with stable production in 2022. For its part, the Renault group sees its production drop by 9% in 2022. Among the German manufacturers, the Volkswagen group recorded a good performance with an increase in its production of 5.2% in 2022, as did Mercedes-Benz Group (+5.4%). Conversely, BMW lost 4.8% of its production volume.

American manufacturers are performing well in 2022, as illustrated by General Motors, which moves to fourth place in the ranking ahead of Stellantis. The group benefited at the end of the year from a rebound in its sales in the USA, where it became the leading vehicle seller ahead of Toyota. Ford production also recovered in 2022, increasing by 7.3%. As for Tesla, it further grew by more than 45% and its production exceeded 1.2 million vehicles in 2022.

Manufacturers in emerging countries (China, India) benefited from a more favorable situation in 2022, both in terms of demand and supply. The Indian manufacturer Tata benefits in 2022 from strong growth in the Indian market for the second consecutive year, but also from the success of its high-end subsidiary Jaguar Land Rover in the fourth quarter, after having suffered greatly from the shortage of semiconductors. Among Chinese manufacturers, SAIC remains in the lead, but saw its production drop by 2.7% in 2022. Among them, Geely is in second position with 2.3 million vehicles ahead of BYD. The latter gained ten places in the ranking and produced, in 2022, more than 1.88 million vehicles, the same as Changan which is positioned just behind with a production of 1.85 million vehicles. Finally, Chery, Great Wall and DongFeng Motor are also among the manufacturers having produced more than a million units.

For heavy vehicle manufacturers, the Volvo group (including Renault Trucks) saw its production increase by 15.2% in 2022 and reach its 2019 level.

PRODUCTION AND TRADE AMONG THE WORLD'S LEADING AUTOMOTIVE REGIONS

3.1 million Number of vehicles exported by China in 2022

China, which has become the leading producer country in the world since 2010, produces mainly to satisfy its domestic market. However, the share of exported vehicles, compared to production, has increased significantly since 2019. It was only 4% at that date; it increased to 8% in 2021. In 2022, 12% of Chinese production is exported, or more than 3 million vehicles.

North America (USA, Canada, Mexico) is now the second largest vehicle producing area in the world, just ahead of the European Union. It is mainly intended for the local market with exports which oscillate around 15% of the area's production (14% in 2022).

The European Union, counted without the United Kingdom since 2020, is now in third position. It benefits from both a solid domestic market, but also from vehicle export flows outside its zone, which represent 48% of production in 2022.

In Japan, half of production is exported (49% in 2022), while imports compared to local production remain low (4% in 2022).

► THE EVOLUTION OF PRODUCTION AND TRADE IN THE FOUR GLOBAL AUTOMOTIVE CENTRES

	European Union (1)		United States, Canada and Mexico (2)		Japan		China	
ALL VEHICLES								
PRODUCTION	in thousands	index (100=2010)	in thousands	index (100=2010)	in thousands	index (100=2010)	in thousands	index (100=2010)
2000	17,106	100	15,761	129	10,141	105	2,069	11
2018	18,605	109	17,424	143	9,730	101	27,809	152
2021	12,209	71	13,468	111	7,837	81	26,122	143
2022	12,938	76	14,719	121	7,835	81	27,021	148
IMPORTS (3)	in thousands	share of production	in thousands	share of production	in thousands	share of production	in thousands	share of production
2000	2,871	17%	3,140	20%	285	3%	n/a	n/a
2018	4,181	22%	5,245	30%	385	4%	1,130	n/a
2021	3,576	29%	4,598	34%	338	4%	940	4%
2022	3,899	30%	3,871	26%	313	4%	878	3%
EXPORTS (3)	in thousands	share of production	in thousands	share of production	in thousands	share of production	in thousands	share of production
2000	2,963	17%	1,469	9%	4,455	44%	n/a	n/a
2018	5,889	32%	2,305	13%	4,817	50%	1,041	4%
2021	5,697	47%	2,233	17%	3,819	49%	2,016	8%
2022	6,258	48%	2,048	14%	3,813	49%	3,111	12%

(1) The number of countries taken into account in the «European Union» set is equal to the number of member countries for the year.
(2) Mexico is included from 2009.
(3) Intra-community trade is not taken into account.
Sources: OICA, Eurostat, CCFA since 1991, Ward's from 1999, JAMA

Since 2000, the evolution of the automobile industry has been contrasting in the three major automobile clusters. China has established itself over these two decades as a new major production hub, becoming in 2010 the leading vehicle producing country in the world.

In the European Union, vehicle production grew by 9% between 2000 and 2018 and trade, already significant, increased significantly over this period. Then, as in other areas, production slowed down in 2019 and collapsed in 2020 with the health crisis. In 2022, European production recovers (+6%) and trade becomes more dynamic again. European Union vehicle exports increase by almost 10% in 2022.

In North America, production reached a peak in 2016 and then declined until 2020. In 2022, it rebounds by 9%, but remains down 20% compared to 2016. Exports outside the zone represent around 15% of production, while imports account for 30%, but fell sharply in 2022, with the increase in flows within the zone, particularly from Mexico.

In Japan, vehicle production fell by 5% between 2000 and 2019, but remained above its 2010-2018 average, following the dynamism of the domestic market and exports (+8% between 2000 and 2019), stimulated by the depreciation of the yen. After the fall in production and trade in 2020 and 2021, production and exports stabilise at a level around 20% lower than that observed in 2019.

In China, production increased tenfold between 2000 and 2010. It then increased by 41% between 2010 and 2019, while exports grew by 108% over the same period. The exported share of production was 4% in 2019. Between 2019 and 2022, Chinese production increased by 7%, but exports increased by almost 3 times, while Chinese imports fell by 16%. The number of vehicles exported now represents 12% of the volume of production in China and is close to the volume exported by North America, but still remains much lower than that exported by the European Union.

WORLD VEHICLE MARKETS

In 2022, the global automotive market declined by 1.1%, after rebounding by almost 5% in 2021. Since 2019, the market has lost 10 million vehicles, now standing at 82.7 million units. The shortage of semiconductors, the persistence of the COVID pandemic in certain areas and logistical problems continued to weigh on the automotive market in 2022. The outbreak of war in Ukraine in February further weakened the global economic situation, causing a major energy crisis and high inflation on many products (energy, food, industrial materials). The European and American automotive markets were the most affected with a decline in sales of -10.7% and -5.1% respectively compared to 2021. In Asia, registrations increased by 4.6% in 2022, mainly thanks to India, the ASEAN countries and China, despite lower growth in the latter, due to the resurgence of the COVID epidemic. Unlike last year, the passenger car market (+2%) held up better than that of light commercial vehicles (-8%), particularly in China, where the latter fell by 31%.

In Europe, Central and Eastern European markets, including Turkey, Russia and the former CIS countries, were particularly affected by the war in Ukraine. The Russian and Ukrainian markets, which were the most important in the zone, were more than halved. The Central and Eastern European countries that are members of the EU, for their part, experienced developments similar to those of Western European countries, between -5 and -6%. Turkey is one of the few countries growing compared to 2019 within this bloc.

On the American continent, the USA, which represents 2/3 of registered volumes, saw its market decline (-7.6%), which weighs on the entire area (-5.1%), while that the Central and South American markets posted growth of 2.8%. Within CUSMA (formerly NAFTA), the Mexican market is also progressing and is approaching the Canadian market in volume.

In Asia, sales increased by 4.6% on average, but with strong disparities depending on the country. India recorded the strongest growth (+25.7%), followed by Indonesia (+18.1%), ASEAN's largest market. Chinese growth was more modest (+2.1%), weighed down by a sharp decline in commercial vehicle registrations (-31%) and the return of the COVID pandemic. Finally, the more mature Japanese and South Korean automobile markets declined for the third consecutive year.

In Africa, registrations fell by 3.8% in 2022 to 1.1 million vehicles. South Africa, the continent's largest market, has returned to its 2019 level after two years of strong growth. Conversely, the Egyptian and Moroccan markets are in decline in 2022, after increases of more than 20% in 2021.

China, the world's largest market since 2009, now occupies 32.5% of the total, followed by the USA (17.2%). India takes 3rd place with 5.7% of the market ahead of Japan (5.1%). These top four global markets represent more than 60% of the total.

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

	Passenger cars		Light commercial vehicles		Total				Change 2022/2021	Change 2022/2019
	2021	2022	2021	2022	2019	2021	2022			
	thousands	thousands	thousands	thousands	thousands	thousands	thousands	%	%	%
EUROPE	**14,016**	**12,637**	**2,866**	**2,443**	**20,930**	**16,882**	**15,080**	**18.2**	**-10.7**	**-28.0**
Western Europe	10,600	10,164	2,105	1,769	16,664	12,705	11,933	14.4	-6.1	-28.4
Central and Eastern Europe (EU member countries)	1,162	1,112	258	237	1,740	1,420	1,349	1.6	-5.0	-22.5
Other Central and Eastern European countries (Turkey, Russia, CIS)	2,238	1,344	504	436	2,507	2,741	1,780	2.2	-35.1	-29.0
AMERICA	**7,023**	**6,551**	**14,992**	**14,338**	**25,390**	**22,015**	**20,888**	**25.3**	**-5.1**	**-17.7**
CUSMA (1)	4,191	3,604	13,969	13,324	20,825	18,160	16,928	20.5	-6.8	-18.7
UNITED STATES	3,350	2,859	12,059	11,372	17,488	15,409	14,230	17.2	-7.6	-18.6
Central and South America	2,832	2,947	1,022	1,014	4,565	3,854	3,961	4.8	+2.8	-13.2
ASIA-OCEANIA	**35,404**	**38,502**	**8,215**	**7,129**	**44,545**	**43,619**	**45,631**	**55.2**	**+4.6**	**+2.4**
China	21,518	23,563	4,796	3,300	25,797	26,314	26,864	32.5	+2.1	+4.1
South Korea	1,469	1,420	266	263	1,795	1,735	1,684	2.0	-2.9	-6.2
India	3,082	3,792	677	933	3,817	3,759	4,725	5.7	+25.7	+23.8
Japan	3,676	3,448	773	753	5,195	4,448	4,201	5.1	-5.6	-19.1
ASEAN (2)	1,875	2,232	905	1,037	3,475	2,780	3,269	4.0	+17.6	-5.9
Other Asia-Oceania	3,783	4,045	799	842	4,466	4,582	4,887	5.9	+6.6	+9.4
AFRICA	**833**	**790**	**300**	**301**	**1,200**	**1,134**	**1,091**	**1.3**	**-3.8**	**-9.1**
TOTAL	**57,276**	**58,480**	**26,373**	**24,210**	**92,065**	**83,649**	**82,690**	**100.0**	**-1.1**	**-10.2**
CHANGE 2022/2021	**2.1%**		**-8.2%**							

(1) CUSMA: The Canada-United States-Mexico Agreement replaces NAFTA since July 2020.
(2) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.

Source: OICA

Since 2005, the centre of gravity of the global automotive market has moved from Western Europe and North America, mature markets (56% of the total in 2005 to 35% in 2022) towards Asia (from 31% of total at 55%). Recent crises have not changed the evolution of the structure of the world market. The weight of mature countries continues to decrease in favour of BRICS and emerging countries.

In the USA, the market fell 7.6% to 14.2 million vehicles, compared to 17.5 million in 2019. In Canada, the market fell 8.3%, to 1.5 million vehicles; the units are caught up by Mexico (1.1 million) which, after two years of decline, sees its market grow by 8.4%. In Central and South America, growth rates slowed in 2022, with the exception of the Argentinian market which rebounded by 6.9%. Brazil, which represents 53% of sales in this region, saw its market decline for the third consecutive year to around 2 million units.

In Western Europe, most countries recorded a decline in sales in 2022 (-6.1% on average). Greece and Portugal are the only ones to benefit from a growing market. The German market, which is stagnating in 2022, is now below the 3 million vehicle mark and the French market, down 10%, has fallen below the 2 million unit threshold. Spain (-7.3%), Italy (-9.8%) and the United Kingdom (-5.1%) also suffered from supply-related problems. Even Norway, which, thanks to the success of electric vehicles, managed to bounce back in 2021, saw its volumes drop by 3.4% in 2022.

Central and Eastern European EU countries also saw their markets fall in 2022 (-5%). Poland, the largest market in the zone, saw a drop of 6.6% to 520,000 units. Bulgaria, Latvia, Romania and Slovakia are the only growing markets, but remain below their 2019 volumes. In other non-EU Eastern countries, sales have been strongly impacted by the war in Ukraine and the collapse of registrations in Russia, which accounts for 65% of the region in 2021 (but only 45% in 2022). With registration growth of 7% in 2022, Turkey is now the largest light vehicle market in the region, surpassing Russia, particularly in the light commercial vehicle market.

In the Asia-Oceania region, the market excluding China will increase by 8.5% in 2022 to more than 18.7 million vehicles. The Japanese market fell for the third consecutive year to 4.2 million units and is now overtaken by the Indian market which grew significantly in 2022 (4.7 million). Indonesia, which halved its market in 2020, returned to its 2019 volumes (1 million units). Finally, South Korea, one of the rare countries growing in 2020, fell below its 2019 level at 1.7 million units.

VEHICLES IN USE IN THE WORLD

In 2020, the global vehicle fleet (passenger cars and light commercial vehicles) amounts to 1.6 billion units and is made up of 75% passenger cars. Asia-Oceania now represents 40% of the fleet, compared to 34% in 2015, while the weight of Europe and America has decreased, going from 31% to 27% and from 32% to 28% respectively. Africa's weight remains stable at only 4%.

In 2015, registrations represented 7% of the fleet and ensured both the renewal of the existing fleet and its pure growth. In 2020, with the collapse of sales and a larger fleet, the ratio fell by 2 points and registrations represented 5% of the fleet.

Fleets are almost stable in mature markets in developed countries (increases generally between 0% and 2%). They are growing strongly in emerging countries (between 3% and 20%).

The USA's fleet, which was the largest in the world in 2015 with 264 million vehicles, is now surpassed by that of China, made up of 318 million vehicles in 2020, compared to 289 million for the USA. The Japanese fleet maintains its 3rd place with 77 million units, but is stagnating, or even down slightly compared to 2015. With 45.4 million vehicles, France still occupies 8th place in the world behind Russia (4th), Germany, Brazil and India.

The automobile density in the world amounts to an average of 209 vehicles per 1000 inhabitants in 2020 (+46% compared to 2005). However, it varies from 49 vehicles in Africa to 722 in the CUSMA zone (USA, Canada, Mexico), including 107 in Asia (excluding Japan and South Korea), 179 for Central and South America and more than 550 for the European Union and the Japan-South Korea zone. The density of Europe as a whole is 517.

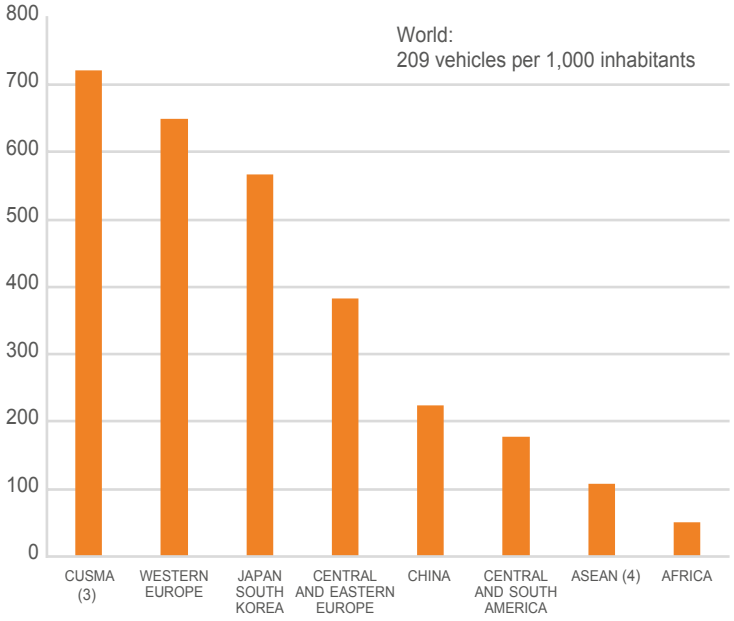
North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has benefited from strong growth in the fleet with an average rate of 6% per year since 2005. The latter is thus increased from 10 to 23 million units in 2020.

	TOTAL		CAGR variation	Share of the global fleet	Share of the global fleet
	2015	2020	2020/2015	2015	2020
	thousands	thousands	%	%	%
EUROPE	**393,160**	**432,694**	**2%**	**31%**	**27%**
Western Europe (1)	255,188	274,626	1%	20%	17%
Central and Eastern Europe (2)	137,972	158,068	3%	11%	10%
AMERICA	**410,561**	**452,977**	**2%**	**32%**	**28%**
CUSMA (3)	324,763	360,912	2%	25%	23%
USA	264,194	289,037	2%	21%	18%
Central and South America	85,799	92,066	1%	7%	6%
ASIA-OCEANIA	**433,336**	**644,048**	**8%**	**34%**	**40%**
China	162,845	318,034	14%	13%	20%
South Korea	20,990	23,730	2%	2%	1%
India	28,860	45,687	10%	2%	3%
Japan	77,403	76,703	-0.2%	6%	5%
ASEAN (4)	54,158	71,045	6%	4%	4%
Other Asia-Oceania	89,080	108,848	4%	7%	7%
AFRICA	**49,978**	**60,557**	**4%**	**4%**	**4%**
TOTAL	**1,287,034**	**1,590,276**	**4%**	**100%**	**100%**

(1) EU 14, UK, EFTA.
(2) EU12, Russia, Turkey and other Europe.
(3) CUSMA: Canada, United States, Mexico.
(4) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
Source: OICA

1.6 billion Number of vehicles in the global fleet in 2020

AUTOMOBILE DENSITY BY REGION IN 2020 (NUMBER OF VEHICLES PER 1000 INHABITANTS)



In 2020, mature areas, which have stock growth of between 1 and 2% per year, now represent less than 50% of the global stock and 15% of the global population. Since 2005, they have lost around 22 points to the benefit of emerging areas, whose parks have increased by around 10% per year.

Within the Europe zone, which represents 27% of the global fleet, the fleet is growing more quickly in the east than in the west, which is already very equipped (see page 19). The number of vehicles per 1000 inhabitants stands at 651 in Western Europe, compared to 381 in Central and Eastern Europe.

In America, the Canada, USA, Mexico zone (23% of the global fleet) is a mature market with a high motorisation rate (722 vehicles per 1000 inhabitants), especially in the USA where it reaches 860. Mexico is experiencing the highest growth in the stock (+4% between 2010 and 2020). On the other hand, Central and South America is an emerging zone in which the stock has grown relatively slowly (+2% on average between 2015 and 2020). Its weight in the global stock amounts to only 6% in 2020 and its density stands at 179, ranging from 113 in Colombia to 311 in Argentina.

In Asia, Japan and South Korea (8% of the world fleet), mature markets, have a motorisation rate of 612 and 458 respectively. On the other hand, emerging countries, with a larger population, have a low automobile density : 33 in India, 78 in Indonesia and 223 in China, although this has doubled in five years. Since 2005, almost all of the increase in the number has come from Asia - excluding Japan and South Korea. China has doubled its fleet over the past five years, from 163 million vehicles in 2015 to 318 million in 2020.

WORLD TRADE IN AUTOMOTIVE PRODUCTS

In 2022, global exports of goods reached a record level of $24.925 billion, up 11% compared to 2021. Exports of automotive industry products, still impacted by the shortage of semiconductors, grow by only 6% in 2022, but finally exceed their pre-crisis level. Valued at $1,562 billion in 2022, automotive products represent 9.9% of total manufactured products exported and 6.3% of all goods exported, compared to 11.8% and 7.9% respectively in 2019.

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

Areas	World		
COUNTRY	EXP.	IMP.	Balance
UNITED STATES			
2010	99.7	189.8	-90.0
2019	139.3	317.7	-178.4
2021	125.5	286.0	-160.5
2022	137.7	327.4	-189.7
MEXICO			
2010	55.6	29.4	26.2
2019	127.9	51.1	76.7
2021	117.7	46.2	71.5
2022	129.0	56.1	72.9
CANADA			
2010	50.1	59.6	-9.5
2019	60.8	75.8	-15.1
2021	45.1	67.1	-22.0
2022	50.2	78.0	-27.7
EUROPEAN UNION (1)			
2010	546.4	426.9	119.4
2019	701.4	572.1	129.3
2021	689.9	541.2	148.7
2022	700.6	553.4	147.2
JAPAN			
2010	149.5	14.2	135.3
2019	152.4	23.5	128.9
2021	138.5	22.0	116.4
2022	135.2	21.0	114.3
SOUTH KOREA			
2010	54.5	8.0	46.5
2019	65.2	16.8	48.3
2021	69.0	19.4	49.6
2022	77.1	21.0	56.0
CHINA (EXCLUDING HONG KONG)			
2010	28.0	53.0	-25.0
2019	59.3	80.0	-20.7
2021	93.4	89.9	3.5
2022	124.2	83.1	41.1

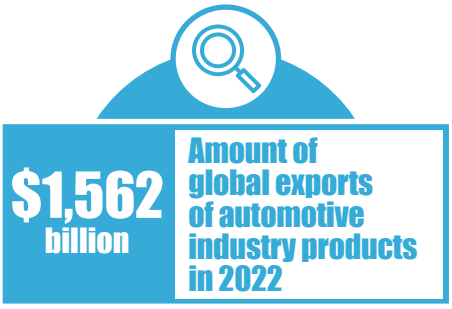
In addition to the macro-economic context, global trade in automotive products is influenced by multilateral agreements signed under the aegis of the WTO or bilateral/regional agreements signed between zones. They can also be influenced by national economic policies aimed at supporting the local economy and attracting new foreign investment. The Inflation Reduction Act, signed in August 2022 in the United States which subsidises locally assembled electric vehicles, is an example of measures that could have consequences on trade to and from this zone in the coming years. In the large markets of the European Union and CUSMA (Mexico, United States, Canada), the share of intraregional trade in world trade is particularly high (around 75%). Conversely, in Asia-Oceania, intraregional trade barely reaches 30%. This zone remains very oriented towards the outside world with national markets which are not as open (Japan, South Korea).

World trade is also influenced by changes in exchange rates. In 2022, the appreciation of the dollar against the euro continued due to different monetary policies between the two zones. The dollar also continued to appreciate against most other developed country currencies. The euro, for its part, appreciated against the Japanese yen and the Chinese yuan only during the second half of the year.

In 2022, the European Union, now without the United Kingdom, remains the main exporter of automotive products with $700 billion, or 45% of global exports. Germany, with $252 billion in exports, exports more than half of the Union's non-EU exports and accounts for 16% of world exports. Other major exporters are Japan ($135 billion), the United States ($138 billion) and Mexico ($129 billion). Chinese exports, which jumped by 33% in 2022 after 61% in 2021, are almost at similar levels with an amount of 124 billion euros in 2022.

On the import side, EU-27 imports 553 billion automotive products in 2022, 79% of which come from its zone. With the United Kingdom's exit from the EU, whose automobile balance is in deficit, the EU's automobile balance has increased since 2020 and will amount to 147 billion euros in 2022.

Auto sales are also positive in Japan (+$114 billion), Mexico (+$73 billion) and South Korea (+$56 billion). On the other hand, they are in deficit and have reached their lowest level in the United States (-$188 billion). China now has a positive balance, which increased from 3.5 billion in 2021 to 41 billion in 2022, also thanks to a drop in its imports of 8%, explained by the sharp increase in the penetration of Chinese manufacturers in their market interior.



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

	2005	2017
Intra Asia	24%	31%
Intra-Europe	78%	72%
Intra North America	83%	77%
Intra Latin America	51%	79%

Source: WTO

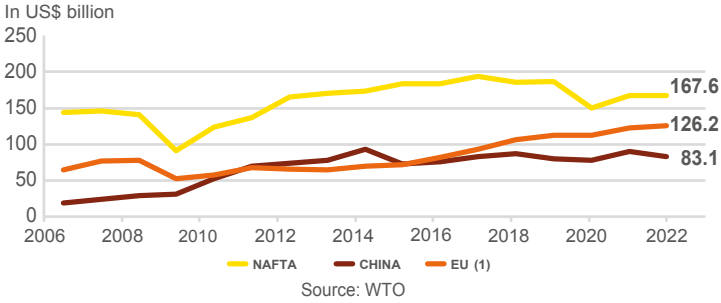
► TRADE BETWEEN THE MAIN COUNTRIES OF THE EUROPEAN UNION (1) AND THE UNITED KINGDOM (IN US$ BILLION)

	GERMANY			FRANCE			SPAIN			ITALY			UNITED KINGDOM		
	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance	EXP.	IMP.	Balance
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
2019	247.6	137.3	110.3	55.3	70.4	-15.1	56.8	46.8	10.0	40.0	47.0	-7.0	51.8	73.5	-21.7
2020	246.7	129.0	117.7	51.7	71.1	-19.4	53.8	40.3	13.5	42.3	41.6	0.8	41.1	59.9	-18.8
2022	252.1	132.6	119.5	49.8	68.2	-18.4	53.1	42.2	11.0	41.2	42.7	-1.5	41.0	70.7	-29.7

(1) For comparisons, 15 countries are counted in the European Union as a whole from 1993, 25 countries from 2004, 27 countries from 2006 and 28 from 2014 and 27 from 2019.
Source: WTO

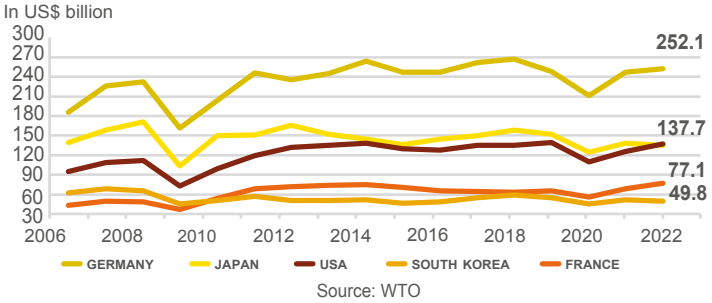
WORLD TRADE IN AUTOMOTIVE PRODUCTS

IMPORTS FROM MAJOR AREAS OF AUTOMOTIVE PRODUCTS (EXCLUDING INTRA-REGIONAL TRADE)



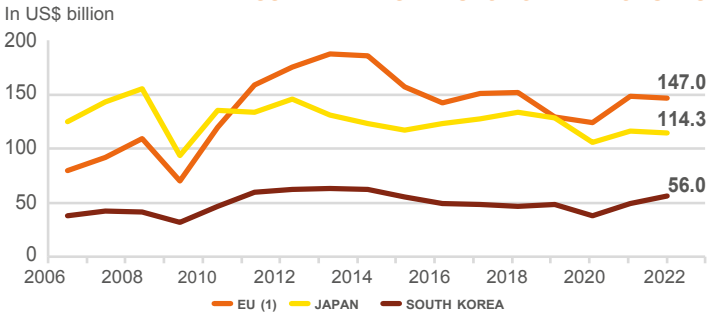
Source: WTO

MAIN EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



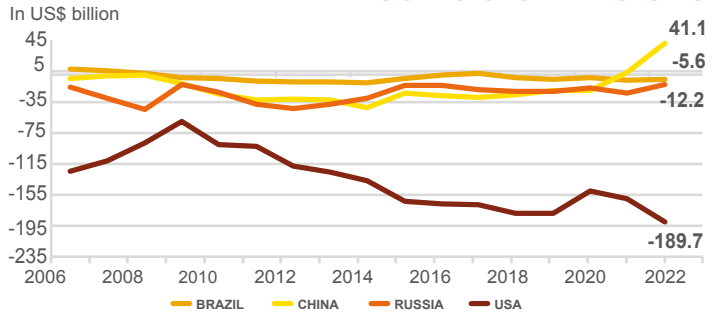
Source: WTO

EXCESS BALANCES IN AUTOMOTIVE PRODUCTS



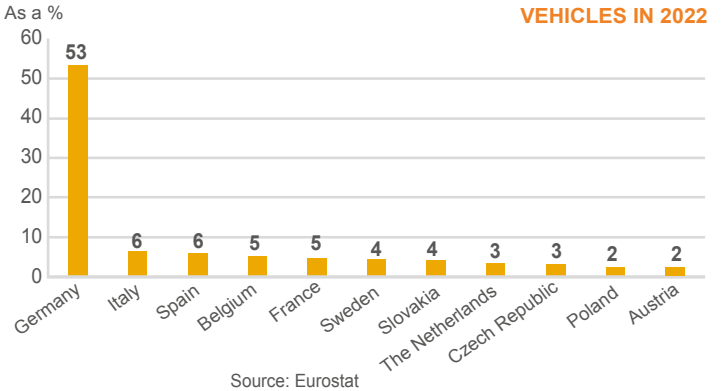
Source: WTO

DEFICIT BALANCES ON AUTOMOTIVE PRODUCTS



Source: WTO

WEIGHT OF EU EXPORTS TO NON-EU COUNTRIES - ROAD VEHICLES IN 2022



Source: Eurostat

3% **Share of France in world exports of automotive industry products in 2022**

(1) For comparisons, 15 countries are counted in the European Union as a whole from 1993, 25 countries from 2004, 27 countries from 2006 and 28 from 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 an increase in their trade surpluses. Conversely, the deficit balances of the United States and China deteriorated until 2018, then stabilised in 2019. China, which has become the world's largest automobile market, multiplied its trade deficit by six, between 2005 and 2019, going from -4 to -21 billion dollars. In Canada, the positive balance in 2005 became negative from 2007, notably due to the place taken by Mexico in trade within NAFTA. Thus in Mexico, the trade surplus was multiplied by 7 between 2005 and 2019. In 2020, most zones or countries saw their trade balance deteriorate, with the exception of the United States which reduced its deficit balance by 16 %.

In 2021 then 2022, with the restart of world trade, the automobile trade balance improves in most countries, with the exception of the United States and Canada, whose currencies have appreciated against the main currencies, but also of France whose automobile deficit is increasing. Germany remains the leading exporter of automotive products in the world, with 36% of European exports and 16% of global exports ($252 billion). The United States now ranks second ahead of Japan with $138 billion, or 8.8% of world exports. Japan, now in third position with 135 billion dollars, is closely followed by Mexico (129 billion) and China (124 billion). France represented 3.2% of global exports of automotive products in 2022 ($49.8 billion), compared to 7.6% in 2004.

In 2022, exports from EU-27 amounted to $700 billion (45% of global automotive exports), of which 61% went to the EU. Exports of vehicles outside the EU are mainly made by Germany (53% in 2022), ahead of Italy and Spain (6%), with Belgium (5%) now just ahead of France (4.7%). The share of the six new entrants (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) amounts to 12% in 2022, compared to 10% in 2019. In 2022, EU exports to China represent 14% of exports outside the EU, compared to 19% for those to the United States.

In 2022, the United States remains the world's leading importer of automotive products, with $327 billion, and is widening its trade deficit to $190 billion. With Canada and Mexico, the zone imports $461 billion in automotive products, 40% of which comes from abroad. The Canada-United States-Mexico agreement, signed in 2020, should strengthen imports from Mexico in a context of distancing the United States from China and desire to relocate production nearby. In 2022, according to the Mexican Automobile Federation (AMIA), 9 out of ten light vehicles manufactured in Mexico are exported, including 77% to the United States and 6.6% to Canada.

China sees a drop in its imports in 2022 ($83 billion), while its exports are still increasing sharply (+33%). Thus, for the second year, its trade balance in automotive products is in surplus.

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

The passenger car market in Western Europe (90% of the European market) declined for the third consecutive year to fall to 10.2 million units in 2022. This represents a drop of 4.1% compared to 2021 and 29% compared to 2019. In 2022, the shortage of semiconductors and supply difficulties weighed, for the second year, on registered volumes and the European automobile market fell below its level of 1985.

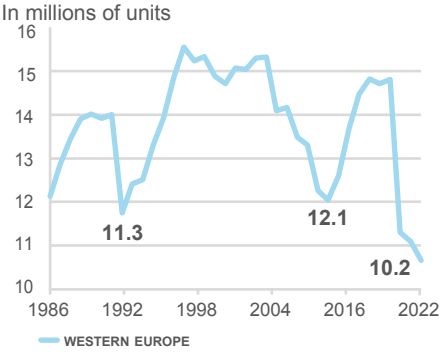
In 2022, the five largest European markets will represent 78% of passenger car volumes registered in Western Europe. Germany, the largest European market, alone represents 25% of volumes; with the surrounding countries of Northern Europe, this ratio increases to 45%.

Particularly affected by supply problems and a resurgence of the COVID epidemic in 2021, the German market is the only one to have experienced a slight increase in 2022 but remains down 26% compared to 2019. The other four large European markets, which had almost sluggish or weak growth in 2021, lost volumes in 2022 and are down around 30% compared to before the crisis. The United Kingdom, which saw its automobile market decline by only 2%, moved into second place in Europe ahead of France, with a market share of 15.9%. France, now in third place (15% of registrations) saw a decline of 7.8%, followed by Italy (13% of volumes sold), down 9.7%. Finally, the passenger car market in Spain fell by 5.4%.

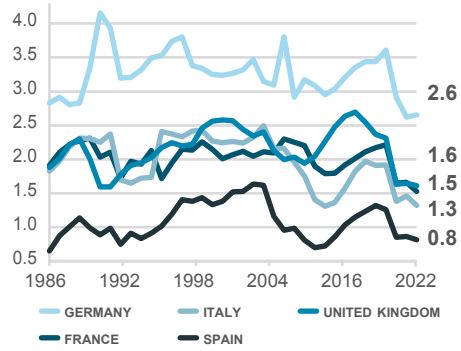
In the other countries of Southern Europe (Greece and Portugal), the markets rebounded in 2022 by 4.3% and 6.6% respectively, without this offsetting the drop of more than 30% recorded in 2020. Finally, in the countries of Northern Europe (Denmark, Finland, Norway and Sweden), less impacted by COVID in 2020, registrations fell in 2022 and remain down around 20% compared to before the crisis, with the exception of Norway which benefits from a special situation. Indeed, the Norwegian market has been driven in recent years by sales of electric cars, which cushioned its fall in 2020 and 2022, and enabled a strong rebound in 2021. Thus in 2022, the level of registrations in Norway exceeds 22% its 2019 level.

► REGISTRATIONS OF NEW PASSENGER CARS IN WESTERN EUROPE

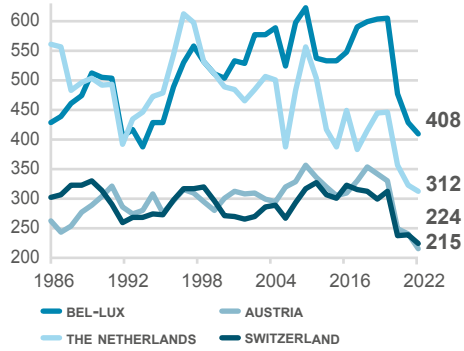
In millions of units



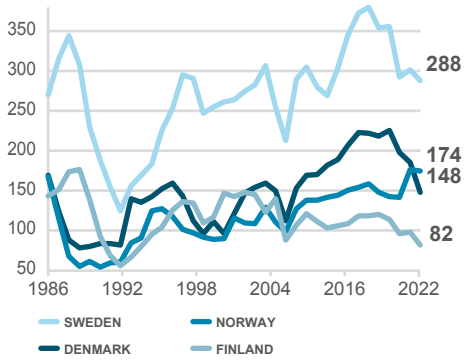
In millions of units



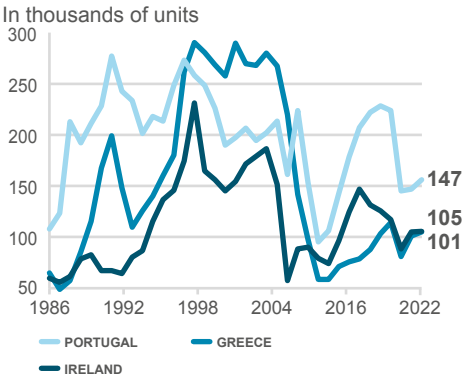
In thousands of units



In thousands of units



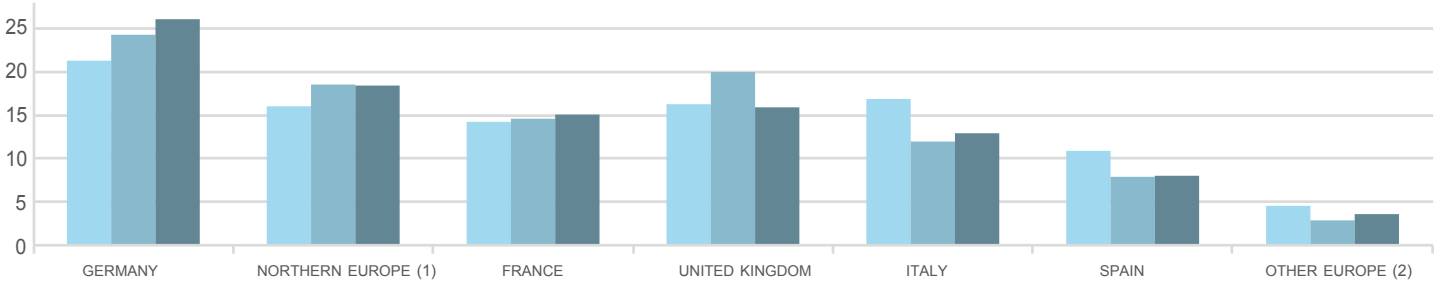
In thousands of units



-29% Decline in new passenger car registrations in Western Europe in 2022 compared to 2019

As a % of West European market

SHARE OF COUNTRIES IN THE NEW PASSENGER CAR MARKET



(1) Austria, Belgium-Luxembourg, Denmark, Finland, Iceland, Norway, 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, to which are added 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, remains counted in this group. These countries have a similar environment and obey comparable economic rules.

The market had experienced two major crises before that of 2020. The first, in 1993, had led to a drop in the European market by 2.2 million units in 1 year, to 11.3 million units, but this one rose again the following year and experienced a continuous increase until 1999. The second crisis, from 2008, led to a continuous fall in the market until 2013 (-3.3 million units in 6 years) to reach 11.5 million units. In 2020, the economic shock following the health crisis was of such magnitude that the market fell to its lowest level since 1985 for almost all Western European countries. But, against all expectations, it continued to decline in 2021 and 2022, falling below its 1985 level. Italy and Spain remain the only two large markets which are, in 2022, above their point the lowest in 2013. And even if registrations are at very low levels, several small countries in Southern Europe (Greece and Portugal) or Northern Europe (Sweden and Ireland) nevertheless have automobile markets which are above from their lowest point in 1993.

NEW PASSENGER CAR REGISTRATIONS BY GROUP

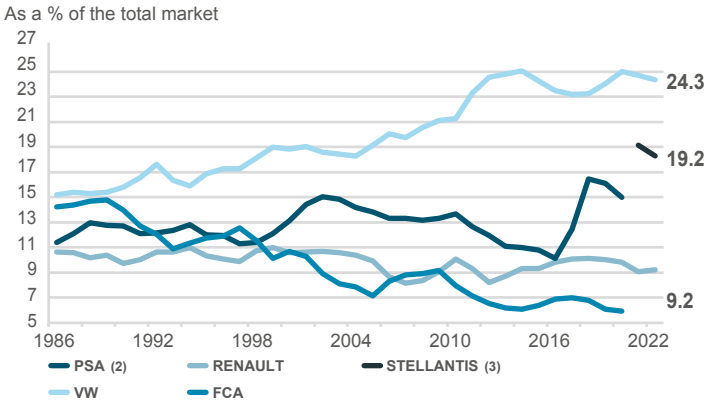
In 2020, the PSA and Renault groups represented 25% of the Western European market for new passenger cars. Stellantis, resulting from the merger of the PSA and FCA groups, was created on January 16, 2021. The Renault group and Stellantis now represent 28.4% of the West European passenger car market.

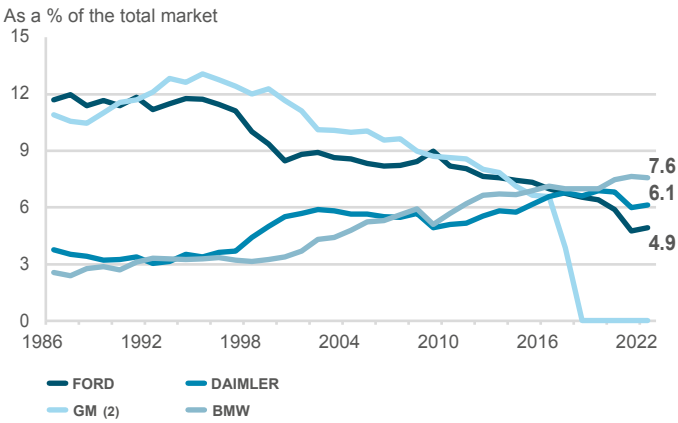
The Renault group is based on the Renault (5.4% market share), Alpine and Dacia brands. The latter, which represented 0.5% of the market in 2007, grew and reached 3.8% of the market in 2022. The new Stellantis entity brings together 14 brands. The four brands from the PSA group are Peugeot (5.8%), Citroën (3.5%), Opel/Vauxhall (3.9%) and DS (0.5%). The other brands, from the FCA group, are mainly Fiat (3.8%) and Jeep (1%).

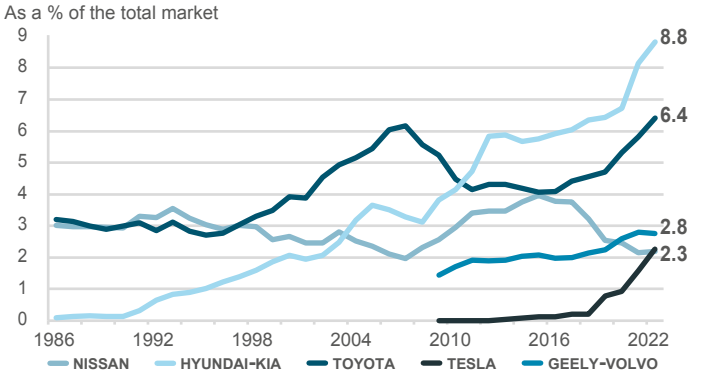
The other manufacturers traditionally present in Europe are the Volkswagen group, which holds a 24% market share, as well as four other large general groups and two specialist groups for higher ranges. These players each have a market share of between 2% and 9%. The Chinese group Geely is also an important player in Europe since its acquisition of the Volvo cars branch in 2010 with a 2.8% market share in 2022.

Finally, new players have appeared on the European market in recent years. The Tesla brand really emerged in 2019, quadrupling its sales in one year and today holds more than 2% of the market. In 2022, it is Chinese brands that have made a significant breakthrough in Europe, going from 0 to more than 1% of sales.

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







28% Share of new passenger cars sold by Stellantis and by the Renault group in Western Europe

(1) The scope of the groups corresponds to their situation on 01/01/2022.
(2) The Opel brand belongs to the GM group until July 31, 2017 and to the PSA group from August 1, 2017.
(3) On January 16, 2021, the PSA group merged with the FCA group to create Stellantis.
Read page 74 for group definitions.
Source: CCFA

The Renault group's market share exceeded 10% until 2004, due to its strong presence in the Southern European markets (including France), which accounted for 45% of the Western European market. Today, these markets only represent 40% of the Western European market, which affects the group's performance. In 2022, its market share is stable at 9.2%.

All the brands of the new Stellantis entity represent 19.2% of sales in Western Europe in 2022, down 1.9 points compared to 2021. The Citroën, Fiat and Opel brands lost between 0.3 and 0.4 points, but the DS and Alfa Roméo brands, positioned in the premium segment, each gain 0.1 points.

Since 1995, the Volkswagen group (VW), with its four main brands, has consolidated its positions. It represents 24.3% of the market in 2022, down 0.3 points compared to 2021.

The American group Ford and its eponymous brand have halved its market share since the early 1990s. In 2022, it will stabilise at 4.9%.

The German groups Daimler and BMW, specialists in higher ranges and sales to businesses, have pursued a strategy of expanding their range with smart and Mini respectively, to gain market share. Daimler reached a peak in 2019 at 6.9%, but fell back to 6% in 2022 with, from 2020, the decline of smart then, in 2021, that of Mercedes-Benz. In 2022, with the split of the heavy goods vehicle activities, called Daimler Truck, the Daimler group will be renamed Mercedes-Benz Group. The BMW group, for its part, gained market share between 2019 and 2022, thanks to its premium brand BMW (5.9%), but also thanks to Mini which is growing each year (1.7% of the market). It is now widening the gap with its competitor, with a market share of 7.6%, or 1.6 points more.

The progress of Asian groups on the European market since the mid-1990s is very significant. The Japanese groups Nissan, Toyota and the Korean Hyundai-Kia, which represented 7% of the market in 1995, now represent more than 17%. The Toyota group grew between 1995 and 2007, then stalled until 2016. Since then, it has regained market share and reached 6.4% in 2022. The market share of the Hyundai-Kia group, almost non-existent in 1990, has progressed constantly over the last thirty years, passing Toyota in 2011. It will reach a record level of 8.8% in 2022. The Nissan group, which had reached a record market share level of 4% in 2015, is in decline since then and represents 2.2% of the Western European market in 2022. Finally, the Chinese group Geely is present in Europe thanks to the Volvo brand acquired in 2010 and occupies a growing market share which reaches 2.8% in 2022.

RANKING BY RANGE IN 2022

Over the last twenty years, manufacturers have developed their offering across different ranges (minivans, AWD vehicles, sedans) and across different energy sources (rechargeable and non-rechargeable hybrids, electric). Stellantis and the Renault group now offer more than eighty-eight different models, including 32 electric models. In addition, each body includes different versions depending on the equipment of the car, which implies the marketing of several thousand possible combinations. New electric models have been put on the market in recent years by Stellantis and the Renault group, particularly in the LCV range (E-Berlingo, E-Expert, Kangoo ZE, Master ZE, Trafic E-Tech, E-Jumper) . The electric offering has also expanded in the sedan segment (208, E-C4, Twingo, Zoé, Spring, Megane-E, Corsa) and AWD vehicles (2008, DS3 crossback, Mokka).

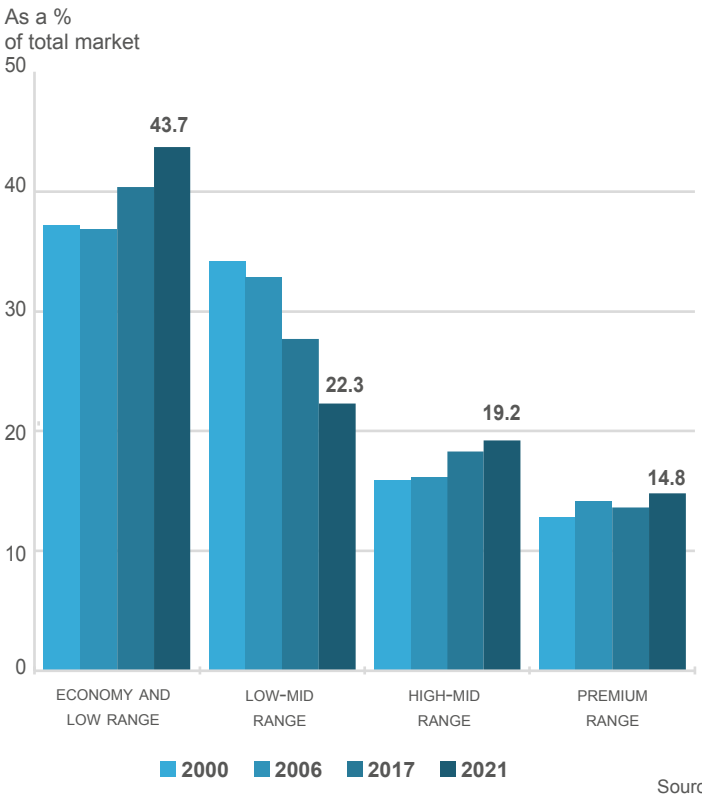
88 & 32 respective numbers of models and electric models offered by the Renault group and by Stellantis

Groups	Brands	Economy and low range	Lower-mid range	High-mid range	Premium range
STELLANTIS	CITROËN	C3, C4 Cactus, Berlingo	C3 Air Cross, C4, C4 X, C5 Air Cross, Jumpy, Spacetourer, Jumper	C-Elysée, C5 X	
	DS	DS3, DS3 Crossback	DS4	DS7	DS9
	PEUGEOT	108, 208, 2008, Partner, Rifter	308, 3008, 5008, Expert, Traveller, Boxer	508, 408	
	OPEL	Corsa, Combo, Mokka, Crossland, Grandland	Astra, Zafira, Movano	Insignia, Vivaro	
	ALFA ROMEO			Tonale	Giulia, Stelvio
	FIAT	Panda, 500, Fiorino, Doblo	Ducato, Tipo, Scudo		
	MASERATI				Ghibli, Levante, Quattroporte, MC20, Grecale
	JEEP	Renegade		Wrangler, Compass, Gladiator	Grand Cherokee
	LANCIA	Ypsilon			
RENAULT Group	RENAULT	Twingo, Clio, Captur, Kangoo, ZOE, Express	Arkana, Mégane (including Scénic, Grand Scénic), Megane E-Tech, Master	Trafic, Kadjar, Koleos, Alaskan, Austral	Espace, Talisman
	DACIA	Logan, Sandero, Duster, Dokker, Spring, Jogger	Lodgy		
	ALPINE				A110
BMW Group	BMW	i3	1 Series, 2 Series, M2	4 Series, X1, X2	Alpina, 3, 5, 6, 7, 8 Series, X3, X4, X5, X6, X7, Z4, M3, M4, M5, M8, IX, IX1, IX3
	MINI	Mini			
DAIMLER Group	MERCEDES-BENZ	Citan, Classe T	Classes A, B, CLA, Vito, Sprinter	GLA, EQA, Classe X	Classes C, E, G, S, SL, V, CLS, EQB, EQC, EQE, EQS, EQV, GLB, GLC, GLE, GLS, GT, Série G, SLC
	SMART	Fortwo, Forfour			
FORD EUROPE	FORD	Fiesta, T. Courier, T. Connect, Ecosport, Puma	Focus, Kuga, Transit, T. Custom	Mondeo, Ranger, Serie F	S-Max, Mustang, Galaxy, Edge, Explorer, Mac-E
GEELY	VOLVO			V40, XC40	C40, S60, S90, V60, V90, XC60, XC90
SAIC MOTOR	MG		MG4, MG5, ZS, EHS		
HONDA	HONDA	Jazz, E	Civic, HR-V	CR-V	
HYUNDAI KIA	HYUNDAI	Bayon, I10, I20, Kona	I30	I40, Santa Fe, Tucson, Ioniq, Nexo, Ioniq5, Ioniq6	
	KIA	Picanto, Soul, Stonic	Cee-d, Ceed, Niro, Proceed, Rio, Xceed	Optima, Sportage, Stinger, EV6	Sorento
MAZDA	MAZDA	2, CX-3, MX-30	3, MX-5, CX-5	6, CX-30	CX-60
MITSUBISHI	MITSUBISHI		ASX, Spacestar	Outlander, ECL-Cross, L200	
NISSAN	NISSAN	Micra, Juke, Townstar	Leaf, NV200, NV300	Qashqai, X-Trail, Navara, Interstar	NV400, Ariya
SUBARU	SUBARU			Impreza, Legacy, Forester, Levorg, Outback, Solterra	BRZ
SUZUKI	SUZUKI	Celerio, Ignis, Jimny, Swift, SX4, Vitara	Baleno, Swace	Across	
TATA Group	JAGUAR			E-Pace	F-Pace, F-Type, XE, XF, I-Pace
	LAND ROVER			RR Evoque, Defender	Discovery, Discovery.Sp, Range Rover, Rangsport, RR-Velar
TESLA	TESLA				Model 3, Model S, Model X, Model Y
TOYOTA	LEXUS			UX	ES, LS, RC, RX, NX300H, NX
	TOYOTA	Aygo, Aygo X, Yaris, Yaris Cross	Corolla, Proace, Pro.City, GR86	Prius, C-HR, RAV4, Mirai, Highland, Hilus, BZ24X	Land Cruiser, Camry, Supra
VOLKSWAGEN Group	AUDI	A1, Q2	A3	A4, A5, TT, Q3, Q4 e-tron	A6, A7, A8, Allroad, E-Tron, Q5, Q7, Q8, R8, E-Tron GT
	PORSCHE				911, 718 Boxster, 718 Cayman, Macan, Cayenne, Panamera, Taycan
	SEAT / CUPRA	Ibiza, Arona	Born, Leon	Ateca, Formentor	Alhambra, Tarraco
	SKODA	Citigo	Fabia, Kamiq, Scala	Octavia, Karoq, Enyaq	Superb, Kodiaq
	VOLKSWAGEN	Up, Polo, Caddy, T-Cross, T-Roc	Golf,Touran, Crafter, Taigo, ID.3	Passat, Arteon, Tiguan, Transporter, ID.4, ID.Buzz	Sharan, Touareg, ID.5

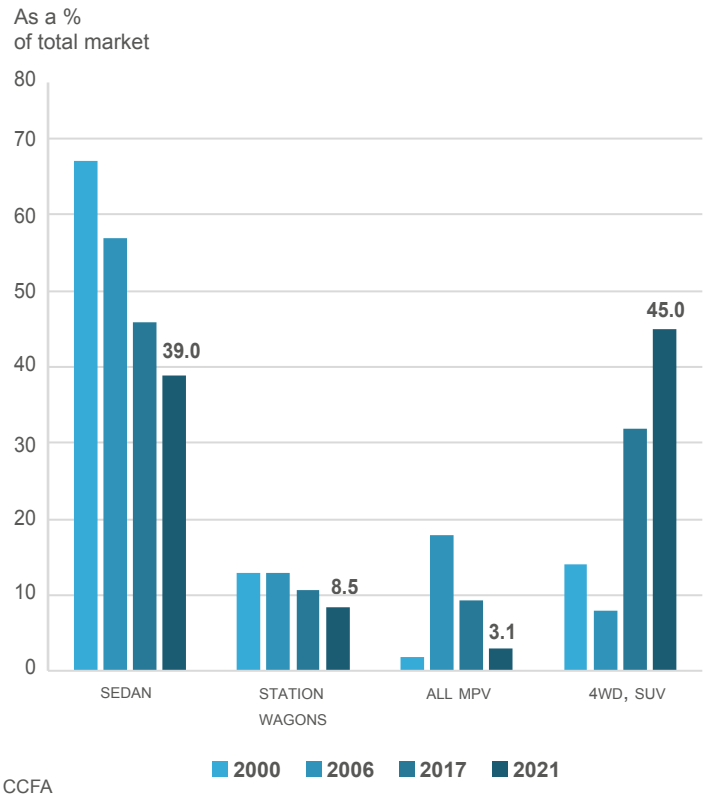
Source: CCFA

NEW PASSENGER CARS BY RANGE, BODY AND TECHNICAL CHARACTERISTICS

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



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



Source: CCFA

In 2022, the diversity of the offer continues to increase; the market shares of the top 15 vehicles sold in Western Europe now amount to only 22.5%, compared to 40% in 2000.

Concerning the market by range, the latest available data (2021) indicates that the economy and low range still dominates the market with 44% of registrations, compared to 41% in 2017. The low-mid range, rich in sedans, fell by 3 points in 2021 (22% of the market), for the benefit of the high mid-range and premium range (34%), which traditionally weigh more when the market is low. Gaps remain between Northern Europe, which is more inclined towards higher ranges and station wagons, and Southern Europe, favouring lower ranges. Despite the success of the low range and sedans in Germany and the United Kingdom during the 2009 crisis, the market shares of lower ranges remain, in these two countries, 5 to 11 points below the European average, while that those in the higher ranges remain above (40%).

The bodies of new cars have also evolved over the last twenty years in Western Europe. The market share of sedans continues to decline (39% in 2021, compared to 67% in 2000) in favour of the 4WD, SUV category, which benefits from a varied and growing offering and takes 45% of the market today, compared to 14% in 2000. Their market share even exceeds 50% in Spain, Ireland, Sweden and Norway. Conversely, it is low in Germany, with only 37% of sales.

The technical characteristics of vehicles (cylinder capacity, power) have also undergone changes, thanks to the reduction in engine size (downsizing, identical engine power with a lower cylinder capacity) and the development of electrification, but remain very linked to the economic, fiscal and geographical conditions of each national market.

The 4WD, SUV market has grown significantly in Western Europe since 2010, with a market share that has more than tripled in a decade to reach 45% in 2021. It is higher than the average in Nordic and mountainous countries, in order to meet the needs of geographical relief or weather conditions and exceeds 60% in Norway. We also note a significant increase in several countries. France, for example, which goes from a market share of 10% in 2010 to 43% in 2021, or even Spain, which goes from 13% to 56%. As for Germany, the increase is less steep, going from 16% to 37%.

Finally, the increasing electrification of passenger car sales and the loss of diesel market share do not seem to change the evolution of the market structure. Sales by range and by bodywork follow the trends of previous years.

12 of the 15 Best-selling models in Western Europe were in the economy and lower range in 2022

► RANKING OF THE 25 BEST-SELLING MODELS IN WESTERN EUROPE IN 2022

Models	Volume	%
PEUGEOT 208	195,813	1.9%
DACIA SANDERO	178,335	1.8%
FIAT 500	178,001	1.8%
TOYOTA YARIS	166,661	1.6%
VOLKSWAGEN GOLF	164,731	1.6%
VOLKSWAGEN T-ROC	161,504	1.6%
OPEL CORSA	156,582	1.5%
TESLA MODEL Y	134,211	1.3%
PEUGEOT 2008	134,067	1.3%
CITROEN C3	133,694	1.3%
VOLKSWAGEN TIGUAN	133,653	1.3%
RENAULT CLIO	131,632	1.3%
FORD PUMA	126,733	1.2%
RENAULT CAPTUR	125,662	1.2%
HYUNDAI TUCSON	124,069	1.2%
FIAT PANDA	122,931	1.2%
FORD KUGA	114,420	1.1%
DACIA DUSTER	113,978	1.1%
KIA SPORTAGE	112,592	1.1%
VOLKSWAGEN POLO	107,421	1.1%
NISSAN QASHQAI	105,675	1.0%
TOYOTA YARIS CROSS	102,303	1.0%
PEUGEOT 3008	99,540	1.0%
VOLKSWAGEN T-CROSS	99,228	1.0%
MINI MINI	98,472	1.0%

NEW PASSENGER CARS BY ENERGY

In 2022, the electrification of vehicles continued in Europe in a still fragile economic context. Registrations of new passenger cars fell by 4%, while those of electric cars increased by 30% to 15% of the total market, compared to 11.1% the previous year. As for hybrid cars, they represented 33% of the new passenger car market in 2022, a gain of 4 points in market share. Plug-in and non-rechargeable hybrids have increased respectively by around 1 and 3 points of additional market share compared to 2021. In this case, plug-in hybrids now represent 10% of cars sold. Non-rechargeable hybrids represent 23% of registrations. In total, around 50% of registrations in 2022 are electric or hybrid cars, 25% if we only consider electric and plug-in hybrids. This shows an increase of more than 5 points in market share compared to 2021 when the number of electrified passenger cars sold (electric and plug-in hybrid) was 20%.

The share of new cars equipped with a diesel engine continues to contract and will only amount to 14% in 2022, compared to 55% in 2012. From now on, in all Western European countries, the Diesel is below or around 20% market share, but it holds up more in Southern Europe than in the Nordic countries. Petrol engines have decreased but remain above 30% of registrations in 2022. Finally, the electric car market is more developed in the Nordic countries than in the Southern countries, Norway being the country with the largest market share. higher (79% of registrations). In Eastern Europe, diesel appears to be the leading propulsion energy, with a market share of 53%. Diesel engines are, as in Western Europe, constantly decreasing. Finally, the market for electrified vehicles is growing but electric vehicles remain well behind Western European markets (4% of sales compared to 15% respectively).

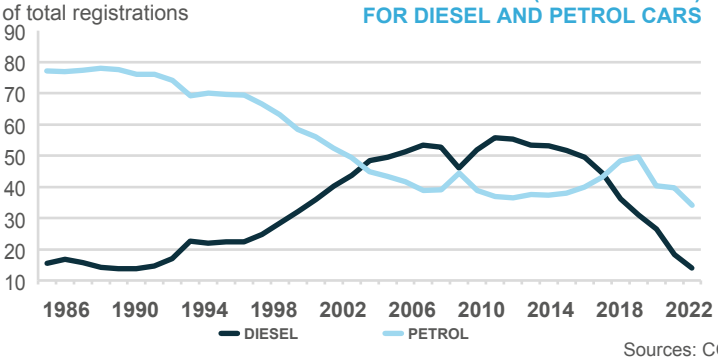
15% **Market share of electric cars in Western Europe in 2022**

► NEW PASSENGER CARS BY ENERGY IN EUROPE IN 2022 (AS A %)

	Diesel	Petrol	Hybrid	Non-rechargeable hybrids	Plug-in hybrids	Electric
GERMANY	17%	32%	31%	17%	14%	17%
AUSTRIA	22%	37%	25%	19%	6%	16%
BELGIUM	16%	49%	31%	7%	24%	10%
DENMARK	7%	36%	37%	19%	18%	21%
SPAIN	17%	42%	35%	29%	6%	4%
FINLAND	7%	24%	51%	31%	20%	18%
FRANCE	16%	37%	30%	22%	8%	13%
GREECE	16%	45%	33%	28%	5%	3%
IRELAND	27%	30%	27%	20%	8%	15%
ITALY	20%	28%	39%	34%	5%	4%
LUXEMBOURG	22%	35%	28%	19%	9%	15%
THE NETHERLANDS	1%	38%	36%	25%	11%	23%
PORTUGAL	18%	42%	26%	15%	10%	11%
UNITED KINGDOM	5%	42%	36%	30%	6%	17%
SWEDEN	6%	16%	43%	20%	23%	33%
ICELAND	14%	12%	40%	18%	22%	33%
NORWAY	3%	4%	14%	5%	9%	79%
SWITZERLAND	12%	37%	33%	25%	8%	18%
ALL 18 COUNTRIES	**14%**	**34%**	**28%**	**23%**	**10%**	**15%**
NEW EU COUNTRIES (11 COUNTRIES)	**15%**	**53%**	**28%**	**26%**	**2%**	**4%**

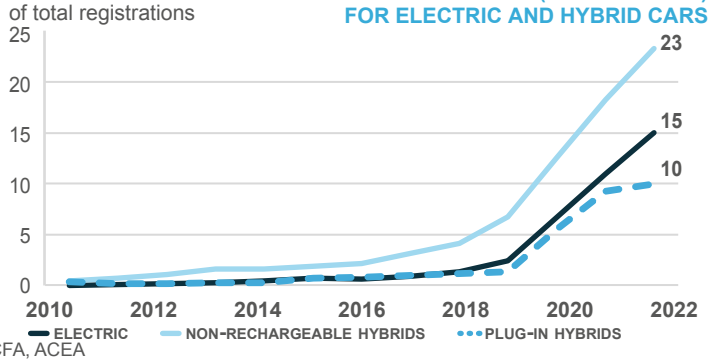
As a percentage of total registrations

EUROPEAN MARKET (18 COUNTRIES) FOR DIESEL AND PETROL CARS



As a percentage of total registrations

EUROPEAN MARKET (18 COUNTRIES) FOR ELECTRIC AND HYBRID CARS



Sources: CCFA, ACEA

The evolution of engines in Europe is largely influenced by the tightening of regulations and taxation in each country, particularly in relation to CO_2 emissions. In recent years, it has also been impacted by announcements from national and local authorities aimed at restricting the circulation of cars with thermal engines and in particular diesel (low emission zones), but also by financial aid for the purchase of less expensive vehicles. transmitters (electric, hybrid or sometimes even petrol as part of the conversion bonus). The adoption of the "Fit For 55" legislative package in 2021 aims to implement concrete actions to accelerate the fight against climate change and enable Europe to achieve carbon neutrality by 2050. In June 2022, the European Parliament voted for the end of the thermal engine in 2035 and an intermediate objective of reducing CO_2 emissions by 2030, by 55% for light vehicles.

The development of the alternative energy vehicle market remains strongly linked to GDP per capita, as shown by an ACEA study. EU-27 countries, which have an electrified vehicle market share of less than 4%, have an average GDP per capita of less than 27,000 euros and, in 2021, 72% of electric vehicle sales are concentrated in 4 countries which all have a GDP per capita above 45,000 euros: France, Germany, Italy and Sweden. The different national public policies such as financial aid for the purchase of an electrified vehicle or traffic restrictions on polluting vehicles also explain these differences. Finally, infrastructure is another essential factor for the development of electric mobility. The number of charging stations is correlated with the development of the electrified car market and 70% of charging points in Europe are located in only 3 countries: the Netherlands, Germany and France which are also those where the more electrified cars.

In 2022, the average share of electric cars in Western Europe is 15%, but it is below this average in southern European countries (less than 5% in Spain and Italy) and above in the countries of Northern Europe, with share exceeding 13% such as Denmark (21%), Sweden (33%) and Norway (79%).

For plug-in hybrid cars, the same gap is observed between Northern European countries, such as Sweden (23%) and Denmark (18%), whose market shares exceed the European average by the West (10%), and those of Southern Europe where market shares do not exceed 5%.

Finally, in Eastern Europe, non-rechargeable hybrids represent a little more than a quarter of sales in 2022. Conversely, the market shares of electric cars and plug-in hybrids remain very low, respectively 4% and 2% of sales of new private vehicles. The highest share of electric cars is observed in countries where financial aid for purchases is the most generous (Romania with 9%).

THE PASSENGER CARS IN USE IN EUROPE

As of December 31, 2021, the passenger car fleet in enlarged Europe (EU-27 + EFTA + UK + Turkey) stood at 307 million units, an increase of 1.4% compared to the previous year. In Western Europe, where automobile density is high (542 cars per 1,000 inhabitants on average), the fleet increased by 0.8%, compared to +1.5% on average between 2014 and 2019. In the new countries joining the European Union and Turkey, where motorisation rates are generally lower (508 per 1000 inhabitants on average outside Turkey and 162 in Turkey), the growth rate of the fleet is more sustained. It increased by 3.6% as of December 31, 2021, compared to 4.4% on average between 2014 and 2019. At the start of 2022, this area represents 22% of the European stock, compared to 15% in 2005, and several countries now have rates motorisation identical to the countries of Western Europe.

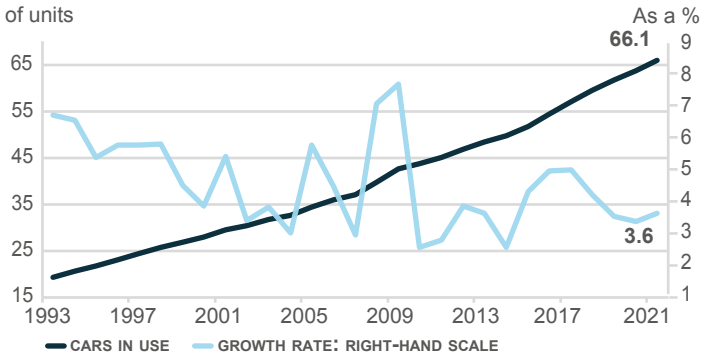
For the third year in a row, the share of diesel in the fleet has fallen in Western Europe and amounts to 40.8%. As for the Central and Eastern European countries that are members of the EU, the share of diesel now occupies 36.7% of the vehicle fleet in this area.

The share of cars older than 10 years in the Western European fleet continues to increase and reached more than 50% as of December 31, 2021, with significant disparities between countries and geographic areas. In the Central and Eastern European EU countries, this percentage is even higher, with 77% of the passenger car fleet over 10 years old.

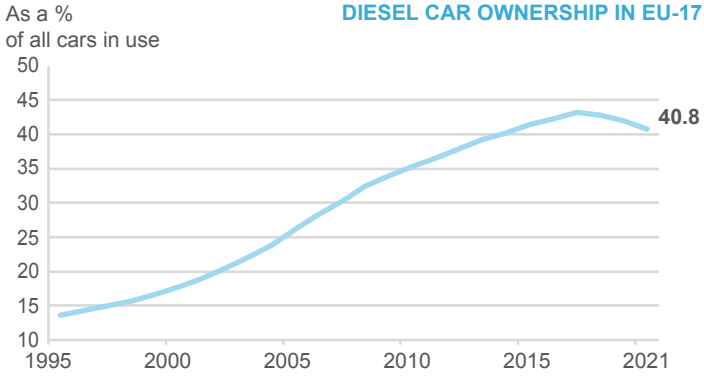
► PASSENGER CAR IN USE, AS OF DECEMBER 31 OF EACH YEAR

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

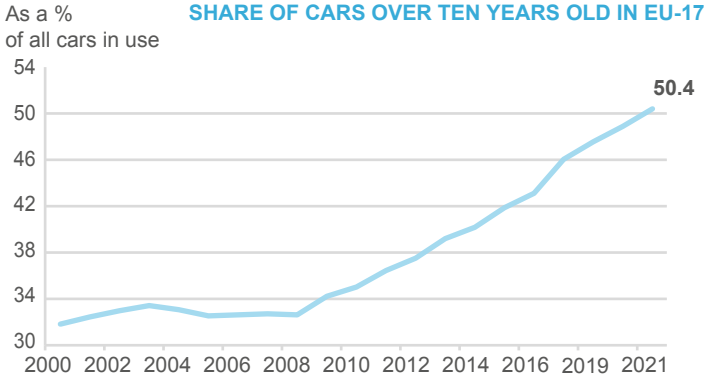
IN THE 10 NEW EU MEMBERS STATES AND TURKEY



DIESEL CAR OWNERSHIP IN EU-17



SHARE OF CARS OVER TEN YEARS OLD IN EU-17



(1) The change was calculated on a like-for-like basis.
Sources: ACEA, professional organisations

As of December 31, 2021, the passenger car fleet in Western Europe amounted to 241 million units. High equipment rates and the crisis have affected the growth of the fleet, the rate of which averaged 1.9% per year between 1992 and 2009. From 2009, the growth rate slowed to 1.1% per year on average. As of December 31, 2021, the fleet is growing in all European countries. In the new accession countries and in Turkey, the growth of the fleet also slowed down, going from 5.2% per year before 2009 to 3.7% per year afterwards. As of December 31, 2021, it still grew by 3.6% 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 slowed down (+1.2 points per year) and fell for the second consecutive year to 40.8 %. As of December 31, 2021, this engine remains the majority in only five Western European countries, including Spain (57%) and France (55%), despite the decline observed in these two countries. In Germany, this share is low (31%), while it is close to the European average (41%) in the United Kingdom (36%) and Italy (43%). In Eastern countries, the share of diesel is decreasing for the first time, showing a shift towards other engines, particularly hybrids.

After hovering around a third between 2000 and 2009, the share of cars aged over 10 years in Western Europe has constantly increased and now reached more than 50% as of December 31, 2021, compared to 48.9% a year earlier. This share is particularly high in Southern European countries, where it reaches almost 60% in Italy, as well as 64% and 63% respectively in Spain and Portugal. In Eastern countries, lower-cost demand is mainly met by imports of used vehicles and the share of vehicles over 10 years old is even higher (77% on average). It even reaches 81% in Poland and 87% in Romania.

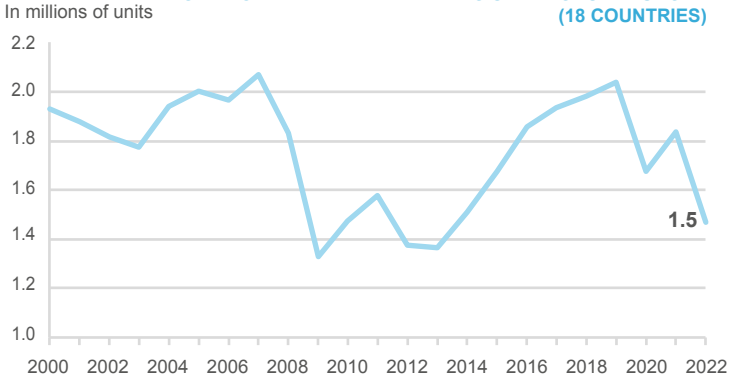
NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

45% Share of Stellantis and the Renault group in light commercial vehicle sales in Western Europe in 2022

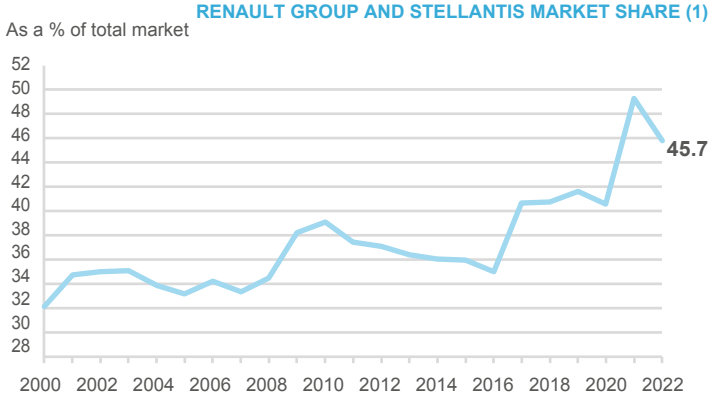
In 2022, the West European light commercial vehicle market decreased by 19% to 1.5 million units. Less affected than the passenger car market by the lockdowns in 2020 and the shortage of semiconductors in 2021, it is on the other hand more affected by the difficult economic context of 2022 (inflation, war in Ukraine) and is also suffering from the problems of persistent supply. It therefore declines more than the passenger car market in 2022 and all countries are affected. As with the passenger car market, the market is around 30% below its pre-crisis level.

The growth of the European market between 2014 and 2019 allowed French groups to gain market share. They represented 41.6% of the total in 2019. Then, the merger of the PSA and FCA groups in 2021 to create Stellantis allowed them to cover up to 49% of the total commercial vehicle market in Western Europe. In 2022, their market share is 46%, down 3 points compared to 2021. After France with a market share of 70%, it is in Italy and Spain that the two entities record market shares. highest market share (around 56% of the total).

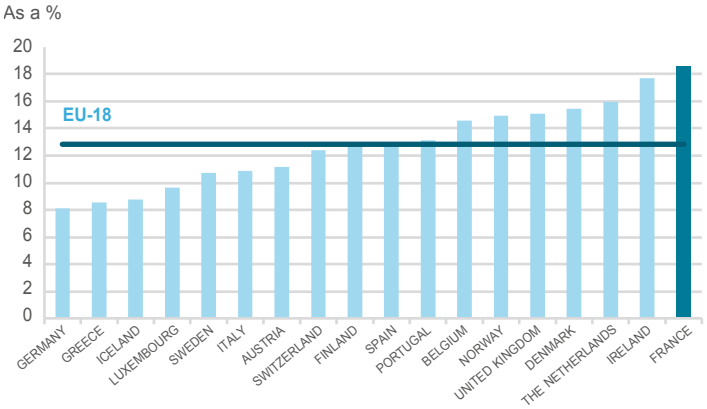
LIGHT COMMERCIAL VEHICLE REGISTRATIONS IN EUROPE (18 COUNTRIES)



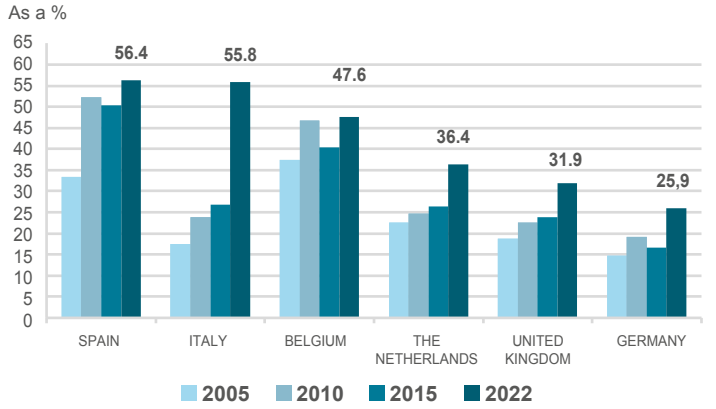
RENAULT GROUP AND STELLANTIS MARKET SHARE (1)



SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2022



MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES OF THE RENAULT GROUP AND STELLANTIS (1)



(1) Renault group and PSA market share until 2021.
Source: CCFA

Tax treatments are not identical in all European countries, so the share of light commercial vehicles (light commercial vehicles of less than 5.1 t) in all light vehicles varies from 8% in Germany to 18 .5% in France. On average, it amounted to 12.8% in Western Europe in 2022. In volume, France remains the leading European market, with 348,072 units, ahead of the United Kingdom (286,609 units), the Germany (234,403 units), Italy (161,084 units) and Spain (120,155 units) which remains in 5th place.

Since 2014, this market has grown continuously and French manufacturers have gained market share compared to 2007. In 2022, Stellantis represents 31.6% of the market, but also produces light commercial vehicles for other brands (Toyota).

The Renault group occupies 14.1% of the market and also produces for other partner brands (Daimler, Nissan, Mitsubishi).

The van segment (Trafic, Master, Expert, Boxer, etc.) represents almost half of sales and that of vans and combispaces (Kangoo, Berlingo, etc.) around 20%. The other segments are mainly occupied by pickups and passenger car derivatives.

Despite the development of the alternative energy vehicle offering, the market share of electric or plug-in hybrid vehicles in Europe remains low in 2022 (5.8%), compared to the passenger car market (25%). As for passenger cars, it is higher in Norway (24%) and the Netherlands (8%) and lower in Southern European countries (4% in Portugal, 3% in Italy) including in France where the market share is only 5%. In Germany, the market share of electrified vehicles is 7.3% in 2022. Diesel engines are still largely dominant in this market with 84% of light commercial vehicle sales.

THE HEAVY TRUCK MARKET IN EUROPE

The Western European market for industrial vehicles over 5.1 tonnes increased by 2.1% in 2022, an increase which remains weak and which does not allow a return to pre-crisis registration volumes. With 264,000 units, the level of registrations remains 16% lower than in 2019, but close to the long-term average.

The evolution of industrial vehicle registrations in Western Europe is contrasted in 2022. Across Western Europe as a whole, volumes are increasing, but certain countries such as France and Germany, which had experienced a growth of around 6% in 2021, will see their registrations decline by 1% and 3% respectively in 2022. Germany, the largest European market, represents 28% of volumes sold in Western Europe in 2022, ahead of the United Kingdom (17% of volumes) which, thanks to an increase of 7% in 2022, is ahead of France (16% of volumes). These three countries remain down by around 20% compared to the registrations recorded in 2019. Italy is in fourth position, with 9% of volumes, and records for the second consecutive year an increase in registrations, which now exceed their 2019 level (+7%). Finally, Spain progresses by 13% in 2022, but remains down 5% compared to 2019.

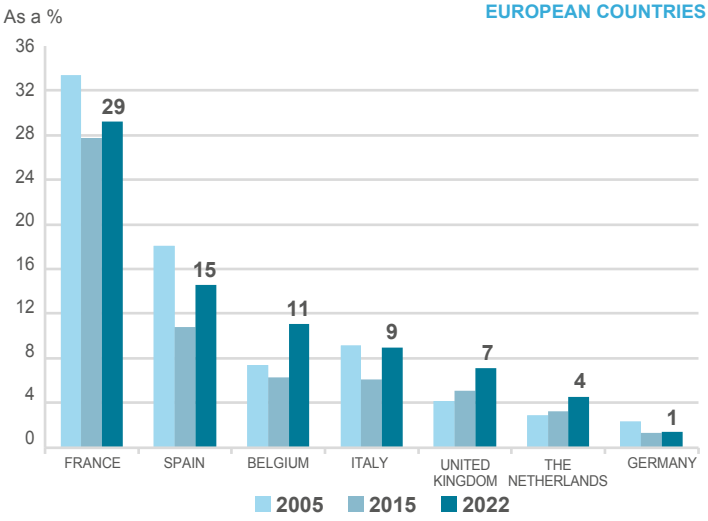
26,724 New Renault Trucks industrial vehicles over 5t sold in Western Europe in 2022

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

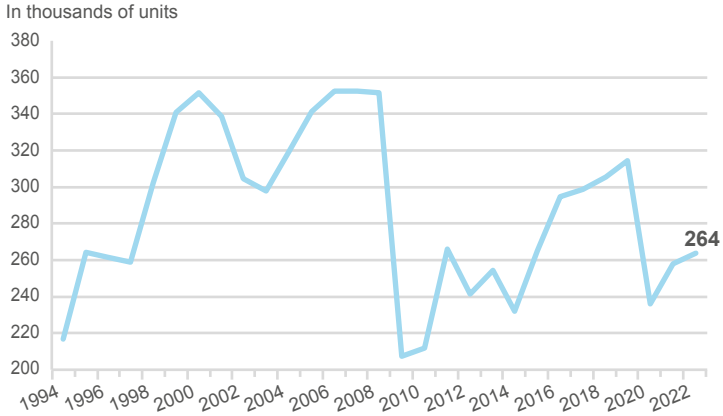
	2010	2015	2021	2022	Change 2022/2021
REGISTRATIONS OF NEW INDUSTRIAL VEHICLES					
From 5.1t to 15.9t	54	48	45	39	-11.8%
16t and above	159	217	214	224	5.0%
TOTAL	212	265	258	264	2.1%

Source: ACEA, CCFA estimates

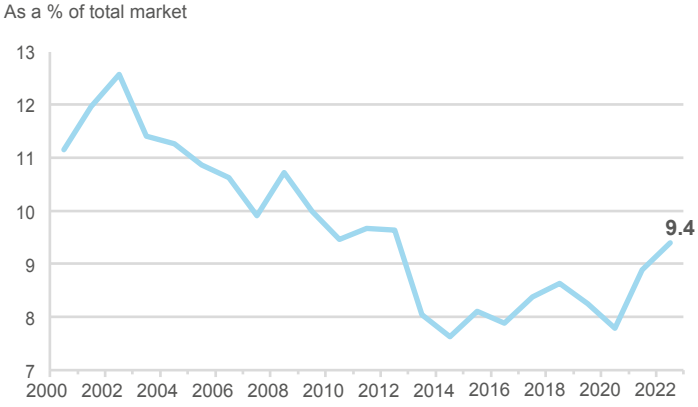
RENAULT TRUCKS' MARKET SHARE IN THE MAIN EUROPEAN COUNTRIES



NEW HEAVY TRUCK REGISTRATIONS IN WESTERN EUROPE



RENAULT TRUCKS' MARKET SHARE IN WESTERN EUROPE



Source: CCFA

The European industrial vehicle market has experienced very broad developments over the last few decades, strongly linked to the macro-economic context. The year 2000 was a first high point after the 1993 crisis, then the market experienced a trough before breaking new volume records in 2006-2008 at 350,000 units. With the financial and economic crisis of 2009, it then collapsed and lost 150,000 units in one year. Then, it oscillated around 250,000 units, before experiencing a further improvement between 2015 and 2019, without nevertheless returning to its record levels of 2000 and 2007. With the health crisis of 2020 and the weak rebounds recorded in 2021 then 2022, the market now oscillates between 240,000 and 260,000 units, as after the 2009 crisis.

Vehicles of 16 tonnes and more (rigids or road tractors) largely dominate the European market for industrial vehicles (>5t). They represent 8 out of 10 vehicles on average. This weight is a little lower in Germany and the United Kingdom (around 70%), while it reaches 90% in Spain, the Netherlands and Austria.

The market for alternative energy industrial vehicles (gas, electric, hybrid) remains weak (3.5% in 2022). Electrified vehicles continued to develop with a 90% increase in registrations in Western Europe. On the other hand, registrations of vehicles using other alternative energies (particularly gas) contracted in 2022, due to the increase in gas prices, linked to the conflict in Ukraine, and its strong impact on the Italian and German markets. The energy transition remains a major concern for manufacturers, as well as for road freight transport companies, who must anticipate legislative and regulatory developments (targets for reducing CO_2 emissions, city traffic restrictions, sustainable urban logistics). The CNG market is the most developed and in certain countries (Italy, Latvia, Sweden), its market share exceeds 5% in 2022. The market share of electric vehicles remains very low in 2022 (0.5%), but the offer is starting to expand in the urban delivery segments and is now extending to other uses (regional transport, construction). This share remains far from the objectives of reducing CO_2 emissions from heavy vehicles resulting from the Green Deal.

In 2022, Renault Trucks' market share will increase in almost all European countries. Its market share amounts to 9.4% across Europe, up 0.6 points. In France, where the brand generates more than half of its Western European sales, its market share amounts to 29.4%.

In terms of electric mobility, Renault Trucks is strengthening its positions in Europe with 24.2% market share in the intermediate range segment. On its national market, the manufacturer is consolidating its leading position, with 29.4% market share in the segment of vehicles over 16 tonnes and 75% market share in the intermediate electric ranges.

REGISTRATIONS AND PRODUCTION IN THE NEW MEMBER STATES OF THE EUROPEAN UNION

Vehicle production in the new EU member countries amounts to 3.7 million units in 2022, up 7.7% compared to 2021, but still down 14.9% compared to to 2019. The health crisis in 2020, then supply problems linked to the shortage of semiconductors in 2021 and 2022 caused production to fall, with volumes falling back to 2014 levels. On the demand side, vehicle sales new units, after falling by 23% in 2020, increased by 4.4% in 2021. In 2022, they fell back to 1.3 million units, a level almost similar to 2020, which remains far below (-22%) of 2019 volumes. This sharp drop is linked to that of demand for light commercial vehicles. The difference between production and sales of new vehicles is around 2.4 million units in 2022, compared to 2 million the previous year. This gap shows that this area remains more of a production area than a consumption area.

The Renault and Stellantis groups have been commercially present in this area for many years and also have industrial sites there: Stellantis (excluding FCA) in Slovakia and Poland; Renault in Slovenia and especially in Romania with Dacia. All of these sites produced 722,163 units in 2022. Registrations of new light vehicles from Stellantis and the Renault group within these countries amounted to 283,000 units in 2022, or 28% market share, in increase compared to 2021. The market is expected to grow further given the gaps that remain in some of these countries in terms of automobile densities, compared to Western Europe.

28% Renault group and Stellantis market share of new light commercial vehicles sold in the new EU Member States in 2022

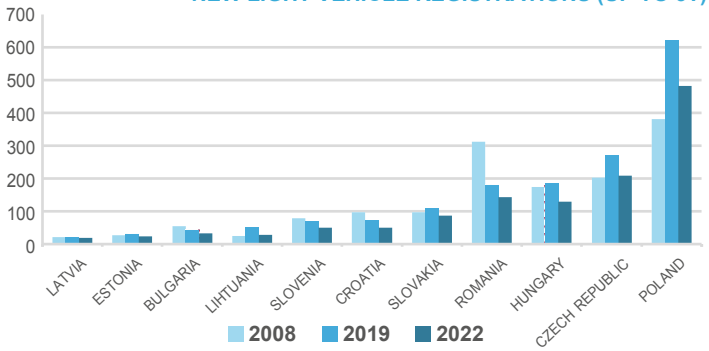
►THE MARKET AND VEHICLE PRODUCTION IN THE NEW EU MEMBER STATES (IN THOUSANDS OF UNITS)

	2021	2022	Change
VEHICLE PRODUCTION (1)			
Passenger Cars	3,277	3,492	+6.6%
Light commercial vehicles	185	236	+27.7%
Heavy vehicles			
TOTAL VEHICLES	3,462	3,728	+7.7%
NEW VEHICLE REGISTRATIONS (2)			
Passenger Cars	1,153	1,111	-3.6%
Light commercial vehicles	175	146	-16.5%
Heavy vehicles	77	85	+10.6%
TOTAL VEHICLES	1,405	1,342	-4.5%

(1) 6 countries.
(2) 11 countries, excluding Malta and Cyprus.
Sources: CCFA, OICA

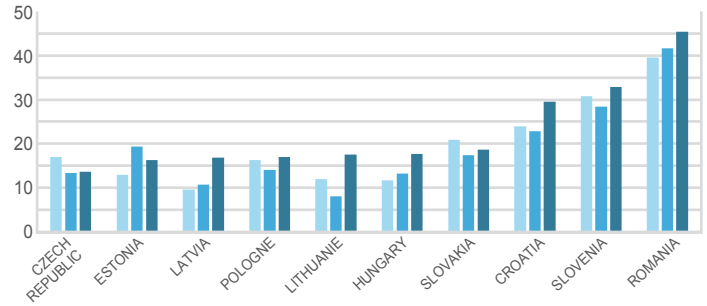
In thousand of units

NEW LIGHT VEHICLE REGISTRATIONS (UP TO 5T)



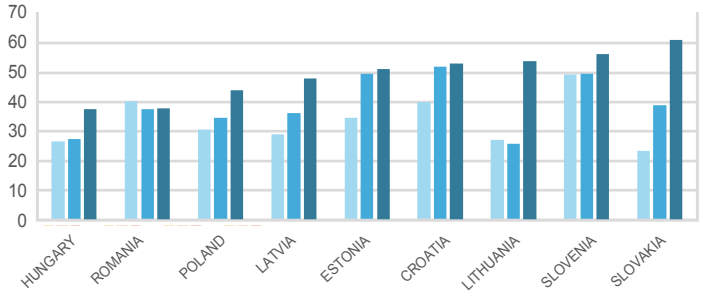
MARKET SHARE OF THE RENAULT GROUP AND STELLANTIS (3): NEW PASSENGER CARS

As a % of total market



MARKET SHARE OF THE RENAULT GROUP AND STELLANTIS (3): NEW LIGHT COMMERCIAL VEHICLES

As a % of total market



(3) PSA Group before 2021.
Source: CCFA

If the European Union of 15 countries now appears as an automobile market whose demand mainly concerns renewal, this is not yet the case in all the new member countries of the EU. The average motorisation rate, which amounts to 567 private cars per 1000 inhabitants in the European Union, hides large disparities between countries. It is now around 400 in Latvia and Romania and between 400 and 450 in Hungary, Croatia and Slovakia, but rises to 684 in Poland and is around 600 in Estonia, Slovenia and the Czech Republic. Poland (38%) and the Czech Republic (17%) together account for 55% of passenger car registrations in the region, followed by Romania (12%) and Hungary (10%). For light commercial vehicles, the leading market remains Poland (40%), followed by Hungary which represents 12% of the market.

In 2022, the automotive markets in the new member states of the European Union suffered from the semiconductor crisis, like the Western European countries and did not really bounce back from the COVID crisis. The passenger car market fell by 4% in 2022 compared to 2021, as in Western European countries; this market remained down 25% compared to 2019. The automobile market in these Member States thus remains below pre-covid levels. The main markets, those of Poland and the Czech Republic, fell by -6% and -7.2% respectively in 2022. The Hungarian market, in 3rd position, fell by 8.5 %. The light commercial vehicle market, for its part, experienced a significant drop in volume (-16.7%), while registrations of heavy vehicles increased by 23.8%. The Polish market, which is the region's leading market in terms of volume for light commercial vehicles (40% of the total) and heavy vehicles (42.3% of the total), experienced a sharp decline in the first segment (-16.8%), but a significant increase on the second (+23.8%). Its sales of industrial vehicles exceeded their 2019 level with more than 25,000 units. Slovakia experienced the largest increase and almost quintupled its heavy vehicle registrations, which allowed it to return to a level similar to 2019.

The technical characteristics (engine size, power, bodywork) of passenger cars registered in this zone are close to those of Western Europe, with the exception of those relating to the engine. The share of cars equipped with a petrol engine has seen a slight increase and remains almost 20 points higher than that of Western European countries (53%, compared to 34%). In 2022, the weight of electric cars in the total market increased by 2 points, but remains very low (4%) compared to Western Europe (15%). Hybrid engines have also developed (+2 points in 2022) and reach 28% of registrations (compared to 33% in Western Europe) thanks to the success of non-rechargeable hybrid cars, which represent 26% in 2022, compared to 23%. in Western Europe. In Poland, the largest market in the region, non-rechargeable hybrids represent 33% of new car registrations in 2022.

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2020, the European automotive industry was hit hard by the Covid crisis. Production fell by 15% and value added by 16%. The social shock absorbers put in place by governments, however, made it possible to slow down the decline in personnel expenditure (-2.8%). In terms of jobs, the automotive industry represents in 2020, 2.4 million people, or 8.3% of industrial jobs in Europe, down 0.2 points compared to 2019, distributed between vehicle construction. (44% of jobs), the manufacturing of automotive equipment (49%) and the manufacturing of bodies and trailers (7%).

In the 7 Western European countries where the automobile industry is historically present, the sector's workforce decreased significantly between 2005 and 2010, while they increased in the 7 new entrants to the EU. Then, thanks to the growth of the markets and the valorisation of products manufactured in this area, the workforce increased again between 2010 and 2019, in particular thanks to Germany, but without returning to their initial level. As for France, it has benefited little from this context due to its degraded competitiveness. In Eastern Europe, the workforce increased by 460,000 people between 2005 and 2019, but they fell in 2020 (-6%) more sharply than in Western Europe (-2%).

In 2020, the added value per employed person in Europe amounted to 69,000 euros, compared to 80,000 euros in 2019. In fact, the crisis temporarily blocked industrial production and the return to activity close to pre-crisis has been slow, which mechanically reduced the added value of companies. In France, it stands at 68,000 euros compared to 103,000 euros in Germany, which does not change the hierarchy between these two countries. In 2020, personnel expenses per employed person amounted to an average of 52,000 euros, a decrease of 3,000 euros compared to 2019. However, there are strong disparities between Western Europe (-5%) and Central and Eastern Europe (-18%). They amount to 60,000 euros in France, 81,000 euros in Germany, but only 17,000 euros on average in the 7 countries of central and eastern Europe. Social security contributions represent 30% of these expenses in France, compared to 18% in Germany and 21% on average in Europe.

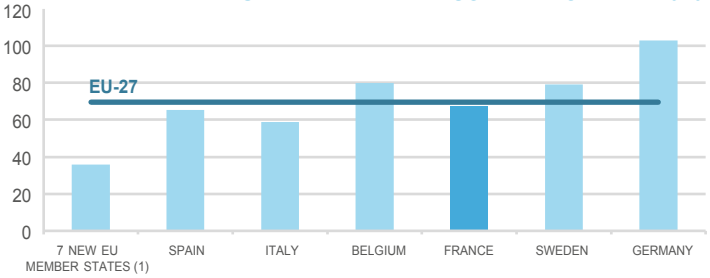
2.4 MILLIONS People employed in the automotive industry in Europe

► THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION 27 COUNTRIES IN 2020

	Units	EU excluding UK (27 countries)	Germany	France	Spain	Italy	Sweden	Belgium	7 new EU member states (1)	United Kingdom (2)
People employed	**thousands**	**2,487**	**883**	**234**	**159**	**173**	**86**	**31**	**763**	**166**
of which automobile assembly	thousands	1,100	560	116	71	67	65	17	157	85
of which body and trailer manufacturers	thousands	158	51	22	11	12	4	5	29	21
of which automotive equipment manufacturing	thousands	1,229	272	96	78	93	18	8	594	60
Sales	**€ million**	**986,349**	**470,006**	**119,602**	**64,507**	**60,797**	**42,577**	**14,191**	**164,627**	**88,239**
Production	**€ million**	**771,551**	**349,303**	**74,040**	**59,394**	**54,418**	**27,131**	**12,931**	**154,221**	**76,217**
Production/Sales	%	78.2	74	62	92.1	89.5	63.7	91.1	93.7	86.4
Value added (at factor cost)	**€ million**	**172,771**	**90,705**	**15,869**	**10,440**	**10,150**	**6,835**	**2,435**	**27,220**	**18,965**
Value added/Production	%	22.4	26.0	21.4	17.6	18.7	25.2	18.8	17.6	24.9
Value added per employed	€ thousand	69	103	68	65	59	79	80	36	114
	base 100: 7 new EU member states	195	288	190	184	165	222	223	100	320
Purchases of goods and services	**€ million**	**818,570**	**378,756**	**102,258**	**55,458**	**51,394**	**36,483**	**11,899**	**140,225**	**71,060**
Purchases as a % of production	%	106.1	108.4	138.1	93.4	94.4	134.5	92.0	90.9	93.2
Staff expenditures	**€ million**	**130,209**	**71,549**	**14,048**	**6,987**	**7,844**	**6,097**	**1,792**	**12,768**	**8,879**
Expenditure per employed	€ thousand	52	81	60	43.8	45.4	70.5	58.6	16.7	53.4
	base 100: 7 new EU member states	313	484	358	262	271	422	350	100	319
Gross Operating Surplus (GOS)	**€ million**	**42,561**	**19,156**	**1,821**	**3,453**	**2,305**	**737**	**643**	**10,136**	**10,086**
GOS/Value added	%	24.6	21.1	11.5	33.1	22.7	10.8	26.4	37.2	53.2

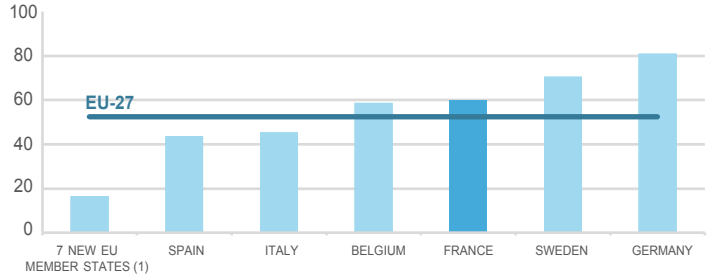
In € thousand

VALUE ADDED PER PERSON EMPLOYED IN 2020



In € thousand

PERSONNEL COSTS PER PERSON EMPLOYED IN 2020



(1) 7 main new EU members: Hungary, Poland, Czech Republic, Romania, Slovakia, Slovenia, Bulgaria.
(2) 2018 figure.
Sources: Eurostat and CCFA estimates

The automotive industry, one of the essential sectors of the European economy, includes the construction of motor vehicles, the manufacturing of bodies and trailers and the manufacturing of automotive equipment.

In 2020, France represents 9.4% of the total workforce in the European Union automotive industry excluding the UK, Germany accounts for 35.5%, Italy 7% and Spain 6%. In 2005, these rates were 12% for France and 39% for Germany. The weight of Western Europe in the workforce has decreased (63% in 2020, compared to 84% in 2005) in favour of new, lower-cost countries such as new entrants to the European Union, represented here by 7 countries (Hungary, Poland, Czech Republic, Romania, Slovakia, Slovenia and Bulgaria). They now represent 31% of the total workforce compared to 16% in 2005.

The automotive industries are very different depending on the country in terms of structure and wage costs. In Germany and Sweden, more than 60% of the automobile industry workforce is employed in automobile manufacturing, compared to 50% in France, 44% in Spain, 39% in Italy and 21% in the seven joining countries. In 2020, the gap in salary costs between Germany or France and new entrants remains significant. The expenditure index per employed person, expressed as a base of 100 for the average of the 7 participating countries, amounts to 358 in France, 422 in Sweden and 484 in Germany and this gap has widened with social support policies. implemented by governments.

On average in the European Union, the automobile industry represents 8.3% of direct industrial employment, but it reaches 11% of jobs in Germany, 13.7% in the Czech Republic, 13.8% in Sweden and more than 15 % in Romania and Slovakia. In addition to direct jobs, the automobile industry also generates indirect jobs which are estimated by the ACEA at just under a third of direct jobs. The industrial sector therefore directly and indirectly employs 3.1 million people in Europe excluding the UK, or 10.5% of industrial jobs. By adding all automobile-related jobs in services (commerce, repair, rental, insurance), transport (people and goods) and construction (road maintenance), the sector directly or indirectly employs 12.9 million people, or 6.8% of all jobs in Europe.

THE SITUATION OF MANUFACTURERS IN 2022

STELLANTIS (from 01/17/2021): www.stellantis.com

In 2022, in a context still marked by the shortage of semiconductors, the Stellantis group's sales amounted to 5.8 million vehicles, compared to 6.6 million in 2021.

The Stellantis group, born from the merger of the PSA and FCA groups, brings together 14 automobile brands. It relies on a workforce of more than 270,000 people worldwide, including 47,000 in France, spread across around twenty sites: assembly plants, production of thermal and now electric (Trémery) and mechanical engines; R&D centres (Vélizy then Poissy), spare parts stores (Vesoul). In France, downstream development is taking place thanks to Distrigo and MisterAuto in the distribution of parts; regarding the automobile trade, the group is increasing its presence on the second-hand market with AramisAuto and Spoticar, multi-brand used vehicle labels created in 2019. With the Free2Move and Leasys (formerly FCA) brands, it is expanding into mobility services, including internationally and is strengthening in 2022 with the acquisition of Share Now to become a global leader in mobility.

In 2022, the group spent more than 5 billion euros on research and development. With the Dare Forward 2030 strategic plan, the group is aiming for carbon neutrality by 2038 and a 50% reduction in its emissions by 2030, thanks to decarbonisation and the circular economy. The group has set itself the objective of selling 100% electric vehicles in Europe and 50% in the United States by 2030. It plans to have more than 75 100% electric models and to sell 5 million each year worldwide by 2030. To achieve this, numerous investments are being made in the transformation of engine factories, in the creation of an ACC joint venture with TotalEnergies and Mercedes-Benz which plans the construction of three factories of batteries in Europe, including one in Douvrin in the North and in a hydrogen partnership with Forvia-Michelin (Symbio).

Finally, in its desire to secure its supplies of raw materials (Lithium, Nickel and Cobalt) linked to the energy transition, Stellantis is developing cooperation, in particular with Vulcan Energy, to secure carbon-free lithium production, or even with Alliance Nickel for nickel and cobalt.

Internationally, the Stellantis group has a strong presence in Europe, North America and Latin America. It is developing its industrial cooperation in China and plans to continue to develop its activities around the world (India, Africa, Middle East). The Dare Forward plan plans to achieve 25% of global revenue outside of broader Europe and North America. In addition, it develops partnerships with players in new technologies.

Renault Group: www.renault.com

In 2022, the Renault group sold 2 million vehicles worldwide, compared to 2.2 million in 2021. The Dacia and Alpine brands have progressed, while the Renault brand remains more impacted by the shortage of semiconductors.

In 2022, the Renault Group employed 108,784 people worldwide, including 38,000 in France on around fifteen sites: assembly plants, engine and mechanical production plants (Cléon, Le Mans); R&D centres (Guyancourt), etc. Its downstream presence is based on Renault Retail Group, which distributes new and used vehicles, as well as parts under different brands (Motrio). The group is also actively working to develop the recycling of end-of-life vehicles and the use of recycled materials. For sales financing, it relies on Mobilize financial services. Concerning mobility services, they are gradually emerging and generate around 35 million euros.

In 2022, the Renault Group spent 2.1 billion euros on research and development. With the "Renaulution" strategic plan, the group is committed to achieving a zero CO_2 impact by 2040 in Europe and by 2050 worldwide. All new models marketed from 2022 will have an electric or electrified version, in a market which, in 5 years, will see 50% of vehicles sold operate electric or hybrid. At the end of 2022, Renault confirmed the creation of the ElectriCity cluster, in the north of France, the aim of which is to create a complete industrial ecosystem around the electric car and to reduce production costs by improving industrial processes. The manufacturer also invests in batteries (stake in Verkor). Renault is also working on hydrogen vehicles and has formed a partnership with Plug Power to create a joint venture (Hyvia).

In 2022, the Renault group also announced the creation of The Future is Neutral, a company which aims to be a leader in Europe in the circular economy of the automotive industry. Furthermore, the Re-factory project in Flins is coming to fruition and its Factory VO (Used Vehicles), the first factory specialising in the reconditioning of used vehicles on an industrial scale, was inaugurated at the end of 2021.

To meet the needs induced by the energy transition, Renault has entered into agreements to secure its supplies, particularly of carbon-free lithium (Vulcan), nickel (Terrafame) and cobalt (Managem Group).

The cooperation initiated in 1999 with Nissan within the Alliance has been optimised and expanded over time with the integration of Mitsubishi in 2016. In 2023, the alliance has been transformed, with the aim of generating synergies (local cooperation, pooling of vehicles). In the near future, French factories will produce vehicles for Nissan and Mitsubishi. Furthermore, with the outbreak of war in Ukraine, the group ceased its activities in Russia in 2022 (Lada).

The "Renaulution" plan launched in 2021 is continuing and the group is setting up companies with the aim of becoming leading players in their fields (Horse for thermal and Ampère for electric). It also initiates cooperation with players in new technologies.

Renault Trucks : www.renault-trucks.com

Renault Trucks, with 60,000 vehicles sold in 2022, is one of the leading truck manufacturers in the world. Renault Trucks' international sales increased by 24% compared to 2021. Its truck models are assembled in France in its factories in Bourg-en-Bresse and Blainville-sur-Orne and rely on partners for local editing.

Part of the Volvo group, which employs more than 100,000 people worldwide, Renault Trucks has 10,000 employees, four-fifths of whom are in France, as well as a global network of distributors and importers with 1,400 sales and service points. 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, as part of the circular economy, Renault Trucks has created workshops specialising in the transformation of used trucks (Used Trucks Factory in Bourg-en-Bresse) and in the recovery of parts (Used Parts Factory in Vénissieux).

The manufacturer now offers a complete range of alternative energy vehicles (gas, B100 biodiesel, electric), for ranges ranging from light commercial vehicles to heavy duty trucks. It also offers a range of services including solutions promoting fuel economy (Optifuel Solutions), but also predictive maintenance services (Start & Drive Excellence Predict). It continues to invest massively in electric mobility to be part of a trajectory aimed at a 100% carbon neutral offer from 2040, with an intermediate stage whose objective is 50% of volumes electric in 2030. To complete its range, Renault Trucks is developing cooperation with Renault (E-Tech Master) and Kleuster (Vélo-cargo).

96,000 people Workforce of manufacturers in France

	Units	Stellantis	Renault Group	Volvo Group
Turnover	€ million	179,592	46,391	46,122
Research and development expenditure	€ million	6,720	2,259	2,194
Net profit	€ million	16,779	700	3,212
Global workforce	number of people	272,367	108,784	102,155
including France	number of people	47,000	38,161	11,000

Sources: Activity reports from the Stellantis, Renault and Volvo groups

FRANCE - LOCATION OF THE RENAULT GROUP, STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS FACTORIES IN 2022

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 Palencia
21 Saragosse
22 Valladolid
23 Vigo
24 Madrid (Villaverde)

Italy
25 Val di Sangro

Poland
26 Gliwice (Opel)

Portugal
27 Mangualde

Czech Republic
28 Kolín (TMMCZ-Toyota)

Romania
29 Mioveni (Pitesti)(Dacia)

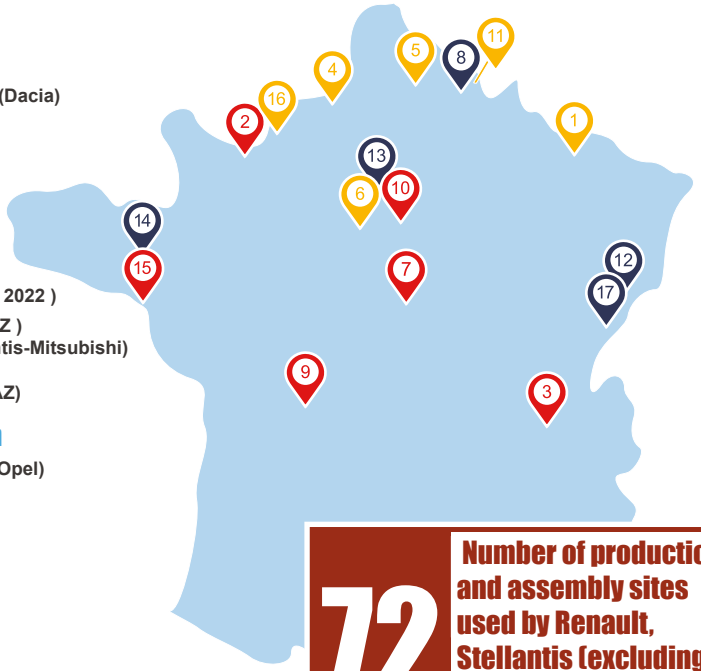
Slovenia
30 Novo Mesto

Slovakia
31 Trnava

Russia (until april 2022)
32 Izhevsk (AvtoVAZ)
33 Kalouga (Stellantis-Mitsubishi)
34 Moscow
35 Togliatti (AvtoVAZ)

United Kingdom
36 Ellesmere Port (Opel)
37 Luton (Opel)

Turkey
38 Bursa (Oyak)



STELLANTIS (EXCLUDING FCA)
RENAULT TRUCKS
GROUPE RENAULT GROUP

72 Number of production and assembly sites used by Renault, Stellantis (excluding FCA) and Renault Trucks worldwide

AMERICA

Argentina
39 Buenos Aires
40 Cordoba (Santa Isabel)

Brazil
41 Curitiba
42 Porto Real
43 Betim (Fiat)

Colombia
44 Envigado (Sofasa)

Mexico
45 Cuernavaca (Nissan)

Uruguay
46 Montevideo (Nordex)

AFRICA

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

Egypt
50 (Mansour Group) (project)

Kenya
51 Thika (URYSIA)
52 Thika (CKD par CMC Motors)

Morocco
53 Kenitra
54 Casablanca
55 Tanger

Nigeria
56 Kaduna (PAN)
57 Lagos (Coscharis group)

Tunisia
58 Tunis (STAFIM)

Ghana
59 Tema SSA

ASIA

Saudi Arabia
60 KAEC (AVI)

China
61 Chengdu (Dongfeng)
62 Shenzhen (SQRI)
63 Dingzhou (ChangAn)
64 Wuhan (Dongfeng)
65 Nanchang (JMEV)
66 Shiyan (eGT-NEV)

South Korea
67 Busan (Renault Korea Motors)

India
68 Thiruvallur (Chennai) HMFCL - CK Birla
69 Chennai (Renault-Nissan)

Malaysia
70 Gurun (Naza Automotive Manufaturing)

Vietnam
71 Chu Lai (Thaco)

Pakistan
72 Karachi (Lucky Motor Corporation)

WORLD PRODUCTION OF FRENCH GROUPS

266 million Light vehicles produced by the Renault group and Stellantis (excluding FCA) worldwide since 1898

In 2022, global production of the Renault group and Stellantis (excluding FCA) fell by 3.6% to 5 million vehicles. Automotive production remained disrupted by supply problems with electronic components and by the increase in production costs (raw materials, energy), which worsened with the war in Ukraine. Between 1996 and 2018, their production increased by more than 110%, or an average annual growth of 3%, both thanks to the increase in outlets in Europe outside France, then, subsequently, to those outside Europe. Since 2018, the decline is now 37%.

The production of passenger cars amounted to 4.2 million units, a decline of 2.9% compared to last year and 40% compared to the record of 2018. Production of light commercial vehicles also fell in 2022 to 890,000 units, a decrease of 6.9% compared to last year and 15.4% compared to 2018.

The Renault group and Stellantis (excluding FCA) have a wide diversity of sites: historic factories (Sochaux, Sandouville), recent factories in emerging countries (Tangier, Kenitra), large ones (Vigo, Pitesti), those producing a single type of model (Trnava, Bursa) or a great diversity (Chengdu, Curitiba), those of van-type light commercial vehicles (Hordain, Batilly) and those of smaller light commercial vehicles (Maubeuge, Vigo).

► PRODUCTION OR ASSEMBLY LOCATIONS BY MODEL IN 2022

STELLANTIS (excluding FCA)

Brands and models	PRODUCTION OR ASSEMBLY LOCATIONS BY MODEL IN 2022
Peugeot: 108 / Citroen: C1	Kolin (Czech Rep.) (TMMCZ)
Peugeot: 208	Trnava (Slovakia), Kenitra (Morocco), Buenos Aires (Argentina)
Citroën: C3, C3 Aircross, C3 Picasso, C3-XR	Trnava (Slovakia), Saragosse (Spain), Porto Real (Brazil), Wuhan (China), Tiruvallur (India)
DS: DS3 Crossback	Poissy (France)
Peugeot: 301 / Citroën: C-Elysée	Vigo (Spain)
Peugeot: 308	Mulhouse (France)
Peugeot: 2008	Porto Real (Brazil), Chengdu-Wuhan (Spain), Vigo (Spain), Gurun (Malaysia), Chulai (Vietnam)
Peugeot: 3008	Sochaux (France), Vietnam (THACO), Gurun (Malaysia)
Peugeot: 4008	Chengdu (China) (DPCA), Malaysia (Naza Automotive Manufacturing)
Peugeot: 5008	Rennes (France), Sochaux (France), Chengdu (China), Malaisie (Naza Automotive Manufacturing), Vietnam (THACO)
Citroën: C4, C4 X	Kaluga (Russia) (PCMA), Madrid (Spain)
Citroën: C4 Cactus, C4 Spacetourer	Vigo (Spain), Porto Real (Brazil)
Citroën: C5 Aircross, C5 X	Rennes-la-Janais (France), Chengdu (China)
Citroën: C6	Wuhan (China)
DS: DS4	Russelsheim (Germany)
DS: DS7 Crossback	Mulhouse (France), Shenzen (China)
DS: DS9	Shenzhen (China)
Peugeot: 408	Kaluga (Russia) (PCMA), Wuhan (China), Mulhouse (France)
Peugeot: 508	Mulhouse (France), Wuhan (China)
Peugeot: Partner, Rifter / Citroën: Berlingo / Opel: Combo	Vigo (Spain), Mangualde (Portugal), Kaluga (Russia), Buenos Aires (Argentina)
Peugeot: Expert / Citroën: Jumpy	Hordain (France), Kaluga (Russia) (PCMA), Montevideo (Uruguay) (Nordex), Luton (UK)
Peugeot: Traveller / Citroën: Spacetourer	Hordain (France), Kaluga (Russia) (PCMA), Vietnam (THACO)
Peugeot: Boxer / Citroën: Jumper / Opel: Movano	Val di Sangro (Italy), Gliwice (Poland)
Opel: Vivaro, Zafira Life	Hordain (France), Luton (UK)
Opel: Corsa, Crossland	Saragosse (Spain)
Opel: Astra	Ellesmere Port (UK), Rüsselsheim (Germany)
Opel: Insignia	Rüsselsheim (Germany)
Opel: Grandland	Sochaux (France), Eisenach (Germany)
Opel: Mokka	Poissy (France)

Source: Stellantis

RENAULT Group

Brands and models	PRODUCTION OR ASSEMBLY LOCATIONS BY MODEL IN 2022
Alpine: A110	Dieppe (France)
Renault: Twingo 2, Twingo 3, Electric Twingo	Novo Mesto (Slovenia)
Renault: Kwid	Chennai (India), Curitiba (Brazil)
Renault: Clio 4, Clio 5	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), Pitesti (Roumania), Oran (Algeria)
Renault: Kadjar, Austral	Palencia (Spain)
Renault: Koleos	Busan (South Korea) (RSM)
Renaullt: Duster	Curitiba (Brazil), Envigado (Colombie), Pitesti (Romania)
Renault: Lodgy / Ludospace	Tanger (Morocco)
Renault: Triber, Kiger	Chennai (India)
Renault: Dokker, Express Van	Cordoba (Argentina), Tanger (Morocco)
Renault: Arkana	Moscow (Russia), Chennai (India)
Renault: Megane 4, Sedan C	Palencia (Spain), Bursa (Turkey)
Renault: Electric Megane	Douai (France)
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, Trafic 2	Sandouville (France)
Renault: Alaskan	Cordoba (Argentina), Cuernavaca (Mexico)
Mobilize: Limo	Nanchang (China)
Dacia: Sandero, Logan 2	Pitesti (Romania), Tanger (Morocco), Casablanca (Morocco), Oran (Algeria)
Dacia: Duster, Jogger	Pitesti (Romania)
Dacia: Lodgy	Tanger (Morocco)
Dacia: Spring (K-ZE)	Shiyan (China)
RSM: Koleos	Busan (South Korea)
RSM: Talisman	Busan (South Korea)
RSM: XM3 / SM7	Busan (South Korea)
Lada: Kalina, Granta, Granta Hatchback, 4X4, Niva Travel	Togliatti (Russia) (AvtoVAZ), Izhevsk (Russia) (AvtoVAZ)
Lada: Vesta	Izhevsk (Russia) (AvtoVAZ)

Source: Renault Group

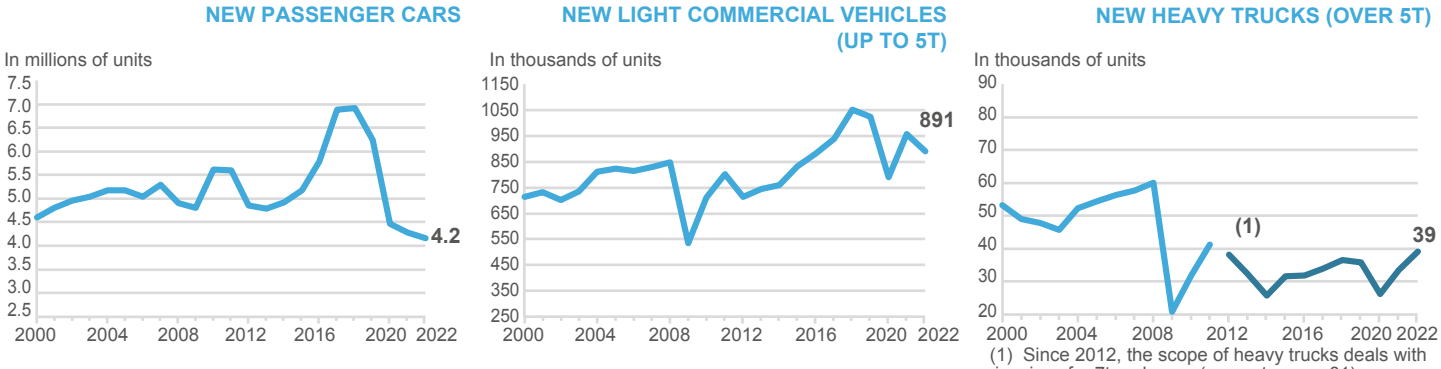
MARKETS FOR NEW VEHICLES FROM AUTOMOBILE GROUPS

In 2022, the outlets outside France of the Renault group, Stellantis (excluding FCA), and Renault Trucks represent 73% of their global production, compared to 60% in 1990 and 67% in 2000. Among these outlets outside France, Deliveries of passenger cars to the European Union increased from 38% in 2013 to 59% in 2019, then 54% in 2022. Deliveries of commercial vehicles (light and heavy) to the European Union increased, for their part, from 61% in 2013 to 74% in 2019, then 59% in 2022.

The decline recorded in recent years is partly explained by the failure to take into account flows to the United Kingdom, following its exit from the EU in 2020, but also by the fall in European markets. By adding deliveries to the United Kingdom, the share to this area, however, rises in 2022 to 61% for passenger cars and 72% for commercial vehicles, i.e. levels close to those observed in 2019. As for deliveries outside the EU (including the UK), they represent around a third of the global production of the two groups; this ratio has varied in line with geopolitical developments (Russia, Iran).

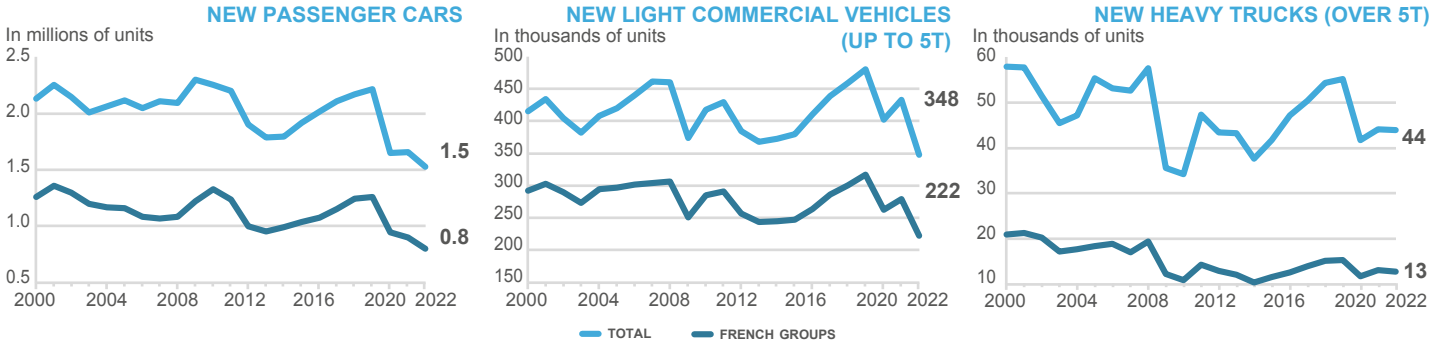
73% Share of outside France for the Renault group, Stellantis (excluding FCA) and Renault Trucks

►WORLDWIDE PRODUCTION OF RENAULT GROUP, RENAULT TRUCKS AND STELLANTIS (EXCLUDING FCA)

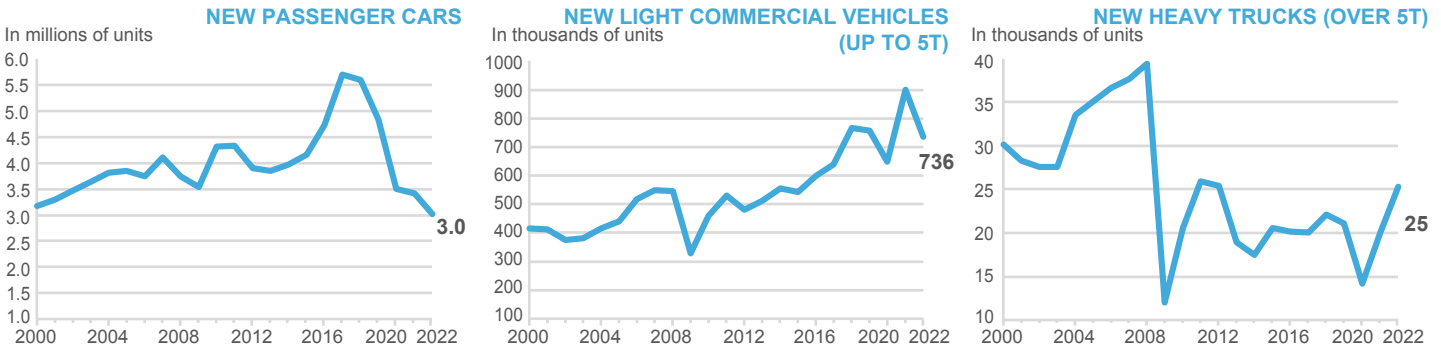


(1) Since 2012, the scope of heavy trucks deals with invoices for 7t and more (see note page 81).

►VEHICLES REGISTRATIONS IN FRANCE



►DELIVERIES OUTSIDE FRANCE



Source: CCFA

The Renault group and Stellantis (excluding FCA) have developed their activities throughout the world following the opening and development of markets in emerging countries. The French market therefore mechanically occupies a less important place than before in their sales. In 1990, the French market for new passenger cars represented 2.3 million units, while the PSA and Renault groups produced 3.3 million units worldwide. In 2019, these data amounted to 2.2 million for the French market and 6.2 million cars produced by the two French groups. Following the health crisis, registrations in France fell to 1.5 million units and global production of the Renault group and Stellantis (excluding FCA) to 4.2 million in 2022.

In 2022, deliveries outside France of passenger cars from the Renault group and Stellantis (excluding FCA) fell by 12% to 3 million units, after a decline of 28% between 2019 and 2020. They are now at a lower level by 21% to their low point in 2013. Deliveries of light commercial vehicles also fell significantly in 2022 (-18%), going from 900,000 units in 2021 to 736,000 units. Finally, industrial vehicle deliveries increased by 25% in 2022, surpassing the 2019 delivery level to reach 25,000 units.

ECONOMIC RATIOS OF THE AUTOMOTIVE SECTOR IN FRANCE

Between 2012 and 2017, the added value per employee in 2015 euros in automobile manufacturing increased significantly, thanks to the better health of European markets, the productivity efforts of manufacturers, as well as the higher average unit value of vehicles produced (increase in the share of LCVs and high-end vehicles in French production). The health crisis suddenly slowed down activity in 2020, resulting in a 25% drop in added value. In 2021, this increased by 16% and returned to a level almost similar to that of 2019.

As for the numbers, they continue to decrease in a downward trend; in 2020, the support and assistance systems for partial unemployment, put in place during the crisis, had mitigated the impact of the drop in production.

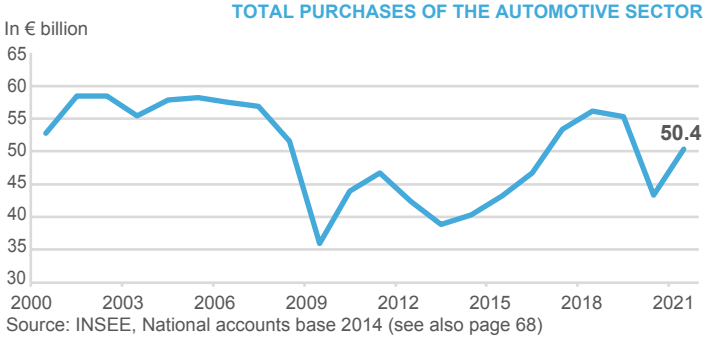
Furthermore, in 2021, automobile manufacturing has an added value per employee approximately 5% higher than that of industry; it was respectively 97,000 euros, compared to 92,000 euros in the industry.

The share of turnover exported in automobile manufacturing amounts to around 60%, compared to almost 40% on average in the industry.

At the crossroads of numerous and diverse techniques, the automobile industry requires significant investments: since the 2009 crisis, automobile manufacturing has devoted an average of 2% of its turnover to it each year. This ratio fell in 2021 (1.6%) in a context of uncertainties, energy transition and optimisation. In 2021, the automotive industry nevertheless made 3.4% of total industry investments.

Furthermore, the automotive sector has a significant impact on other branches, particularly through the purchases it makes. Total purchases in the automotive sector amounted to 50.4 billion euros in 2021, a sharp increase compared to 2020 (43.4 billion), but still at a lower level than that observed in 2019.

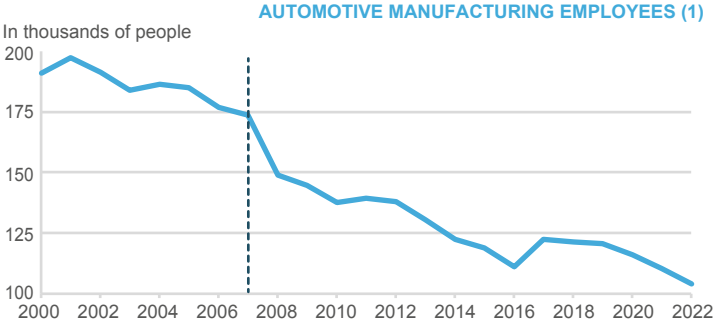
TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR



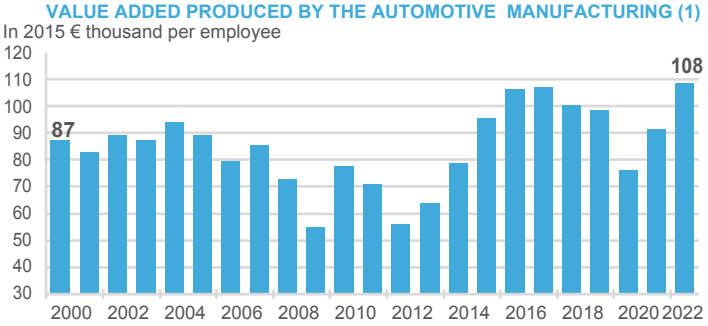
Source: INSEE, National accounts base 2014 (see also page 68)

+60% Share of exported turnover in automobile manufacturing in 2022

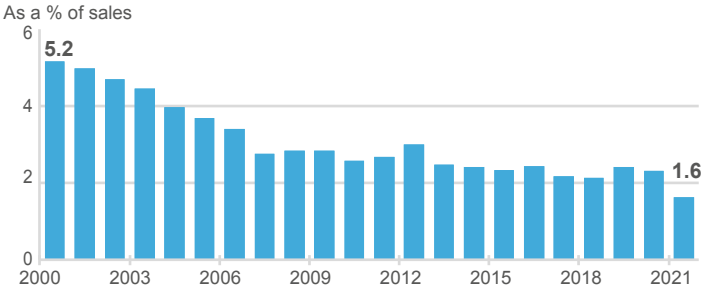
AUTOMOTIVE MANUFACTURING EMPLOYEES (1)



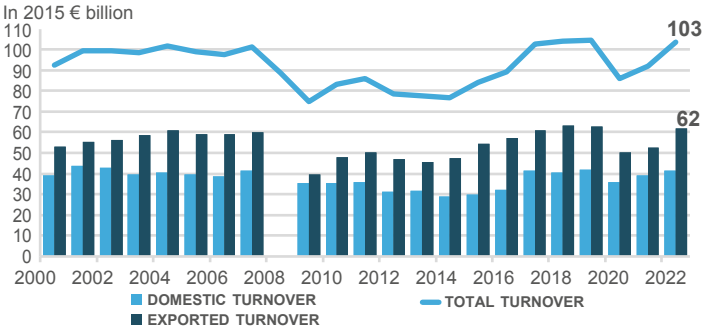
VALUE ADDED PRODUCED BY THE AUTOMOTIVE MANUFACTURING (1)



CAPITAL EXPENDITURE BY THE AUTOMOTIVE MANUFACTURING



DOMESTIC AND EXPORT SALES BY THE AUTOMOTIVE MANUFACTURING (1)



(1) CCFA estimates for 2022: also read pages 88 and 89.
Sources: SESSI, INSEE from 2008

Each year, INSEE produces annual company surveys, which are one of the main sources of knowledge of French industry. The data provided by these surveys correspond to the results of surveys at N-2, the data at N-1 being estimated by the CCFA. A major renovation of these surveys was carried out, with the new ESANE information system and a new classification of economic activity was introduced at the beginning of 2008 (read pages 88 and 89).

The automotive industry sector brings together companies whose main activity is the construction of motor vehicles, automobile bodies, caravans and leisure vehicles, but also, upstream, the manufacturing of automotive equipment. However, certain products, such as tyres, plastics, capital goods and glass, escape classification because they appear in other activity nomenclatures (read page 69).

After 2004, in line with the increase in vehicle production, the added value (excluding tax) of automobile manufacturing, in constant euros and per employee, decreased under the impact of various factors: costs linked to new environmental standards, stagnation, then fall of the Western European automobile markets. Then, from 2013, it increased again and was multiplied by almost two in 7 years. In order to develop new models and optimise production capacities, automobile manufacturing has devoted on average 2% of its turnover to its investments, or more than 2 billion euros per year. In addition to these tangible investments, there are intangible investments which are not included in these figures (read page 34 on research and development expenses)

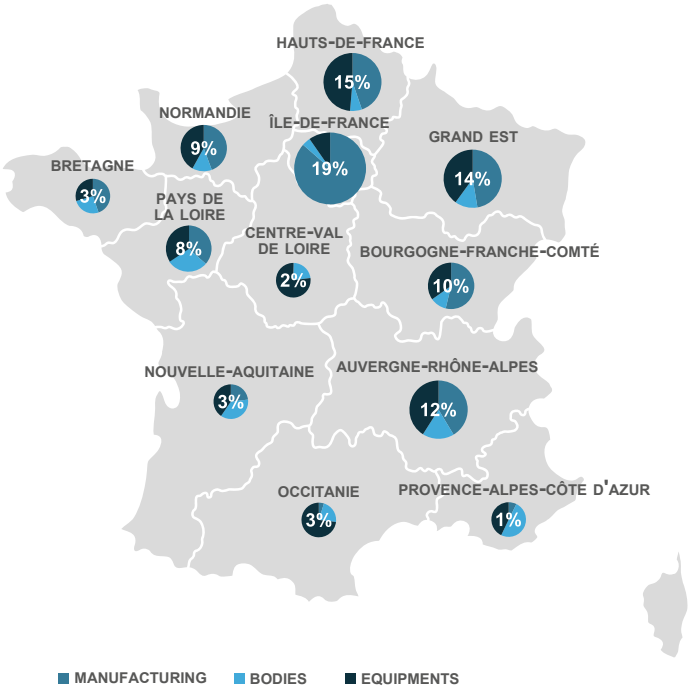
For the automobile industry, the share of turnover from exports has continued to grow since 1990, when it reached 38%, now hovering around 54%, compared to 38% for the industry as a whole.

THE AUTOMOTIVE INDUSTRY IN THE REGIONS

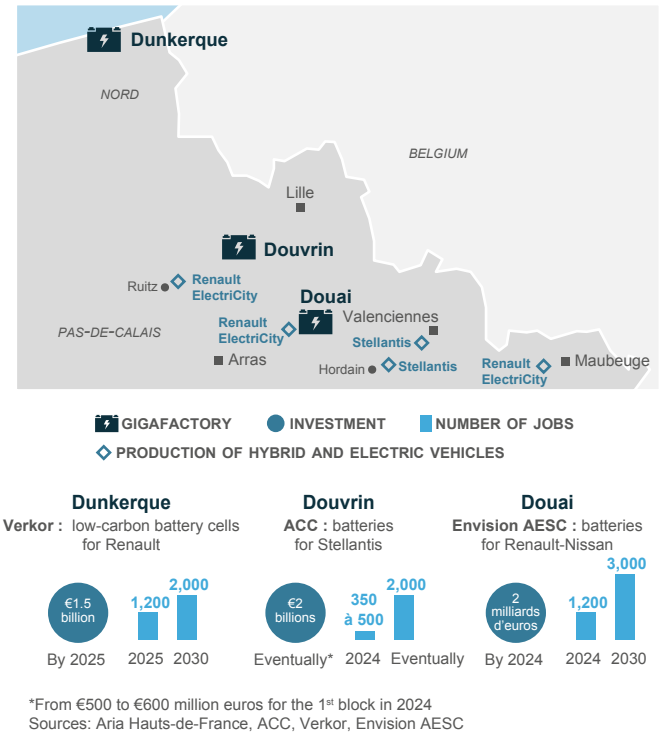
The automotive industry often constitutes an essential pillar of a region's economy thanks to the jobs it creates. It is significantly present in several French regions, particularly in the North and the East, and through its presence has powerful knock-on effects on the rest of the economy. Even if the direct workforce in the automobile industry has decreased over the last twenty years, with a significant economic impact at the local level, investment projects linked to the ecological transition should revitalise employment and the economy of the regions concerned. The Regional Associations of the Automobile Industry (ARIA), in close connection with the competitiveness clusters, bring together companies in the sector in the region and carry out, with the public authorities and educational and research establishments, actions specific to the regional sector (development of innovation and R&D, development of the sector and the territory, increase in competitiveness and performance, development of skills and employment).

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

THE WEIGHT OF REGIONS IN THE AUTOMOBILE INDUSTRY WORKFORCE IN 2022 AND THE DISTRIBUTION OF JOBS BY ACTIVITY



THE "BATTERY VALLEY" IN HAUTS-DE-FRANCE



*From €500 to €600 million euros for the 1st block in 2024
Sources: Aria Hauts-de-France, ACC, Verkor, Envision AESC

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

Sectors	Agriculture	Agri-food products	Capital goods	Automotive	Aeronautics and space	Other transport equipment (excl. aeronautics)	Other industrial products	Power, water, waste	Construction	Trade, services
Multipliers	2.3	2.8	2.3	4.1	4.8	3.0	2.3	2.1	2.0	1.5

Source: INSEE - Outlook report - March 2012

The automobile industry is the second sector, behind aeronautics, with the largest added value multiplier. According to INSEE, one unit of added value in the automotive sector generates 4.1 units of added value in the national economy. Other INSEE studies in the regions have shown the impact of the automobile industry on direct jobs (manufacturers' production and research sites), but also on indirect jobs (staff employed by suppliers, subcontractors and service providers) and induced jobs, which are those necessary to satisfy the consumption of employees (direct and indirect) and their families. In Franche-Comté for example, the 11,800 direct jobs generated, 2,400 indirect jobs and 6,200 induced jobs.

The number of employees in the automobile industry has declined, but it remains an important sector in several regions. According to URSSAF data, which is based on the activity codes of establishments, Île-de-France is the region which today brings together the most salaried jobs (19% of the total in 2022). 86% of employees are in construction and 10% in equipment, the rest in bodywork. A study published by INSEE in 2020 indicates that the broader automotive sector, which includes manufacturing, trade and maintenance-repair activities, brings together up to 110,000 employees in the Vallée de the Seine (western departments of Île-de-France + Norman departments along the coast or crossed by the Seine). The research and development activities of the entire automotive industry are mainly located in Île-de-France (Stellantis in Vélizy and on the future research campus in Poissy, Renault in Guyancourt). Furthermore, changes in the sector are also accompanied by a refocusing of tertiary activities in the region (Poissy) and the development of new activities (used cars reconditioning, retrofit, recycling and management of batteries in Flins, production of electric motors in Cleon).

The sector is also very present in the Hauts-de-France region, with 15% of the total workforce in the automotive industry in France according to URSSAF. In 2018, a study estimated that there were 56,000 direct and indirect jobs in the regional automotive industry, including 15,400 in automobile manufacturing, 15,000 in the manufacturing of automotive equipment and 26,300 in the supply of materials, intermediate products and services. More recently, the region was chosen to host the four largest battery factory projects in France (ACC in Douvrin, Verkor in Dunkirk and Envision in Douai, etc.), which should make it "the European valley of battery" and compensate for the drop in staff numbers linked to the shutdown of thermal engines. These new factories must be operational at full capacity before 2030 and will create new jobs, estimated between 10,000 and 20,000 direct and indirect jobs.

The Grand-Est region appears to be the third automotive region in terms of number of employees with 14% of jobs according to URSSAF. It is also committed to the energy transition with the creation, on the Tremery site, of a complete production and assembly line for electric motors enabling, by 2025, the delivery of 600,000 electric motors per year and maintaining employment.

Other investments related to automobiles, at different levels of the value chain, are also underway or expected in the coming years. We can in particular cite recycling plant projects for electric car batteries, lithium extraction projects or even several hydrogen projects (transformation of vehicles, manufacturing of tanks or fuel cells, production of hydrogen). These projects linked to automobile manufacturers represent billions of euros of investments, as well as the creation of thousands of direct and indirect jobs.

COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

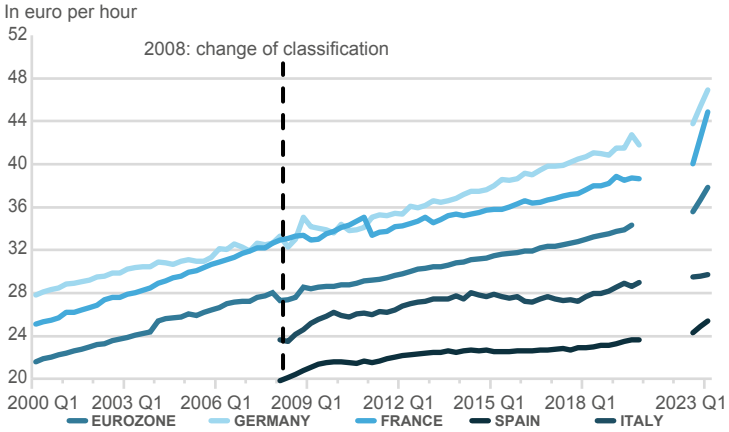
In a highly competitive global market, automakers must compete in their home countries and face factors common to the entire industry. These include wage costs, the weight of compulsory levies on production factors, the exchange rate and energy prices. Others are specific to the automotive sector, such as the opening of the base market to competition. All of these factors weigh on margin rates (ratio between gross operating surplus and gross added value) and have an impact on the capacity of companies to invest in production, product development, research and development in the energy transition, digital technology and new mobility.

In France, since the 2000s, the competitiveness of manufacturers has deteriorated. After the 2008 crisis, the government tried to put in place policies promoting competitiveness; manufacturers, for their part, have also activated all internal levers for the development of their activity and the maintenance of industrial and research sites in France. All of these actions have had results, but the French industrial base maintains a degraded economic competitiveness compared, in particular, to its European environment. Production taxes, which are those linked to production activity, regardless of the quantity or value of goods and services produced or sold, remain at a higher level than in other countries. In 2022, although down 0.4 points compared to 2020, they represented 3.3% of GDP in France, compared to 1.8% in Italy, 1.1% in Spain and 0.7% in Germany, according to Eurostat.

In 2022, the conflict in Ukraine caused sharp increases in energy prices (gas, electricity) which affected companies in the automotive sector, some of which consume significant quantities of energy in their production processes (steel, steel, etc.). chemistry, plastics, mechanics). In Europe, governments have adopted aid policies intended to reduce the impacts of these sharp increases. However, this results in new competitiveness gaps within Europe and even more so with countries like China, where energy prices are lower.

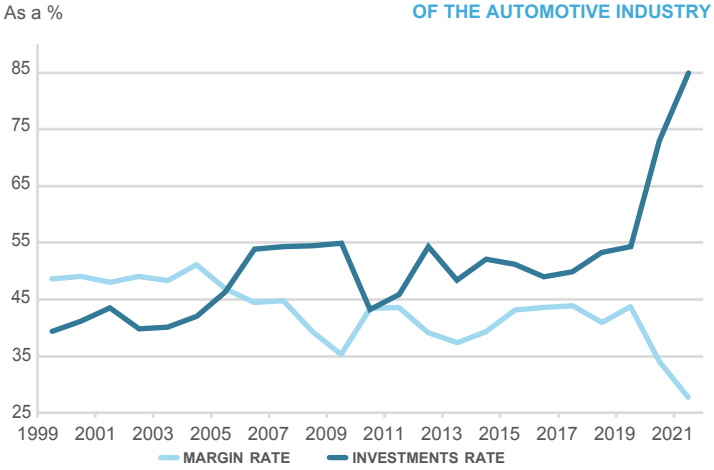
With the health crisis of 2020, the margin rate of companies was strongly affected, falling to 34% for the automotive sector (compared to 44% in 2019). In 2021, in a context of low production levels linked to the semiconductor crisis, the drop in this rate continued to reach 27.8%. Concerning investment, the various transitions (energy, digital and services) result in concrete projects which explain the good performance of investments in the automotive sector in France. Also, as for several years, the investment rate is higher than the margin rate according to INSEE. In order to cope with changes, the government has decided to implement the France Relance plan, which offers support to businesses, particularly in terms of investments, in order to strengthen the competitiveness and attractiveness of the territory.

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



Source: Eurostat, Rexecode calculation
Note: Due to the COVID-19 pandemic and its impact on the comparability of data between countries, Rexecode has not updated the hourly cost levels from the indices published by Eurostat.

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



The margin rate is the ratio between gross operating surplus and value added excluding tax and the investment rate is the ratio between gross fixed capital formation and value added excluding tax.
Source: INSEE (National accounts, base 2014)

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.

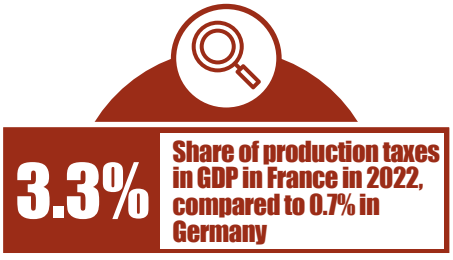
The French automobile industry must ensure performance comparable to that of its global competitors to continue to develop. Among the factors which affect the competitiveness of French industry, we find wage costs, which are notably linked to the weight of social charges on the labour factor and which increased between 2000 and 2009, approaching German costs and thus penalising the competitiveness of French manufacturers and their suppliers in France.

From 2012, the government introduced measures more favourable to competitiveness (CICE). Following the economic crisis linked to Covid, it continued this policy with the halving of the contribution on the added value of companies (CVAE) and the property tax of companies (CFE), and the lowering of 3% to 2% of the territorial economic contribution (CET) capping rate based on added value.

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 and under these conditions, the production in France of vehicles in the range segment lower is no longer profitable, especially compared to countries like Spain.

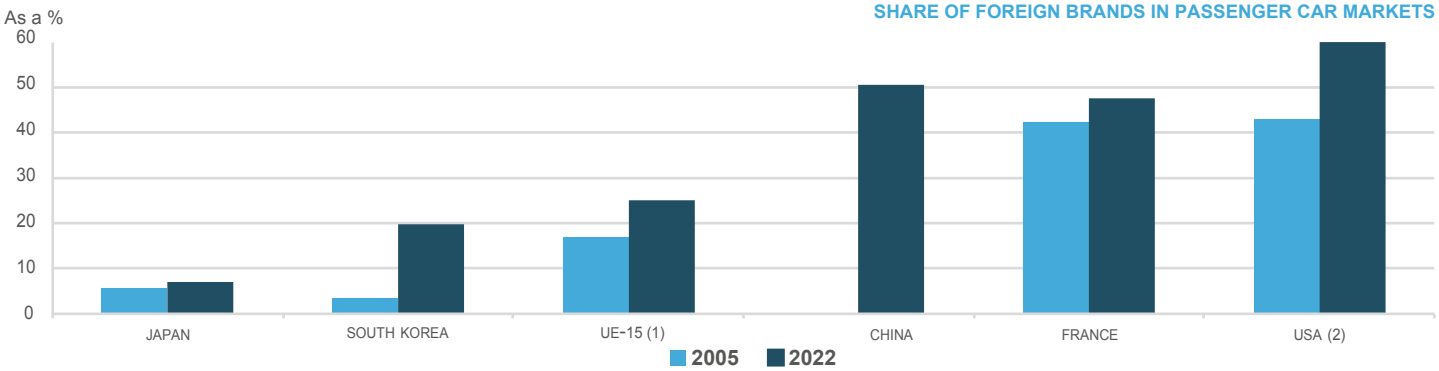
The evolution of exchange rates is another important factor in the competitiveness of automobile manufacturers, due to the significant and increasingly large share of production outside the euro zone. The latter represented 60% of external outlets for passenger cars in 2022, compared to 47% in 2002. In 2022, the euro remains on average at a lower level than between 2009 and 2014 compared to the dollar, slightly improving the competitiveness factor.

Finally, there are factors linked to the opening of the market, whether internal or external. In general, the domestic outlet, called the “base market”, constitutes a solid pillar to nourish, via international development and innovation, growth in external markets. For the French automobile 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 increasing share. In other automobile manufacturing countries such as Japan, South Korea or China, market access is more difficult and local manufacturers therefore have a more extensive base market, on which their international development can be based. Furthermore, Chinese manufacturers now occupy a rapidly growing market share (50%) in their national market, which is the largest market in the world, and even more so in the case of electric cars.



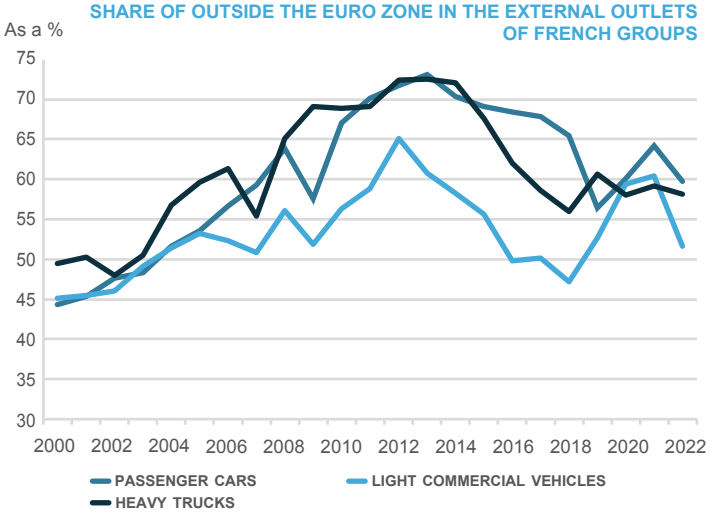
COMPETITIVE FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

SHARE OF FOREIGN BRANDS IN PASSENGER CAR MARKETS



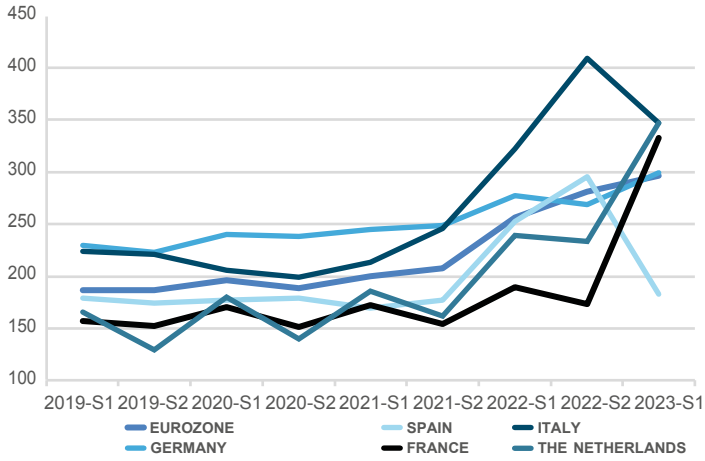
(1) Foreign brands are considered to be Japanese and Korean, Indian from 2014, Chinese and Tesla from 2022.
(2) Share of foreign brands calculated on light vehicles. The Chrysler, Dodge, Ram and Jeep brands are not considered foreign brands.
Source: CCFA

SHARE OF OUTSIDE THE EURO ZONE IN THE EXTERNAL OUTLETS OF FRENCH GROUPS



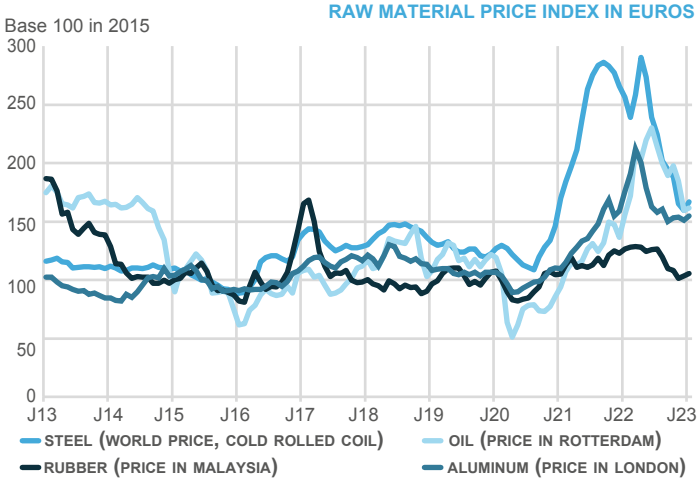
Source: CCFA

AVERAGE PRICE OF ELECTRICITY IN EUROS FOR INTERMEDIATE-SIZED CONSUMERS (1)



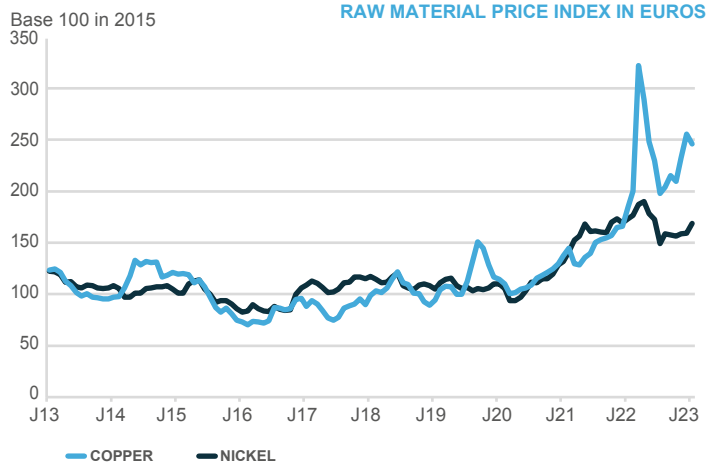
(1) Band 20 MWh to 500 MWh per year.
Source: Eurostat, Rexecode calculations

RAW MATERIAL PRICE INDEX IN EUROS



Source: Rexecode, CCFA calculations

RAW MATERIAL PRICE INDEX IN EUROS



Source: Insee, CCFA calculations

+56% Increase in the average price of copper between 2019 and 2022

The prices of raw materials, but also of energy, can impact the production costs of user companies. These prices experience significant fluctuations, even within the same year. Expressed in euros, commodity prices experienced significant increases from 2001 to 2012. Prices then hit a low point until the post-covid recovery, which brought commodity prices to very high levels. The pass-through of price fluctuations in final sales prices always proves difficult, in a context of intense competition and consumer arbitrage within households.

In 2021 and 2022, the main raw materials used in automobiles, such as steel and aluminum, experienced sharp price increases. The average price level in 2022 is 78% and 60% higher respectively than in 2019.

With the development of electric vehicles, the demand for new raw materials, such as copper, cobalt, nickel and lithium, is beginning to be driven and their average prices are increasing significantly. These increases could continue, or even increase, if the supply of these materials does not increase structurally.

Regarding energy prices (gas, electricity), they vary depending on the area: in 2022, they were much higher in Europe, due to the conflict in Ukraine, than in other automobile production areas, such as the United States or China. In Europe, states have sought to limit extremely large price fluctuations by putting in place measures to reduce bills. Overall, average electricity prices increased significantly between 2019 and 2022. Support measures that differ between European countries can generate competitiveness gaps.

CONSOLIDATION OF THE AUTOMOTIVE SECTOR

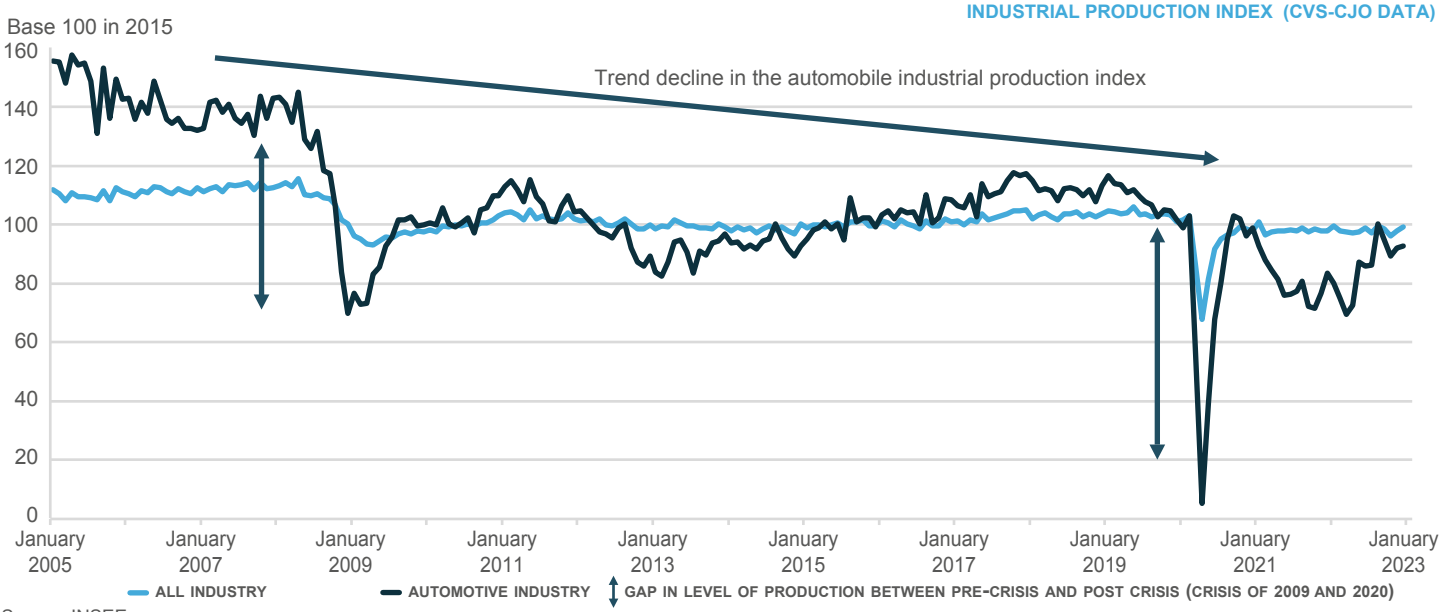
2023 New strategic sector contract 2023-2027

Over the last fifteen years, the automotive industry has had to consolidate in the face of several types of events. The first was the crisis of 2008-2009, which severely affected European markets and production in France. The INSEE automobile industry production index (IPI) fell by 25% on average annually during 2009 (-12% for the entire industry). After a recovery, it fell again in 2013, finally growing regularly until 2018. This growth was interrupted in 2020 with the health crisis, which resulted in a drop in the automobile IPI by 28% on an annual average, compared to 10% for the industry as a whole. With the semiconductor crisis and tensions over raw materials, the expected rebound in 2021 did not take place. In 2022, despite persistent supply problems, the automotive IPI recovered during the second half of the year, notably thanks to automobile manufacturing and equipment manufacturers, but without returning to the pre-crisis level. On an annual average, the automobile IPI is down, in 2022, by 21% compared to 2019 and by 38% compared to 2007, the year before the financial crisis. These fluctuations are much higher than those observed in the rest of the industry, respectively 5% compared to 2019 and 13% compared to 2007.

In this difficult structural context, the sector must face major disruptions (technological, digital and societal), which are leading to a profound restructuring of the value chain (batteries, power electronics, hydrogen, mobility services, etc.). Companies must adapt to the reduction of their traditional outlets, linked to thermal vehicles, and invest in new products, by training the workforce in future technologies in a relatively short time horizon (European objective of 100% reduction of CO_2 exhaust in 2035).

Since 2009, the automobile industry has been structured around the Automobile Industry Platform (PFA), established by French automobile groups and their suppliers, brought together within the Automobile Supplier Liaison Committee (CLIFA). As part of the National Industry Council (CNI), the Automotive Sector Strategic Committee (CSF) was set up. It brings together the entire sector, from upstream to downstream, including employee unions, as well as major research organisations. In 2018, the strategic contract for the automotive sector was signed in order to set the sector's roadmap for 5 years (2018-2022). In 2021, an amendment to the contract was signed to take into account the new post-crisis economic context. A contract for the period 2023-2027 should be signed soon.

INDUSTRIAL PRODUCTION INDEX (CVS-CJO DATA)



Source: INSEE

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

Since 2010, it has relied at the regional level on the Regional Automobile Industry Associations (ARIA), but also on competitiveness clusters. It was consolidated in 2012 around the Automotive Technical Committee (CTA) and its two councils, the Automotive Technical Standardisation Council (CSTA) and the Automotive Research Council (CRA) and defined five research programs.

In May 2018, a new sector contract was signed for the period 2018-2022, focused on the energy transition, autonomous vehicles, new mobility services, skills and employment needs, and the competitiveness of the sector. Then, an amendment to this contract was signed in April 2021 to take into account the support plan for the sector, launched during the health crisis, and strengthen actions in favour of the ecological transition and the electrification of vehicles.

In 2022, the PFA continued its action to support businesses (launch of the 5th promotion of the Automotive Accelerator, prospective studies, employment-training roadmap, launch of 5G Open Road) and support for the competitiveness of the sector.

As for the contract covering the period 2023-2027, it should focus on strengthening competitiveness (to produce electric cars in France), support for R&D and innovation, sovereignty, in particular based on the circular economy (materials for batteries), or even supporting companies and employees in the transition (retraining, training, etc.).

RESPONSE FUNDS, RESEARCH TAX CREDIT, FUTURE INVESTMENTS

The automobile industry 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 linked to safety or the environment (electrification, hydrogen, etc.). Manufacturers must also respond to new challenges linked to digital technology (autonomous and connected cars) and new mobility services. The automobile industry is therefore a capital-intensive industry which, overall, has significant financing needs. These are more difficult to mobilise in periods of crisis or transition and must benefit from support mechanisms, particularly from public authorities.

Following the financial crisis of 2009, public authorities put in place structural instruments favouring long-term financing. Created in 2009, under the name of the Automobile Equipment Manufacturers Modernisation Fund, and which became the Automobile 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 during the 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 respond in the long term to the challenges of the sector. It will also benefit companies which have suffered from the economic consequences of the health crisis, with envelopes ranging from 3 to 50 million euros invested in equity or quasi-equity.

The automobile recovery plan also provides for public aid of up to 150 million euros to support R&D and innovation. They will be deployed as part of the 4th Future Investment Program (PIA) over the period 2021-2025, in line with the priority areas defined within CORAM (Steering Committee for Automotive and Mobility Research). This committee, established in 2020 as part of the automotive support plan and renewed in 2021 and 2022, contributed to the structuring of the sector through innovation, by identifying short-term priorities (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).

Finally, the Research Tax Credit (CIR) is a tax measure created in 1983 intended to support companies in their research and development efforts and thus contribute to filling the deficit in fiscal and social competitiveness of France compared to other large countries in which car manufacturers are present, particularly through their R&D centres. This system was supplemented in 2013 by the innovation tax credit (CII) which aims to help SMEs engage in innovation spending and the promotion of research and development. In 2021, 6.4% of the research tax credit benefited the automobile industry and 1.4% for innovation. Finally, the 2022 finance law created the research collaboration tax credit (CICo), in order to encourage companies to undertake R&D work as part of research collaborations with research and dissemination organisations awareness.

€44 million — **Amount of aid to the 11 winners of CORAM 2022**

► INVESTMENT AND SUPPORT FUNDS FOR THE AUTOMOTIVE SECTOR

	Objectives and attributions
Fonds Avenir Automobile 2 (launched in November 2020)	**Following on from the FAA launched in 2009, which has reached 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 will be 5 years. 80% of the Fund, or up to €420 million, will be invested in around fifteen subcontractor groups, while the remaining 20%, or up to €105 million, will be invested in funds of funds (private investments and supplementary to the FAA 2).**
Support fund for employees in the automotive sector	**Intended to finance exceptional support and professional retraining actions for redundant economic employees in the automotive sector. The fund's resources 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. Support is planned until June 2023.**
AMI CORAM 2022 (Call for events within the framework of CORAM)	**Subsidies and advances of 30% to 70% (depending on the size of the company and usage) of the amount of the investment for R&D projects which are part of the roadmap of the Steering Committee of the Automotive and Mobility Research (electric vehicles, hydrogen, innovative materials, circular economy, connected and autonomous vehicles)**

Source: Bpifrance

The Strategic Investment Fund (FSI), which became Bpifrance Participations with the creation of the public investment bank Bpifrance, had invested at its creation in three companies in the automobile sector. As for the Tier 1 Automobile Equipment Manufacturers Modernisation Fund (FMEA Rank 1), to which French automotive groups had contributed 400 million euros in addition to the 200 million euros provided by the FSI, it invested with the Equipment Manufacturers Modernisation Fund Automobiles Rank 2 (FMEA Rank 2) in several supplier companies in 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 financing were announced. The first, the Automobile Future Fund 2, increased to 600 million euros, is dedicated to subcontractors as a continuation of the FMEA. It aims 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 decarbonised. The second major mechanism is the Call for Expressions of Interest which is part of the fourth Future Investment Program (PIA4) and aims to support projects selected within the framework of CORAM. The financial assistance consists of a subsidy part and a repayable part. The "CORAM 2022" call for projects succeeded CORAM 2021 and aimed to support research and innovation projects relating to ambitious and innovative technologies, services and/or solutions in mobility in the following areas: electric vehicle and its value chain, hydrogen vehicles, innovative materials and their assembly and circular economy, connected and automated vehicles, reduction of CO_2 emissions, mobility and related services. It made it possible to select 11 winners totaling €115 million in investments in research and development, including €44 million in state aid.

The Future Investment Program allowed, in 2014, the creation of VEDECOM "Communicating Carbon-Free Vehicle and its Mobility", which is an Institute for the Energy Transition (ITE). It aims to become the reference for the new eco-mobility sector on the themes of electrification, the autonomous and connected vehicle and new mobility solutions and shared energy. It has been supported by the NextMove competitiveness cluster since 2010 and belongs to the "Autonomous Vehicle Plan". It brings together around 50 members and partners: large industrial groups, including Stellantis and Renault, SMEs, research centres and laboratories, schools and training centres and local authorities. The budget is around 30 million euros per year.

French automobile manufacturers are also stakeholders in the Jules Verne Technological Research Institute (IRT), based in Nantes. Created in 2012 as part of the PIA, its mission is to accelerate innovation and technological transfer to factories in 4 strategic industrial sectors linked to transport, including the automobile industry. Since its existence, 107 projects have been carried out for 225 million euros. In the automobile 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.

RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

5.3 billion euros — **Amount of internal and external expenditure on research and development of the automotive sector in 2021**

In 2021, the automobile industry is the second branch in terms of domestic research and development expenditure (DRDS) within companies in France, behind scientific and technical activities, but ahead of aeronautical and space construction.

These innovation expenses amounted to 3.9 billion euros, or 11% of all companies' DRDS. They were affected by the health crisis but continued to decline in 2021 (-8% compared to 2020 and -15% compared to 2019). However, they have held up much better than external research and development expenditure (ERDS), which has fallen by 40% since 2019 to 1.3 billion euros.

Manufacturers must invest, not only to satisfy customers and comply with regulatory standards, but also to achieve objectives linked to the energy transition and develop mobility services. From 2015, total R&D spending increased regularly to reach 7 billion euros in 2019. Cumulatively since 2015, the sector has spent more than 36 billion euros on innovation, including 26 billion in spending domestic industries, which also has a knock-on effect on its suppliers, such as plastics companies, electronics companies, etc.

The 2009 crisis significantly limited companies' financial resources, yet domestic research and development (R&D) spending only fell by 2% in 2009 and 2010, highlighting their vital and long-term nature. But in 2021, research spending has stalled with the cessation of certain programs, following the European objective of ending the sale of thermal vehicles in 2030. Likewise, certain programs in connected and autonomous vehicles have been spread out in time. Finally, efforts to optimise resources were continued. However, the automobile sector remains the sector which files the greatest number of patents and the manufacturers Renault and Stellantis appear in the list of patent filers.

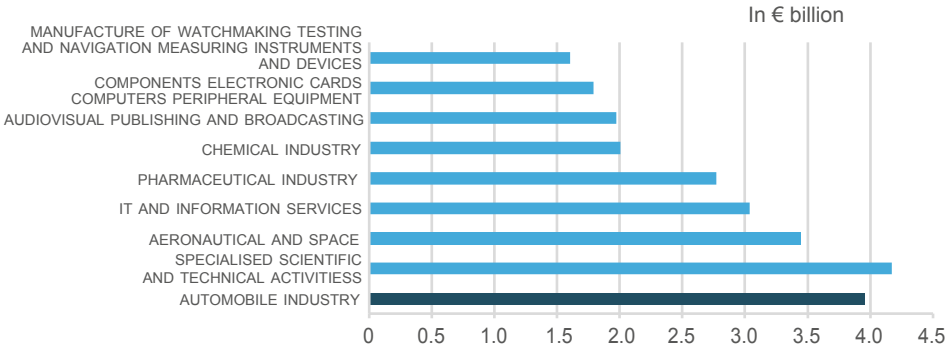
In Europe, the automotive sector is also the one that spends the most on research and development with, according to ACEA figures, 59.1 billion euros spent in 2021, or a third of total R&D spending.

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

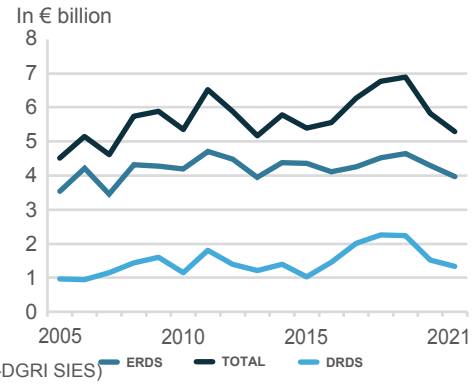
	DRDS (2) in 2021		ERDS (3) in 2021	
	In € million	As a % of total	In € million	As a % of total
Specialised scientific and technical activities	4,174	11%	787	6%
Automotive industry	**3,962**	**11%**	**1,335**	**11%**
Aeronautical and space	3,447	9%	3,671	30%
IT and information services	3,036	8%	197	2%
Pharmaceutical industry	2,772	8%	2,000	16%
Chemical industry	2,007	6%	449	4%
Audiovisual publishing and broadcasting	1,971	5%	244	2%
Components electronic cards computers peripheral equipment	1,792	5%	184	2%
Manufacture of watchmaking testing and navigation measuring instruments and devices	1,602	4%	249	2%
Primary, energy, construction	1,550	4%	447	4%
Manufacture of electrical equipment	1,424	4%	525	4%
Manufacture of machines and equipment not included elsewhere	1,374	4%	221	2%
Manufacture of telecommunications equipment	1,148	3%	137	1%
Other sectors	6,218	17%	1,735	14%
TOTAL	36,478	100%	12,180	100%

(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 2021 IN THE MAIN RESEARCH SEGMENTS



AUTOMOTIVE INDUSTRY RESEARCH AND DEVELOPMENT SPENDING



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

The Office of Statistical Studies on Research (Ministry of Higher Education, Research and Innovation) conducts surveys on R&D spending by companies and the broader public sphere. From 2008, the data is distributed in a new classification of economic activity. The total R&D budget is broken down into internal expenditure (DRDS), which corresponds to work carried out in France, whatever the origin of the funds, and external expenditure (ERDS), corresponding to R&D work entrusted to other companies. or to public research organisations; part of these latter expenses can be made abroad.

In 2017, 17% of the DRDS in the automotive sector generated by subsidiaries came from subsidiaries of groups under foreign control (more than 50% of the capital).

In 2021, automotive sector companies located in France employ 27,125 full-time equivalent people in R&D (including 18,900 researchers). These numbers decreased by 18% compared to 2003, but the number of researchers increased by 37% over the same period.

According to the National Institute of Industrial Property (INPI), the Renault group and Stellantis will appear in the top seven places in the list of patent applicants in 2022. 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, competitiveness clusters bring together on a well-identified territory and on a targeted theme, companies (large groups and SMEs/ETIs), research units and training centres in a logic of collaborative projects. Their role is to be a lever for the competitiveness of the French economy, by accentuating its capacity for innovation and encouraging anchoring and structuring in their territories. Several studies have also shown their impact on R&D spending by companies: one euro of public subsidy received under this policy would have generated on average 2.5 euros additional R&D spending by beneficiary SMEs. Beyond the research aspect, competitiveness clusters help stimulate business exports and strengthen employment.

Phase IV of the clusters (2019-2022) expired at the end of December 2022 and a call for applications, with an annual budget of 9 million euros over the duration of phase V, was launched. 55 centres have been certified for this new phase lasting 4 years, starting January 1, 2023, including the four automotive centres. The new phase includes three objectives: promoting connections and collaborations between stakeholders in regional economic and industrial ecosystems, in line with regional priorities; expand the markets and networks of SMEs through the actions of the clusters at European level; and support innovative companies in their ecological and digital transition.

The automotive competitiveness clusters have developed their areas of work around innovation, skills, networking and the marketing of new solutions with the aim of improving the competitiveness of their members. They are associated members of the automobile industry structure: the PFA, Automobile and Mobility Industry.

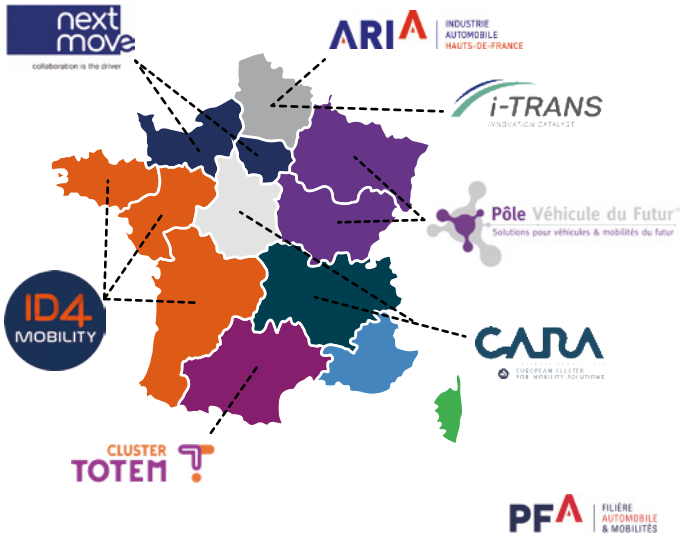
1,870 Projects labeled by automotive competitiveness clusters since their creation

► AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

	Next Move	Véhicule du Futur	CARA (1)	ID4MOBILITY (2)
Number of adherents/ members	600	500	432	463
Number of labeled projects	600	535	334	400
Number of projects funded	320	284	189	-
Year of creation	2006	2005	2005	2006
Overall amount of projects financed (in €M)	320	1167	780	-

(1) On 1 January 2022, CARA Auvergne-Rhône-Alpes and the MAD cluster merged: the 107 members of the MAD cluster thus joined the 270 CARA members.
(2) ID4CAR becomes ID4MOBILITY

► THE NETWORK OF AUTOMOTIVE COMPETITIVENESS CLUSTERS AND ARIA IN FRANCE



The NextMove cluster (formerly Mov'eo), created in 2006, brings together the main players in the automobile and mobility industry. It extends over the Île-de-France and Normandy regions. Its four innovation drivers are mobility with a low environmental footprint, "safe, autonomous and connected" mobility, "new mobility services and solutions" and industrial and operational excellence. The cluster runs and represents "Mobility Valley", a territory of European excellence where solutions are invented, developed, tested and industrialised to meet the mobility challenges of the future. By 2023-2026 (Phase V), NextMove's mission will be to consolidate the European dimension of its action and to implement national (France 2030) and regional innovation policies.

The Vehicle of the Future cluster, historically established in Alsace and Franche-Comté, now extends over the entire territory of the Grand Est and Burgundy-Franche-Comté cluster. The cluster supports companies towards new mobility markets (electric, hydrogen, autonomous & connected vehicles and mobility services) and towards the industry of the future (transformation of the production process), with the mission of stimulating innovation, improve business performance, support the skills development of teams and support businesses in their development and growth. It also provides training.

The ambition of the CARA cluster is to support changes in the transport systems of people and goods 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, demonstrators in real situations, actions for the economic and industrial development of its members. The activity is structured around five research programs: motorisation and powertrain, safety and security, vehicle architecture, intelligent transport system, mobility, practices and governance.

Located in the west of France (Brittany, Pays de la Loire, Nouvelle Aquitaine), the role of iD4MOBILITY (formerly ID4CAR) is to structure collaborative dynamics in order to put innovation at the service of land mobility transitions. Initially, the four strategic areas of activity are vehicle materials and architecture, on-board systems intelligence, vehicles (uses and industrialisation) and digital mobility services and infrastructure. As part of phase V of the competitiveness clusters, ID4CAR becomes ID4MOBILITY in order to realise its strategy of being a cluster dedicated to land mobility in all its forms (vehicles, services, infrastructure or industry).

Clusters other than those specialising in automobiles may have opportunities in this sector, such as those working on materials, rubber, plastics, mechanics or mobility. Polymeris is the competitiveness cluster for rubbers, plastics and composites, born from the merger of Elastopôle, dedicated to rubber and polymers, and Plastipolis, dedicated to plastics processing, both anchored in the Auvergne-Rhône-Alpes and Centre-Loire valley regions. Its two main strategic axes are the industry of the future and the circular economy. Anchored in the Hauts-de-France region, i-TRANS is the competitiveness cluster for transport, mobility and logistics. Its action now focuses on four priority sectors: rail, automobiles, aeronautics and the industry of the future. TOTEM, for Transport d'Occitanie Terrestre Et Maritime, is the Cluster for intelligent and sustainable mobility in Occitanie. It works with the rail, maritime and automobile sectors and brings together 140 members.

FRENCH AUTOMOTIVE FOREIGN TRADE

France's trade, very affected in 2020 by the health crisis, rebounded in 2022, in a context of geopolitical tensions and a major energy crisis. Growth in exports was mainly driven by the increase in prices (cereal prices, energy) and by the dynamism of exports of chemicals, agri-food products and transport equipment. But the growth in imports was even stronger, driven by energy products, the rise in prices and the fall of the euro against the dollar. France's trade deficit thus reached a record level of 190.3 billion euros in 2022.

Exports of the industrial automobile branch amounted to 50.1 billion euros in 2022, up 8.1% compared to 2021. They were driven by exports of new cars (+12.7% in 17.9 billion euros), industrial vehicles (+28.8% to 6 billion euros) and parts (including engines, chassis, bodies and trailers), while exports of light commercial vehicles fell by 17.3% to 3.9 billion euros. By adding used vehicles, total exports of the automotive sector reached 52.8 billion euros in 2022 (+8.6% compared to 2021). They represent 9% of French exports, which places the automobile industry in 3rd position behind the food industry (10.5%) and chemicals (9.6%).

On the import side, these increased by 8.5% in 2022, driven by imports of new cars (+4.6%), industrial vehicles (+16%) and parts, engines, bodies (+16%), while imports of light commercial vehicles and used vehicles fell by 7.5% and 4.2%, respectively.

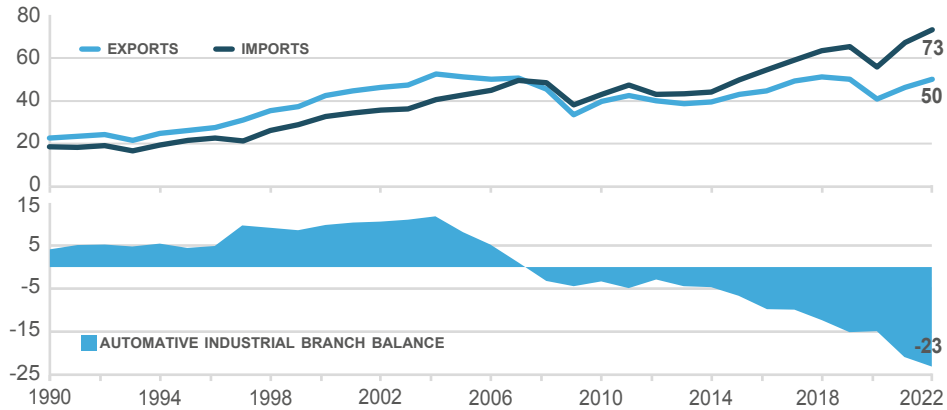
In total, the balance of the industrial automobile branch increased by more than 2 billion euros in 2022, to stand at -23.1 billion euros, reflecting the lack of competitiveness of the France site.

► FOREIGN AUTOMOTIVE TRADE
(IN € BILLION)

	New passenger cars	New light commercial vehicles	New heavy vehicles (including buses & coaches)	Parts, Engines and Bodywork (1)	Industrial automotive sector	Used vehicles	Automotive sector	All goods (2)	Share of automotive
EXPORTS (FOB)									
2019	19.9	5.1	4.7	20.4	50.1	1.6	51.8	496.8	10.4%
2021	15.9	4.8	4.6	21.1	46.3	2.3	48.6	489.8	9.9%
2022	17.9	3.9	6.0	22.3	50.1	2.7	52.8	584.8	9.0%
2022/2021 change as a %	+12.7	-17.3	+28.8	+5.7	+8.1	+18.0	+8.6	+19.4	-
IMPORTS (CIF)									
2019	32.9	4.5	5.2	22.7	65.3	1.6	66.9	575.7	11.6%
2021	32.2	4.7	4.3	26.0	67.2	2.1	69.3	598.1	11.6%
2022	33.7	4.3	5.0	30.1	73.1	2.0	75.2	775.1	9.7%
2022/2021 change as a %	+4.6	-7.5	+16.6	+16.0	+8.9	-4.2	+8.5	+29.6	-
SALES									
2019	-13.0	+0.6	-0.5	-2.3	-15.1	-0.0	-15.1	-78.9	-
2021	-16.3	+0.1	+0.4	-4.9	-20.8	+0.2	-20.6	-108.3	-
2022	-15.8	-0.4	+1.0	-7.9	-23.1	+0.7	-22.4	-190.3	-

(1) From 2021, the scope is expanded to include new parts and trailers are taken into account.
(2) Not including military equipment.
FOB: Franco on board; transaction value of the goods, including transport and insurance costs to the border of the exporting country.
CIF: Cost, insurance, freight; transaction value of the goods plus transport costs and insurance to the border of the importing country.
Sources: Customs data processed by the CCFA

EVOLUTION OF TRADE IN THE AUTOMOTIVE INDUSTRIAL SECTOR (1)



(1) The automotive industrial sector includes all new vehicles, parts, bodywork, chassis, engines, trailers. It does not take into account used vehicles. From 2021, trailers and a larger number of parts are taken into account in the scope.
Sources: Customs data processed by the CCFA

50 billion euros — **Exports of industrial automotive products from France in 2022**

Automotive industry exports amounted to more than 50 billion euros in the mid-2000s, before falling to 34 billion in 2009 with the crisis. They remained in a range between 39 and 45 billion euros until 2013, then increased to reach 51 billion in 2018. The year 2019, however, marks an inflection point which was accentuated with the crisis health in 2020. In 2021 and 2022, exports rebounded, but imports grew even more strongly, widening the sector's deficit to 23 billion euros, including 15 billion for vehicles.

Since 2004, the balance has deteriorated, linked to the unfavourable evolution of tax and social charges and labour costs in France, compared to other European countries. The balance became negative in 2007 and has continued to grow, despite the rebound, from 2016, of vehicle exports, thanks to the dynamism of the European market, and, for light commercial vehicles, to the production of new vans in France (including for foreign partners).

After the fall in trade in 2020, the growth in exports in 2021 and 2022 did not prevent the widening of the trade deficit, due to weak European demand, production problems linked to semiconductors, but also to the persistence of competitiveness difficulties.

Concerning exchanges of parts and other automotive products (bodywork, chassis, trailers, engines), the balance remained in surplus until 2018. But, subsequently, in the context of the competitiveness difficulties of the France site, imports increased much faster than exports, generating a negative balance. Furthermore, the energy transition leads to a need for equipment to produce electric vehicles (batteries in particular) which accentuates this imbalance.

FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automobile industry are generally European. Five Western European countries alone represent 60% of exports from the industrial automobile sector in 2022. In the top ten customers of French automobile exports, we also find emerging Eastern European countries, such as Poland.

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 2022, Germany remains the main importing country with French exports valued at 4.5 billion euros, up 15% compared to 2021. To the United Kingdom, French exports of passenger cars are also in sharp increase (more than 50% to 1.5 billion euros). The United Kingdom moves to third place ahead of Italy and Spain, with which France has reduced its exports by 27% and 12% respectively in 2022, in connection with French production less oriented towards small cars in greater demand in these countries. French exports of passenger cars are also growing strongly to other European countries (Netherlands, Poland) or to the Maghreb (Algeria).

In 2022, light commercial vehicles will remain mainly exported to the same five countries. Germany is in the lead with 860 million euros, a sharp drop compared to last year (-27%), ahead of Belgium (615 million euros, -5%) and the United Kingdom (608 million euros, +10%). Poland is now a more important partner than Italy and Spain for these flows and finds itself in fourth place with 292 million euros exported to this country.

Exports of industrial vehicles and coaches increased sharply in 2022 (+29%), in line with the good performance of the European market and reached nearly 6 billion euros. Germany, France's largest customer in this market, increased its imports by 23% in 2022 to 1.2 billion euros. The other main customers (Spain, Italy, United Kingdom) returned to their 2019 levels.

Finally, the top five destinations for exports of parts, engines, trailers and bodies are also European. Germany leads with 21% of French exports, or 4.6 billion euros, up 8% compared to 2021. It is followed by Spain, which represents 13% of the total, or 2. 9 billion euros (-5% compared to 2021) and the United Kingdom, which totals 9% to 1.9 billion euros (+19% compared to 2021).

On the import side, there is a greater diversity of supplier countries: Western Europe (Germany, Spain, Italy, United Kingdom), but also Eastern Europe (Slovakia, Czech Republic, Romania), including Turkey. Morocco and South Korea are also among the top 10 vehicle supplier countries. For light vehicles, Spain is the leading supplier (7.5 billion euros) ahead of Germany (6.7 billion euros). Slovakia and Italy are in third and fourth place respectively, with Italy in first place for light commercial vehicles alone.

China represents 2% of new car imports in 2022, but in the electric car segment, it ranks 3rd among French imports, with 10% of imports by value and 19% of imports by volume.

For industrial vehicles, Germany leads and represents 35% of total imports at 1.8 billion euros in 2022, up 15% compared to last year. Belgium, which was in second place, is now well ahead of the Netherlands and Turkey, representing 16% and 11% of the total respectively.

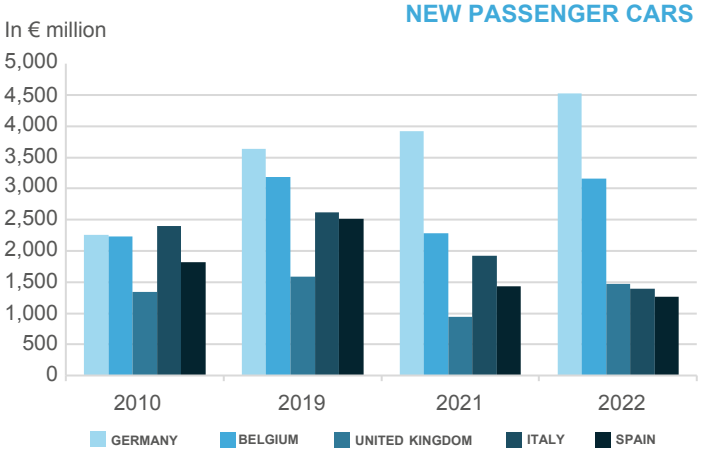
Finally, when it comes to imports of parts and accessories, engines, bodywork and trailers, Germany is in first place, far ahead of other countries, with 30% of total imports. Spain and China are in second and third place and each account for 9% of France's parts imports in 2022.

Germany

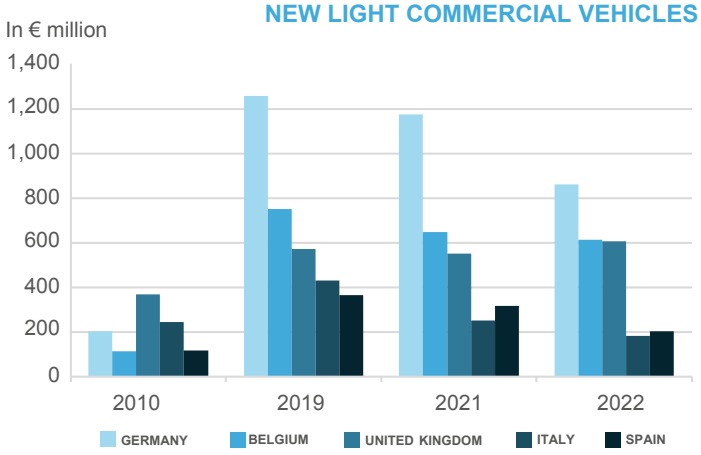
Leading commercial partner of the automotive industry in France

► LEADING DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE

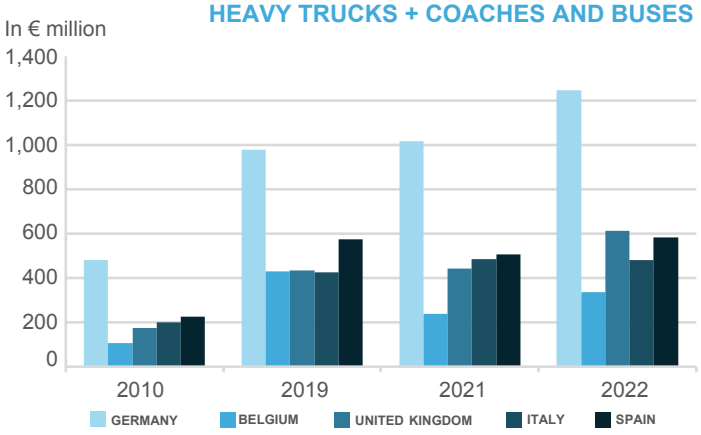
NEW PASSENGER CARS



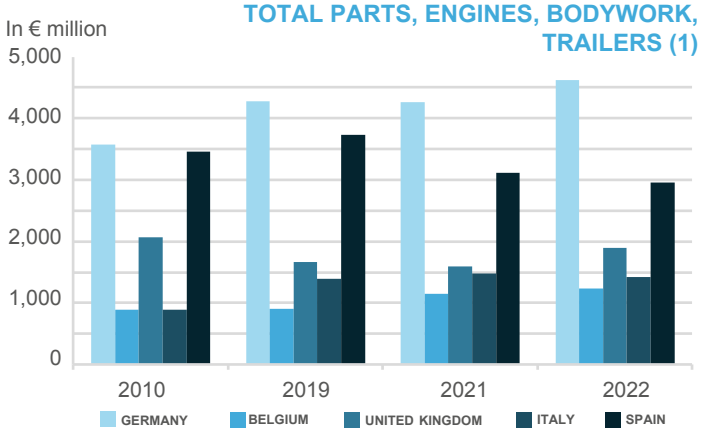
NEW LIGHT COMMERCIAL VEHICLES



HEAVY TRUCKS + COACHES AND BUSES



TOTAL PARTS, ENGINES, BODYWORK, TRAILERS (1)



(1) From 2021, the scope has been expanded and is not comparable to previous years.
Sources: Customs data processed by the CCFA

PASSENGER CARS BY ENERGY

In 2022, sales of new passenger cars equipped with a diesel engine continued to decline (-31.6%) and now represent only 16% of the total. Furthermore, for the third consecutive year, sales of petrol cars are in decline (-12.4%) and their market share continues to decline, going from 58% in 2019 to 48% in 2020, then 41% in 2022.

Despite the sharp decline in the automobile market in 2022 (-7.8%), sales of electric and hybrid cars continued at a sustained pace. The objectives set by the European Union to end the sale of thermal cars by 2035, the development of low-emission zones in France and the maintenance of the ecological bonus, even revised downwards, continue to stimulate purchases of alternative energy cars (electric and hybrid). In 2022, registrations of electric cars increased by 25.2% to reach more than 200,000 units, representing a market share of 13% (+3.5 points in one year) compared to 7% in 2020.

Cars with hybrid engines represent 30% of registrations but perform differently depending on the type of hybridisation. Non-rechargeable hybrids dominate the market since they represent 70% of hybrids sold and they continued to progress in 2022, although at a less sustained pace than the previous year (+14.8% in 2022 compared to +71.6% in 2021). They now represent 22% of registrations, exceeding diesel sales for the first time. Conversely, plug-in hybrid engines which had almost doubled in 2021 (+89%) will decline by more than 10% in 2022 and represent only 8% of the market. They constitute only 28% of the hybrid market.

In terms of the fleet, as of 1 January 2023, alternative energy engines represent 5.9% of the total, including 1.5% for electric cars. Diesel continues its steady decline (53% of the total), while the number of gasoline cars has been growing since 2015, but at an increasingly slow rate.

13% Share of new passenger cars with diesel engines registered in France in 2022

► PASSENGER CARS BY ENERGY	2000	2015	2019	2020	2021	2022	Change 2022/2021 in %
REGISTRATIONS							
Essence							
In units	-	741,215	1,290,268	791,026	716,350	627,483	-12.4
As a % of total registrations	51%	39%	58%	48%	43%	41%	-2.1 points
Diesel							
In units	1,046,485	1,097,124	755,583	504,178	349,479	239,105	-31.6
As a % of total registrations	49%	57%	34%	31%	21%	16%	-5.4 points
Electric							
In units	-	17,268	42,764	110,917	162,106	202,929	+25.2
As a % of total registrations	-	0.9%	2%	7%	10%	13%	+3.5 points
Hybrids							
In units	-	61,619	125,372	243,464	430,838	459,216	+6.6
As a % of total registrations	-	3.2%	6%	15%	26%	30%	+4.1 points
including non-rechargeable							
In units	-	56,030	106,780	168,872	289,837	332,669	+14.8
As a % of total registrations	-	2.9%	5%	10%	17%	22%	+4.3 points
including plug-in							
In units	-	5,589	18,592	74,592	141,001	126,547	-10.3
As a % of total registrations	-	0.3%	0.8%	5%	8%	8%	-0.2 points
Total registrations	-	1,917,226	2,214,279	1,650,118	1,659,004	1,529,035	-7.8
VEHICLES IN USE AS OF DECEMBER 31							
Petrol							
In thousands of units	18,080	13,015	14,956	15,237	15,544	15,712	+1.1
As a % of the total fleet	64.4%	35%	39%	40%	40%	40%	+0.4 points
Diesel							
In thousands of units	9,980	23,718	22,610	22,024	21,416	20,598	-3.8
As a % of the total fleet	35.6%	64%	59%	57%	55%	53%	-2.2 points
Electric							
In thousands of units	-	42	141	245	403	596	+47.7
As a % of the total fleet	-	0.1%	0.4%	0.6%	1.0%	1.5%	+0.5 points
Hybrids							
In thousands of units	-	212	565	805	1253	1713	+36.7
As a % of the total fleet	-	0.6%	1.5%	2.1%	3.2%	4.4%	+1.2 points
including non-rechargeable							
In thousands of units	-	176	480	647	954	1289	+35.1
As a % of the total fleet	-	0.5%	1.2%	1.7%	2.5%	3.3%	+0.9 points
including plug-in							
In thousands of units	-	36	85	158	300	424	+41.5
As a % of the total fleet	-	0.1%	0.2%	0.4%	0.8%	1.1%	+0.3 points
Total	**28,060**	**37,164**	**38,421**	**38,468**	**38,815**	**38,856**	**+0.1**

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

In 2022, with the sharp decline in sales of diesel cars in France, the country moved to third place in the European market with 239,105 registrations, behind Germany (437,951 units) and Italy (257,883 units). Diesel engines, which were still in first place for purchases by "non-individual" customers in 2020, with 41% market share, are now behind petrol with 23% of sales (compared to 36.4% for petrol) but also behind the hybrid engine which represents 31.9% of "non-individual" sales in 2022. Among individuals, diesel is now very low (6.8%), far behind petrol (46.6%), non-rechargeable hybrid (21.5%) and electric (18.8%).

Concerning alternative energies, registrations of new hybrid passenger cars amounted to 459,216 units in 2022 (+6.6%), placing France in fourth position in Europe on this market, behind Germany (818,391), the United Kingdom (581,406) and Italy (515,573). Those of new electric passenger cars increased by 25.2%, reaching 202,929 units. The French market is in third place among European markets behind Germany (463,358) and the United Kingdom (267,196).

In terms of the fleet in France, 53% of cars in circulation on 1 January 2023 were equipped with a diesel engine. This ratio has decreased by more than 11 points since the high point of 2015 and by 2.2 points in one year. The share of petrol cars in the fleet has been growing since 2015 and now represents 40% of the total, a share which has stabilised since 2020. Alternative energy cars represent 5.9% of the total fleet. The share of electric cars stands at 1.5% (+0.5 points), that of non-rechargeable hybrid cars at 3.3% (+0.9 points) and that of plug-in hybrid cars at 1.1% (+0.3 points).

ALTERNATIVE ENERGY PASSENGER CARS

In 2022, registrations of alternative energy passenger cars (electric and hybrid) continued to increase, despite the impact of the semiconductor shortage and the conflict in Ukraine on the automobile market (-7.8%). Registrations of electric and hydrogen cars increased by 25% and those of hybrid cars by 6.6%. The market share of these vehicles now reaches 43%, compared to 36% in 2021, including 21.5% for electrified vehicles (electric + plug-in hybrids).

The "Fit for 55" plan adopted by the European Commission in July 2021 recalled the objective of carbon neutrality in 2050 for Member States and the objective of ending the sale of thermal vehicles in 2035, which was voted by parliament European in July 2022.

64% **Private market share in electric car registrations in 2022**

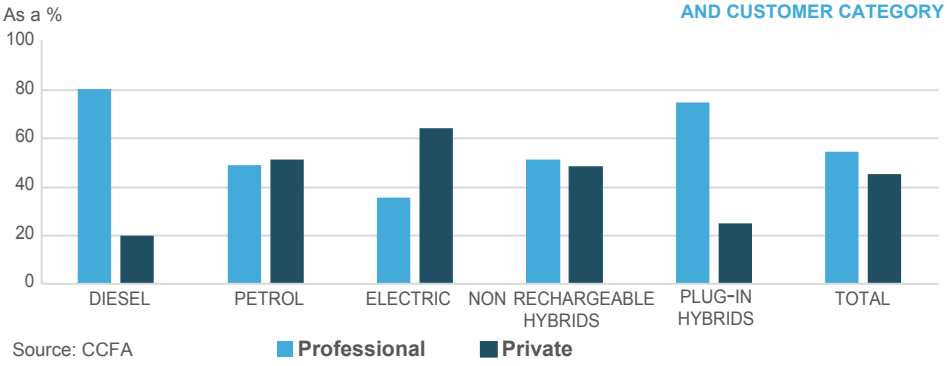
► RANKING 10 BEST-SELLING MODELS, ELECTRIC CARS IN 2022

RANK	MODEL	BRAND	%
1	208 II	PEUGEOT	9.5%
2	SPRING	DACIA	9.0%
3	MODEL 3	TESLA	8.4%
4	MEGANE-E	RENAULT	7.7%
5	500	FIAT	7.5%
6	TWINGOIII	RENAULT	6.2%
7	ZOE	RENAULT	6.0%
8	MODEL Y	TESLA	5.9%
9	2008 II	PEUGEOT	3.5%
10	KONA	HYUNDAI	3.2%

In France, the State continued to support the development of electromobility through the payment of the automobile bonus and the conversion bonus. The maximum amount of the bonus at 6,000 euros was maintained by decree until 31 December 2022, while it was initially scheduled to drop to 5,000 euros in July. In addition, the ceiling for benefiting from it was raised to 47,000 euros, whereas it was originally capped at 45,000 euros. The 1,000-euro bonus for plug-in hybrids has also been maintained until the end of the year.

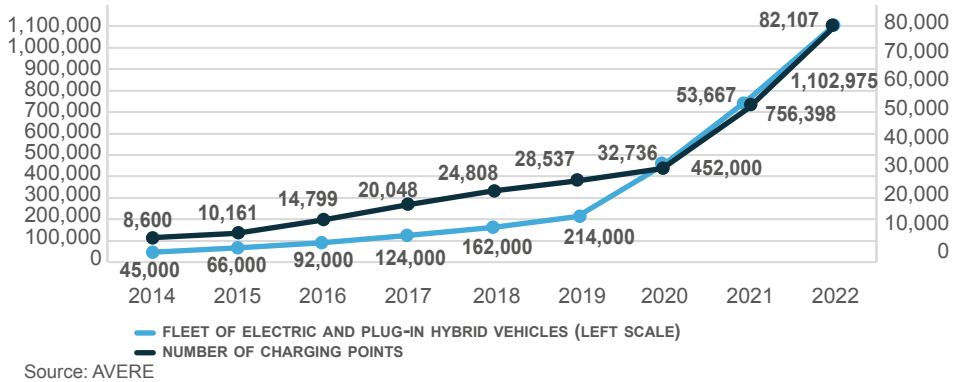
Regarding the deployment of infrastructure, the Advenir program, renewed for the third time in December 2021, made it possible to finance charging points for individuals in collective buildings, condominium trustees, businesses, communities and public entities. In September 2022, the program passed the milestone of 100,000 charging points financed and its objective is to reach 125,000 charging points by 2025. It thus complements public initiatives to support electric mobility.

BREAKDOWN OF PASSENGER CAR REGISTRATIONS IN 2022 ACCORDING TO ENERGY AND CUSTOMER CATEGORY



Source: CCFA

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



Source: AVERE

As of 31 December 2022, there were 82,107 charging points in France for 1,102,975 electric or plug-in hybrid vehicles, or 1 for 14 vehicles according to AVERE figures. Despite the strong growth in the number of charging points in 2022 (+53% in one year), the objective set by the government of reaching 100,000 charging points by the end of the year has not been achieved as planned and charging infrastructure remains insufficient compared to needs. 90% of electric vehicle users recharge at home or at their workplace but, according to the Parc Auto survey, the presence of charging points remains insufficient, even if it is increasing. Only 18% of workers surveyed have a charging station at the workplace at the end of 2022 (compared to 12% at the end of 2021). And only 8% of those surveyed have a terminal at their home, which remains unchanged compared to last year. On the other hand, more and more people are finding terminals on their usual journeys (33% vs. 28% in 2021). On motorways, the development of charging points also accelerated in 2022. According to ASFA, as of 30 June 2022, 219 areas, or 60% of all concessioned motorway service areas, were equipped with charging fast.

In terms of vehicle offerings, it will expand further in 2022 with electric and hybrid models. Nearly 80 different models of electric cars were sold in France in 2022, and the Renault Group and Stellantis still dominate the market with more than 20 models offered in 100% electric mode. Peugeot's 208 II topped sales in 2022 with 9.5% of 100% electric volumes, closely followed by Dacia's Spring (9% of sales). The Megane-E, Twingo and Zoé are also in the Top 10, while at Stellantis, the Fiat 500 and the 2008 are also among the 10 best sellers of the year.

On the demand side, the electric car market is mainly driven by demand from individuals, who represent 64% of buyers. The main obstacle to purchasing an electrified vehicle, according to Parc Auto, remains the cost of the vehicle, followed by the lack of autonomy, then the lack of charging stations. 65% of those surveyed consider financial support measures (bonus/malus/bonus) as the first factor impacting their purchasing decision. Likewise, traffic restrictions for polluting vehicles influence purchasing intentions, particularly in large cities. Business demand is not yet as oriented towards electric vehicles: 36% of total electric sales, compared to 45% on the market for all energies combined. Usage profiles (large vehicles more diesel) and the low maturity of the second-hand electric market constitute factors which slow down the greening of fleets. There are nevertheless objectives for the market share of electric vehicles in fleets, and various financial incentives intended to support the development of electrified vehicles (TVS, depreciation ceiling, exemption from the Special Tax on Insurance Agreements, etc.).

NEW CAR REGISTRATIONS BY MODEL, RANGE AND BODY TYPE

The economy and lower range is predominant in France with 54.1% market share in 2022. Within this range, it is the low range cars which dominate the market (47.6% of the total), with seven models of this range among the ten best-selling models. The development of the 4WD, SUV product offering in this range (2008, Captur, Duster) is stimulating the segment, which is also benefiting from the success of certain models (208, Sandero, Clio, C3). The development of hybrid or electric models or versions (208, 2008, DS3 Crossback, Clio, Corsa) has also contributed to expanding the offering.

The economic range, which reached 11.5% of sales in 2009 thanks to the success of the conversion bonus and the bonus, amounts to 6.5% of sales in 2022. It is, however, much more present on the market electric with four models (Spring, Fiat 500, Twingo, ZOE) among the ten best-selling electric models. The low-mid range represents 25.9% of the market in 2022 with three models among the top 10 on the market (308, 3008 and Arkana). It also benefits from the development of models in electric or hybrid versions (Megane-E, Arkana). Furthermore, the success of Tesla's Model 3 continues to drive progress in the Luxury segment in 2022, which accounts for 3.5% of registrations.

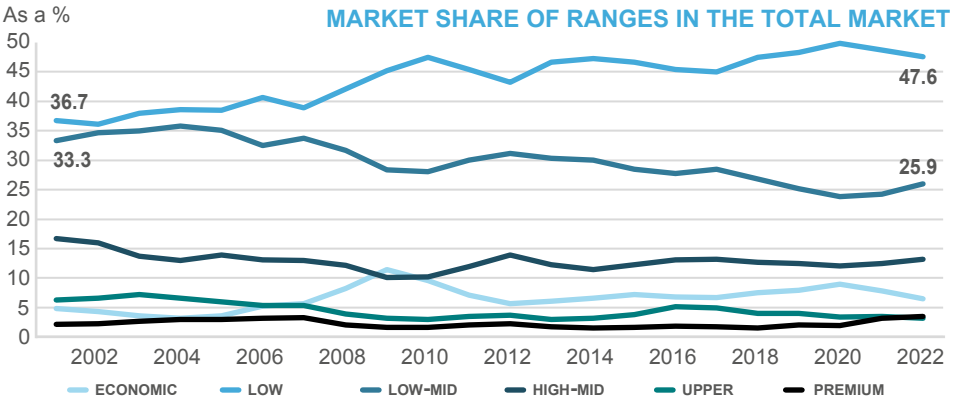
Sales by body type show that sedans remain the majority on the new market (46.4% of sales in 2022) but continue to lose market share (-15 points compared to 2010), in favour of 4WD, SUV vehicles. These continue their strong growth (+36 points of market share since 2010) thanks to the offer in the low (Captur, 2008, Duster) and low-mid ranges (C3 Aircross, C5 Aircross, 3008, 5008) and represent, in 2022, 45.2% of sales (+5.6 points compared to 2020). Finally, other market segments (minivans, station wagons and coupés-convertible) have continued to decline for around ten years.

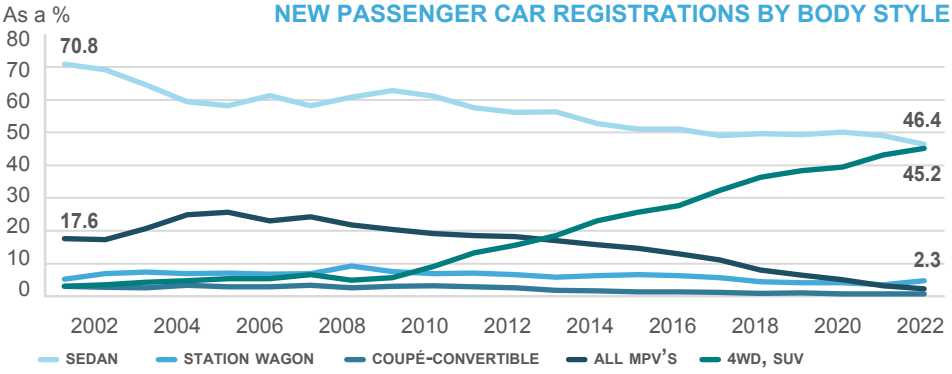
45% **Share of new passenger cars registered belonging to the 4WD and SUV bodies**

► RANKING OF THE MAIN MODELS OF NEW PASSENGER CARS IN 2022

Rank	BRAND	MODEL	% market
1	PEUGEOT	208	5.8%
2	DACIA	SANDERO	4.2%
3	RENAULT	CLIO	4.2%
4	CITROEN	C3	3.9%
5	PEUGEOT	2008	3.4%
6	RENAULT	CAPTUR	3.0%
7	PEUGEOT	308	2.7%
8	PEUGEOT	3008	2.4%
9	DACIA	DUSTER	2.1%
10	RENAULT	ARKANA	2.1%
11	TOYOTA	YARIS	2.0%
12	FIAT	500	2.0%
13	MINI	MINI	1.7%
14	TOYOTA	YARIS CRO	1.5%
15	RENAULT	TWINGO	1.5%
16	RENAULT	MEGANE	1.5%
17	CITROEN	C5 AIRCR.	1.4%
18	FORD	PUMA	1.3%
19	CITROEN	C3 AIRCR.	1.3%
20	DACIA	SPRING	1.2%
21	VOLKSWAGEN	POLO	1.2%
22	CITROEN	C4	1.2%
23	HYUNDAI	TUCSON	1.2%
24	VOLKSWAGEN	T-ROC	1.1%
25	TESLA	MODEL 3	1.1%
26	PEUGEOT	5008	1.1%
27	RENAULT	MEGANE-E	1.0%
28	DACIA	JOGGER	1.0%
29	OPEL	CORSA	1.0%
30	KIA	SPORTAGE	0.9%

Source: CCFA





► NEW CAR REGISTRATIONS BY RANGE

Ranges	2000		2010		2019		2021		2022	
	units	%	units	%	units	%	units	%	units	%
Economic and low ranges	972,417	45.6	1,283,998	57.0	1,246,492	56.3	938,368	56.6	827,650	54.1%
Low-mid range	695,146	32.6	627,694	27.9	557,062	25.2	402,168	24.2	396,776	25.9%
High-mid range	303,028	14.2	234,664	10.4	276,406	12.5	207,224	12.5	202,319	13.2%
Premium range	163,293	7.7	105,313	4.7	134,319	6.1	111,244	6.7	102,290	6.7%
Total	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,214,279**	**100.0**	**1,659,004**	**100.0**	**1,529,035**	**100.0%**

► NEW CAR REGISTRATIONS BY BODY

Bodies	2000		2010		2019		2021		2022	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	1,094,467	49.4	814,013	49.1	709,558	46.4%
Station wagon	119,739	5.6	153,476	6.8	92,487	4.2	56,409	3.4	72,167	4.7%
Coupé-convertible	50,527	2.4	70,353	3.1	21,562	1.0	11,928	0.7	11,998	0.8%
All MPV'S	369,434	17.3	430,857	19.1	142,540	6.4	52,370	3.2	35,201	2.3%
AWD, SUV	57,116	2.7	205,106	9.1	847,850	38.3	715,128	43.1	690,892	45.2%
Others	9,392	0.4	14,379	0.6	15,373	0.7	9,156	0.6	9,219	0.6%
Total	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,214,279**	**100.0**	**1,659,004**	**100.0**	**1,529,035**	**100.0%**

Source: CCFA

USED PASSENGER CARS

In 2022, in line with a new car market down 7.8%, the used car market fell 13.5% to 5.2 million units. 3.4 used cars were sold for every new car in 2022, compared to 3.6 in 2021 and 2.6 in 2019. The shortage of new cars linked to the semiconductor crisis and the increase in their price had stimulated second-hand purchases in 2021, which reached a record level of 6 million units. In 2022, the shortage of new vehicles and rising prices will impact the second-hand market. According to the INSEE price index, the price of used cars increased by 5.5% between December 2021 and December 2022.

All age groups were affected by the drop in registrations, but transactions for cars less than a year old were the most impacted by the rise in prices and the shortage of recent vehicles. They fell by 34.4% and will only represent 6% of the market in 2022, compared to 10% in 2019. Used cars aged fifteen years and over are those which are holding up the best (-0.3%) and represent a quarter of transactions in 2022. Cars ten years old and over now represent 47% of the total, compared to 41% in 2019.

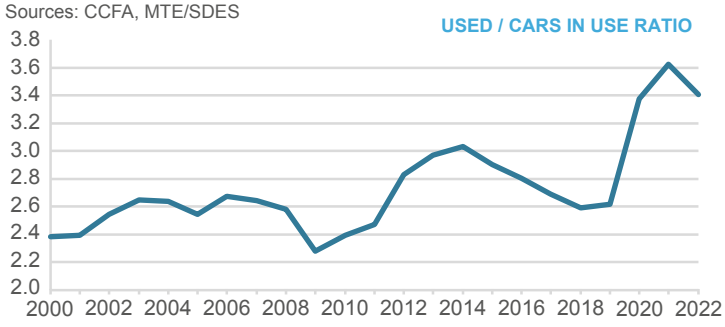
Diesel cars continue to dominate the second-hand market, but their share falls by 4 points in 2022 to 52% of the market (2.7 million units). Their decline is to the benefit of alternative engines, which benefit from purchase support schemes (bonuses, conversion bonuses), while petrol cars are falling in volume (-9.7%) but are regaining market share (+2 points to 41% of the total). The used market for electric cars is still underdeveloped. Nevertheless, it increased by 26.6% in 2022 to reach 73,000 units, or 1.4% of the total market. Registrations of used hybrid cars increased by 12.5% and now represent 6.4% of transactions.

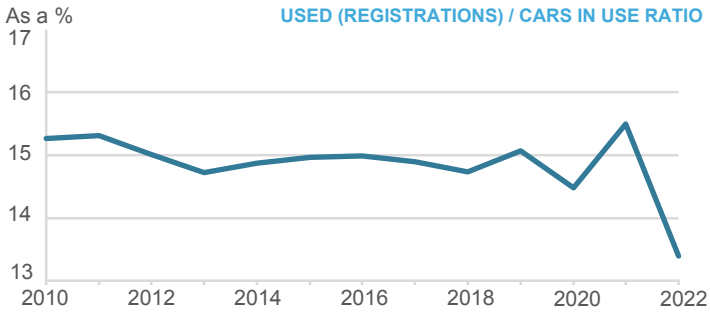
25% **Share of used cars 15 years and older registered in 2022**

► USED PASSENGER CARS

	Units	2000	2005	2010	2019	2020	2021	2022
REGISTRATIONS								
New cars	thousands	2,134	2,118	2,252	2,214	1,650	1,659	1,529
Used cars	thousands	5,082	5,383	5,386	5,791	5,569	6,016	5,205
Used/new ratio		2.4	2.5	2.4	2.6	3.4	3.6	3.4
Cars less than five years old	% used	40	40	37	37	37	36	32
-Cars less than a year old	% used	12	10	8	10	9	8	6
-Cars less than a year old	% new	29	25	19	27	31	27	20
Cars over five years old	% used	60	60	63	63	63	64	68
Cars from five years to 9 years	% used	-	25	26	21	20	20	20
Cars from 10 years to 14 years	% used	-	22	21	22	22	22	22
Cars 15 years and older	% used	-	13	15	19	21	22	25
Diesel used cars	thousands	-	2,996	3,558	3,518	3,200	3,339	2,711
	% used	-	55.7	66.1	61	57	56	52
Electric or hybrid used cars	thousands	-	-	6	104	146	285	331
	% used	-	-	0.1	1.8	2.6	4.7	6.4
PASSENGER CARS IN USE (AS OF 31/12)	**thousands**	**28,825**	**-**	**35,280**	**38,421**	**38,468**	**38,815**	**38,856**
USED (REGISTRATIONS) / CARS IN USE RATIO	**%**	**17.6%**	**-**	**15.3%**	**15.1%**	**14.5%**	**15.5%**	**13.4%**

Sources: CCFA, MTE/SDES





The passenger car is a durable good that the household buys, uses, maintains and possibly resells on the second-hand market. According to the Parc Auto survey (page 47), households are keeping their car for longer and longer. The length of detention increased from 3.8 years in 1991 to 6.2 years today (5.6 in 2020).

Sales of used cars are made through an automobile professional or directly between individuals. Professionals generally handle transactions for "young" used cars, less than 5 years old. According to the Parc Auto survey, sales channels between individuals have declined with the pandemic, in favour of second-hand dealer networks, which are undoubtedly more reassuring in terms of health. In 2022, the share of second-hand transactions carried out through a professional now stands at 71%, including 45% through a car brand dealership. Purchases from individuals have therefore fallen by another point in one year.

Between 5 and 6 million used cars are exchanged per year. This market undergoes fewer fluctuations than that of new homes. 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 and therefore less impacted in the event of severe crises. It may nevertheless be affected by measures to stimulate the new home market. On average, 15% of the stock changes hands each year, but this ratio fell to 13% in 2022.

The aging of the fleet and the development of multi-motorisation in households resulted in an increase in the share of cars over 5 years old in used transactions between 1990 and 2016 (68% in 2016, compared to 48% in 1990). Then, over the last three years, incentives to renew the fleet have increased the share of used cars less than 5 years old and reduced that of older vehicles. With the health crisis in 2020, then the semiconductor crisis in 2021, the share of used cars aged 15 and over increased again and went from 19% in 2019 to 22% in 2021. It increases mechanically in 2022 due to a sharp drop in sales of recent cars (-21.5% for those under five years old).

Used cars less than a year old can be compared to the new market. In fact, these are often cars registered first by an automobile professional (demonstration car or rental car), then sold to individuals. Their share steadily decreased from 2001 to 2009, during the years of the scrappage bonus, when the prices of new cars were more competitive. Then, volumes increased each year until 2020, when automotive professionals affected by the health crisis reduced their purchases. In 2021 and 2022, supply difficulties, shortage of semiconductors and rise in prices have caused the share of these recent vehicles to decline again.

In 2022, according to the Parc Auto survey, cars purchased second-hand still represent a high share of the fleet (60%, compared to 51% in 1991). In car purchases made in 2022, their share fell by 4 points to 63% due to a more marked decline in sales of used cars compared to new cars. Thus, new cars represent 37% of cars purchased in 2022, compared to 33% in 2021.

REGISTRATIONS OF NEW VEHICLES IN FRENCH OVERSEAS DEPARTMENTS (DOM)

Sales of new vehicles in the five overseas departments fell by 1.9% in 2022. This is mainly explained by the drop in registrations of light commercial vehicles (-9.7%) while the market for passenger cars experienced stagnation (+0.1%).

After a particularly dynamic 2021 for the light commercial vehicle market, it declined in 2022 in all overseas departments with the exception of Guadeloupe. As for the passenger car market, it has evolved in very contrasting ways depending on the area. Growing by 11% in Guadeloupe and 3% in Martinique, it however declined in the other departments.

Reunion represents the leading market in the overseas departments with 42% of vehicle volumes. Martinique and Guadeloupe come behind with two markets of similar size. They each represent around 22% of the total. In 2021, they experienced the least dynamic developments in the area, but will catch up in 2022 by being the only growing markets among the overseas departments.

As in mainland France, registrations of diesel cars continue to fall in 2022 and now represent only 13.4% of the total, compared to 15.6% in mainland France. Electric cars have increased by 24% on average but with very different developments depending on the departments. They now represent 7.1% of registrations and up to 11.2% in Reunion but only 1.7% in Guyana. For plug-in hybrid vehicles, the market share does not exceed 2.9% compared to 8.3% in mainland France.

Registrations of commercial vehicles of more than 5 tonnes, which had rebounded strongly in 2021 (+21%), fell in all departments and returned to their 2020 level. Finally, registrations of coaches and buses were down 2% due to sharp declines recorded in Guadeloupe and Martinique while they increase in the other departments.

The Renault group and Stellantis maintain high market shares in the overseas departments. For passenger cars, the market share rises to 55% on average in 2022, up more than 2 points compared to 2021. For light commercial vehicles, the market share rises to 64.5%, up more than one point compared to 2021. In the narrow industrial vehicle market, Renault Trucks' share stands at 33.3% in 2022, up sharply compared to 2021 (+7.7 points).

Registrations of used passenger cars, which had rebounded by 6% in 2021, fell by 4.8% in 2022 to stand at 127,702 units, i.e. a ratio of 2.1 used cars for 1 new car compared to 3.4 in mainland France.

As of 1 January 2023, the passenger car fleet in the French Overseas Territories stood at 915,703 units. The ratio of registrations to fleet is around 7%, which is much higher than in mainland France.

7.1% Share of electric cars registered in the overseas departments in 2022

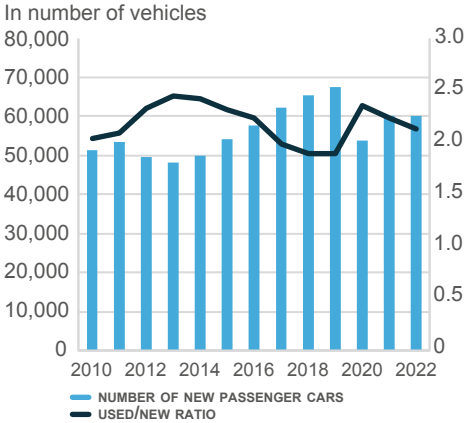
NEW PASSENGER CARS	2000	2010	2015	2019	2020	2021	2022	Change 2022/2021	Change 2022/2019
GUADELOUPE	13,691	13,438	13,409	16,741	12,230	12,731	14,162	11.2%	-15.4%
GUYANA	4,031	4,382	4,414	5,450	4,410	5,497	5,418	-1.4%	-0.6%
MARTINIQUE	14,424	13,147	12,931	15,853	11,374	12,965	13,364	3.1%	-15.7%
MAYOTTE (1)	-	-	1,083	1,729	1,657	2,095	1,958	-6.5%	13.2%
REUNION ISLAND	21,463	20,295	22,288	27,556	23,990	26,667	25,110	-5.8%	-8.9%
TOTAL DOM	**53,609**	**51,262**	**54,125**	**67,329**	**53,661**	**59,955**	**60,012**	**0.1%**	**-10.9%**
TOTAL DOM USED PASSENGER CARS	**N/A**	**104,381**	**125,457**	**127,746**	**126,436**	**134,184**	**127,702**	**-4.8%**	**0.0%**
USED/NEW RATIO	**-**	**2.0**	**2.3**	**1.9**	**2.4**	**2.2**	**2.1**	**-**	**-**

LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES)	2000	2010	2015	2019	2020	2021	2022	Change 2022/2021	Change 2022/2019
GUADELOUPE	2,685	2,394	2,214	2,465	2,136	2,763	2,838	2.7%	15.1%
GUYANA	1,143	1,239	1,159	1,311	1,208	1,578	1,519	-3.7%	15.9%
MARTINIQUE	2,368	2,016	2,156	2,059	1,849	2,744	2,584	-5.8%	25.5%
MAYOTTE (1)	-	-	230	401	331	472	431	-8.7%	7.5%
REUNION ISLAND	5,200	4,166	4,975	5,863	4,875	6,101	4,965	-18.6%	-15.3%
TOTAL DOM	**11,396**	**9,815**	**10,734**	**12,099**	**10,399**	**13,658**	**12,337**	**-9.7%**	**2.0%**

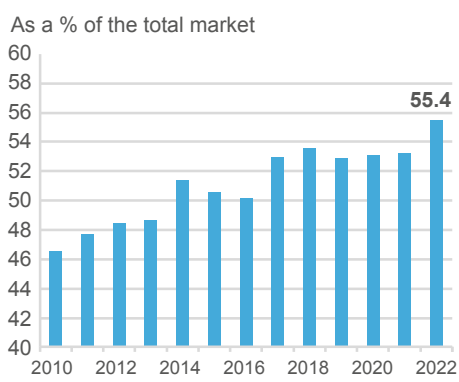
NEW COMMERCIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5 TONNES)	2000	2010	2015	2019	2020	2021	2022	Change 2022/2021	Change 2022/2019
GUADELOUPE	146	135	97	183	153	186	120	-35.5%	-34.4%
GUYANA	66	85	50	88	106	113	111	-1.8%	26.1%
MARTINIQUE	187	84	128	170	149	182	167	-8.2%	-1.8%
MAYOTTE (1)	-	-	48	81	84	134	121	-9.7%	49.4%
REUNION ISLAND	362	293	434	376	390	401	352	-12.2%	-6.4%
TOTAL DOM	**761**	**597**	**757**	**898**	**882**	**1,016**	**871**	**-14.3%**	**-3.0%**

(1) From 1 April 2011.
Source: CCFA

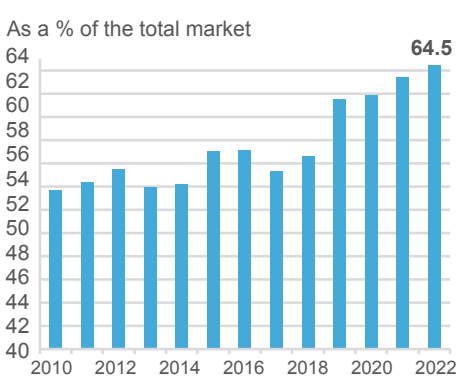
PASSENGER CARS: REGISTRATIONS AND USED/NEW RATIO



SHARE OF THE RENAULT GROUP AND STELLANTIS (EXCLUDING FCA) IN THE OVERSEAS DEPARTMENTS (PASSENGER CARS)



SHARE OF THE RENAULT GROUP AND STELLANTIS (EXCLUDING FCA) IN THE OVERSEAS DEPARTMENTS (LIGHT COMMERCIAL VEHICLES)



NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

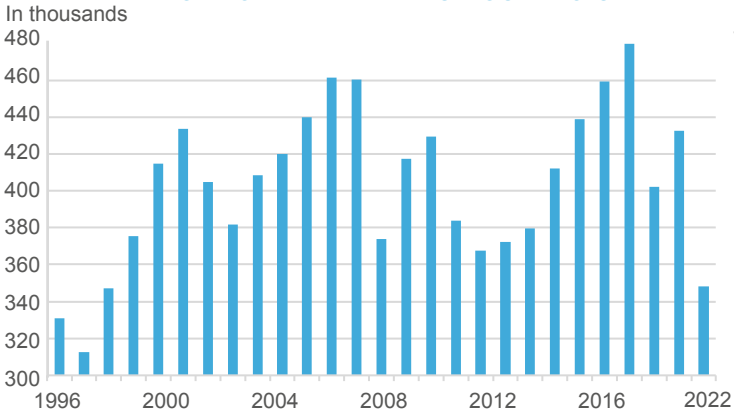
In 2022, the new light commercial vehicle market particularly suffered from economic uncertainties related to inflation, the war in Ukraine, as well as persistent problems in the supply chain. The market fell 19.5% to 348,075 units, its lowest level since 1998, compared to -7.8% for the passenger car market. The used light commercial vehicle market, which reached a record level last year, also suffered from the poor economic situation and fell by 9.1% in 2022 to 814,504 units. The ratio of used registrations to new registrations reached a record level of 2.3 in 2022, higher than that observed during the 2009 crisis.

French groups and brands have always occupied a predominant place in the French light commercial vehicle market. In 2021, with the merger of the PSA and FCA groups, sales of the Renault group and Stellantis reached 72.9% of light commercial vehicle sales. In 2022, however, their market share will decline by 2.6 points to stand at 70.2% of the total.

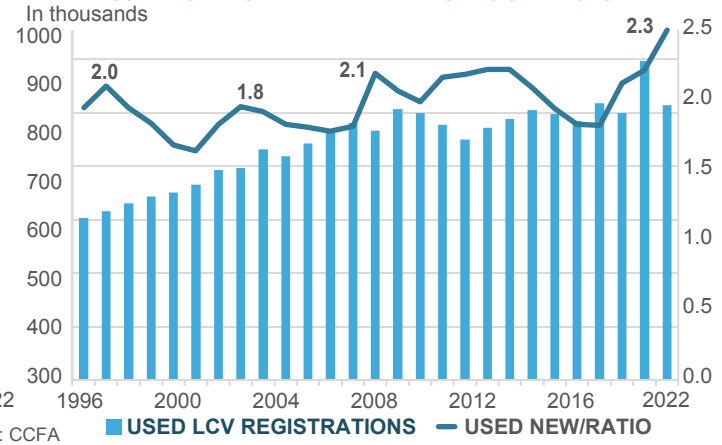
These groups are also leading manufacturers and produce on their sites for their partners (Renault for Nissan, Daimler and Mitsubishi and Stellantis for Toyota). In France, the production of light commercial vehicles is 372,707 units in 2022, which represents 27% of automobile production in the territory. Entirely produced by the Stellantis and Renault group, it accounts for 2% of global production of light commercial vehicles.

27% Light vehicles produced in France are commercial vehicles

NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS IN FRANCE

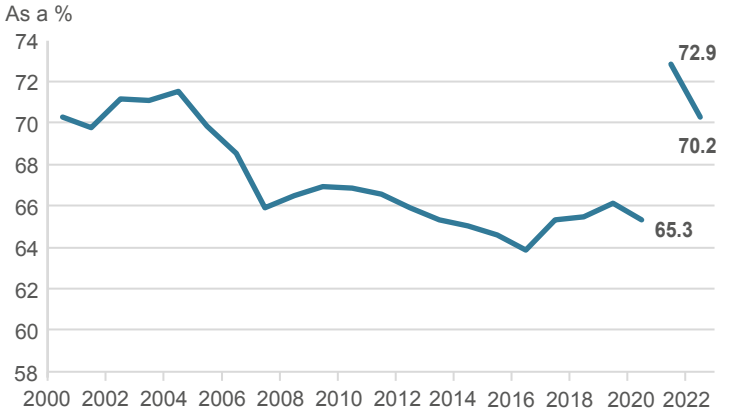


USED LIGHT COMMERCIAL VEHICLES REGISTRATIONS IN FRANCE

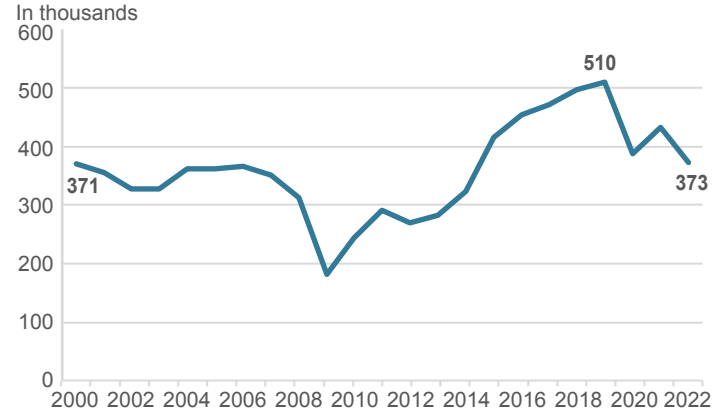


Source: CCFA

MARKET SHARE OF GROUPS (STELLANTIS + RENAULT FROM 2021) AND FRENCH BRANDS OF LIGHT COMMERCIAL VEHICLES ON THE FRENCH MARKET



PRODUCTION OF LIGHT COMMERCIAL VEHICLES BY FRENCH MANUFACTURERS IN FRANCE



Source: CCFA

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

These vehicles are intensively 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, messaging, warehousing, as well as specialised activities and the manufacturing industry. These vehicles are mainly used in urban areas or on the road (excluding motorways).

The fleet of new light commercial vehicles, estimated at 6.4 million units on 1 January 2023, is 48% owned by individuals (individuals and craftsmen), 14% by legal entities operating in the construction sector and 8% in the commerce sector. Its average age varies between 10 and 11 years and is slightly lower than that of passenger cars (10.6 instead of 10.8 as of 1 January 2023).

Light commercial vehicles are vehicles with higher added value, which can be more easily produced in France. Over the last twenty years, the production of light commercial vehicles by French manufacturers in France has increased from 371,000 units in 2000 to 510,000 in 2019, 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. Between 2010 and 2019, it more than doubled. The health crisis, then the semiconductor crisis, however, caused production to fall below the 400,000-unit mark.

CHARACTERISTICS OF NEW LIGHT COMMERCIAL VEHICLES IN FRANCE

The light commercial vehicle market has transformed since the early 2000s, moving from small tonnage vehicles to heavier vehicles with the development of the van segment. In fact, vehicles weighing less than 2.5 tonnes, which represented two thirds of the market in 2001, only represent a third today. Light commercial vehicles weighing more than 2.5 tonnes have become the majority since 2016 and continue to grow, with a market share reaching 63% in 2022, compared to 35% in 2001, in line with the evolution of demand for greater transport capacities and a desire for massification to reduce the environmental footprint.

Vans, which represented only 24% of sales in 2001, are now the largest segment with 46.6% of registrations and continue to grow (+2 points compared to 2021). VP derivatives, which constituted a third of sales in 2001, will only represent 13.8% in 2022. The small van segment now represents the second segment ahead of cars derivatives, but is also in decline. They represent 20% of the market in 2022, down 5 points compared to 2019. Finally, sales of pick-ups, which experienced strong growth between 2015 and 2018, are in decline from 2019.

In terms of engines, developments are slower. Diesel continues to dominate the market with 85.3% of sales in 2022, but it has lost 10 points of market share since 2017. Petrol engines, which are in second position, have experienced significant growth in 2021 and continue to do so to increase in 2022 to 6.8% of sales. The electrical segment is the one that is growing the most with an increase in volumes of 39% and a gain in market share of 2 points to 4.8%. Stellantis and the Renault group occupy 77% of this segment. Finally, the hybrid segment is growing less quickly than last year (+9%), but is gaining 0.8 points of market share, going from 1.4% in 2021 to 2.2% in 2022.

The used commercial vehicle market contracted in 2022, but less sharply than the new market. The used/new ratio reached a record level of 2.3. In 2022, the breakdown of the second-hand market by age group is relatively stable. Those less than 1 year old still represent around 6% of transactions. Conversely, vehicles aged 5 years and over represent 71% of the total (up 3 points compared to 2019).

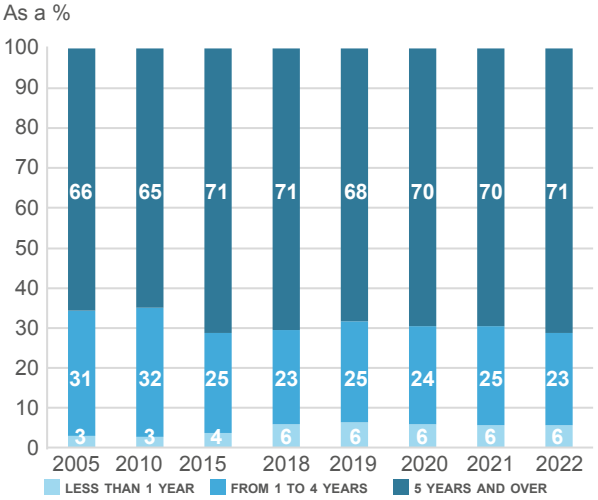
The fleet of new light commercial vehicles, estimated at 6.3 million units on 1 January 2023, is still largely dominated by diesel engines, which represent 94% of vehicles. The fleet of electric light commercial vehicles, although low (73,625 units), increased by 25% compared to last year. The fleet, all energies combined, is made up of 55% vehicles from 2.5 tonnes to 3.5 tonnes inclusive.

47% Share of vans in light commercial vehicle registrations

► LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY BODY STYLE

BODIES	2000		2010		2015		2021		2022	
	units	%	units	%	units	%	units	%	units	%
Cars derivatives	133,679	32.2	116,582	27.9	85,976	22.7	57,819	13.4	47,899	13.8
Small vans	110,727	26.7	113,152	27.1	99,227	26.2	99,697	23.0	69,937	20.1
Vans	99,953	24.1	136,647	32.7	140,153	36.9	191,612	44.3	162,367	46.6
Mini-buses/coaches	867	0.2	525	0.1	621	0.2	360	0.1	453	0.1
Pickup	6,327	1.5	12,126	2.9	12,877	3.4	12,019	2.8	9,486	2.7
4WD, SUV	4,470	1.1	9,302	2.2	9,908	2.6	10,048	2.3	8,872	2.5
Others	58,943	14.2	29,278	7.0	30,666	8.1	61,076	14.1	49,062	14.1
TOTAL	**414,966**	**100.0**	**417,612**	**100.0**	**379,428**	**100.0**	**432,631**	**100.0**	**348,076**	**100.0**

USED LIGHT COMMERCIAL VEHICLES BY AGE



► NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY WEIGHT

	2005	2010	2022
< 1.5T	3%	4%	1%
1.5T TO < 2.5T	56%	52%	35%
2.5T TO 3.5T	41%	43%	63%
> 3.5T TO 5T	0.2%	1%	0.3%
TOTAL	**100%**	**100%**	**100%**

► NEW LIGHT COMMERCIAL VEHICLES REGISTRATIONS BY ENERGY

	2010	2021	2022	
	%	%	units	%
DIESEL	98.4%	89.7%	296,885	85.3%
PETROL	1.2%	5.2%	23,824	6.8%
ELECTRIC	0.2%	2.8%	16,826	4.8%
OTHERS	0.3%	2.3%	10,541	3.0%
TOTAL	**100.0%**	**100.0%**	**348,076**	**100.0%**

Source: CCFA

CHARACTERISTICS OF THE HEAVY TRUCKS MARKET IN FRANCE

The French market for new industrial vehicles over 5.1 tonnes stagnated in 2022 (-0.3%), to stand at 44,011 units. The supply problems that appeared in the second half of 2021 continued in 2022 and impacted delivery times and registration volumes. The market therefore remains down 20% compared to the record level of 2019.

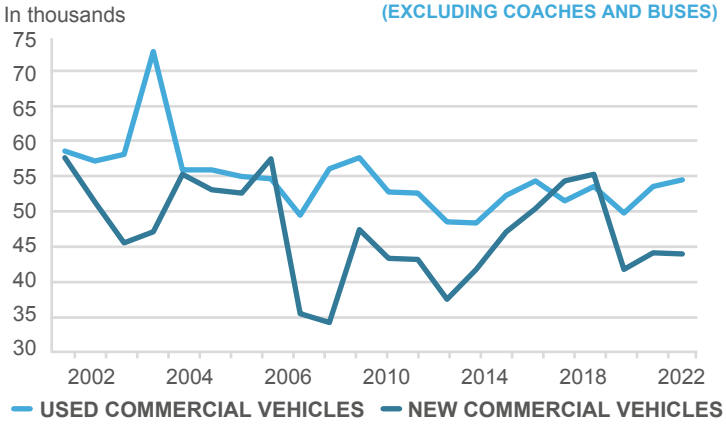
The segment most impacted by delivery issues was rigid vehicles, which fell 13.1% compared to 2021 to 18,593 units, while the tractor market increased 11.8% to 25,4148. units. Today, tractors represent 58% of vehicle sales, compared to 48% in 2001.

The share of industrial vehicles weighing more than 16 tonnes has also increased over the past twenty years. It increased from 80% of sales in 2001 to 90% in 2022 and reflects efforts to massify transport, in line with the desire to reduce its environmental footprint.

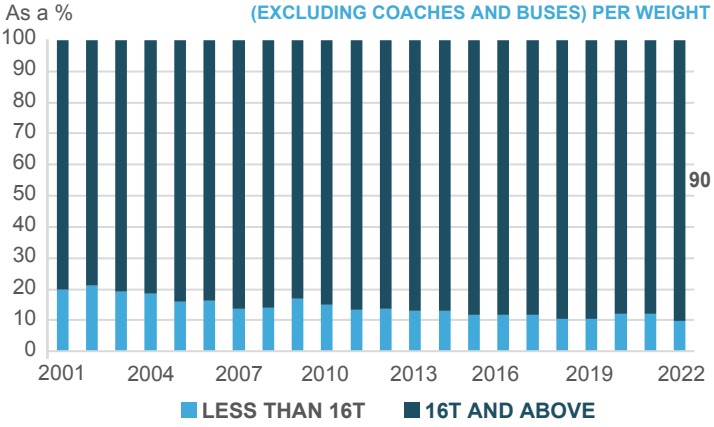
The shortage in the new market continues to favour the used vehicle market, which reached its highest level since 2010 with 54,465 units (+1.8% compared to 2021). Since the end of the 2009-2010 crisis, the used industrial vehicle market was close in volume to that of new vehicles, with an average ratio of 1.1 used vehicles sold for 1 new vehicle (compared to 1.5 during the crisis). Since 2020, the ratio is slightly higher at 1.2.

In 2022, Renault Trucks retains its leading position in France with a market share of more than 29%, compared to 28.2% in 2020. Its market share in the used vehicle market of more than 5.1 t s rises to 29% in 2022.

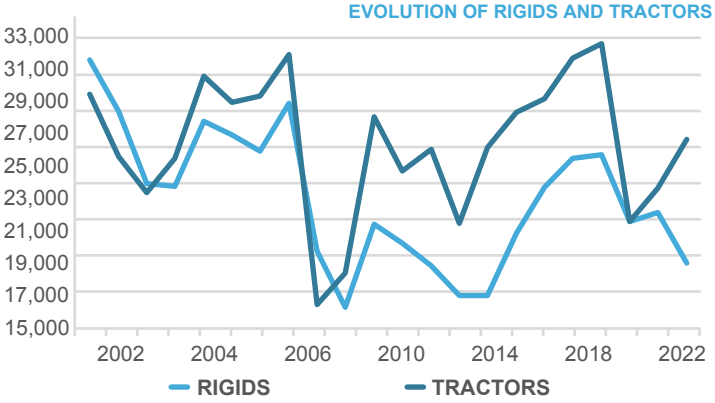
REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5.1T (EXCLUDING COACHES AND BUSES)



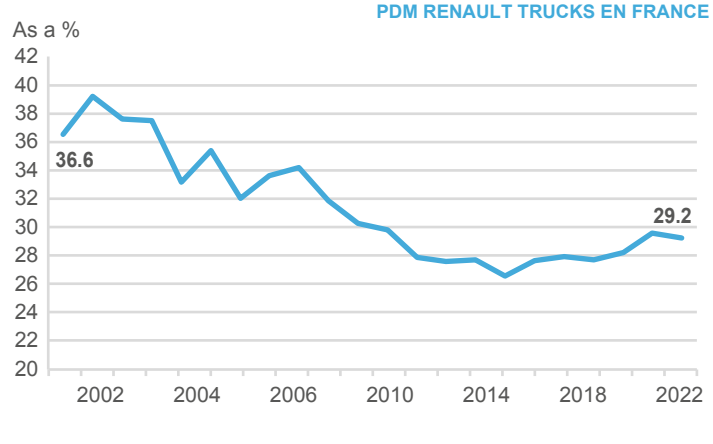
REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5.1T (EXCLUDING COACHES AND BUSES) PER WEIGHT



REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5.1T (EXCLUDING COACHES AND BUSES): EVOLUTION OF RIGIDS AND TRACTORS



PDM RENAULT TRUCKS EN FRANCE



Source: CCFA

Industrial vehicles are defined as vehicles with a total weight of more than 5 t, intended to transport goods. A distinction is made between straight trucks and road tractor trucks. They can be delivered with a body or in the form of independent chassis subsequently fitted by specialist manufacturers. Each truck is custom built and is therefore a unique product. The rigid truck is manufactured to accommodate a container or heavy equipment on its chassis and is available in different categories depending on its uses: tipper, van, flatbed, refrigerated, tank. The road tractor is intended to "tow" its trailer and is used more for long-distance transport. Tractors used for long journeys are equipped with numerous devices improving driver comfort: bunks, storage, touch screens, audio/radio system and even refrigerator.

The tractor market, which represents approximately 56% of the industrial vehicle market, is more volatile than that of rigids. More intensively used (113,000 km per year, compared to 75,000 km for a carrier according to the CNR), towing vehicles are renewed more frequently. Thus, the tractor fleet is twice as young as that of carriers, with an average age of 5.5 years and 11 years respectively. However, sales of road tractors are also more strongly affected by the vagaries of the economic situation and road transport of goods. In 2009, 2014 and 2020, the tractor market declined by 10 points more than that of rigids. In 2022, the truck market was more affected than that of tractors by problems with longer delivery times linked to the shortage of semiconductors and logistical difficulties.

Renault Trucks' market share in France has remained at around 28% since 2013, after having experienced higher levels in the 2000s (around 35%). In 2022, this reaches 29.2% over 5 t (29.4% in the over 16 t segment).

Diesel engines continue to dominate the market at more than 90%, but the supply of electric vehicles is growing and the CO_2 emissions reduction targets set by the European Union are also helping to stimulate sales. If the electric market still represents only 0.3% of volumes sold, sales have tripled between 2021 and 2022. Renault Trucks now offers a complete range of 100% electric vehicles, ranging from 650 kg to 44 t (Kleuster Freegônes cargo bike, Renault Trucks E-Tech Master Red Edition, Renault Trucks E-Tech D and Renault Trucks E-Tech D Wide) to respond to the diversity of urban logistics professions (refrigerated transport, waste collection, distribution). Its market share in medium electric ranges reached 75% in 2022.

HOUSEHOLD VEHICLES IN USE

85% **Household car ownership rate**

In 2022, the household motorisation rate (excluding large commercial vehicles) remains stable at 85%. Multi-motorised households represent 36% of all households, a share down slightly compared to 2021, after having increased continuously since 1980 (16% of households were multi-motorised). The share of households with 3 or more cars has also stabilised at 5% of all households, after having increased regularly (see page 93).

The category of household municipality remains an essential factor in the motorisation rate. In rural communities or peri-urban areas, 94% of households own a vehicle. Conversely, in the Paris region, a dense area benefiting from a developed public transport network, the share of equipped households is lower at 67.7% in 2022. In other large French cities of more than 100 000 inhabitants, the rates are around 83%.

In line with the levels observed in peripheral or rural areas, the motorisation rate is also higher among workers/farmers (more than 90%) than in higher socio-professional categories (85%), residing more in urban areas. The inactive, including retirees, are also less motorised than the average (around 80%), but the motorisation rate of those over 65 has increased over the last twenty years.

The rate of holding 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	2010	2015	2022
BY SOCIO-PROFESSIONAL CATEGORY						
Farmers	95.9%	98.9%	91.1%	92.1%	88.0%	92.6%
Farm workers	74.7%	-	-	-	-	-
Tradesmen, craftsmen, business owners	95.2%	89.4%	90.6%	91.1%	90.9%	88.4%
Self-employed professionals, executives	94.4%	85.5%	84.6%	84.1%	83.2%	85.1%
Middle management	93.3%	88.7%	90.8%	89.8%	88.0%	90.5%
White collar workers	78.3%	75.9%	77.5%	82.5%	80.1%	83.2%
Blue collar workers	87.2%	89.7%	88.7%	91.2%	90.9%	91.4%
Non-working population	54.6%	65.8%	70.9%	77.1%	77.6%	81.6%
Including retired persons	59.4%	70.9%	76.0%	80.1%	80.6%	80.8%
BY AREA OF RESIDENCE						
Rural areas	82.1%	88.6%	91.1%	92.7%	92.9%	94.3%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	90.2%	91.1%	91.6%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	87.1%	87.8%	87.3%
Towns with over 100,000 inhabitants	74.2%	75.1%	76.6%	80.8%	81.4%	83.2%
Greater Paris	77.0%	60.8%	60.4%	63.6%	59.7%	67.7%
Inner Paris	47.3%					
BY LOCATION OF RESIDENCE						
Town center	-	67.6%	69.4%	73.0%	71.6%	74.0%
Suburb	-	79.3%	80.5%	83.2%	82.1%	84.8%
Peri-urban area	-	88.5%	89.8%	91.6%	92.5%	93.1%
Rural area	-	85.3%	90.4%	94.8%	94.4%	94.3%
BY AGE OF HEAD OF HOUSEHOLD						
Under 25	-	51.2%	49.3%	64.9%	74.0%	62,5% (1)
25 to 34 years old	-	85.1%	82.4%	83.9%	82.5%	87.3%
35 to 44 years old	-	86.7%	86.3%	88.0%	87.3%	86.5%
45 to 54 years old	-	87.5%	87.4%	88.1%	84.7%	88.3%
55 to 64 years old	-	84.9%	87.0%	86.9%	85.1%	86.9%
65 to 74 years old	-	61.9%	69.0%	76.2%	78.6%	84.4%
Over 75 years old	-					78.1%
VEHICLES WITH A WOMAN AS THEIR MAIN DRIVER	-	-	40.4%	41.5%	41.9%	42.7%
ALL	76.5%	78.4%	80.3%	83.5%	82.9%	85.0%

(1) Figure not significant because the sample is too small.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO from 1994

The motorisation rate is measured by the percentage of households with at least one car. After several years of decline, it has increased since 2015 (+2 points) to reach 85% in 2022.

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

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

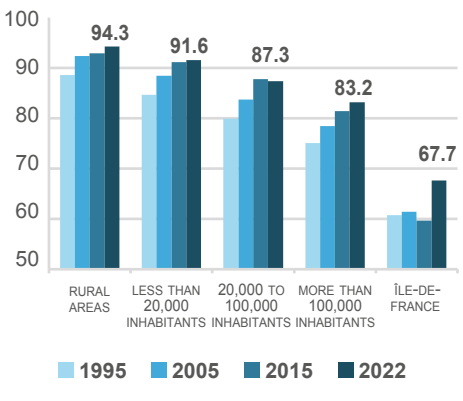
• Motorisation rates in towns with more than 100,000 inhabitants will stabilise at around 83% in 2022, compared to 75% in 1995. On the other hand, in large cities, motorisation rates have increased since COVID. In the Paris metropolitan area the rate is 67.7% in 2022, compared to 65.6% in 2020. In the Lille and Lyon metropolitan areas, the motorisation rates increased from 87% to 92% and from 76% to 80% respectively. In the Marseille metropolitan area, on the other hand, the motorisation rate fell by 5 points in 2022 to 81%, compared to 86% in 2021.

• Rural households, large families, as well as workers and agricultural operators constitute highly motorised categories (90%). In addition, their multi-motorisation rates are also above average.

• The categories of employees and inactive people (including retirees) are relatively less equipped but, since 2000, their motorisation rate has increased regularly.

In 2010, among households that did not own a vehicle, the proportion of households that had "demotorised" was 45%, compared to 55% of households that had never owned a vehicle. Then, the share of demotorised households increased significantly to reach 57% in 2017 (compared to 43% having never owned a car). Since 2017, the demotorisation rate has fluctuated around 55% and has fallen to 54% in 2022. The main cause of non-motorisation remains the absence of a driving license (cited by 49% of people), followed by the absence of need (44%). In third and fourth position, the costs of acquisition (30% of non-motorised households) and use (28%) are now cited as the cause of non-motorisation, ahead of the preference for public transport (27%) and for cycling or the market (22%). Among non-motorised households, 14% of them plan to re-motorise over the next two years, a share down 1 point compared to 2021.

CAR OWNERSHIP BASED ON AREA OF RESIDENCE



THE HOUSEHOLD CAR FLEET

After having declined regularly since the 2000s, daily car use has stabilised at around 72%. Then, in 2020, it fell again with the health crisis and remained at this level in the following years with the development of teleworking. The share of fleet vehicles used daily or almost daily rises to 67% in 2022 (vs. 69% in 2019). The main reasons for using the car are shopping (88% of vehicles) and leisure (74%). The share of vehicles used for commuting is 52%. Finally, 22% of vehicles are used to take children to daycare or school.

The average age of the household fleet and the length of vehicle ownership continues to increase. Since 2020, the phenomenon has been accentuated by the economic context and the weakness of the new home market. In 2022, the average age of the fleet stood at 9.8 years, compared to 8.9 years in 2019, and the vehicle ownership period increased to 6.2 years, compared to 5.5 in 2019.

The mileage of the vehicles owned or made available to households reflects the aging of the fleet, the weight of new registrations in the fleet, but also the intensity of vehicle use. In 2022, the mileage of a petrol vehicle amounts to an average of 72,440 km, compared to 135,7000 km for a diesel vehicle, which is more intensively used. Between 2010 and 2022, the mileage of diesel vehicles has continued to increase (except for 2020) with the drop in diesel registrations. That of a petrol vehicle decreased continuously to reach its lowest level in 2020 (67,880 km) and rebounded slightly in 2021 and 2022. All energies combined, the average mileage thus increased from 70,000 km in the early 1990s at an average of 105,000 km between 2005 and 2017, then decreased to reach 101,360 km in 2022. In recent years, the lower use of vehicles has weighed more than the aging of the fleet or the low number of new registrations.

Finally, the share of diesel vehicles in the fleet continues to decrease with the drop in registrations. They now represent less than one in two vehicles (46.7% of the fleet), compared to more than 60% in 2015, a drop of more than ten points in less than ten years.

7 out of 10 cars **Are used every day (or almost)**

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

	units	1990	2000	2005	2010	2015	2019	2020	2022
Total	millions	23.0	27.4	31.0	33.6	34.1	36.1	36.2	36.1
Average age	year	5.8	7.3	7.7	8.0	8.9	8.9	9.0	9.8
Average ownership period	year	3.7	4.4	4.7	5.0	5.5	5.5	5.6	6.2
BREAKDOWN BY AUTOMOTIVE GROUP									
Renault Group	%	33.3	33.3	30.2	28.6	28.3	27.6	27.1	27.0
Groupe PSA before 2021, Stellantis outside FCA otherwise	%	38.3	35.2	36.4	38.2	36.5	39.2	38.5	37.0
Foreign brands	%	28.4	31.4	33.2	33.2	35.2	33.2	34.4	36.0
BREAKDOWN BY FISCAL POWER									
2 & 3 HP	%	3.4	0.7	43.3	44.4	49.2	51.7	50.9	51.2
4 & 5 HP	%	38.4	40.5						
6 & 7 HP	%	47.1	50.0	46.6	42.5	39.0	35.7	36.6	35.7
8 HP & more	%	12.8	8.8	10.1	13.1	11.8	12.6	12.5	13.1
BREAKDOWN BY VEHICLE RANGE									
Small cars	%	39.4	45.1	44.5	46.8	49.3	47.7	48.5	48.0
Low-mid	%	20.8	27.3	32.2	30.9	29.2	25.7	23.6	22.0
High-mid	%	26.0	19.9	16.2	11.5	7.9	4.9	5.1	5.0
Premium range	%	8.7	7.0	5.7	5.0	3.0	2.3	2.1	2.0
Others	%	5.1	0.8	1.4	5.7	10.6	18.5	20.7	24.0
Percentage of cars purchased new	%	50.4	43.9	40.1	41.1	41.5	41.8	41.5	40.4
BREAKDOWN BY TYPE OF FUEL USED									
Premium unleaded - Petrol	%	15.3	49.1	51.1	40.1	38.8	46.0	46.0	49.8
Premium leaded - AVSR	%	62.1	11.9						
Diesel	%	17.2	38.1	48.9	59.9	61.2	54.0	52.0	46.7
Kilometres on clock	km	69,500	93,140	99,460	103,470	105,590	102,120	99,670	101,360
Percentage of vehicles used on daily or near daily basis	%	75.1	78.7	75.7	71.8	71.9	69.0	67.3	67.0
Share of vehicles used for home-work travel	%	55.4	55.1	55.2	53.7	52.2	52.0	52.3	51.0

Note: From 2007 onwards, years are not directly comparable to previous years; the scope of light commercial vehicles has been expanded.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO from 1994

The AUTO 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 (around 4% of the total).

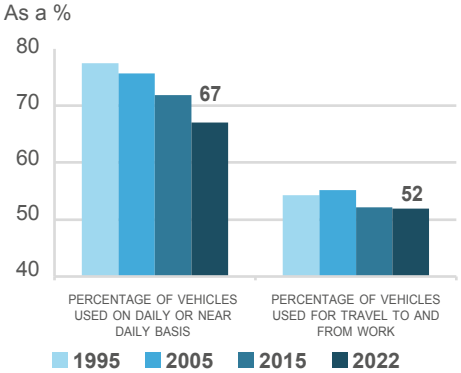
The low level of new vehicle registrations over the past 3 years is weighing on the average age of vehicles in the fleet. The average age of the petrol fleet, which tended to decline, rose again for the second consecutive year and stood at 9.3 years, compared to 8.5 years in 2020. The average age of diesel continues, for its part, to its increase initiated in 2009 and reaches 10.7 years in 2022, compared to 6.8 years in 2008. The weight of vehicles over 5 years old rises to 70% in 2022, or four points more than in 2019. This is explained by the increase in those over 10 years old, who now represent 37% of the population (+4 points in 2 years).

The most common fiscal powers are between 2 and 5 CV and their share stagnates around 51% of the fleet. Lower and lower mid-range cars represent respectively 48% and 22% of the fleet in 2022. The share of cars in the miscellaneous range, essentially made up of 4WD, SUV vehicles, continues its strong progression and amounts to 24% of the stock in 2022, compared to 10.6% in 2015.

The equipment of fleet cars with automatic transmissions and emergency systems (E-Call) continues to progress. In 2022, 21% of cars are equipped with an automatic transmission (+5 points in 2 years) and 12% with an E-Call system (compared to 3% in 2016). Multi-motorised households are more equipped, with 31% and 19% of cars equipped respectively for these households. The speed limiter is now fitted to 67% of cars in the fleet and 83% of multi-motor homes.

Concerning the use of vehicles, the behaviours that emerged during covid seem to be lasting, with a share of vehicles used every day or almost not increasing. Regarding driving frequency, the share of daily drivers stagnates at 75% in 2022 and is up slightly compared to 2007 (73%). In the Paris metropolitan area, this frequency is only 57% and tends to decrease in inner Paris (19% in 2022, compared to 31% in 2007) and the inner suburbs (48% in 2022, compared to 56% in 2007). Conversely, in other areas including large cities, daily driving is intensifying more than 8 out of 10 households in towns with less than 100,000 inhabitants and 7 out of 10 households in towns with more than 100,000 inhabitants in 2022. In the Paris metropolitan area, 57% of households use their car daily in 2022 and 62% in the Lyon metropolitan area.

VEHICLE USE



DOMESTIC PASSENGER TRANSPORT

In 2022, domestic passenger transport of all modes combined increases by 14.4% in 2022, to 1000 billion passenger-kilometres, i.e. a level which is close to that before the crisis (-3.4% compared to 2019). This growth is observed for all modes of transport, but it is stronger for rail and air transport.

Expressed in passenger-kilometres and limited to internal transport, the road is predominant in passenger travel with 87% modal share. But in 2022, as in 2021, the share of private cars falls by 2 points, and stands at 82%, compared to 86% in 2020. This drop is to the benefit of rail transport, whose modal share increases by 2 points at 11.8%. The share of buses, coaches and trams remains stable (4.8%). The modal share of air transport amounts to 1.3%.

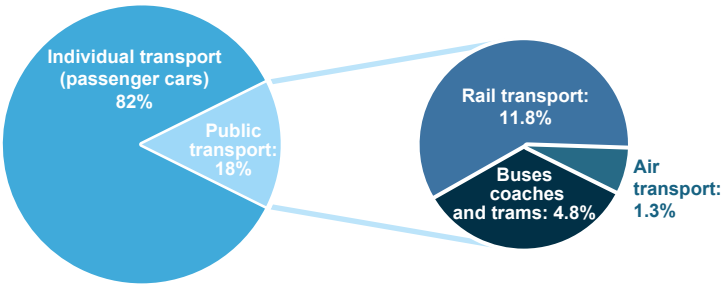
Mobility by passenger car is the one that was less impacted by travel restrictions in 2020. It therefore rebounded less strongly than other modes in 2021 and is growing at a lower rate in 2022. Its level is only 3% lower. to that of 2019. Public road transport lost 40% of its passenger kilometres in 2020 and only slightly rebounded in 2021. In 2022, it will increase by only 15%, i.e. more weakly than other modes of collective transport. It remains down 21% compared to 2019.

The rail mode, which includes journeys by train (TGV, TER, RER), but also by metro, is the only mode which has gained passenger-kilometres compared to 2019 (+5%). It was strongly impacted by the COVID crisis in 2020 (-42%) but benefited from growth of more than 30% in the following two years. In 2022, it will reach its highest level thanks to the dynamism of the TGV (+41%), but also of the Île-de-France network (+32% for trains and RER and +33% for the metro), in line with favourable investment decisions and rail policies.

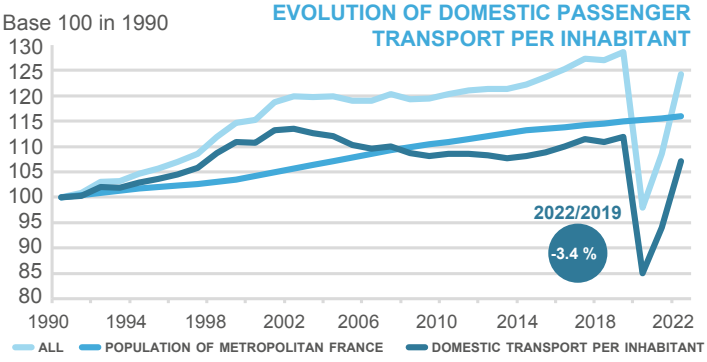
Finally, air transport, which had lost half of its flows and reached a historically low number of travellers in 2020, is growing in 2021 and 2022 by more than 30% each year, but it remains down 17% compared to 2019.

+14.4 % **Increase in domestic passenger transport of all modes expressed in passenger-kilometres in 2022**

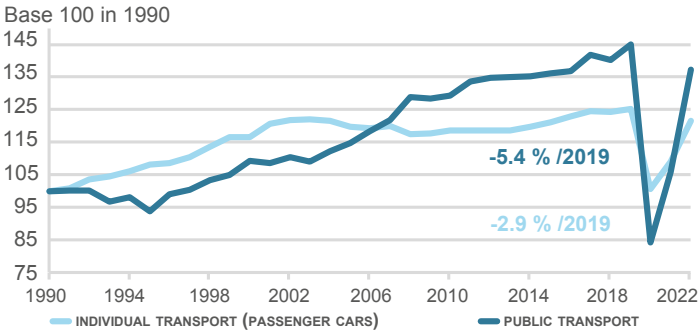
BREAKDOWN OF DOMESTIC PASSENGER TRANSPORT BY MODE IN 2022



EVOLUTION OF DOMESTIC PASSENGER TRANSPORT PER INHABITANT



EVOLUTION OF PUBLIC AND INDIVIDUAL TRANSPORT



Sources: MTE/SDES, INSEE

The mobility of people is obviously linked to the economy, as with 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-work commutes constitute an important basis, 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 transport modes lie in the origin-destination, distance, times and individual constraints (volumes transported, schedules, etc.). The development of new individual transport services also broadens modal choice.

Passenger transport requires, for each mode, significant investments, generally amortised over a long period, to build and maintain infrastructure.

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

Domestic passenger transport, expressed in passenger-kilometres relative to the number of inhabitants, increased continuously between 1990 and 2002 (+1.1% per year). Then, due in particular to the increase in fuel prices, a plateau seems to have been reached and an average drop of 0.4% was observed between 2002 and 2013. From 2014, domestic passenger transport per capita increased again, linked to the increase in individual mobility, but at a low average annual rate (+0.5% between 2014 and 2019).

The 2020 crisis constituted a historic rupture that the years 2021 and 2022 have not yet succeeded in erasing.

DOMESTIC FREIGHT TRANSPORT

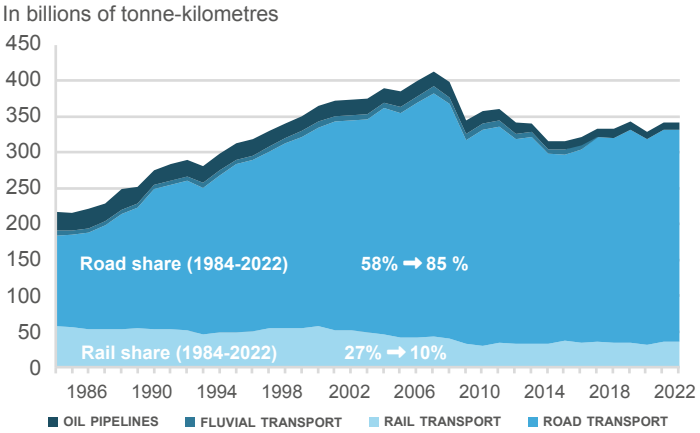
Domestic transport of goods (including oil pipelines) remained stable in 2022 at 348.6 billion euros. Transport by heavy goods vehicle is the main mode of transport used and represents 85% of tonne-kilometres transported, a share which remains stable in 2022. It meets numerous criteria which are involved in the modal choice and is adapted to most flows. Indeed, in 2021, 64% of the tonnes loaded by the French flag are delivered within 150 kilometres, making modal shift difficult. Conversely, only 5% of the tonnes transported are transported more than 500 kilometres.

Over the last fifteen years, road freight transport has gone through different phases. In 2009, it was strongly impacted by the economic crisis and experienced a low point at 284 billion tonne-kilometres. After a rebound in 2010-2011, the decline continued (-1.5% per year) until 2015, linked to the decline in activity of the French flag in favour of the foreign flag. Then, from 2016, the economic recovery allowed the return of growth (+4% per year) which was interrupted by the Covid crisis. After a recovery in 2021 and 2022, road freight transport activity stands at 296.2 billion tonne-kilometres, as in 2019.

Rail transport, which represents 10.1% of tonne-kilometres, falls by 1.4% in 2022 to 35.3 billion tonne-kilometres, particularly in connection with the strikes of December 2022, but it remains slightly above from its 2019 level. As for river transport, it fell by 9.3% in 2022, impacted by the decline in the flow of raw materials (ore, extraction products, construction materials), but also by drought and from the lower level of the Rhine and the Moselle.

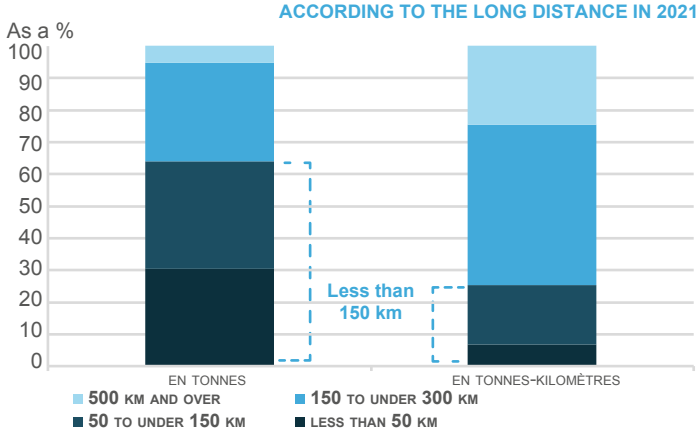
85% **Share of road transport in land transport of goods measured in tonne-kilometres in 2022**

DOMESTIC FREIGHT TRANSPORT IN FRANCE



Source: MTE/SDES

BREAKDOWN OF FREIGHT TRANSPORT USING FRENCH HAULIERS ACCORDING TO THE LONG DISTANCE IN 2021



Source: MTE/SDES, Road Freight Haulage survey

The demand for freight transport is closely linked to the country's economy and its interactions with others; it corresponds, on the one hand, to the internal 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 road freight transport, this results in the phenomenon of cabotage but also, for several years, in the arrival of foreign players, who are taking increasing market shares under the French flag.

The physical transfer of goods and goods exported by a country is one aspect of the competitiveness of the economy. In order to face competition and facilitate exporting activity, the social and fiscal burden weighing on road transport, whether under common law or specific (fuel tax), must be close to that in force in other European countries.

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

The internal demand of different economic agents concerns very varied merchandise or goods. It is satisfied by national (self)production, or by imports. Transport makes it possible to physically connect 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 land use planning is all the more significant.

Due to the great variety of goods and merchandise, many factors come into play and can influence the choice of mode of transport. It's the case for:
- the weight of the goods: automobile manufacturers mainly transport their steel coils by rail or river;
- the value of the goods and merchandise transported;
- delivery time: perishable goods, such as fresh produce, must be transported quickly and are therefore mainly by road;
- the place of departure and arrival of 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, namely a massification of flows, is all the more relevant. The same applies if, during a transport chain, several modes are used, particularly due to load breaks between these different modes.

Road transport of goods, through its ability to irrigate the capillarity of the road network, its flexibility, its capacity for adaptation 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. Good intermodality is based on an economically acceptable cost and efficient changes in transport modes. The energy transition of road freight transport must be part of this framework.

Without considering the geographical positioning of departure and arrival locations, there are two main units for measuring the transport of goods: the tonne measured during loading and tonne-kilometres. Road remains predominant in the transport of goods, with a modal share of 86% of tonne-kilometres travelled.

ROAD TRAFFIC

Road traffic, expressed in billions of vehicle-kilometres, increased on average by 1.5% per year between 1990 and 2012. Until 2002, its growth was greater than 2%, then it slowed down significantly, growing by 0.6% per year between 2002 and 2012. Over the period 2012-2022, it shows an average annual growth of 0.3%. In 2020, with travel restrictions linked to Covid, it fell by 17.6%. Despite a rebound of 8.5% in 2021, then 9.1% in 2022, it reached 629 billion vehicle-km, down 2.4% compared to 2019.

Traffic is mainly carried by light vehicles (92% of total traffic). In 2020, confinements and the development of teleworking had a significant impact on the journeys of passenger cars, which fell more than those of goods transport vehicles. In 2022, the circulation of passenger cars rebounded more (+9.9%) than that of other vehicles, but it remains down 2.6% compared to 2019.

In 2022, the circulation of light commercial vehicles registered in France increases by only 2.1% and remains below its 2019 level (-1%). That of heavy goods vehicles, which had slowed down since 2018 due to the economic slowdown and had been less impacted in 2020, will increase by 1.5% in 2022 and has now exceeded its pre-crisis level.

At the end of 2022, more than 30% of the passenger car fleet has a Crit'Air 1 and E sticker. For heavy goods vehicles, 57% of the fleet has a Crit'Air 2 sticker. Their virtuous presence in traffic is even more important that they drive more than older vehicles.

+9,1% **Increase in traffic in 2022**

► OVERVIEW OF ROAD TRAFFIC

	1990	2000	2012	2019	2020	2021	2022	Average annual variation as a %		
								2012/1990	2022/2012	2022/2021
TOTAL VEHICLES (annual averages in thousands of vehicles)	**28,726**	**34,333**	**41,729**	**45,043**	**44,939**	**45,486**	**45,751**	**+1.7**	**+0.9**	**+0.6**
Cars	23,939	28,746	35,480	38,093	38,046	38,461	38,683	+1.8	+0.9	+0.6
Petrol	20,303	18,715	13,407	15,272	15,858	16,725	17,581	-1.9	+2.7	+5.1
Diesel	3,636	10,031	22,073	22,821	22,188	21,736	21,101	+8.5	-0.4	-2.9
Non rechargeable hybrids	-	-	21	426	544	791	1,108	-	+48.7	+40.1
Plug-in hybrids	-	-	28	75	109	224	357	-	+29.0	+59.4
Electricity & other energies (excluding LPG)	-	-	11	125	187	312	491	-	+46.2	+57.4
Light commercial vehicles (LCV)	4,177	4,946	5,573	6,252	6,196	6,320	6,356	+1.3	+1.3	+0.6
Petrol	2,279	1,261	291	219	212	218	232	-8.9	-2.2	+6.4
Diesel	1,944	3,598	5,254	5,974	5,916	6,019	6,022	+4.6	+1.4	+0.0
Hybrids and gas	-	-	21	20	21	28	36	-	+5.5	+28.6
Electricity & other energies (excluding LPG)	-	-	8	40	46	55	66	-	+23.5	+20.0
French heavy trucks (>5t)	543	561	591	606	605	612	619	+0.4	+0.5	+1.1
French buses & coaches	67	79	85	92	92	94	94	+1.1	+1.0	+0.0
KILOMETRES (annual averages) (in thousands of km)										
Cars	13.66	13.96	12.83	12.51	10.21	10.95	11.96	-0.3	-0.7	+9.2
Petrol	11.95	10.73	8.23	8.92	7.55	8.24	8.87	-1.7	+0.7	+7.7
Diesel	21.28	18.75	15.56	14.75	11.92	12.70	13.91	-1.4	-1.1	+9.6
Non rechargeable hybrids	-	-	19	16	13	15	16	-	-1.6	+11.7
Plug-in hybrids	-	-	18	16	13	16	18	-	+0.3	+18.3
Electricity & other energies (excluding LPG)	-	-	8	11	9	10	11	-	+3.5	+11.7
Light commercial vehicles (LCV)	14.90	16.20	14.64	14.17	12.69	13.60	13.79	-0.1	-0.6	+1.4
Petrol	9.92	7.49	4.91	5.97	5.96	6.84	7.41	-3.1	+4.2	+8.3
Diesel	20.16	18.60	15.22	14.53	12.98	13.89	14.09	-1.3	-0.8	+1.4
Hybrids and gas	-	-	10	10	10	14	19	-	+7.4	+36.1
Electricity & other energies (excluding LPG)	-	-	7	8	7	8	7	-	+1.1	-0.9
Heavy trucks (>5t)	42.19	47.83	44.79	44.20	41.09	43.89	44.03	+0.3	-0.2	+0.3
Buses and coaches	31.55	30.56	33.52	33.34	25.02	29.12	31.80	+0.3	-0.5	+9.2
UNIT CONSUMPTION (in litres per 100 km)										
Petrol cars	8.68	8.12	7.61	6.90	6.83	6.77	6.80	-0.6	-1.1	+0.4
Diesel cars	6.73	6.74	6.35	5.96	5.94	5.95	5.90	-0.3	-0.7	-0.8
Petrol LCV	9.39	9.22	7.91	7.60	7.52	7.52	7.50	-0.8	-0.5	-0.2
Diesel LCV	9.77	9.35	7.93	7.80	7.77	7.77	7.80	-0.9	-0.2	+0.3
Heavyweight	36.23	36.62	34.97	33.32	32.98	32.87	32.60	-0.2	-0.7	-0.8
Buses and coaches	32.00	32.99	32.78	30.72	30.41	30.41	30.40	+0.1	-0.8	-0.0
TOTAL FUEL CONSUMPTION (in millions of litres)										
Petrol	24,956	19,172	9,978	11,087	9,438	10,654	12,202	-4.1	+2.0	+14.5
Diesel	19,775	33,105	41,808	40,949	34,132	36,346	37,813	+3.5	-1.0	+4.0
Total	44,731	52,277	51,786	52,036	43,570	47,000	50,015	+0.7	-0.3	+6.4
TOTAL TRAFFIC (in billions of vehicle-km) (1) (2)	**438**	**542**	**609**	**645**	**532**	**577**	**629**	**+1.5**	**+0.3**	**+9.1**
Light vehicles (1)	404	496	560	593	485	527	577	+1.5	+0.3	+9.6
Including French cars	321	394	447	469	382	414	455	+1.5	+0.2	+9.9
Including French light commrcial vehicles	66	80	82	89	79	86	88	+0.9	+0.7	+2.1
French heavy trucks (1)	22.7	26.6	25.7	26.2	24.3	26.2	26.6	+0.6	+0.3	+1.5

(1) Including vehicles registered abroad. (2) Including two motorised wheels.

Source: MTE/SDES/CCTN

Road traffic is estimated by cross-checking information from vehicle counts on the various road networks, with the average annual mileage travelled by vehicles in the fleet and fuel consumption data. Vehicles registered abroad are included. Since 2020, the traffic report has been based on the new SDES road vehicle directory (RSVERO), which combines information from registration certificates and technical inspections. The long series have been reconstructed and the estimates are updated from one year to the next.

In 2022, the number of vehicles registered in France is estimated at 45.7 million, an increase of 0.6%. The number of diesel cars in the fleet continues to decline (-2.9%) and now represents 54.5% of the total. In traffic, this share is higher (64%), due to more intensive use of vehicles, but it has been decreasing regularly since 2014 with the aging trend of diesel cars and the drop in average annual mileage. Petrol engines, for their part, are increasing in the fleet and in traffic, with vehicles getting younger and an increase in average mileage. But, in 2022, this trend slows down with the development of other engines, notably hybrids, which occupy a growing share in traffic (5.4% in 2022, compared to 3.6% in 2021) and in the fleet (3. 8% in 2022, compared to 2.6% in 2021. 100% electric engines now represent 1.3% of the fleet (2.2% with plug-in hybrids) and 1.2% of traffic (2.7% with plug-in hybrids).

The improvement in the technical performance of engines has made it possible to reduce the consumption gap between petrol and diesel cars. From 2 litres at the beginning of the 90s, it has fallen today to less than a litre. Since 2015, consumption of petrol and diesel cars has fallen by 6.8% and 3.6% respectively. In 2022, the unit consumption of a petrol car increased to 6.8 litres per 100 km, due to the development of this engine in higher segments. That of a diesel car is 5.9 litres per 100 km.

The heavy goods vehicle fleet has returned to growth since 2015 and continues to grow in 2022 (+1.1%). The unit consumption of heavy goods vehicles has been falling continuously since 2015 (-5.5%) and will continue in 2022 (-0.8%). The heavy goods vehicle fleet has also been transformed and includes 59% EURO VI standard vehicles by the end of 2022 (82% for tractors). We also observe a regular increase in the share of vehicles over 19 t in the rigid fleet (65% at the end of 2022, compared to 57% in 2011). The rejuvenation of the vehicle fleet, as well as the increase in their carrying capacity, contributes to optimising the energy efficiency of road freight transport.

ROAD TRAFFIC AND CO_2 EMISSIONS

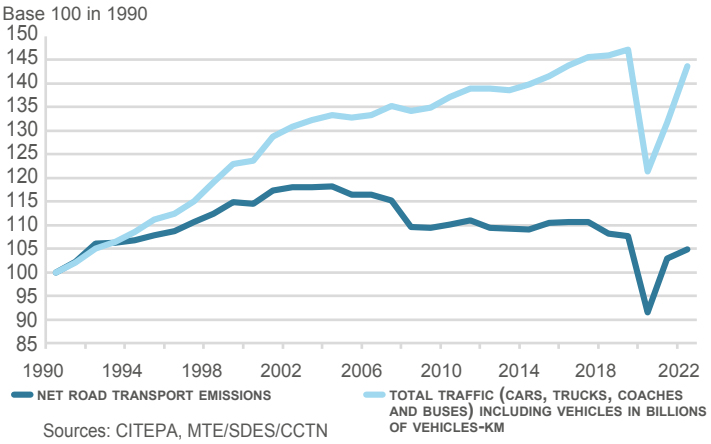
After a historic decline recorded in 2020 in the context of the health crisis, road traffic and associated CO_2 emissions increased in 2021 and 2022. Road traffic grew by 18% over two years, settling slightly below the level of 2019. CO_2 emissions from road transport increased by 15% over this same period, remaining 3% lower than the level observed in 2019. Between 1990 and 2022, the total circulation of French and foreign vehicles on French territory increased by 44%; their associated CO_2 emissions, net of renewable energies, increased by only 5%.

Over the long term, different factors are responsible for improving energy efficiency. The first is the drop in the average unit consumption of passenger cars in circulation and registered in France, which has fallen by 24% since 1990. This is the consequence of the dieselisation of the fleet between 1990 and 2015 of the bonus/malus system established in 2008 and the efforts of manufacturers and drivers. The trend was interrupted occasionally in 2017, but in 2018 consumption of passenger cars fell again, mainly thanks to greater efficiency gains for petrol than for diesel. Progress linked to vehicle unit consumption has continued since then, going from 6 l/100 km in 2017, compared to 5.9 in 2022, for diesel, and 7.1 l/100 km in 2017, compared to 6.8 in 2022, for petrol. However, the growing share of petrol cars in the fleet and in circulation weighs on the average unit consumption of a vehicle in the fleet, which stands at 6.2 litres per 100 km in 2022. Furthermore, the development of cars electric vehicles, which emit no CO_2, are beginning to become a factor in reducing emissions. They represent approximately 1% of traffic. This factor will continue and increase, but its impact on the reduction of CO_2 emissions will be slow.

Concerning energy efficiency in freight transport, this continues to improve. According to the latest estimates, the quantity of CO_2 emitted by an industrial vehicle, when moving a tonne of goods over one kilometre on French territory, has fallen by 26% between 1990 and 2022. This progress is mainly explained by the improvement of vehicle performance (better engine efficiency, increase in vehicle size allowing massification), optimisation of logistics (increase in filling rate, reduction in empty returns) and dissemination of good practices in eco-driving matters.

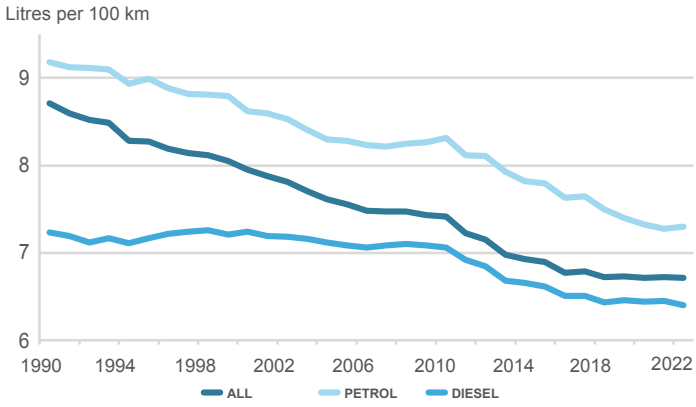
-24% **Reduction in the average unit consumption of a passenger car in circulation since 1990**

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



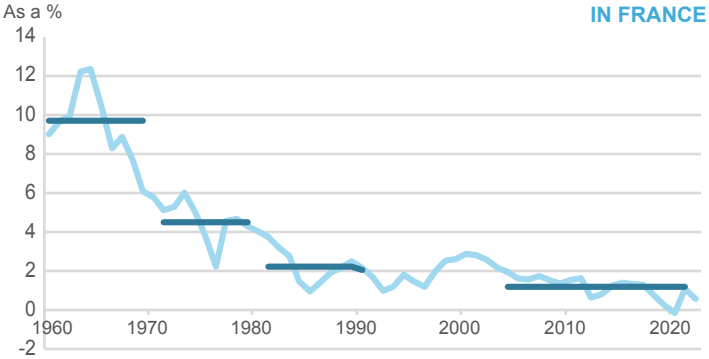
Sources: CITEPA, MTE/SDES/CCTN

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



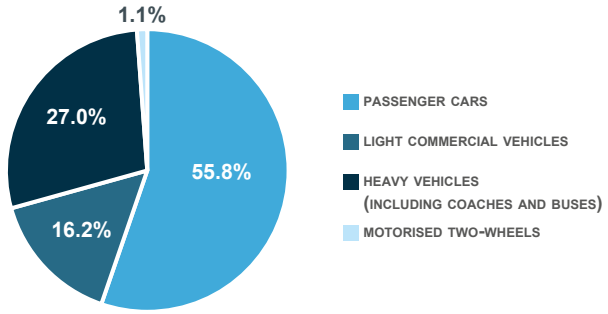
(1) Unit consumption includes the overconsumption effects associated with biofuels.
Source: Road traffic report (MTE/SDES)

ANNUAL GROWTH RATE OF THE PASSENGER CAR FLEET IN FRANCE



Sources: CCFA, MTE/SDES

BREAKDOWN OF CO_2 EMISSIONS FROM ROAD TRANSPORT IN 2022



Source: Citepa / Secten (2022 Edition)

The circulation of passenger cars results from two components: the car fleet and their average annual mileage. Over a long period, the growth rate of the fleet slowed down significantly, after the phase of access to motorisation. It went from 9.7% average annual growth between 1957 and 1970, to respectively 4.5%, then 2.2% growth in the 1970s and then 80s. Since 2004, the average annual growth rate has risen at 1.3%, it slowed down significantly from 2018 (less than 1% per year) but remains positive.

The development of multi-motorisation, followed by significant increases in fuel prices, are the main factors linked to the drop in average annual mileage. Between 2000 and 2019, average annual mileage fell by 0.6% per year. After a very sharp decline in 2020, it remains down 4% in 2022 compared to 2019.

In 2022, new estimates from the Interprofessional Centre for Atmospheric Pollution Studies (CITEPA) for road transport show net CO_2 emissions from renewable energies of 122 million tonnes, compared to 126 in 2019. After the ceiling observed in early 2000s, around 135 million tonnes, a clear decline was recorded from 2004 to 2009, linked, among other things, to the effects of the economic crisis, then a stabilisation around 130 million tonnes was observed until 2019 Travel restrictions and the development of teleworking caused road traffic to fall in 2020, leading to a drop in CO_2 emissions (-15%). In 2022, the level of emissions rises again but increases by only 1.6%. It remains down 3% compared to the level observed in 2019.

In 2022, net CO_2 emissions from renewable energy in road transport are distributed, according to CITEPA, at 55.8% for cars, 16.2% for light commercial vehicles, 27% for heavy goods vehicles, buses and cars and 1.1% for motorised two-wheelers.

NEW USES OF THE AUTOMOBILE

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

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. Carpooling, car-sharing and rental between individuals are part of these new consumption practices.

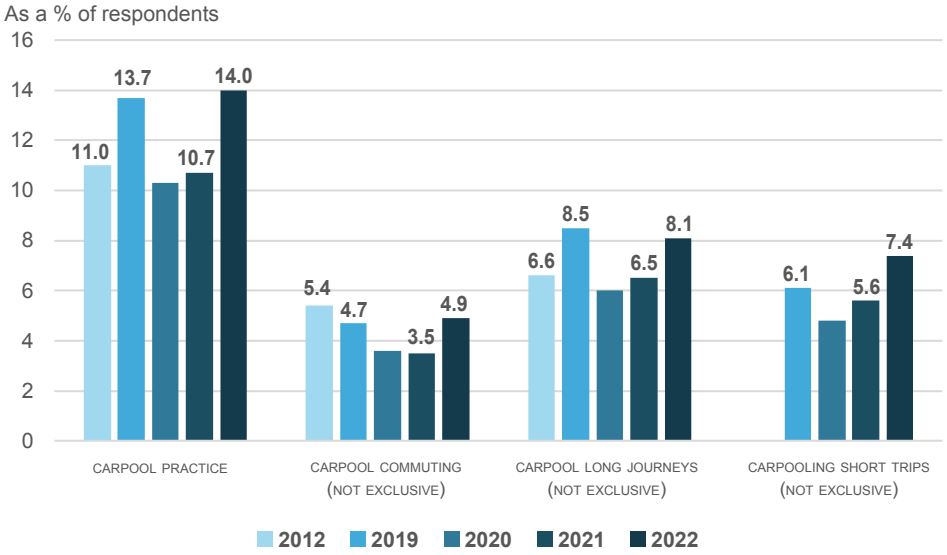
Car-sharing makes it possible to reduce vehicle use and maintenance costs and increase the transport offer in peri-urban and rural areas at a lower cost for the community. In dense areas, it is also a complement to public transport (loads to be transported, staggered schedules) which improves the occupancy rate of vehicles, with positive effects on the environment and energy consumption.

Among the developments, we also observe a strong growth in chauffeur-driven transport vehicles (VTC) and the development of new services around mobility (passenger information, route calculations, ticketing, parking assistance).

Car manufacturers have adapted their offers to these new needs and are positioning themselves as real mobility operators, by creating new entities and brands dedicated to these activities (Mobilize, Free2Move) and by offering a whole range of new services in France such as abroad: short rentals, car sharing for companies or individuals, “free-floating”, but also rental services with driver (taxis, VTC) and MAAS (Mobility As A Service) platforms which combine multimodal information and tools ticketing. They have also invested in companies linked to mobility and connected services: acquisition of Share Now for Stellantis, acquisition and participation in various startups (Karhoo, iCabbi, glide.io, Bipi) for Renault.

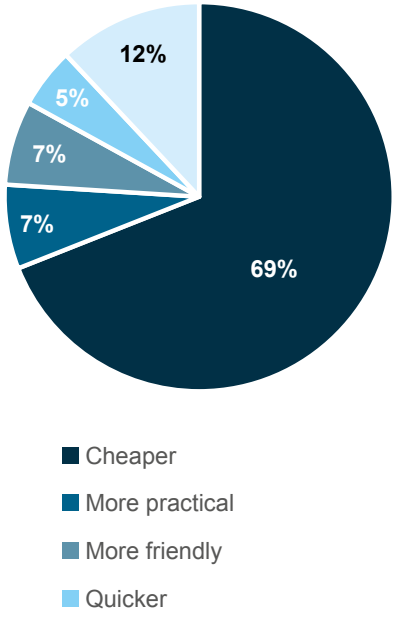
14% **Of respondents carpooled in 2022 (KANTAR TNS survey)**

CARPOOLING PRACTICE SURVEY OVER LAST 12 MONTHS



Source: PARCAUTO TNS Sofres survey handled by CCFA and IFSTTAR

MAIN REASONS FOR CARPOOLING (6T, 2015)



CARPOOLING

Carpooling is defined in the energy transition law for green growth as “the joint use of a motorised land vehicle by a driver and one or more passengers, carried out without charge, except for the sharing of costs, in as part of a trip that the driver makes on his own account. Their connection, for this purpose, may be carried out for a fee” (Art. L. 3132-1).

The mobility orientation law (LOM), promulgated at the end of 2019, strengthened 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 mobility package sustainable. This system allows a public or private employer to set up financial assistance for its employees’ home-work travel using modes other than public transport, and in particular with shared modes such as carpooling.

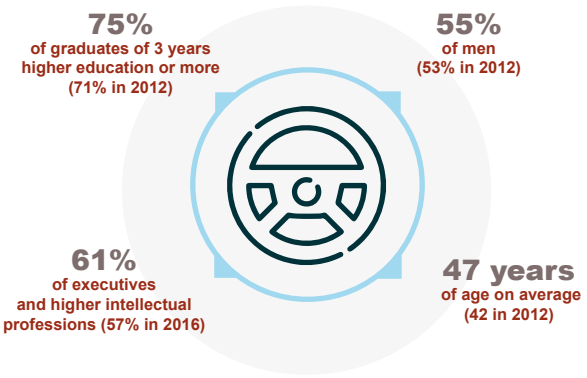
According to the PARC AUTO survey, the practice of carpooling, which had declined in 2020 due to the health crisis and had remained behind in 2021 with the continuation of teleworking, is on the rise in 2022. 14% of those questioned have made a carpool trip in the last 12 months, compared to 10.7% in 2021. 4.9% of those surveyed carpooled for their home-work trips (compared to 3.5% in 2021), 8.1 % for journeys greater than 100 km (compared to 6.5% in 2021) and 7.4% for journeys less than 100 km (compared to 5.6% in 2021). The main motivation is economic, with 58.4% of those surveyed who carpool to save money and 50% for conviviality. With the pandemic, carpooling with friends and family had increased, but in 2022 it will decline. It concerns 83% of carpoolers for home-work journeys (compared to 92% in 2021) and 82% for short journeys (compared to 88% in 2021). For long journeys, carpooling through a connection structure dominates. Thus only 44% of people carpooled with those around them for long journeys. Financial compensation is therefore more present for long journeys with 74% of carpoolers, compared to only 29% for short journeys.

At the end of 2022, the State launched a major national plan for everyday carpooling. It has set itself the objective of tripling the number of daily journeys made by carpooling by 2027 to reach 3 million. From January 1, 2023, a bonus of 100 euros will be paid for first-time drivers and the State will finance half of the financial incentive offered by certain communities. Finally, the Green Fund will be mobilised to the tune of 50 million euros to help communities finance carpooling areas and lines.

Within companies, carpooling is also growing thanks to the sustainable mobility package. 56% of private employers who have deployed it have opened it to carpooling.

NEW USES OF THE AUTOMOBILE

PROFIL OF USERS IN 2019



CARSHARING RENTALS IN 2019

54%
of rentals take place during the week

51€ / 30€
average and medium cost of a rental (56 € / 28 € in 2016)

2.4
average number of rentals per user and per month (2.2 in 2016)

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

► REASONS FOR JOINING A CAR-SHARING SERVICE

- **82%** Avoid problems related to vehicle maintenance
- **81%** Lower cost compared to a private car
- **74%** Ecological nature of car-sharing
- **63%** Avoid parking problems
- **46%** Convenience compared to public transport

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

15 Number of car-sharing operators in 2022

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 subscribed users or authorised by the organisation or person managing the vehicles. Each subscriber or authorised user can access a driverless vehicle for the journey of their choice and for a limited time. A distinction is made between P2P car-sharing (rental between individuals) and B2B commercial car-sharing (intended for employees of a company) or B2C (intended for individuals).

The mobility orientation law, passed at the end of 2019, provided a legal framework for the car-sharing activity by giving mobility organising authorities (AOM) the means to regulate self-service modes of transport on their territory. They can in particular do this by granting, through a "car-sharing label", parking spaces reserved for car-sharing vehicles, provided that they respect the conditions defined by the AOM (type of authorised vehicles, minimum number of rentals per month …). In addition, as with carpooling, the law allowed the costs incurred in car-sharing to be covered in the sustainable mobility package.

The latest ADEME survey, carried out in 2022, indicates that the car-sharing offer has changed little between 2019 and 2022, with 15 operators present in the territory, including 8 loop car-sharing operators and 6 free-floating. There are nearly 12,000 car-sharing vehicles for nearly 300,000 active car-sharers. So-called "loop" car-sharing (collection and return of the vehicle at a station, by reservation and for a defined period) continues to dominate the market, in terms of number of operators and cities served. As in 2019, the profile of users of this type of car-sharing is predominantly male (55%), urban, qualified and active for 80.9% of them (mainly executives). They use car-sharing services on a regular basis for short rentals, for journeys in the local area of residence and for non-constrained reasons. The uses of free-floating car-sharing (without reservation, without station) are different: very short, regular rentals, for trips within the residential area and for everyday trips.

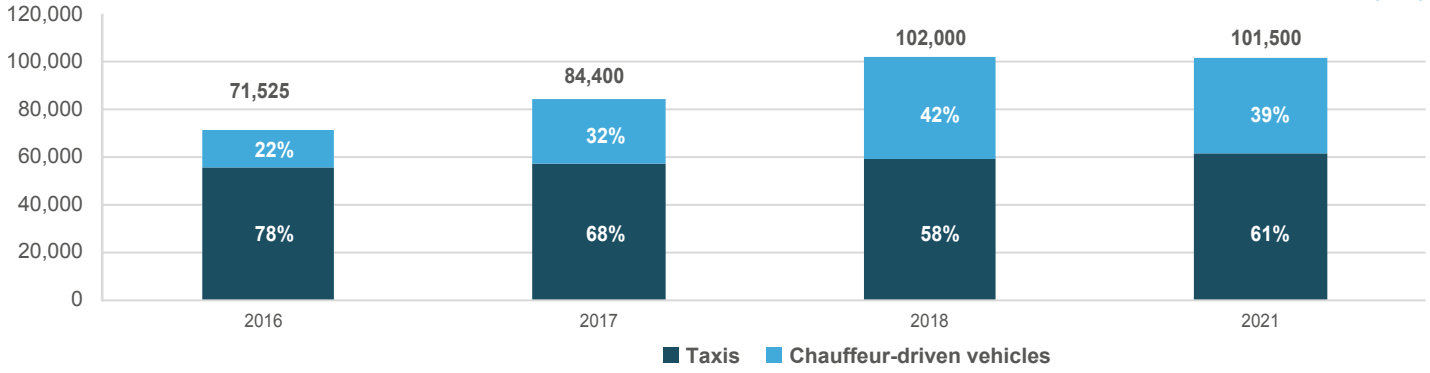
THE B2C AND B2B OFFER FROM FRENCH CAR MANUFACTURERS:

The Renault group offers nearly 10,000 electric car-sharing vehicles in most European capitals. With the Zity brand, it operates a free-floating car-sharing service in Madrid (since 2017), Paris (since 2020), as well as in Lyon and Milan. The principle is the same with Green Mobility in Copenhagen or the Mobi totem in Marseille and Montpellier. With the Renault Mobility application, a car-sharing offer has been developed in several cities, particularly in Nice, where it benefits from the "car-sharing" label. The group has also established partnerships with commercial brands in order to offer the service to their customers.

Stellantis' Free2Move brand and its application of the same name offer self-service car-sharing services in Paris, Madrid, Lisbon, Washington DC, Portland, Denver and Columbus. In July 2022, with the acquisition of Share Now, present in sixteen major European cities with around 10,000 vehicles including 3,000 electric, Free2Move strengthens its car-sharing service offering in Europe. This will be amplified thanks to synergies with Leasys (e.g. FCA).

NEW USES OF THE AUTOMOBILE

NUMBER 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, July 2023

CHAUFFEUR-DRIVEN TRANSPORT VEHICLES (TRANSPORT CARS WITH DRIVER - VTC)

The VTC activity belongs to private public transport of people (T3P), defined by the transport code, which also includes taxis and two or three-wheeled motorised vehicles, commonly called motorcycle taxis.

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

Originally, the status of VTC was inherited from the status of "large discount car" and the profession of "Grand Remisier", luxury passenger car drivers. In 2009, this regime was transformed by the Novelli law, which deregulated the activity and created the status of tourist vehicle with driver. The Thévenoud (2014) and Grandguillaume (2018) laws made it possible to set new regulations applicable to VTCs, now called "chauffeur-driven transport vehicles", and to clarify the contours of the profession.

So today, the VTC activity is subject to specific installation and operating conditions which distinguish it from the taxi activity.

- The vehicle used must meet certain "high-end" requirements. It must have between four and nine seats (driver included), have been in circulation for less than six years (excluding collector vehicles) and meet certain technical characteristics (size, power).
- The driver must obtain a professional VTC card and register in the national register of VTC operators.
- Reservation of the vehicle by the customer is obligatory. 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 fare is completely free, unlike taxi fares, which are regulated and set by decree.

The National Observatory for Private Public Passenger Transport, created in 2017 and responsible for establishing an inventory of the sector, draws up an annual report on activity. The number of VTCs registered in the register increased from 15,000 in 2016 (i.e. 22% of the T3P offer) to 43,000 in 2018 (i.e. 42% of the T3P offer), following the Grandguillaume law (2017), requiring drivers to register in the register to continue their activity. In 2021, we observe a drop (-7%) in the number of active drivers on VTC platforms and a slight increase in the number of taxis (+4%) to 60,500. The concentration of taxis in relation to the population is very high in rural areas and in Île-de-France. VTCs, for their part, work almost exclusively in metropolitan areas.

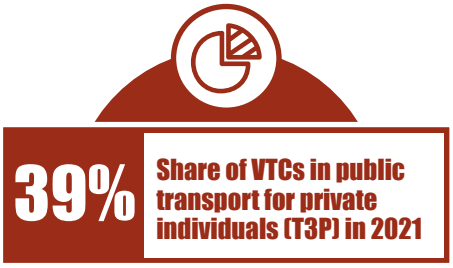
Manufacturers partner with different operators to provide vehicles and services to VTC drivers. Free2move is supporting Uber to convert 50% of the vehicles available on the platform into electric vehicles by 2025. The Mobilize Driver Solutions offer offers in Paris and Madrid a range of 100% electric vehicles and services, totally dedicated to taxis and VTCs.

RENTAL BETWEEN PRIVATE INDIVIDUALS

Vehicle sharing outside the private sphere has also developed and has been facilitated by the development of platforms for connecting individuals. Car rental between individuals allows vehicle owners to rent it when they are not using it and thus amortise certain fixed costs linked to ownership or maintenance. It differs from car-sharing between individuals, which consists of sharing one or more cars between several people who have previously defined its conditions of use.

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

According to the PARC AUTO survey, rental activity, which had declined in 2020 in a context of low mobility, remained at a low level in 2021 and increased slightly in 2022 (6% of the sample used it, compared to 8% in 2019). Concerning private rental, more than nine out of ten people still say they are very reluctant about the idea of providing or renting a car via a platform. However, it is growing: 11% of households having rented a car resorted to private rental in 2021, compared to 7% in 2019.



THE CONNECTED AND AUTONOMOUS VEHICLE

The connected vehicle is based on communication and information sharing between vehicles (V2V) or between vehicles and road or communication infrastructure (V2X), using wireless connectivity systems. Different services are offered to users: entertainment (Bluetooth or 5G), geolocation data (GNSS systems), real-time traffic information, calculation of energy consumption. The development of advanced electronic driving assistance and assistance systems (ADAS) integrated into vehicles also makes it possible to perceive the immediate environment, through sensors, and make driving easier (parking assistance) and more safe (intelligent speed adaptation, warning systems in the event of loss of attention), some of these safety devices now being imposed by European regulations. The progressive development of these connectivity technologies should enable the deployment of automated mobility services.

The different levels of vehicle automation have been defined by the Society of Automotive Engineers (SAE), through a nomenclature which distinguishes driver assistance systems (levels 1 and 2) from systems, where the driver can delegate driving task (levels 3 to 5). The Vienna Convention, adopted in 1968, limited traffic to levels 1 and 2 by requiring the presence of the driver, who had to be in control and remain in control of his vehicle (see box). In 2016, a first development authorised automated driving or delegated driving systems (therefore level 3), provided that the driver remains in control of his vehicle and that these systems comply with UN regulations. Then, in July 2022, an amendment to the Vienna Convention entered into force, allowing the circulation of driverless vehicles, but under certain conditions.

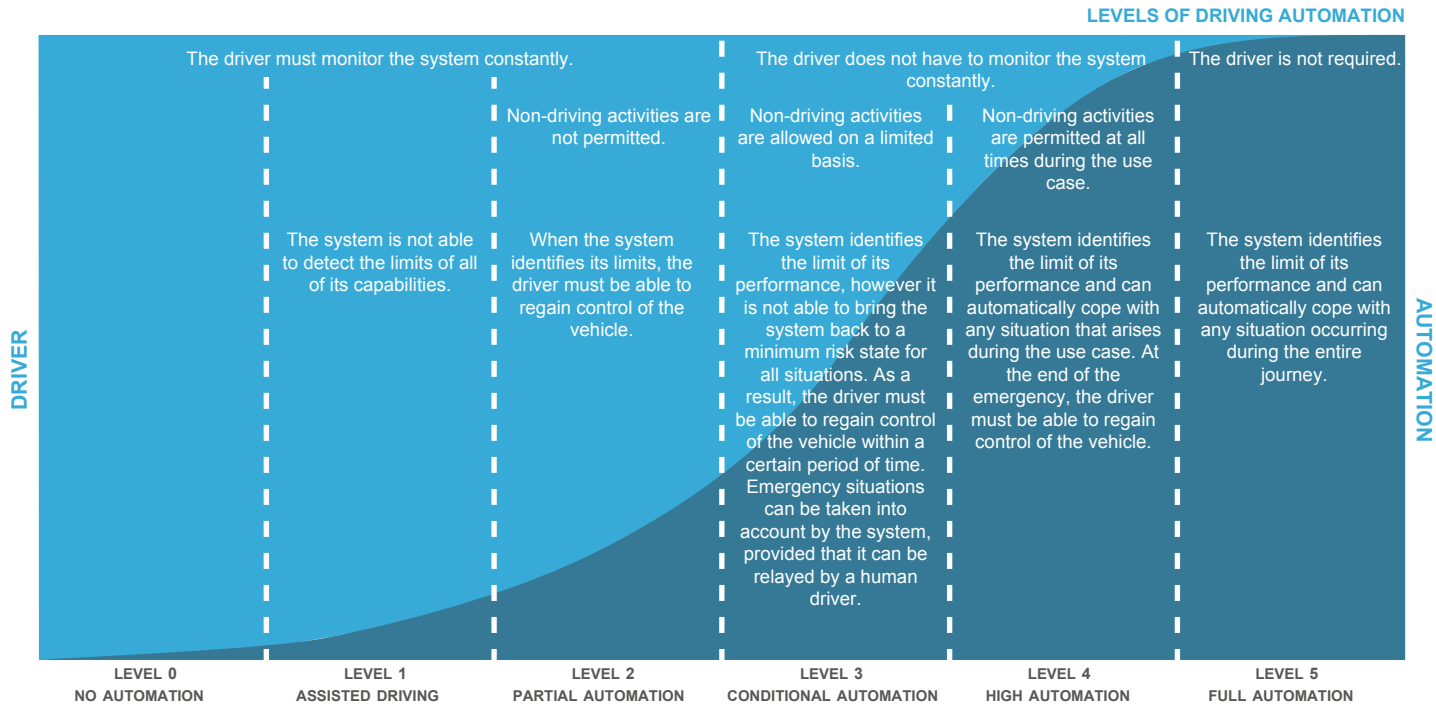
On a technical level, the first regulation on level 3 automation is Regulation 79 UNECE, concerning the approval of vehicles with automated lane keeping systems (known as “ALKS”) adopted in June 2020. This system of Low-speed driving delegation can be activated by the driver only on eligible separate carriageway lanes and at a speed of 60 km/h maximum. Its entry into force in January 2021 was an important step towards the putting into circulation of level 3 autonomous vehicles. Then, the European regulation of August 5, 2022 defined the approval of fully automated vehicles.

On a legal level, the law of August 17, 2015 relating to the energy transition for green growth legally qualifies “autonomous vehicles” as vehicles with partial or total delegation of driving, whether they are private cars, transport of goods or passenger transport vehicles. The mobility orientation law, published in December 2019, made it possible to adopt various structuring provisions for the development of automated mobility, particularly on the question of criminal liability, provisions which entered into force on September 1, 2022.

Vehicle automation and connectivity will make it possible to offer new services related to driving and road safety (alert systems, feedback), focused on the vehicle itself (maintenance services, repair), relating to the road infrastructure (traffic management or the infrastructure itself) or to the driver (insurance services or infotainment services). But a clear distinction can be made between the use of data to serve objectives of general interest (streamlining traffic, improving road safety and the environmental footprint, managing infrastructure) and their exploitation for the development of commercial services. In passenger transport, there are multiple use cases: automatic valet parking, urban shuttles on closed or open sites. In freight transport and logistics, three areas of use have been identified: closed sites, last mile logistics, long distance transport.

Car manufacturers have participated in several national or European projects to test vehicle connectivity and automation. In particular, they tested several level 3 use cases which could eventually be deployed. These include low-speed traffic jam driving, motorway driving with lane changing, automated parking and route memory for repetitive parking manoeuvres.

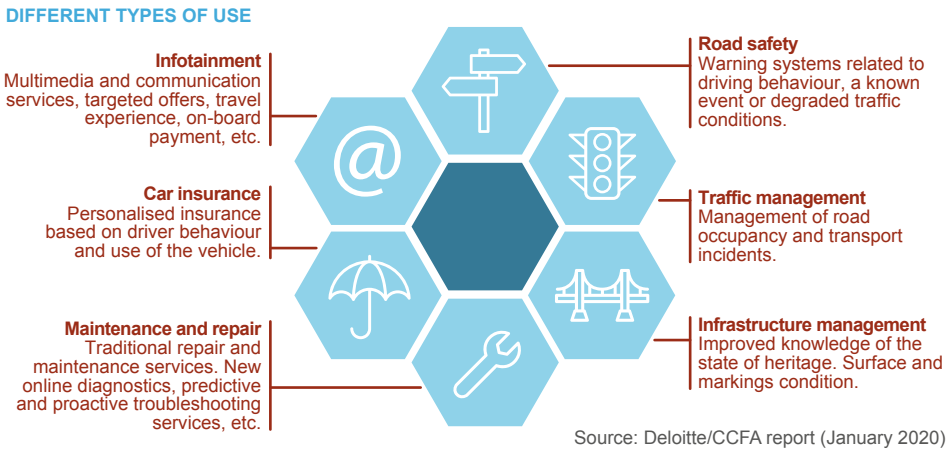
2,000
days of experimentation
135,000
km traveled
for the SAM project



Automation levels were defined by SAE J3016.

THE CONNECTED AND AUTONOMOUS VEHICLE

DIFFERENT TYPES OF USE



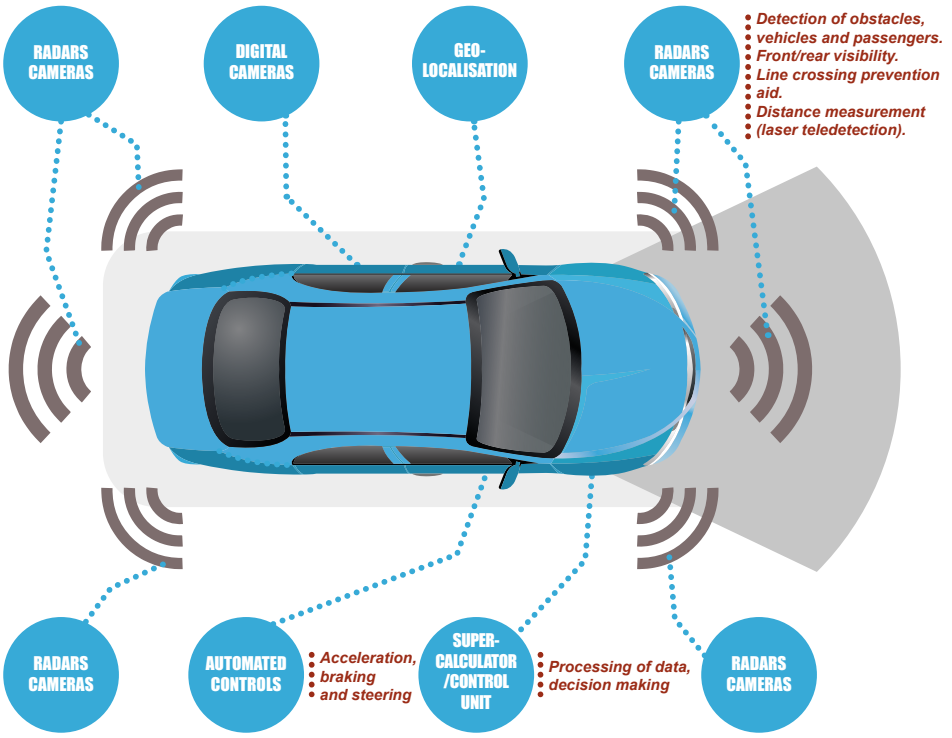
16 major mobility players cooperate to create 5G OPEN ROAD

Source: Deloitte/CCFA report (January 2020)

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).

► EXAMPLES OF ONBOARD INTELLIGENCE SYSTEMS FOR AUTOMATED DRIVING



Government support for the development of autonomous and connected vehicles

In 2018, the French Government initiated a national strategy for the development of autonomous vehicles, which was updated in 2020. It was based on three principles still in force today: safety, progressiveness and acceptability. In 2022, an update was carried out in order to explicitly take into account connectivity issues, and above all to focus not only on vehicles, but also on mobility services made possible by automation and connectivity. This new 2022-2025 strategy aims to accelerate France's commitment on the regulatory, technological and economic levels, in order to make it a leader in the deployment of use cases. It targets between 100 and 500 automated passenger transport services, without operators on board, in 2030.

The mobility orientation law, published in December 2019, 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 specified in a decree of June 29, 2021, which came into force on September 1, 2022. Thus, from now on, the criminal liability of the driver of a vehicle using an automated driving system is not committed during an infraction, if during this incident the system exercises dynamic control of the vehicle. The order also sets out the respective responsibilities of the driver and the manufacturer or designer of these systems and the information obligations of drivers. These provisions cover levels of automation up to so-called "fully automated" systems (i.e. without a driver on board), provided that they are under the supervision of a person responsible for remote intervention and that they are deployed on predefined routes or areas.

The future investments program (PIA) set up by the State to finance innovative investments made it possible, within the framework of PIA3, to launch two national experimental programs (SAM and ENA). The PIA4, announced on January 8, 2021 and with a budget of 200 million euros, led to the launch of a new call for projects "automated road mobility, connected and low carbon service infrastructures". The 8 winning projects (including the 5G Open Road project) concern pilots of automated passenger transport services in various forms (regular services, on-demand transport, or connections to multimodal hubs). The Steering Committee for Automotive Research (CORAM), established in May 2020 and with a budget of 250 million euros in 2022, also supports structuring projects in this area including the 5G Open Road project.

Connected and autonomous vehicle experiments and tests

The general framework

In France, the regulatory framework for experiments was established by the order of August 3, 2016 which requires prior authorisation from the minister responsible for transport, the circulation, on an experimental basis, of vehicles with partial or total delegation of driving on open traffic. This framework was supplemented by the law of May 22, 2019, known as the Pact, which authorises testing of vehicles with the highest levels of automation with an adapted liability regime, and by the Mobility Orientation Bill aimed at the framework circulation of autonomous vehicles. Since the end of 2014, more than 140 experimentation authorisations have been issued.

THE CONNECTED AND AUTONOMOUS VEHICLE

The France Autonomous Vehicles program

As part of the France Autonomous Vehicles experimentation program which supports the national strategy, a call for projects for the experimentation of the autonomous road vehicle (EVRA) was launched in June 2019. The two projects selected are the SAM and ENA projects.

The SAM project *(Safety and Acceptability of Driving and Autonomous Mobility), led by a consortium of autonomous mobility stakeholders (manufacturers, transport operators, local authorities, infrastructure managers, research laboratories) and coordinated by the PFA is a large-scale experimental program (50 vehicles in 13 French territories) carried out over 4 years in three areas: individual mobility, shared or collective mobility and logistics.*

The ENA *(Autonomous Shuttle Experiments)* ***project****, led by Gustave Eiffel University, brings together a consortium of 7 companies, 2 academic establishments and 2 territories. Its first experiment was launched in April 2022 with an automated shuttle service to complement existing urban transport in Sophia Antipolis. The second will be a service serving a sparsely populated rural area (Cœur de Brenne).*

SCOOP / C-ROADS / InterCor projects

Co-financed by the European Commission, the SCOOP project, launched in 2014 and completed at the end of 2019, was the first flagship project for the deployment of cooperative intelligent transport systems, based on the exchange of information between connected vehicles (V2V) and between vehicle and infrastructure (V2I) thanks to vehicle sensors and roadside units. The project brought together public and private partners (communities, car manufacturers, road managers, research centers, etc.) around the Ministry of Transport and deployed 3,000 vehicles on 2,000 km of roads and 5 sites. Other projects such as InterCor (dedicated to freight), InDid or C-Roads were launched subsequently, to extend SCOOP services to other French and European regions. The C-Roads project expands use cases by integrating urban situations and developing new modes of communication, such as the COOPITS road information application deployed in the Bordeaux metropolis in January 2021. This allows the road user to receive real-time information (traffic, parking, reserved lanes) from the road manager to help with driving and promote eco-driving.

Test centres for autonomous and connected vehicles

Funded by the PIA and the Île-de-France Region, a test center for autonomous and connected cars, TEQMO, was inaugurated in June 2019 by UTAC in Montlhéry. Made up of 12 km of test tracks with a motorway circuit, an urban zone and a manoeuvring zone, and integrating 5G connectivity, it offers all the equipment to test automated and connected driving on all types of vehicles. Furthermore, Transpolis, with which Renault Trucks is associated, is a laboratory city located in Ain dedicated to innovation and safety. It is also a place of experimentation for connected and autonomous vehicles (ENA project).

THE EXTENDED VEHICLE (EXVE) AND ITS STANDARDISED INTERFACES

Source: ACEA

Use of 5G network technology for autonomous vehicles

Many projects have been launched in France to carry out use case tests of automated vehicles with 5G technology. One of the largest open road programs in Europe is the 5G OpenRoad project, created in April 2022 by a cooperation agreement between 16 private and public partners and coordinated by the PFA and Nokia. Costing nearly 90 million euros, this project is co-financed by the members of the consortium within the framework of the PIA and the BPI (Public Investment Bank). It is deployed on the Saclay plateau and in the Versailles Grand Parc urban community. It has level 2 vehicles (Renault and Stellantis), level 4 autonomous taxi and shuttle robots and droids to study pedestrian safety, reducing the carbon footprint of mobility, last mile logistics and transportation on demand. At the European level, numerous projects have also been launched. The 5GMED project brings together 21 players 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 expand the data produced for various uses with a significant impact on the development of mobility services. The rules concerning the management of this data, when they are personal, constitute a major subject for respecting 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. In France, the mobility orientation law has also established rules for making certain data available to public authorities or infrastructure managers.

Numerous projects (MOSAR, 3SA, SVR, EVA, CTI, etc.) have been launched in recent years to respond to cybersecurity challenges, with security at the vehicle level, but also at the infrastructure and centralised control according to different scenarios. In addition, European regulation on cybersecurity and cooperative intelligent transport systems also constitute significant contributions. This system is supplemented by "soft" legal rules, with the CNIL compliance pack on connected vehicles currently evolving and technical standardisation (ISO).

The "Extended Vehicle" (ExVe) is a concept that automobile manufacturers, accompanied by large equipment manufacturers and independent distributors, have wished to standardise at the 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, with the impacts that such an extension implies in terms of integrity and security of the system.

The extended vehicle standards establish a system for 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 security of property and people
- Responsible, because it limits the compromise of the vehicle's services (steering, braking, etc.) in all life situations encountered, whatever the external requests, including those for malicious purposes (cyber security issues)
- Interoperable, because the establishment of a standard applied and supported at the international level allows cross-border data management systems to be compatible with each other

Connected technologies and autonomous driving are paving the way for new mobility scenarios and the establishment of an expanded economic and legal system in which automobile 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 2022, in a context of an increase in the general consumer price index (+5.2%), all prices of the different modes of passenger transport increase sharply, in line with tensions on energy prices linked to the outbreak of war in Ukraine, which spread throughout the economy (wages, raw materials), and to a persistent shortage of transport supply. The personal vehicle price index (purchases and use) increases by 10.3% in 2022, after increasing by 4.4% in 2021. This increase is linked to that of the price of fuel which weighs on the "expenses" item. of use" (+11.6%) and, to a lesser extent, that of the price of "vehicle purchases" (+5%).

In road passenger transport, prices increased by 8.4% in 2022. Prices for "transport by coach and bus" increased by 10.9%, while prices for "taxi, cars with driver" increased by 4.4%. While prices fell in 2020 in air transport, and rebounded slightly in 2021 (+3.8%), they explode in 2022 (+22.9%) with the increase in energy prices, costs operating costs (salaries, etc.). Finally, the price of rail transport is also experiencing strong growth (+9.3%).

Over the last twenty years, the price indices of the different modes of passenger transport have evolved in very different ways. Since 2000, real price indices, corrected by the general consumer price index, have increased by 23.6% in private passenger transport (taxis, VTC) and by 17. 3% for personal vehicles. As for air and rail transport, they increased by 14.1% and 12.8% respectively. Road passenger transport (buses, coaches) fell by 4.7%. In passenger rail transport, real prices increased by 19% between 2000 and 2015, but fell over the following 5 years, with a collapse in prices in 2020 linked to price adjustments after confinement. Since 2021, an increase in prices has been recorded again.

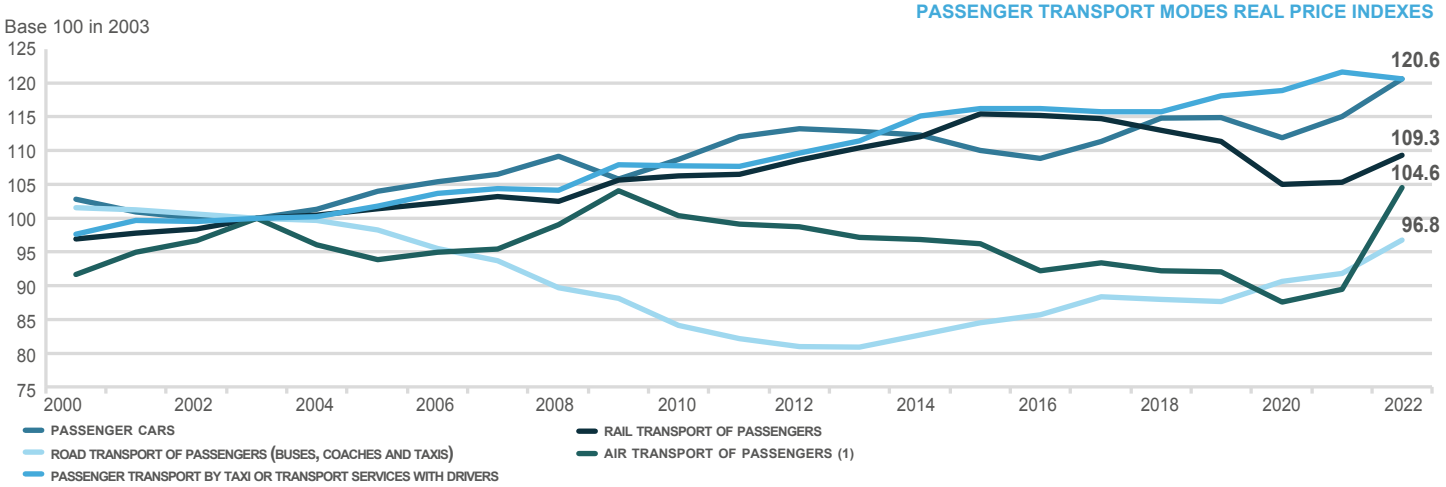
+10.3% et +10.9%

Respective variations in 2022 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%
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%
2021	4.4%	1.9%	3.4%	2.9%	4.0%	3.8%
2022	10.3%	9.3%	8.4%	10.9%	4.4%	22.9%

PASSENGER TRANSPORT MODES REAL PRICE INDEXES



(1) The methodology for calculating the price index for air transport services changed in January 2012. The variation between 2011 and 2012 cannot be considered significant.
Source : INSEE

The price indexes for the different modes of passenger transport trace price developments including all taxes. Thus, for air travel, airport taxes are included; similarly for other modes, charges linked to infrastructure only appear up to what can be incorporated into the sale price. In addition, only the part directly paid by the household is tracked. For example, if a region or local authority decides, as part of a land-use 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 air passenger transport index.

The rail transport and road passenger transport indices mainly only concern interurban connections. The index on personal vehicles was established considering both the purchases part, but also the use part of personal vehicles. To find changes in real prices for these main modes of transport, these different indices are corrected by the general consumer price index in the graph above.

After remaining close to their 1995 level, the real price indexes of the different modes of passenger transport have experienced stronger and contrasting developments 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, but a catch-up took place in 2021 and 2022. The real rail transport index increased by 13% between 2000 and 2022, but declined between 2015 and 2020. That of road passenger transport (coaches and buses) fell sharply until 2013, but has increased regularly since that date, the decline being 4.7% over the period 2000-2022. That of private passenger transport (taxis, VTC) is growing continuously (+24%) over this same period. Finally, the real air transport price index declined for a long period starting in 2009, but has increased sharply since 2021 and reached a 14% increase over the period 2000-2022.

FREIGHT TRANSPORT PRICE INDEXES

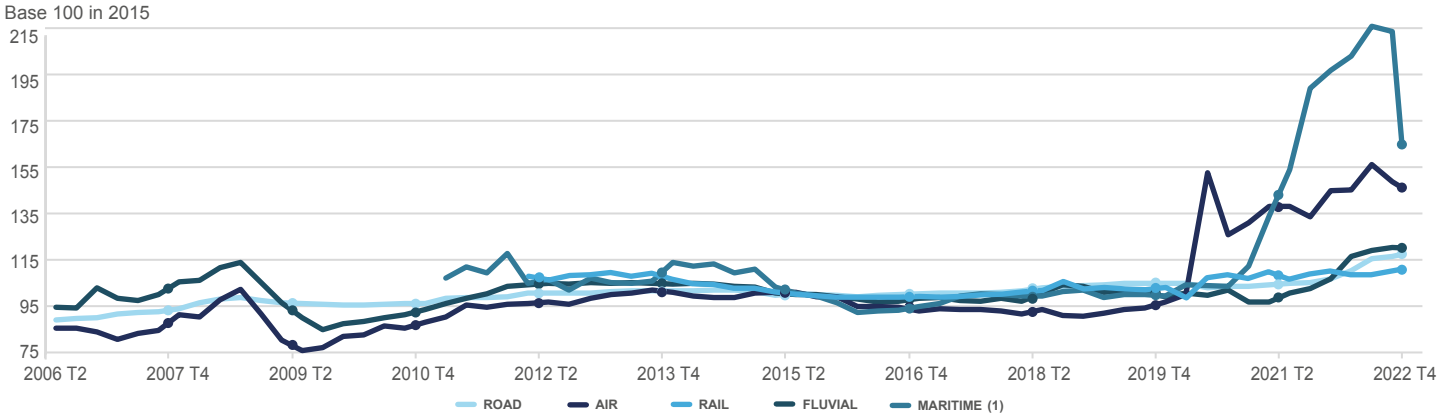
In 2022, in a context of slowed economic activity and high inflation, freight transport prices have increased for all modes, with double-digit increases in maritime (+18.1%) and river (+16.7%) transport. The consequences of the war in Ukraine explain the strong tensions on maritime transport prices, even if positive factors (strong reduction in port congestion, increase in container availability) help to moderate this increase. In road transport, prices increase by 9.3% due to the increase in fuel prices, initiated in 2021 and which will increase in 2022 with the implementation of the embargo on Russian energy. In air transport, the rise in prices also continues, in line with that of fuel prices, but at a slightly lower rate than last year (+7% after +8.7%). Finally, in rail transport, the increase in prices slows down: +0.9% in 2022, after +3.4% in 2021.

Since 2006, the road freight transport price index has increased regularly by 1.6% on average annually, but will accelerate between 2020 and 2022 to 5.3% per year on average. Over the same period, the price indices for river transport and air transport experienced more erratic developments and significant increases from 2019. Over the entire period 2006-2022, prices increased on annual average by 1.3% in the river and 3.6% in the air. But, during the two post-covid years, they increased by 9.1% and 7.9% respectively, reflecting, as for the road mode, the strong tensions on the transport offer, the disorganisation of logistics chains and the increase in energy prices.

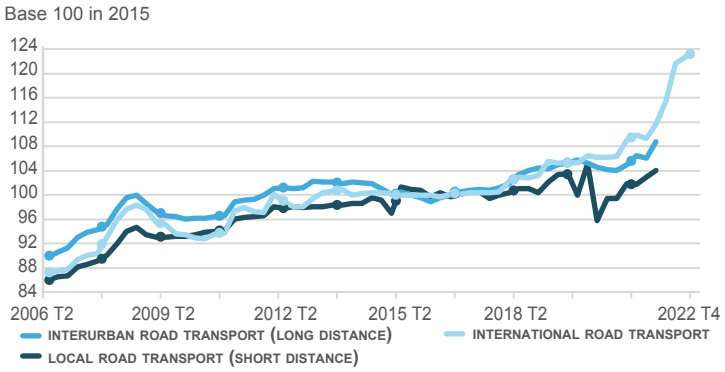
In rail transport, the price index has only been published since 2014, with a history dating back to the first quarter of 2012. Between 2012 and 2019, prices were falling due to the fall in national rail prices. Since 2020, prices have increased sharply on national rail. Internationally, prices which had fallen in 2020 with the global economic slowdown started to rise again in 2021 with the recovery and fell slightly in 2022 (-0.6%). Since the opening to competition in 2006, new operators have developed and represent almost half of the tonne kilometres transported, a level comparable to that of Germany.

+18% and +7% Respective variations of the maritime and air freight transport price indices in 2022

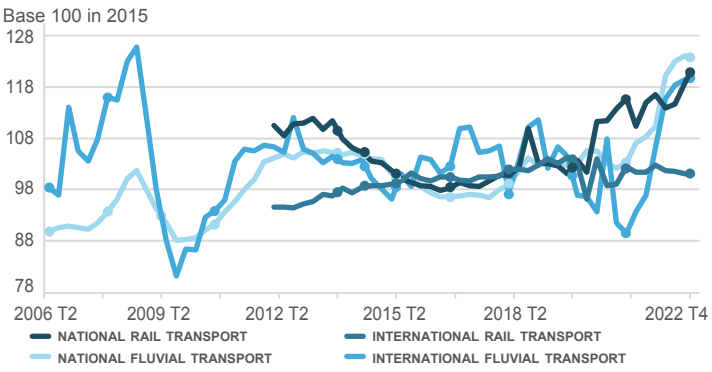
FREIGHT TRANSPORT INDEXES IN FRANCE



FREIGHT TRANSPORT PRICE INDEXES IN FRANCE: ROAD



FREIGHT TRANSPORT PRICE INDICES IN FRANCE: RAIL AND FLUVIAL



(1) Between 2006 and 2011, the volatility of the maritime freight price index was very high. The index rose from 110.1 in Q2 2006 to 195.5 in Q2 2008, before dropping to 79.1 in Q1 2009.
Source: MTE/SDES

Freight transport price indexes are calculated by the SDES statistical service of the Ministry 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 linking the shipper and the carrier. Price statements are carried out 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 1st quarter of 2012, is developed from 111 representative transport services, entrusted by a sample of shippers to rail transport operators.

For air freight, the index is made up 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 integrates fuel and security surcharges paid to the airline providing transportation. This price index is linked to the high volatility of fuel prices.

For maritime transport, the price index is made up of transport services for others carried out by companies registered in France whose activity is maritime freight (bulk and ferry). It is based on international price indices, 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 more than 20% of the total costs of road freight transport, as shown by the CNR survey (read page 61).

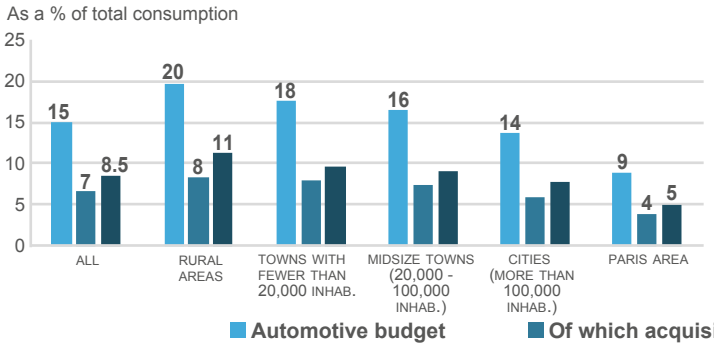
THE COST OF HOUSEHOLD CAR MOBILITY

According to the latest "Family Budget" survey in 2017, metropolitan households spend on average 15% of their budget on automobiles. This budget varies from 20% among rural households to only 9% in the Paris metropolitan area and represents more than half (57%) of the expenses linked to the use of the vehicle (fuel, repairs, maintenance, tolls, insurance). These user expenses amount to 8% of the total budget but reach 11% among rural households and 9% on average among households belonging to the first 3 income quintiles (compared to 7.4% for the 5th quintile). The item that carries the heaviest weight within this group is fuel, which represents 4% of the total and reaches 6% in rural areas, compared to only 2% in the Paris metropolitan area. The least well-off households (Q1-Q3) also devote a larger part of their budget to this item (4.3%) than the richest households who belong to the 5th quintile (3.3%). Finally, the breakdown by socio-professional categories also shows significant contrasts in terms of automobile spending. 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 automobiles (13% and 15% respectively). Conversely, the category of farmers, workers and artisan traders, less present in urban areas and more forced to use their vehicle to work, devote 18% of their budget to the automobile.

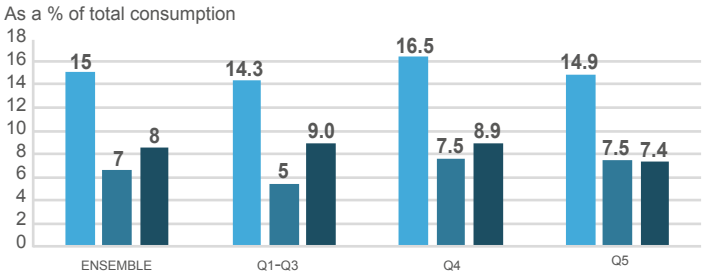
6% Weight of fuel expenditure in the budget of rural households according to the "Budget de famille 2017" survey

►AUTOMOTIVE BUDGET IN 2017

BY RESIDENCE AREA



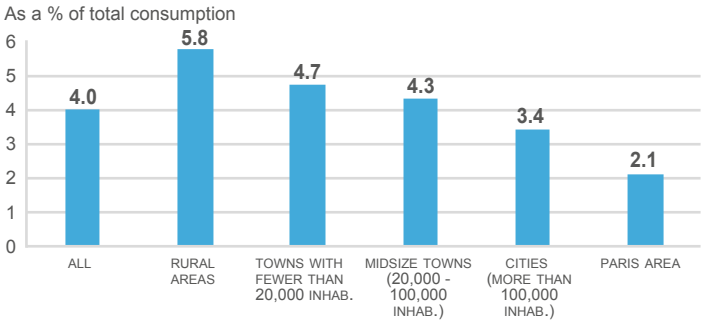
BY INCOME QUINTILES



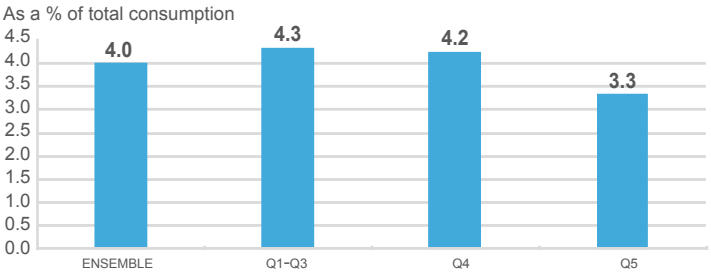
Automotive budget | Of which acquisition expenses | Of which user expenses

► SHARE OF FUEL IN HOUSEHOLD CONSUMPTION IN 2017

BY RESIDENCE AREA



BY INCOME QUINTILES



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 different goods and services and makes it possible to compare the consumption structures of various categories of households according to the different characteristics of these last: socio-professional category, age, income, category of municipality of residence, etc.

At the level of automobile items, there are two important differences compared to the national accounts (page 63). In the treatment of transport insurance expenses, their entirety is considered in the surveys, while only the service (expenses minus reimbursements) is counted at the macroeconomic level.

Concerning expenses for used vehicles, their entirety is counted in the surveys, whereas at the macroeconomic level, these mainly correspond to the margins of professionals involved in a transaction and do not take into consideration exchanges between individuals.

The budget survey used in this edition is limited to mainland France. The distribution of the different automobile items is expressed as a percentage of total consumption excluding taxes, loan repayments and major works. Expenditures are broken down here according to the category of municipality of residence and income quintiles. The 5th quintile, for example, corresponds here to the 20% of households with the highest income.

In 2017, the automobile budget of metropolitan households represented 15% of their total consumption. The acquisition item represents less than half of the total (43%), varying from 5% of the budget for the 60% of households with the lowest income (Q1-Q3) to almost 8% for the 5th quintile. Conversely, the "user expenses" item weighs more for households belonging to the first quintiles (9%) compared to 7.4% for the 5th quintile. This gap is particularly linked to the weight of the fuel item for which the poorest households devote 1 point more 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 follows that households belonging to Q1-Q3 pay, proportionally to their automobile consumption, more taxes than households in the last quintile.

By breaking it down by category of municipality of residence, the fuel item appears higher the smaller the size of the municipality. Thus, households in the Paris metropolitan area devote almost 2% of their consumption to it, compared to more than 6% for households in rural communities, who benefit less from public transport and who travel more frequently and over greater distances.

With the development of electric vehicles with higher unit prices, low-income households will find it more difficult to equip themselves given the low share they currently spend on vehicle purchases.

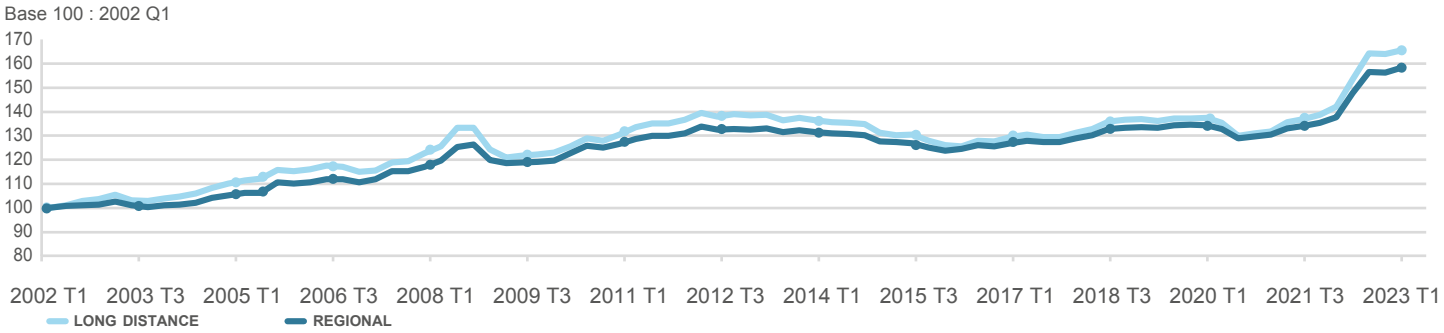
COST PRICE OF ROAD FREIGHT TRANSPORT

+17 %

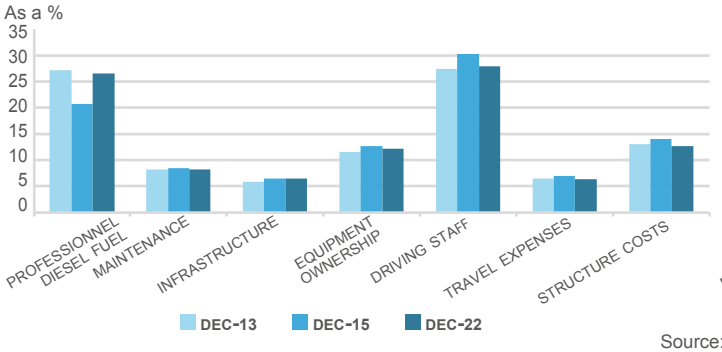
Increase in the full cost price of long-distance road freight transport in 2022

The synthetic indexes calculated by the National Road Committee (CNR) indicate that the cost price of long-distance and regional road freight transport increased by 17% and 14.5% respectively in 2022. This unprecedented inflation is explained by the increase in the costs of the two main components of the cost price of road freight transport: the costs of driving personnel and the price of professional diesel. The former have increased with successive increases in conventional minimums and tensions on the labour market. The second mechanically increased with the rise in the price of crude oil, which began last year, and which reached a peak in mid-2022. The other components of the cost price (equipment, spare parts, tyres, AdBlue and other consumables) also saw their prices increase in line with the rise in energy and raw materials prices.

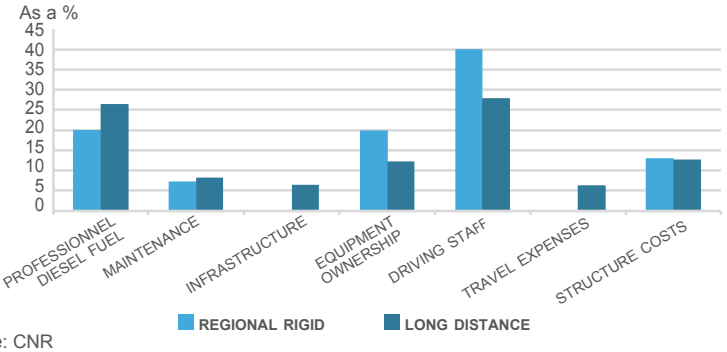
ROAD FREIGHT TRANSPORT COST PRICE



ROAD FREIGHT COST STRUCTURE FOR LONG DISTANCE



ROAD FREIGHT COST PRICE STRUCTURE IN DECEMBER 2022



Source: CNR

The National Road Committee (CNR) publishes each year several indexes reflecting the evolution of the cost of road transport of goods carried out on behalf of others. The two indexes used here are those relating to long-distance transport and regional transport.

Long distance corresponds to national or international transport carried out using articulated units of up to 44 tonnes, the operating constraints of which make the driver's daily return home impossible or uncertain. Regional transport, carried out using 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 daily return of the driver to his home.

The cost structure resulting from the annual CNR 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 considers, in the calculation of its indexes, the CICE since 2013, the year it came into force, to make them comparable with the post-2019 period. The CICE is in fact transformed from January 1, 2019 into a lasting reduction in employer social security contributions.

In long-distance road freight transport, the leading item of expenditure is driving personnel, the share of which has remained stable since 2013, at around 29% (28% in 2022). Second item of expenditure, professional diesel accounted for 27% of the cost price in 2013, before decreasing until 2015, then growing again to oscillate at around 24% over the following three years. In 2022, the share of professional diesel will be 26.5% of the total.

The share of equipment ownership (road tractor and semi-trailer) has remained stable, at a level slightly above 12% since 2016, after two years of increase, following the increase in the price of new vehicles, linked to entry in application of the EURO VI environmental standard as of January 1, 2014 and the new mandatory safety equipment. The impact of these increases is diluted in the calculation of the ownership cost by the gradual renewal of vehicles (around 1/6 of the fleet per year). However, the significant increase in interest rates increases the financial burden of these hardware changes. The maintenance cost index, which includes tyres and vehicle maintenance-repair, remains stable at 8.3% since 2016. Finally, the "infrastructure" item decreases by 0.4 point in 2022 compared to 2021, at 6.4% of the total cost.

In regional transport, the costs linked to driving personnel weigh more than in long-distance transport. They amount to 40% of the total in 2022, a slight increase compared to 2021. The possession of equipment comes in second place at 20%, tied with expenditure on professional diesel. Finally, repair maintenance costs stand at 7% of the total in 2022.

In the coming years, the emergence of new engines, which are more expensive to purchase, will require adapted financing support, to encourage carriers to decarbonise their fleet. Furthermore, the cost of energy must be maintained at a level which does not deviate too far from overall market costs.

CAR PRICE INDEXES

The year 2022 follows the trend started in 2021 of a general increase in prices, which was accentuated with the energy crisis caused by the war in Ukraine and the maintenance of tensions over certain raw materials or agricultural products. The general price level accelerated significantly on an annual average, reaching +5.2%, after +1.6% in 2021.

In this inflationary context and tensions on supplies of electronic components, the prices of new automobiles increased by 7.5%, compared to 1.3% the previous year. The prices of spare parts and accessories and vehicle maintenance and repair are also increasing (+5.7%), at a faster pace than in 2021 (+2.6%). The parts and accessories component experienced renewed inflation (+3.9%, after 1.7%), but at a rate which remains lower than the increase in the cost of the service (cost of labour and supplies used), which increases from +2.8% in 2021 to +5.9% in 2022. Since 2005, this corresponds to an increase in the cost of repair services of 59% (+31% in real prices), while the price of parts and accessories increased by only 3% and even fell in real prices.

Regarding fuels, prices which had fallen in 2020 (-11.9%) with the collapse in demand for petroleum products, then rebounded in 2021 (+13%) with the revival of world trade, experienced a very sharp increase in 2022 (23.3%) linked to the war in Ukraine and the global recovery.

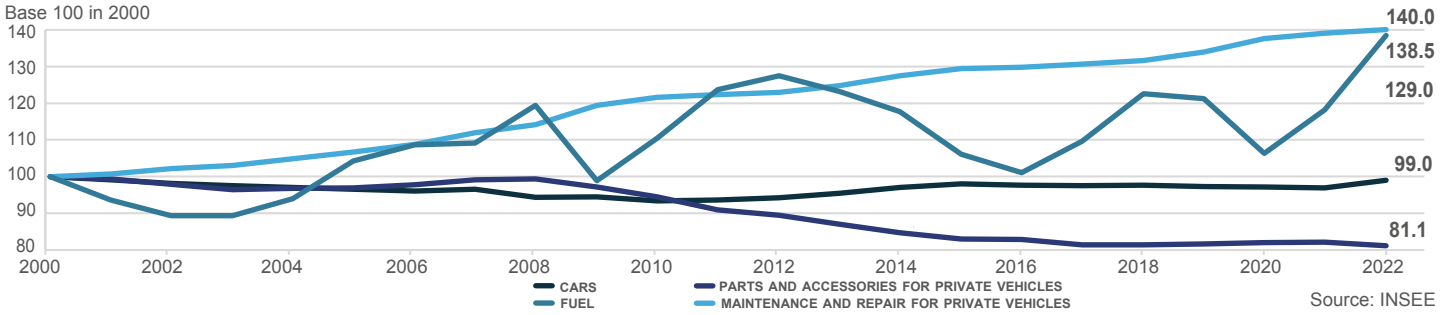
+23% **Increase in fuel prices in 2022**

► 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
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%
2021	1.6%	1.3%	2.6%	1.7%	2.8%	13.0%
2022	**5.2%**	**7.5%**	**5.7%**	**3.9%**	**5.9%**	**23.3%**

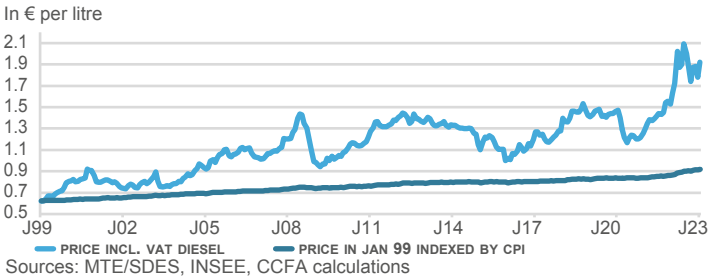
Sources: INSEE, CCFA calculations

REAL PRICE INDEXES FOR NEW CARS, FUEL, SPARE PARTS, ACCESSORIES, MAINTENANCE AND REPAIR OF PERSONAL VEHICLES



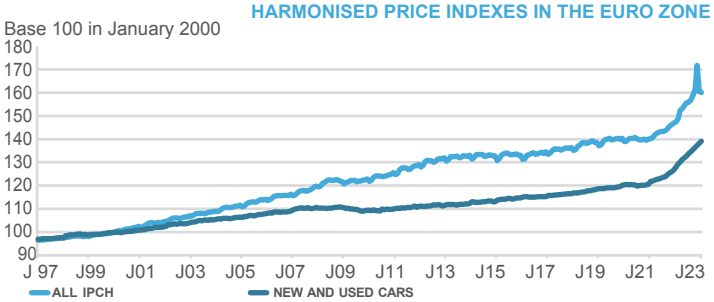
Source: INSEE

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



Source: Eurostat

The index calculated by INSEE of new automobile prices compares the prices of a panel of cars with similar technical characteristics, in order not to consider price increases following improvements in quality or equipment, nor the evolution of the sales structure (energy mix, bodywork mix). It takes into consideration the discounts offered periodically (excluding over the counter), as well as the bonus/malus system. The INSEE index only increased by 1.7% between 2019 and 2021, while the average price of vehicles evolved much more strongly (+12.5%) with the development of 4WD, SUV and electric motorisation. In 2022, the index increases by 7.5% while the average price of new cars increases by 8.4%.

In the graph above, the prices of the main automobile-related items are expressed in real terms, corrected for the general consumer price index.

Over the period 1992-2010, the real price of new cars decreased regularly, under the continuous effect of competition and occasional market support measures (bonus/penalty, scrappage bonus). However, new regulatory requirements in terms of depollution and safety, as well as the tightening of ecological bonus/malus scales, have contributed to the growth in prices since 2011.

In 2022, the prices of new cars have increased sharply with the rise in the prices of energy and industrial raw materials (see page 31), to which have been added persistent logistics problems which also have an impact on prices. The real price index for new cars nevertheless stood at 99 base 100 in 2000, which shows that over a long period, the price index for new cars has increased less quickly than inflation.

It is the same for spare parts and accessories, for which the index declines over a long period and stands at 81 in 2022 base 100 in 2000. Conversely, the real price index for "services of "maintenance and repair" is up 40% compared to 2000, due to the increase in labour costs (cost of labour, skills development, shortage of qualified labour). Finally, fuel prices have increased much more sharply than inflation over a long period, particularly since 2017 and in 2021 and 2022. The real fuel price index is at 138.5 in 2022 (base 100 in 2000). This level is the highest reached since 2000.

In the euro area, Eurostat calculates a harmonised consumer price index which allows international comparisons, using a similar methodology in different countries. Since 2000, the general level of prices in the euro zone has increased by 60%, while that of purchases of new and used cars has increased by only 37%, indicating linked price pressure, like France, to the intensity of competition and the constraint on the purchasing power of households. In January 2023, however, the price index for new and used cars increased by 8.6% in one year, as much as inflation.

HOUSEHOLD CAR CONSUMPTION

In 2022, economic activity in France increases by 2.5%, after +6.4% in 2021. It is marked by an acceleration in inflation (+4.8%), linked in particular to the rise in prices of energy and food. Household gross disposable income (GDI) increased by 5.1%, but purchasing power, eroded by inflation, stagnated (+0.2%, compared to +2.6% in 2021). Household final consumption expenditure increases by 7.1% in value and 2.1% in volume (after +5% in 2021). The household savings rate continues to fall in 2022 and stands at 17.4%, compared to 19% in 2021.

In 2022, total spending on automobiles amounts to 169.2 billion euros, up 8.2% compared to 2021. Vehicle purchases fell 2.1% to 41, 8 billion euros. Spending on new automobiles increased by 3.8%, with prices increasing (+7.5%), while volumes fell by 3.5%. Conversely, spending on used cars fell in 2022 by 12.4%, due to a sharp drop in volumes and a smaller increase in prices.

Expenditure on maintenance and repairs increased by 6.2% in 2022 and amounted to 49.6 billion euros. They now account for 30% of total automobile expenditure, compared to 23% in 2000.

Finally, the "fuels and lubricants" item is, for the second year in a row, the one which has increased the most. Fuel purchases reached a record level in 2022 at 49 billion euros, an increase of 27.6% compared to 2021 and 19.6% compared to 2019. This increase is largely attributable to the increase in price (+23%).

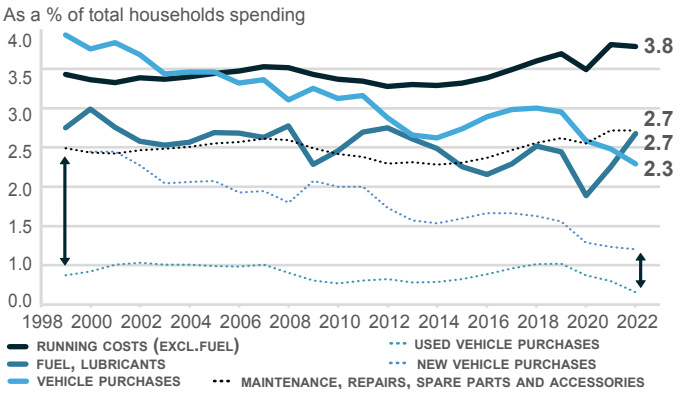
9.3% **Share of car-related expenditure in household consumption expenditure in 2022**

► HOUSEHOLD CONSUMER SPENDING ON TRANSPORT (IN AMOUNT AND SHARE OF ACTUAL NATIONAL HOUSEHOLD CONSUMPTION)

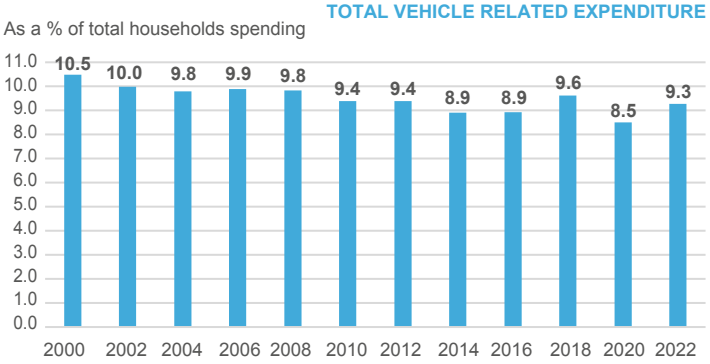
	2000		2010		2019		2020 (1)		2021 (1)		2022 (1)		Change 2022/2021
VEHICLE PURCHASES	**37.5**	**3.8%**	**44.2**	**3.1%**	**49.3**	**3.0%**	**41.5**	**2.6%**	**42.7**	**2.5%**	**41.8**	**2.3%**	**-2.1%**
New and second-hand cars (including tax on registration certificates)	33.7	3.4%	39.1	2.8%	43.1	2.6%	34.9	2.2%	35.0	2.0%	34.1	1.9%	-2.6%
of which new cars	24.5	2.4%	28.3	2.0%	26.1	1.6%	20.8	1.3%	21.2	1.2%	22.0	1.2%	+3.8%
of which used cars	9.2	0.9%	10.9	0.8%	17.0	1.0%	14.1	0.9%	13.8	0.8%	12.1	0.7%	-12.4%
Caravans, motorcycles, bicycles	3.8	0.4%	5.0	0.4%	6.2	0.4%	6.7	0.4%	7.7	0.4%	7.7	0.4%	+0.1%
RUNNING COSTS	**63.5**	**6.4%**	**82.5**	**5.8%**	**102.5**	**6.1%**	**86.5**	**5.4%**	**104.3**	**6.1%**	**117.9**	**6.5%**	**+13.1%**
Maintenance, repairs, spare parts and accessories	24.3	2.4%	34.2	2.4%	43.8	2.6%	41.1	2.6%	46.7	2.7%	49.6	2.7%	+6.2%
of which automotive equipment manufacturing	11.1	1.1%	16.9	1.2%	22.7	1.4%	21.4	1.3%	24.3	1.4%	-	-	-
of which automotive service	9.2	0.9%	11.9	0.8%	15.3	0.9%	14.4	0.9%	16.4	1.0%	-	-	-
Fuel and lubricants	29.9	3.0%	34.8	2.5%	40.8	2.4%	30.4	1.9%	38.8	2.3%	48.8	2.7%	+25.9%
Tolls, parking fees, rental, driving lessons	9.3	0.9%	13.5	1.0%	17.9	1.1%	15.2	0.9%	18.4	1.1%	19.5	1.1%	+5.9%
INSURANCE	**3.9**	**0.4%**	**6.1**	**0.4%**	**8.4**	**0.5%**	**8.8**	**0.5%**	**9.4**	**0.5%**	**9.5**	**0.5%**	**+0.9%**
TOTAL CONSUMER SPENDING ON CARS AND MOTORCYCLES	**105.0**	**10.5%**	**132.8**	**9.4%**	**160.2**	**9.6%**	**136.8**	**8.5%**	**156.3**	**9.1%**	**169.2**	**9.3%**	**+8.2%**
Public transport	15.3	1.5%	24.1	1.7%	31.8	1.9%	16.2	1.0%	20.3	1.2%	32.6	1.8%	+60.3%
TOTAL HOUSEHOLDS SPENDING	**1,000**	**100%**	**1,415**	**100%**	**1,672**	**100%**	**1,608.51**	**100%**	**1,720.03**	**100%**	**1,825.10**	**100%**	**+6.1%**
Number of households (Metropolitan France)	24,256		27,227		29,336		29,583		29,822		30,072		+0.8%
Spending on passenger cars per household	4,327		4,876		5,460		4,626		5,242		5,625		+7.3%
Spending on passenger cars per vehicle-owning household	5,388		5,840		6,431		5,442		6,153		6,549		+6.4%

(1) These data are provisional and may be readjusted for three years.
Source: INSEE - Household consumer spending, 2022 - base 2014 and CCFA estimates

AUTOMOTIVE BUDGET COEFFICIENTS



TOTAL VEHICLE RELATED EXPENDITURE



According to national accounts data, which are based on concepts different from those used in the Family Budget survey (see page 60), households spent 169.2 billion euros on their individual transport in 2022, and 32.6 billion euros in public transport services.

The share of automobile consumption in actual national consumption, called the "automobile budget coefficient," was between 9% and 11% on average between 1990 and 2009. Then, after the 2009 crisis, the coefficient oscillated around 9.3 %, level also observed in 2022.

Until 2005, the leading item of automobile expenditure was vehicle purchases (new, used and other vehicles), which represented between 3.5 and 4.5% of actual household consumption. Then, from 2006, vehicle purchases fell behind vehicle usage expenses (excluding fuel). Since 2019, the drop in the budgetary coefficient associated with the acquisition of vehicles has been even more marked. It is linked both to the trend decline in purchases of new, more expensive cars (64% of car purchases in 2022, compared to 82% in 1990), but also, in 2022, to that of purchases of used cars. The budgetary coefficient amounts to 2.3% in 2022, compared to 3% in 2019, and represents an amount of 41.8 billion euros (compared to 43.1 billion euros in 2019). Excluding other vehicles (caravans, campers, motorcycles and cycles), purchases of new and used automobiles will only represent 1.9% of household consumption in 2022, or an amount of 34.1 billion euros (compared to 43.1 billion in 2019).

Expenditures on vehicle use (excluding fuel) have been increasing steadily since 2014. They represent 3.8% of household expenditure in 2022. Among these expenses (excluding fuel), the "vehicle maintenance and repair" item is the largest. most important. In 2022 it amounts to 49.6 billion euros, more than all vehicle purchases.

Finally, the weight of the "fuel" item has fluctuated over the last twenty years around 2.6%, in line with changes in energy prices. In 2020, it fell to 1.9%, but rises to 2.7% in 2022 with the very sharp increase in prices over the last two years. Fuel expenses thus amount to 48.8 billion euros.

AUTOMOBILE FINANCING

In 2022, the cumulative production of new consumer loans slowed down significantly with the increase in interest rates, particularly during the second half of the year. According to data from the Association of Financial Companies (ASF), the number of car financing files for new purchases by individuals fell by 7% in 2022, linked to the drop in registrations of new cars purchased by households (-3% in 2022). On the other hand, the amounts of financing transactions increased by 4%, reflecting the increase in vehicle prices and interest rates.

Despite the fall in the number of credit financing files (69% of new cars), the number of rental formulas increases by 1% in 2022, thanks to Rental with Purchase Option (LOA) (+3%), while that long-term rentals or without purchase option (LSOA) are in sharp decline in 2022. As for the allocated credit, it continues to fall (-33% in 2022).

In 2022, leasing now represents 81% of credit financing (14% in 2010), ahead of allocated automobile credit (15% in 2022, compared to 49% in 2010) and personal loans. Within rental, LOA largely dominates and increases by 3 points, to reach 89% of rental formulas in 2022. LSOA (Financial rental and LLD) is experiencing a drop of 11%, after having developed significantly in 2021 (+29%).

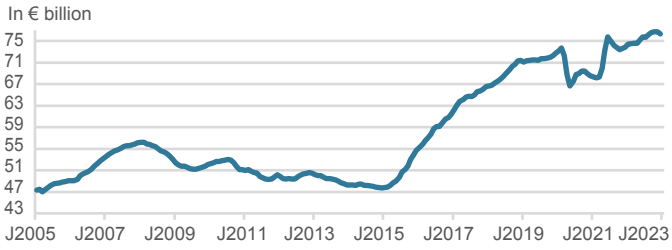
For used vehicles purchased by households, cash purchase remains the main method of financing (61% of used vehicles are purchased with a personal contribution according to the PARC AUTO survey by Kantar). However, despite the drop in registrations of used passenger cars in 2022 (-13%), the number of credit financing files is increasing. The use of credit is growing, both for allocated credit (+3%) and for leasing (+21%). More than a quarter of used cars purchased on credit are purchased using an LOA, compared to 3% in 2016, representing a six-fold increase in the number of LOA financing transactions in six years.

Credit financing for company equipment with new vehicles (passenger cars, light commercial vehicles and industrial vehicles) fell in 2022 (-13%), in line with the drop in registrations (-10% on the non-individual market). Unlike households, allocated credit is almost non-existent and rental formulas represent 98% of credit financing files. Companies favour LSOA, which represents 60% of rental formulas in 2022 and in particular Long-Term Rental (93% of LSOA formulas). LOA only represents 40% of new vehicle financing files. But the average value of LOA financing files is twice as high (44,000 euros in 2022) as that of LSOA files leading to a predominance of LOA in the amounts expressed in euros.

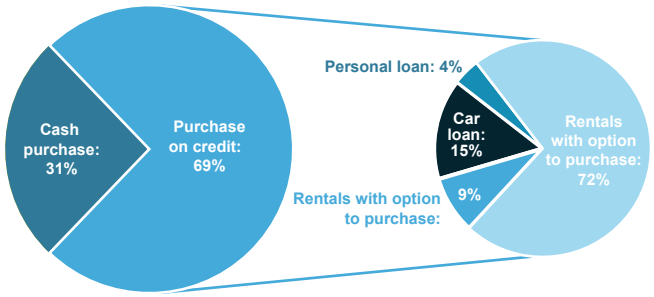
81% **Share of leasing with or without purchase option in credit financing of new cars purchased by households in France in 2022**

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

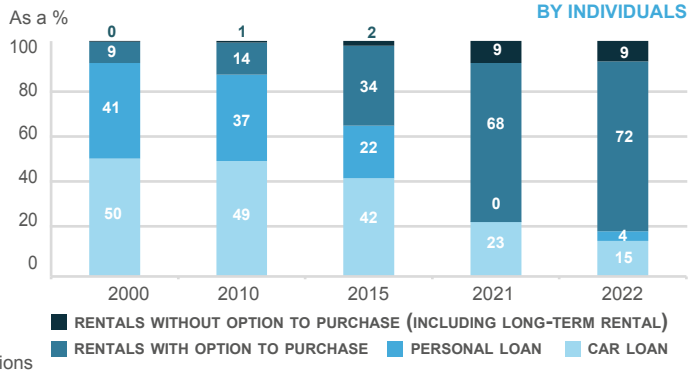
TOTAL AMOUNTS OVER TWELVE MONTHS OF NEW CONSUMER LOANS TO INDIVIDUALS (EXCEPT OVERDRAFTS)



FINANCING THE PURCHASE OF A NEW CAR BY INDIVIDUALS IN 2022



CHANGES IN CREDIT FINANCING OF NEW CARS PURCHASED BY INDIVIDUALS



Source: ASF, CCFA calculations

Buyers of new or used cars resort to financing if they cannot or do not want to purchase cash.

Four financing 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 wishes.
- Affected car credit or classic 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; this is a consumer credit which allows you to have access to a car against the payment of monthly payments during the lease period, which can last up to eighty-four months, or 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 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 purchasing a new car.

In 2022, the number of financing applications for the purchase of new vehicles will decline alongside the market. On the other hand, on the second-hand market, credit financing has developed, despite the decline in registrations, highlighting the difficulty for households to purchase their vehicle outright in a context of sharp rises in prices. LOA has become the main method of financing a new vehicle and is starting to develop on the second-hand market.

TRADE AND REPAIR OF AUTOMOBILES AND MOTORCYCLES

Automotive retail turnover increased by 2.2% in 2022, despite the decline in sales volume. The increase in vehicle prices, linked in particular to the shortage of semiconductors and the surge in raw material costs, explains this development. However, turnover, which amounts to 97 billion euros in 2022, is still down almost 4% compared to that observed in 2019.

Vehicle maintenance and repair continues to increase in 2022 in volume and value (+8.2%) and generates a turnover of 24 billion euros. With the rise of second-hand goods, the increase in the average age of the fleet and the length of ownership, visits to workshops continue to increase (2.5 in 2022, compared to 1.8 in 2015), even if they remain behind compared to 2019 (2.7 on average) due, in particular, to the lower intensity of vehicle use (decrease in average annual mileage).

+2% **Change in turnover including tax from the motor vehicle trade in France in 2022**

The turnover of automotive equipment retail, which had declined over the last three years, rebounded for the second consecutive year and reached 8.1 billion euros in 2022.

Finally, the retail trade in fuels stands at 18 billion euros in 2022, up 25% compared to 2021, with deliveries of road fuels on the rise (+2%), particularly gasoline (+10 %), and a surge in prices linked to international tensions and the Russian-Ukrainian conflict.

Since the 1990s, automobile distribution has experienced a continuous movement of concentration, linked to increased geographical coverage and the development of multi-branding which continues today.

In 2022, the 100 largest automobile distribution groups achieved a turnover excluding taxes of 55.1 billion euros, or 72% of the total automobile trade, up sharply year-on-year (+8%), despite the drop in volumes. The first four groups now have a turnover of more than 2 billion euros and fifteen French groups have reached or crossed the billion-euro turnover mark in 2022, compared to thirteen in 2021 and nine in 2020. The top 10 distributors accumulated 21 billion euros in turnover (a quarter of the total), up 10% over one year.

According to data from INSEE-Esane, the operating margin rate (gross operating surplus / value added at factor cost) of the motor vehicle trade has increased in recent years, from 15% in 2015. to 25% in 2021. The investment rate (physical investment / added value excluding taxes) increased from 11% to 21%. In the maintenance and repair of motor vehicles, these two indicators remain stable, around 20% and 13% in 2021.

► LIGHT VEHICLE SALES NETWORKS IN FRANCE ON 1 JANUARY 2023

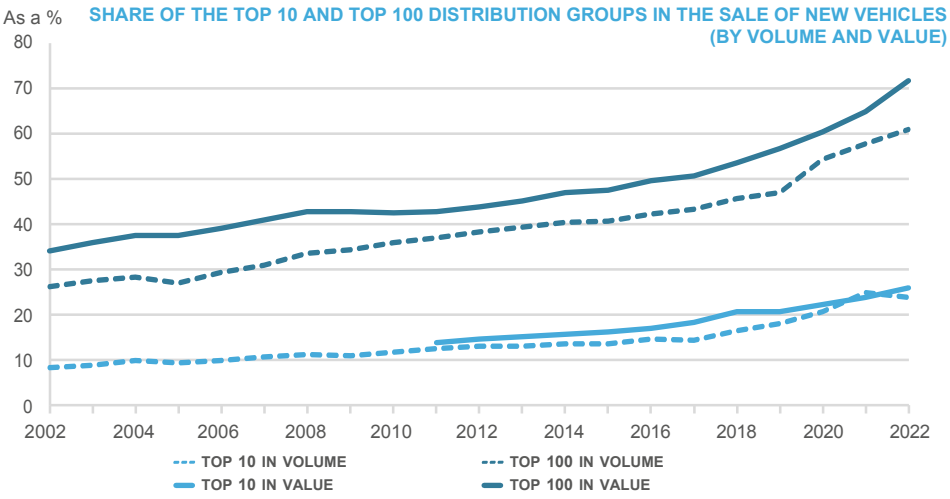
Brands	Primary dealership
Renault-Dacia	596
Peugeot	405
Citroën	388
Opel	240
DS	171
Fiat	218
Renault group and Stellantis	**2,018**
Volkswagen	328
Toyota	267
Ford	224
Kia	215
Suzuki	213
Nissan	193
Hyundai	202
Mercedes-Benz	164
BMW	159
Other Japanese brands	**396**
Mitsubishi	120
Lexus	44
Honda	81
Mazda	107
Lexus	44
Other brands	**1,902**
Including Chinese brands	220
TOTAL	**6,281**

Source: Argus

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

Activity	2010	2015	2019 (sd)	2020 (sd)	2021 (sd)	2022 (e)	Change 2022-2021
Motor vehicle sales	76.9	80.8	100.5	88.7	94.6	96.7	2.2%
Automotive maintenance and repairs	20.5	20.0	21.7	20.5	22.5	24.3	8.2%
Retail sales of automotive equipment	6.5	7.4	7.2	6.9	7.6	8.1	6.7%
Motorcycle sales and repairs	4.0	3.6	5.0	5.0	5.5	5.7	3.9%
Retail fuel sales	15.6	16.2	16.3	12.2	14.5	18.1	25.1%
TOTAL	**123.5**	**128.0**	**150.8**	**133.2**	**144.7**	**153.0**	**5.7%**

Source: INSEE - Trade Accounts, base 2010 of national accounts: (sd) semi-definitive; (e) CCFA estimate



Source: Argus

To guarantee a high level of quality in sales and after-sales, the distribution networks of automobile brands are based on the selection of distributors and repairers able to apply their requirements and customer service. Cooperation between manufacturers, their distributors and their approved repairers ensures, in addition to maintenance and repair, warranty service, user safety, preservation of the environment, availability of spare parts and information on technical developments.

As of January 1, 2023, the primary network, made up of subsidiaries of manufacturers and dealers, brings together 6,281 points of sale, out of a total of 13,391 points of sale in France. The number of points of sale is increasing with the arrival of new players.

In terms of automobile repair, in addition to the manufacturers' networks (approved repairers, dealers and agents, i.e. approximately 13,000 players), there are also independent networks: MRAs (Automotive Repair Mechanics) and auto centres, rapid repair centres and tyre specialists. In 2022, according to ANFA, there will be 20,300 MRAs and 4,600 auto centres, rapid repair centres or tyre specialists. These independent networks benefit more than the manufacturer networks from the aging of the fleet because their activity is more concentrated on the repair of old vehicles (7-9 years old) which generate more workshop visits. Manufacturer networks, for their part, specialise more in predictive maintenance operations on recent vehicles or electronic fault finding. According to GIPA, in terms of volume of entry-workshops, it is the MRAs which are the leading operators in the market, with 34% of volumes in 2022, followed by manufacturers' networks (30%, compared to 34% in 2016), centres cars (19%, compared to 16% in 2016), tyre specialists (7%) and rapid repairers (5%).

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 use resources and reduce the impact on the environment. In the automobile industry, the circular economy concerns the vehicle and its consumables (tyres, oils, batteries, etc.).

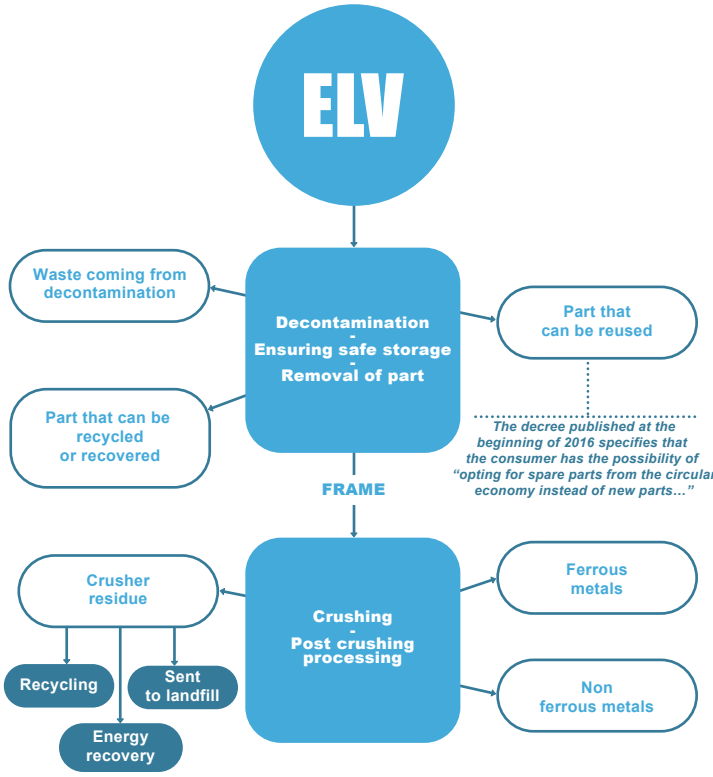
An end-of-life vehicle (ELV) is a vehicle that its last owner hands over to a third party for destruction.

Conversion bonus systems lead to better handling of vehicles by approved processing centres, with an increase in ELVs supported in recent years. In 2020, 1.33 million ELVs were supported by the approved sector, compared to 1.1 million in 2017. This number nevertheless decreased in 2020 (-18%), with the COVID pandemic and confinements (stop of the activity of ELV centres, fall in the new and second-hand market, reduction in the number of accidents). The tightening of the conditions for access to the conversion bonus in mid-2019 is also an explanatory factor.

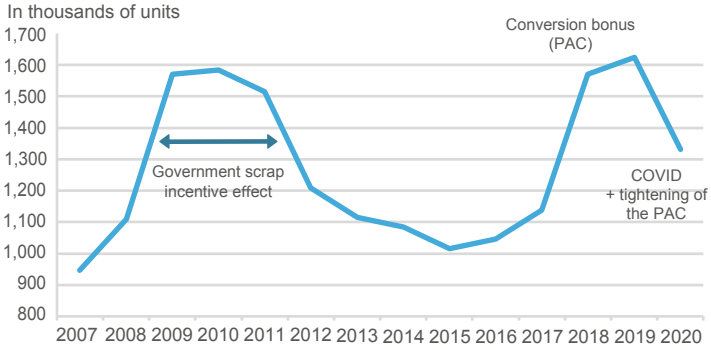
ADEME measures the rate of reuse and recovery of ELVs. This ratio is the sum of the reuse and recycling rate and the energy recovery rate. This rate, which stood at 96% in 2020, has increased by 14 points in ten years.

1.33 billion **Number of ELVs supported in 2020**

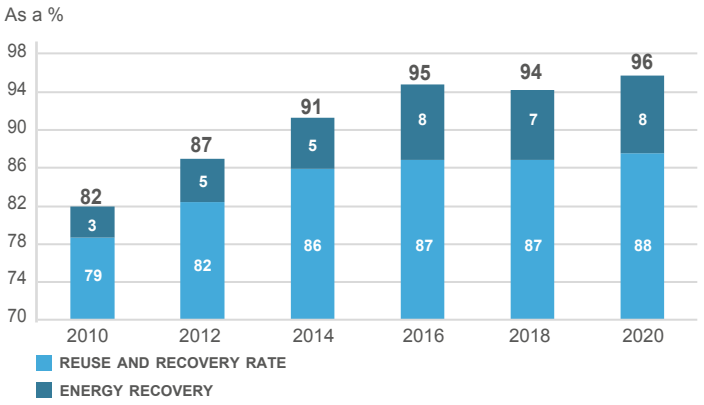
►SIMPLIFIED CHART OF PROCESSING OF AN ELV



NUMBER OF END OF LIFE VEHICLES (ELVS) DEALT WITH



ELV REUSE AND RECOVERY RATE



Source : ADEME

In France, 1.33 million end-of-life vehicles (ELVs) were taken care of by the sector in 2020 and processed by around 1,635 ELV centres. 92% of these ELVs are passenger cars, with an average weight of 1,114 kg in 2020 (974 kg in 2010). Measuring the performance of the ELV treatment sector is based on the average composition of an ELV by material.

In 2020, an ELV is made up of 75% metals (ferrous metals: 70%, non-ferrous metals: 4% and electrical harnesses: 1%), 12% plastics, 3% glass and 2% textiles. This illustrates the diversity of materials used in the composition of a vehicle and the complexity of optimal reprocessing of each of them.

The treatment of end-of-life vehicles must respect 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.

The first stage of treatment consists of depolluting by removing batteries, used oils and filters, cooling or brake fluids and air conditioning fluids. The quantities of waste are estimated at 38,000 tonnes, of which 73% is sent for recycling, 16% for energy recovery and 11% is reused (batteries). In 2021, the collection of automobile accumulators (battery intended to power an automobile starting, lighting or ignition system) increased by 21%, while the increase in these accumulators in millions of units is +1.5%. The marketing of lithium batteries, expressed in tonnes, has increased significantly with the marketing of electric car models. The European Commission has proposed a European regulation aimed at establishing a circular economy sector to manage all stages of the life cycle of batteries, from their design to waste treatment. This regulation, which comes into force from July 10, 2023, sets recycling efficiency targets for lithium-ion batteries at 61% by 2031.

The second stage of treatment is the dismantling of the used tyres. The collection of the automotive tyre sector (light and heavy vehicles) amounted to 532,000 tonnes in 2021, an increase of 10.5% compared to 2020. The collection rate amounted to 111.5 % (i.e. +26 points compared to 2020). This is explained by a catch-up effect caused by the low collection rate during the pandemic. In 2021, around 46.8% of these tyres were intended for energy recovery (substitute fuel in cement plants for example), 35.8% for material recovery, including a little more than half for granulation (sports fields, street furniture), 15.3% for reuse, 12.1% for second-hand resale, 3.2% for retreading and the rest for other valorisation.

Retreading is the technique of giving a used tyre a new tread. In 2021, the automotive tyre retreading market grew by 22.6%, following the post-covid recovery. These retreated tyres increasingly face competition from low-cost new tyres from abroad. For heavy goods vehicles, however, nominal retreading (the tyre belongs to you and you have it retreated) is mainly used and is not taken into account in these figures.

The extraction of materials for recycling and recovery is another step in the processing of ELVs, but certain consumable parts (oils, batteries, etc.) are already recycled during the life of the vehicle. In addition, automobile manufacturers plan to use an increasing share of recycled materials, notably certain plastics such as polypropylene, to offer parts entirely or partially manufactured with recycled materials such as bodywork elements or interior trim.

CIRCULAR ECONOMY

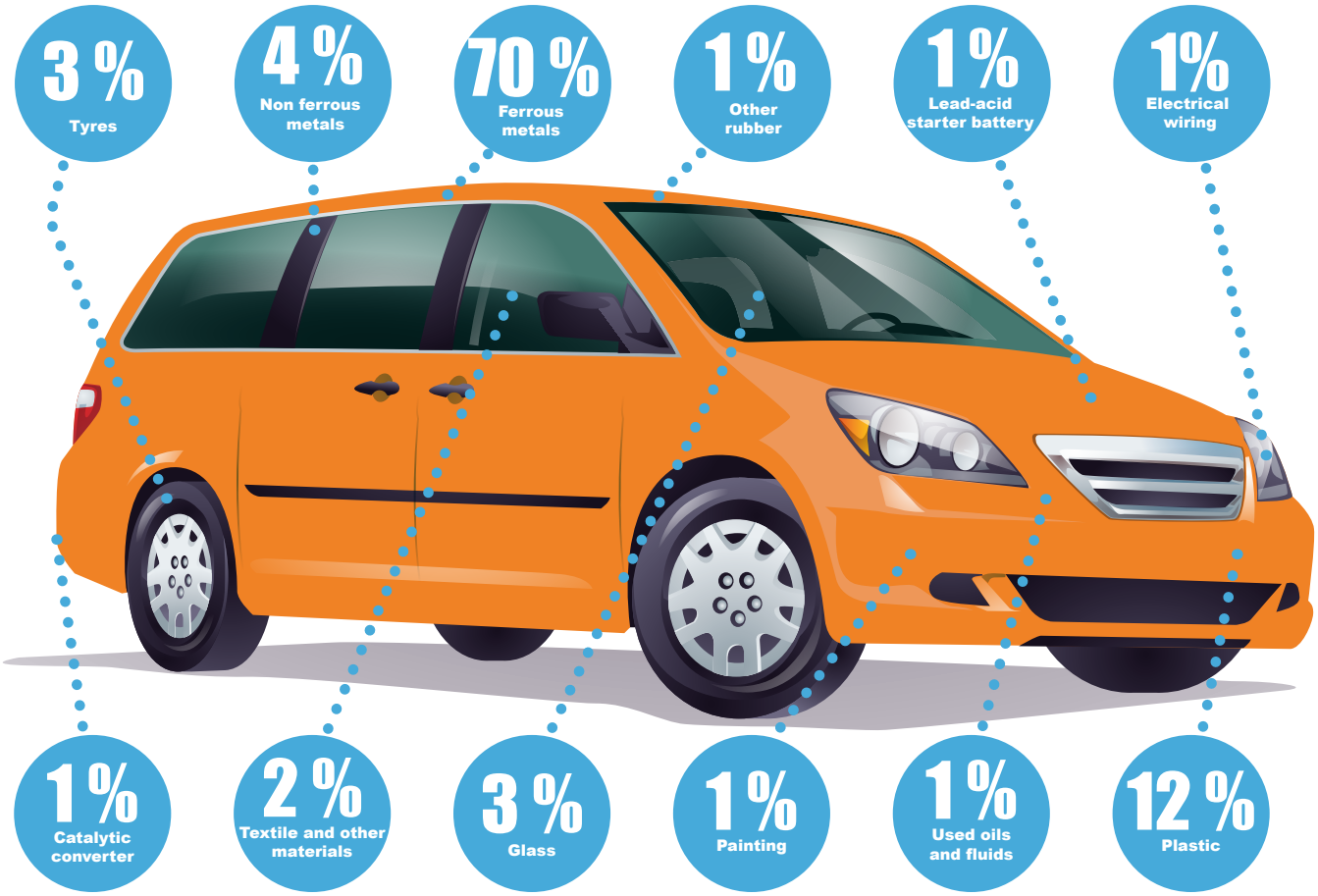
European directive 2000/53/EC of September 18, 2000 relating to ELVs governs the management of these vehicles and sets recycling objectives of 85% of the mass of the ELV, and recovery of 95%. At the national level, the regulatory framework is defined by articles R.543-153 and following ones of the environmental code. Vehicles are marketed by producers (manufacturers and importers) via a network of distributors. At the end of its life, the vehicle must be handed over to an approved ELV centre among the 1,600 treatment centres in France so that it can be treated according to precise specifications allowing compliance with health and environmental rules. This is responsible for decontaminating it (removal of fluids, oils, fuels, braking fluid, air conditioning, batteries and securing pyrotechnic devices) and dismantling parts for second-hand resale or recycling, then transmits the carcass obtained from one of the 60 approved crushers (data 2020, ADEME). These crush the vehicle to separate the different materials that compose it. The latter, when 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).

The AGEC (Anti-waste for a circular economy) laws of February 10, 2020 and the Climate and Resilience law of August 22, 2021 provided for the establishment of a complete REP (Extended Producer Responsibility) sector for producers of energy-efficient vehicles (passenger cars, vans, two- or three-wheel motor vehicles and motor quadricycles). The implementing decree, published on December 1, 2022, defines the management rules relating to ELVs regarding their collection and processing, as well as the conditions and modalities for implementing the EPR obligation.

In addition, 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-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 parts from the circular economy are defined as components and elements marketed by approved ELV centres or components and elements reconditioned in accordance with the manufacturer's specifications and marketed under the label «exchange standard" (decree of October 4, 1978).

96% **Automotive reuse and recovery rate in 2020**

► **COMPOSITION OF AN END OF LIFE VEHICLE IN 2020**



Source: ADEME

Finally, the resale of used spare parts helps to achieve recycling rates and contributes to the economic balance of the automobile industry. More than 114,000 tonnes of parts were dismantled from ELVs for reuse in 2020, or 82 kg per ELV. This tonnage, however, remains lower than in previous years due to the Covid crisis. Furthermore, this market experienced strong development after this crisis because many new spare parts experienced stock problems and saw their prices increase sharply. The used parts market has grown and today represents between 4 and 6% of the repair parts market, depending on the age of the car.

Car manufacturers have been integrating the circular economy into their development plans for many years. In the Renault group, the Flins Refactory proposes the deployment of four areas of activity serving the circular economy: reconditioning of used vehicles, repair of heavily damaged vehicles, reconditioning of batteries as a means of energy storage and recycling of end-of-life vehicles and batteries. The Future is NEUTRAL, created by the Renault group, aims to offer closed-loop recycling solutions at each stage of a vehicle's life (construction, use, etc.). Stellantis has a Business Unit dedicated to the circular economy and has announced the opening in 2023 of its first Circular Economy Hub within the Mirafiori complex in Italy. This will accommodate vehicle refurbishment and dismantling activities, as well as the reconditioning of spare parts. Finally, Renault Trucks, which already offers the transformation of used vehicles in the Used Trucks Factory in Bourg-en-Bresse and remanufacturing in the Limoges factory, opened, in September 2022, the Used Parts Factory, in Vénissieux, intended for the dismantling of trucks at the end of their life and the reuse of their parts for future marketing.

AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT

+16% Increase in total purchases in the automotive sector in 2021

Production in the automotive sector rebounded in 2021 to 59.9 billion euros in 2021, an increase of 12% but it remains down 13% compared to 2019.

The branch's purchases amounted to 50.4 billion euros, an increase of 16% compared to 2020, but they remain down 9% compared to 2019.

The added value (VA) of the automotive sector amounts to 9.5 billion euros, compared to 13.7 billion in 2019, a fall of 31% in two years. The gross operating surplus (EBE) has lost 56% in two years to 2.6 billion euros. Mechanically, the margin rate (EBE/VA), which has fluctuated around 43% since 2015, has fallen sharply over the last two years, standing at 28% in 2021 (compared to 43% in 2019), reflecting competitiveness difficulties. of the branch.

Gross fixed capital formation (GFCF), necessary for the transformation of the sector's activity in the context of energy transition (factories, R&D), however, continued to increase and stood at 8 billion euros. in 2021, up almost 8%.

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

		2000	2005	2010	2015	2021 (1)
PURCHASES FROM OTHER INDUSTRIES	%	**71.7**	**76.3**	**75.6**	**72.4**	**69.5**
Electrical, electronic and IT equipment; machines	%	20.6	21.0	20.1	18.6	19.8
manufacture of IT, electronic and optical products	%	4.8	4.8	4.5	3.3	3.7
manufacture of electrical equipment	%	3.1	3.4	3.5	3.4	3.3
manufacture of machinery and equipment not included elsewhere	%	12.8	12.8	12.1	11.8	12.8
Other industries (including coking and refining)	%	**35.8**	**39.8**	**39.7**	**37.4**	**35.0**
metallurgy and metalworking	%	16.0	16.7	17.5	16.2	14.0
manufacture of rubber, plastic and mineral products	%	9.1	10.8	10.1	9.6	9.2
other manufacturing industries (including repairs and installations)	%	3.7	4.7	4.5	4.3	4.5
chemical industry	%	2.6	2.8	3.0	2.8	2.5
manufacture of textiles, clothing industries, leather and shoes	%	1.6	1.9	1.8	1.8	1.8
wood, paper and printing industries	%	1.4	1.4	1.6	1.4	1.2
Extraction, energy and water industries	%	**1.6**	**1.5**	**2.0**	**2.0**	**1.7**
electricity, gas, steam and air conditioning	%	0.9	0.8	1.2	1.2	1.1
water, sanitation, waste management and decontamination	%	0.7	0.7	0.8	0.8	0.6
Construction	%	**0.3**	**0.4**	**0.3**	**0.3**	**0.3**
Motorcycle and car sales and repairs	%	**0.7**	**1.1**	**1.0**	**1.1**	**1.0**
Transport and storage	%	**1.2**	**1.3**	**1.5**	**1.5**	**1.5**
Information and communications	%	**0.4**	**0.4**	**0.5**	**0.4**	**0.4**
Financial and insurance services	%	**0.8**	**0.7**	**0.9**	**1.1**	**1.0**
Real estate activities	%	**0.2**	**0.2**	**0.2**	**0.2**	**0.2**
Corporate services	%	**7.7**	**7.7**	**7.3**	**7.5**	**6.5**
legal, accounting, control and technical analysis, etc.	%	1.6	1.9	2.1	2.2	2.0
scientific research and development	%	0.0	0.0	0.0	0.0	0.0
other specialised, scientific and technical activities	%	2.8	2.7	2.7	3.0	2.4
administrative and support services	%	3.4	3.1	0.0	0.0	0.0
Other commercial sector industries	%	**2.3**	**2.1**	**2.1**	**2.3**	**2.3**
All commercial sector purchases	%	**13.4**	**13.6**	**13.4**	**14.1**	**12.8**
PURCHASES WITHIN THE INDUSTRY	%	**28.3**	**23.7**	**24.4**	**27.6**	**30.5**
Total industry production at base prices	Current € billion	**70.3**	**75.6**	**58.3**	**56.5**	**59.9**
As a % of production at base prices	%	100.0	100.0	100.0	100.0	100.0
Total purchases (2)	Current € billion	**52.8**	**58.2**	**43.9**	**43.2**	**50.4**
As a % of production at base prices	%	75.1	77.0	75.4	76.6	84.2
Added value by the industry	Current € billion	**17.5**	**17.4**	**14.4**	**13.2**	**9.5**
As a % of production at base prices	%	24.9	23.0	24.6	23.4	15.8
Gross operating surplus (GOS)	Current € billion	-	-	-	**5.7**	**2.6**
As a % of added value (margin rate)	%	-	-	-	43.0	27.8

(1) These data are provisional.
(2) Total purchases (intermediate consumption) refers to the value of goods and services transformed or consumed fully during the production process. The distribution of purchases by industry is expressed by volume. Since 2010 the research and development costs are no longer included in intermediate consumption, but in GFCF. It does not include the depreciation of fixed production assets, which is recorded in uses of capital employed.
Source: INSEE – National accounts (base 2014 excl. years before 2010: base 2010)

The automobile branch's total purchases, which represent more than three quarters of its production, are made 30% by the branch itself. This figure is stable over a long period, but it fell to around 24% between 2009 and 2012 and has risen slightly over the last two years.

Purchases from manufacturers of machinery and equipment (excluding electrical, electronic and IT products) represent nearly 13% of total purchases, while manufacturers of electrical equipment, IT and electronic products represent 7% of purchases.

Purchases from "other industries" amount to 35% of all purchases, among which metallurgy and the manufacturing of metal products remain the leading suppliers (14% of total purchases, in slight but steady decline).

Purchases from the tertiary sector represent around 13% of total purchases, down slightly in recent years, with a share intended for business support activities, the share of which is also decreasing (6.5% in 2021, compared to 7.5% in 2018).

OEMS AND INDUSTRIAL SUPPLIERS TO THE AUTOMOTIVE INDUSTRY

Automotive manufacturing is a structuring industry for its suppliers and for the French economy. It brings together various actors of different sizes, professions and ranks. It involves the sector of equipment manufacturers and other suppliers, such as plastics processing, industrial rubber, foundry, industrial metal services, but also more and more new players linked to the energy transition (power electronics, batteries, recycling, retrofit, etc.). Automobile manufacturing and all its suppliers make up the automobile industry.

The upstream part of the sector brings together manufacturers of light vehicles (passenger cars and LCVs), equipment manufacturers and tier 1 suppliers, as well as numerous subcontractors belonging to very diverse sectors (mechanics, plastics, rubber, electronics); it also includes manufacturers of industrial vehicles (trucks, buses and coaches), as well as bodybuilders. The upstream sector employs more than 350,000 employees in France (excluding temporary workers), has an export value of nearly 50 billion euros, and a 16% share of the turnover of the French manufacturing industry.

In recent years, the automotive industry has undergone significant developments. Facing international competition in terms of competitiveness, it lost 40% of its jobs between 2006 and 2022, with different impacts depending on the regions and subcontractors. The energy transition also has new consequences on employment, both in terms of a drop in volumes, but also in the structure of jobs. Sub-sectors linked to thermal engines and traditional activities (mechanics) will be more impacted in terms of jobs, to the benefit of the IT, electronics, chemistry (batteries) sectors and new activities linked to recycling and the circular economy.

A major customer the French automobile industry is one of the leading industrial customers in many economic sectors

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

Activity	Employees as % of total
Assemblers or engine makers	29%
OEMs	15%
Metal products	11%
Manufacture of rubber and plastic products	11%
Metallurgy	9%
Manufacture of IT, electronic and optical products	6%
Production of mechanical parts	6%
Body builders or developers	4%
Production of electrical equipment	4%
Chemicals	4%
Production of glass products	1%
Textiles	0%
Refined oil products	0%
Production leather items	0%

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

► THE IMPACT OF THE ENERGY TRANSITION ON EMPLOYMENT IN SUB-SECTORS: RISK GROUP (JOB LOSS), INTERMEDIATE GROUP (MODERATE OR NO IMPACT), GROWING GROUP (JOB CREATION)

Risk group	Intermediate group	Growing group
Turning	Rubber	Electronics / Electric
Stamping	Aluminum foundry/extrusion	ePowertrain
Cast iron foundry	Plastics	
Forge	Fabric/Textile	
Metal processing	Fixation	

Source: Alixpartner/PFA study, November 2021

► 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, shows the impact of the core activity of the sector (construction, bodywork, equipment), on peripheral activities, thus forming the entire automotive industrial sector (see table above). The entire sector represents 16% of the turnover of the manufacturing industry and 11% of the added value. The added value of the automotive sector amounts to 24 billion euros, distributed equally between the core and the periphery. In addition, the sector's export rate is higher than that of the manufacturing industry (43%, compared to 34%), but this ratio is more important for the core (56%) than for the periphery (35%).

In recent years, the automotive sector (DGE scope) has experienced a significant drop in its workforce, going from 441,000 "full-time equivalent" employees in 2012, to 400,000 in 2018, then 350,000 in 2022.

According to data from the FIEV (Federation of Vehicle Equipment Industries), the workforce of equipment manufacturers stood at 57,388 employees at the end of 2022, a decline of 17% compared to 2019. The turnover was recovered in 2022 to 15 billion euros (+8%) but remains down 18% compared to 2019. The share of turnover intended for export amounts to 45%. Equipment manufacturers address two types of market: that of original equipment, whose equipment is intended for assembly lines, and that of secondary equipment or spare parts. The share of turnover generated by original equipment in France represents 40% of the total in 2021, or more than 80% when adding exports. The outsourcing process has resulted in an even greater use of suppliers, whose services represent a high and growing share of the cost of manufacturing a vehicle (around 85% according to the FIEV). But a process of re-internalisation of certain activities is appearing today.

The French automobile industry still relies on its industrial base. It represents significant shares of the activity of technical plastic parts, industrial rubber markets, foundry, industrial metal services (cutting, stamping, industrial mechanics, turning, forging, stamping, stamping and metal coatings), to which are added purchases from the steel industry (25% of tonnages to the automobile industry), chemicals (10% for all transport materials), and even energy producers.

Nearly a fifth of plastics and electronic equipment activities and 10% of the domestic mechanical industries market concern the automobile industry. Regarding forging and foundry, this share is around 50% and this ratio rises to 70% in the polymers and rubbers sector. However, the energy transition has significant consequences for the entire sector and will have very different impacts depending on the sub-sectors considered. The Alix Partner / PFA study, published in November 2021, highlighted three profiles of sub-sectors according to their exposure to change: a group of sub-sectors at risk, which concerns traditional activities and those linked to the engine thermal (bar turning, stamping, foundry, forging, etc.); an intermediate group (rubber, plastics, textiles, etc.) which will be less impacted; and a growing group (electronics, ePowertrain), with the opportunity to create new value chains and therefore jobs (battery chemistry, charging infrastructure, etc.).

EMPLOYMENT

In the broad sense, 2.2 million people had their jobs ensured by the automobile in 2022, or more than 8% of the employed active population.

Strictly speaking, the automobile industry employs around 214,000 people, or 7% of salaried employment in the entire industry (including extractive industries, food industries and industrial companies), in regular decline for several years.

► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2022
(IN THOUSANDS OF PEOPLE)

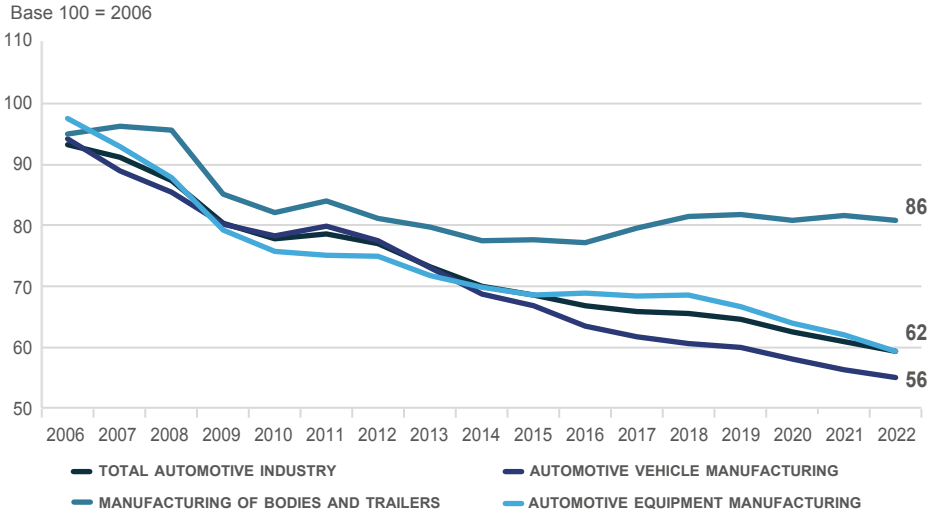
	2022
Production operations	422
Raw materials and services	208
Manufacturing and energy sector	130
Services	79
Automotive industry	214
Automotive manufacturing	104
Equipements, accessories	88
Bodywork, trailers, caravans	22
Cars use	550
Sales, repairs, automotive equipment sales, vehicle inspections, short-term rentals, breakers and recycling	424
Insurance, experts, financing, long-term rental, etc.	90
Others (fuel retailing, self-employed, etc.)	28
Motor sport, media, publishing, other	8
Transports	1,304
Road transport (passengers and freight, outsourced and in-house), related services	1,152
Police, health, education, non-commercial administration	30
Road building and maintenance	122
Total jobs related to the automotive industry	2,275

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

Since the beginning of the 2000s, the lack of competitiveness of the France site has weighed on automotive industrial activities (all components combined), including those upstream. This led to a drop in numbers well before the 2009 crisis. During the latter, public policies to support activity and businesses made it possible to limit the impacts of the crisis on employment. In the following decade, economic policy measures by all actors made it possible to improve productivity. However, they have not made it possible to reduce the competitiveness deficit with other European countries, which have notably captured the production of segment B vehicles, nor to halt the downward trend in the workforce. In 2020, the health crisis affected activity, but its effects on employment were limited by the support mechanisms put in place by the government in the various sectors linked to the automobile. Since then, employment has remained under pressure from external competition and continues to decline. To this development are now added the effects of the ecological transition on employment, with the creation of new professions (electric motors, recycling, etc.), but which will not compensate for the decline in activities linked to thermal energy, more labor intensive. In the broad sense, 2.2 million people had their jobs ensured by the automobile in 2022, or more than 8% of the employed active population

8% **Share of the working population employed in France linked to the automotive sector (direct, indirect and road transport-related jobs)**

EVOLUTION OF THE WORKFORCE IN THE AUTOMOBILE INDUSTRY BY MAIN ACTIVITY



Source: ACOSS

The automobile industry, one of the main contributors to industrial production in France, has generated around 420,000 jobs, through its production and its purchases from other branches, whether industrial or service (including the interim), or around 20% of total automobile-related employment. The number of temporary workers concerned in full-time employment equivalent (FTE) averaged around 21,000 people between 2011 and 2015, which corresponded to years of low production in France. This figure can, however, reach 35,000 people when production is at a high level as was the case in 2017 and 2018. In 2020, the number of temporary workers fell to 18,700 people and it will rise to 24,500 people in 2022.

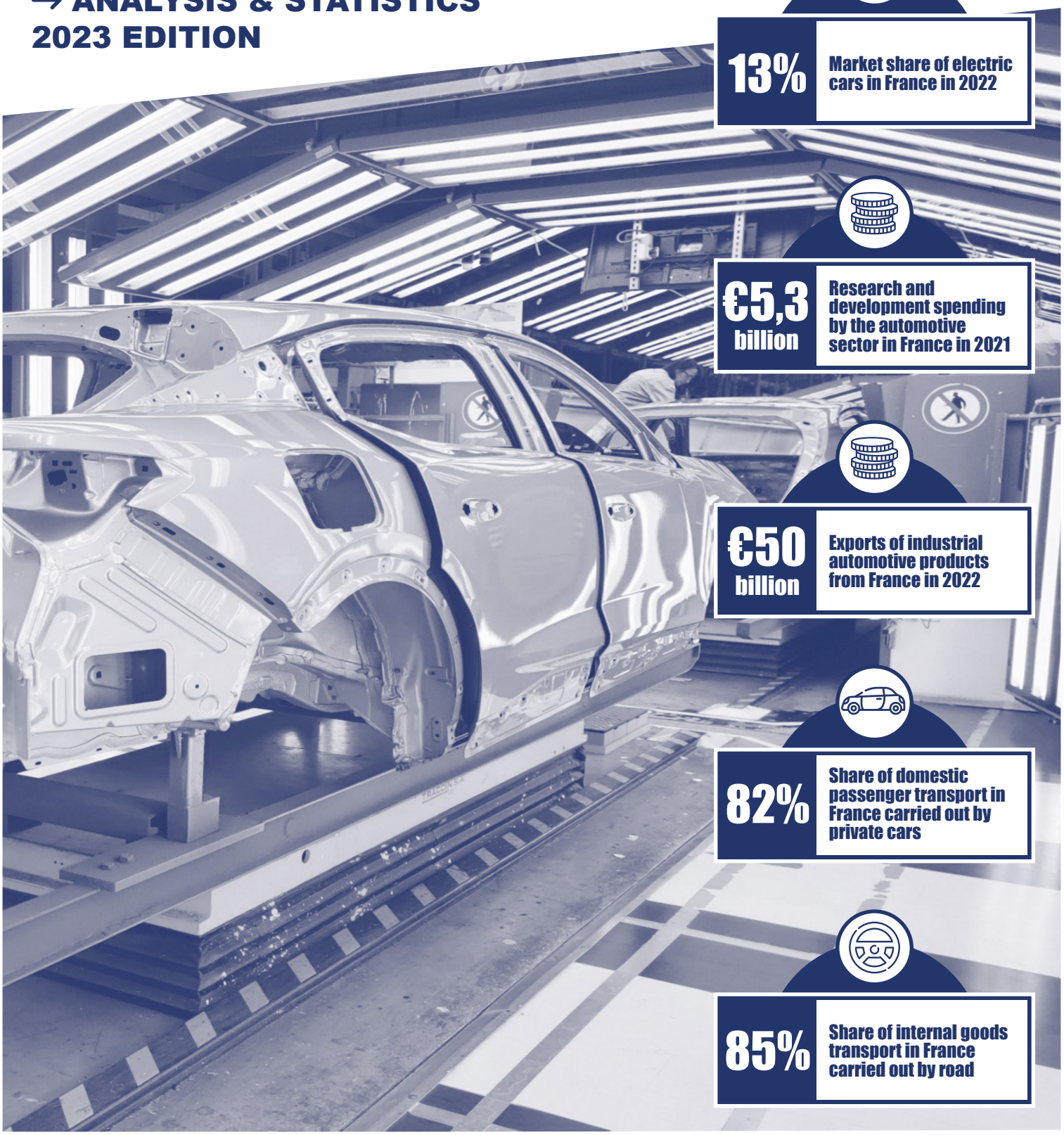
Concerning use, the professions are by nature less sensitive, due to their links with the vehicle fleet which remains in slight progression. The use of the automobile concerns around 550,000 jobs (i.e. a quarter of the total workforce), which are linked in particular to the vehicle-related service sectors (sales, repair, trade in automobile equipment, rental, etc.), fuels and recycling (oils, scrappers, etc.), but also mobility services and learning to drive. These figures correspond to both employees, but also individual entrepreneurs (or non-employees).

Finally, road transport (passengers and goods) and its infrastructure employed around 1.3 million people, or more than half of total automobile-related employment. Thanks to the slight recovery in road passenger transport after the COVID crisis and the rebound in freight transport, employment increased in 2022. On the infrastructure side, the public works sector slightly increased its employment level in 2022, with the resumption of public procurement.

THE FRENCH AUTOMOTIVE INDUSTRY

CCFA

→ ANALYSIS & STATISTICS
2023 EDITION



8.4 million vehicles — Produced by the Stellantis and Renault groups worldwide in 2022

13% — Market share of electric cars in France in 2022

€5,3 billion — Research and development spending by the automotive sector in France in 2021

€50 billion — Exports of industrial automotive products from France in 2022

82% — Share of domestic passenger transport in France carried out by private cars

85% — Share of internal goods transport in France carried out by road

WORLD PRODUCTION

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

► PASSENGER CARS (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
EUROPE	17,407,047	17,585,503	17,330,380	18,545,798	18,721,384	14,556,174	13,852,281	13,725,107
WESTERN EUROPE	14,778,879	14,217,571	12,110,446	12,636,580	11,678,070	8,636,308	8,009,637	8,533,750
Germany	5,131,918	5,350,187	5,552,409	5,708,138	4,663,749	3,515,488	3,096,165	3,480,357
Belgium	912,233	895,109	528,996	369,172	247,020	237,057	224,180	232,100
Spain	2,366,359	2,098,168	1,913,513	2,218,980	2,248,291	1,800,664	1,662,174	1,785,432
France	2,879,810	3,112,961	1,924,171	1,555,000	1,662,963	927,344	918,825	1,010,466
Italy	1,422,284	725,528	573,169	663,139	542,472	451,718	443,819	473,194
The Netherlands	215,085	115,121	48,025	57,019	176,113	127,058	107,021	101,670
Portugal	178,509	137,602	114,563	115,468	282,142	211,281	229,221	256,018
United Kingdom	1,641,452	1,596,356	1,270,444	1,587,677	1,303,135	920,928	859,575	775,014
Sweden	259,959	288,659	177,084	188,987	279,000	249,000	258,023	238,955
CENTRAL AND EASTERN EUROPE	2,330,692	3,588,266	4,616,540	5,118,191	6,060,672	5,064,823	5,059,808	4,380,468
TURKEY	297,476	453,663	603,394	791,027	982,642	855,043	782,835	810,889
AMERICA	10,022,089	8,795,982	8,228,067	9,394,539	7,004,767	4,967,015	4,491,915	4,832,901
CUSMA (formerly NAFTA)	8,371,806	6,523,591	5,084,330	7,019,427	4,369,893	3,219,558	2,559,194	2,699,108
Canada	1,550,500	1,356,271	967,077	888,565	461,370	327,681	288,235	289,371
USA	5,542,217	4,321,272	2,731,105	4,162,808	2,511,711	1,924,398	1,562,717	1,751,736
Mexico	1,279,089	846,048	1,386,148	1,968,054	1,396,812	967,479	708,242	658,001
SOUTH AMERICA	1,650,283	2,272,391	3,143,737	2,375,112	2,634,874	1,747,457	1,932,721	2,133,793
Argentina	238,921	182,761	508,401	308,756	108,364	93,001	184,106	257,505
Brazil (1)	1,351,998	2,011,817	2,584,690	2,017,639	2,448,490	1,607,175	1,707,851	1,824,833
ASIA-OCEANIA	13,573,073	20,249,215	32,408,358	40,125,960	40,650,626	35,822,949	38,188,956	42,324,447
China	605,000	3,941,767	13,897,083	21,143,351	21,389,833	19,994,081	21,444,743	23,836,083
South Korea	2,602,008	3,357,094	3,866,206	4,135,108	3,612,587	3,211,706	3,162,727	3,438,355
India	517,957	1,264,111	2,831,542	3,408,849	3,629,008	2,836,534	3,631,095	4,439,039
Japan	8,359,434	9,016,735	8,310,362	7,830,722	8,329,130	6,960,411	6,619,245	6,566,356
AFRICA	213,444	319,598	356,872	604,130	795,720	562,477	582,814	716,195
South Africa	230,577	324,875	295,394	341,025	348,665	238,216	239,267	309,423
TOTAL	41,215,653	46,950,298	58,323,677	68,670,427	67,172,497	55,908,615	57,115,966	61,598,650

► LIGHT COMMERCIAL VEHICLES (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
EUROPE	2,783,468	3,132,236	2,529,925	2,672,648	2,851,062	2,395,787	2,528,595	2,504,781
WESTERN EUROPE	2,326,653	2,246,450	1,686,875	1,794,888	1,941,872	1,573,402	1,617,815	1,552,840
Germany	394,697	407,523	353,576	325,226	283,567	227,082	212,527	197,463
Belgium	121,061	31,406	26,306	40,081	38,777	30,236	36,858	44,454
Spain	666,515	654,332	474,387	514,221	574,341	467,521	435,959	434,030
France	468,551	436,047	305,250	417,000	509,552	388,653	433,401	372,707
Italy	316,031	312,824	265,017	351,084	372,819	325,339	353,424	323,200
Netherlands (2)	52,234	65,627	46,107	2,252	n/a	n/a	n/a	n/a
Portugal	68,215	83,458	44,166	41,158	63,546	52,955	60,733	66,386
United Kingdom	172,442	206,753	123,019	94,479	78,270	66,116	72,913	101,600
Sweden	41,384	50,570	40,000	n/a	n/a	n/a	n/a	n/a
CENTRAL AND EASTERN EUROPE	323,203	459,997	351,887	309,991	430,588	379,550	417,475	410,182
TURKEY	133,471	425,789	491,163	567,769	478,602	442,835	493,305	541,759
AMERICA	9,761,798	10,488,678	8,119,880	11,567,600	13,155,634	10,725,912	11,698,920	12,923,362
CUSMA (formerly NAFTA)	9,325,214	9,795,192	7,069,234	10,935,086	12,452,713	10,154,846	10,907,871	12,099,038
Canada	1,411,136	1,331,621	1,101,112	1,394,742	1,455,215	1,048,446	826,767	939,364
USA	7,257,640	7,625,381	5,011,988	7,943,180	8,381,173	6,896,628	7,594,488	8,308,603
Mexico	656,438	838,190	956,134	1,597,164	2,616,325	2,209,772	2,486,616	2,851,071
SOUTH AMERICA	436,584	693,486	1,050,646	632,514	702,921	571,066	791,049	824,324
Argentina	100,711	136,994	208,139	217,901	206,423	164,186	250,647	279,388
Brazil (1)	329,519	519,023	797,038	411,782	496,498	406,880	540,402	544,936
ASIA-OCEANIA	4,497,938	5,878,721	8,600,629	7,863,313	8,683,215	8,453,600	8,579,844	7,696,347
China	1,464,000	1,775,852	4,367,678	3,423,899	4,360,817	5,231,161	4,676,969	3,184,532
South Korea	512,990	342,256	405,535	420,849	338,027	295,068	299,677	318,694
India	283,403	374,563	725,531	751,736	895,358	545,285	768,017	1,017,818
Japan	1,781,362	1,782,924	1,318,558	1,447,516	1,355,377	1,107,532	1,217,663	1,269,163
AFRICA	115,305	199,195	158,204	232,291	317,931	237,524	324,488	307,331
South Africa	126,787	200,352	176,655	274,633	283,256	208,997	259,820	246,466
TOTAL	17,158,509	19,698,830	19,408,638	22,335,852	25,007,842	21,812,823	23,131,847	23,431,821

(1) From 1996, this concerns the production of vehicles assembled in France.
(2) From 2001, reclassifications of passenger cars into light commercial vehicless were carried out.
Sources: OICA, CCFA

REGISTRATIONS

► REGISTRATIONS OF NEW PASSENGER CARS BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
EUROPE	**17,276,982**	**17,906,455**	**16,499,863**	**16,410,563**	**17,948,525**	**14,176,858**	**14,016,065**	**12,637,455**
WESTERN EUROPE (1)	**14,725,982**	**14,565,695**	**12,984,549**	**13,261,258**	**14,292,164**	**10,807,689**	**10,599,991**	**10,163,746**
Germany	3,378,343	3,319,259	2,916,259	3,206,042	3,607,258	2,917,678	2,622,132	2,651,357
Belgium	515,204	480,088	547,340	501,066	550,008	431,491	383,123	366,333
Spain	1,381,515	1,528,877	982,015	1,094,077	1,258,251	851,222	859,477	813,374
France	2,133,884	2,118,042	2,251,669	1,917,226	2,214,280	1,650,118	1,659,005	1,529,035
Italy	2,415,600	2,244,108	1,961,580	1,575,737	1,916,949	1,381,753	1,458,030	1,316,919
The Netherlands	597,640	465,196	482,531	449,350	446,056	355,598	322,323	313,609
United Kingdom	2,221,670	2,439,717	2,030,846	2,633,503	2,311,140	1,631,064	1,647,181	1,614,063
EUR. CENTRAL AND EASTERN (2) AND TURKEY	**2,551,000**	**3,340,760**	**3,515,314**	**3,149,305**	**3,656,361**	**3,369,169**	**3,416,074**	**2,473,709**
Poland	-	207,007	315,855	354,975	555,598	428,347	446,647	419,749
Russia	-	1,520,225	1,912,794	1,282,740	1,567,743	1,433,956	1,483,444	629,923
Turkey	456,696	438,597	509,784	725,596	387,256	610,109	561,853	592,660
AMERICA		**11,618,929**	**11,131,614**	**12,664,453**	**9,615,068**	**6,863,607**	**7,022,931**	**6,550,719**
Canada	849,132	847,436	694,349	712,322	496,846	318,750	320,605	258,483
USA	8,846,625	7,659,983	5,635,432	7,516,826	4,719,710	3,401,838	3,350,050	2,858,575
Mexico	603,010	714,010	503,748	892,194	763,793	532,433	520,112	486,962
Argentina	224,950	290,648	522,591	480,952	333,226	232,133	240,688	260,876
Brazil	1,188,818	1,439,822	2,856,540	2,123,009	2,262,073	1,615,942	1,558,467	1,576,666
ASIA/OCEANIA/MIDDLE EAST (3)	**-**	**15,095,017**	**27,269,324**	**36,109,867**	**36,356,750**	**33,036,574**	**35,403,825**	**39,499,158**
Australia	-	789,096	827,407	924,154	799,263	676,804	753,256	777,688
China	-	3,971,101	13,757,794	21,210,339	21,472,091	20,177,731	21,518,324	23,563,287
South Korea	1,057,620	893,159	1,237,482	1,533,670	1,497,035	1,618,333	1,468,873	1,420,486
India	-	1,106,863	2,387,197	2,772,270	2,962,115	2,433,473	3,082,279	3,792,356
Indonesia	-	364,319	541,475	755,566	785,539	388,925	659,809	783,563
Japan	4,259,771	4,748,482	4,203,181	4,215,889	4,301,091	3,809,981	3,675,698	3,448,297
Malaysia	-	410,892	543,594	591,275	550,182	480,965	452,663	544,838
Thailand	-	178,291	346,644	356,063	468,638	343,494	312,200	343,349
AFRICA	**-**	**784,237**	**908,357**	**1,142,250**	**883,120**	**665,099**	**833,233**	**790,083**
South Africa	-	419,868	337,130	412,670	355,378	246,541	304,340	363,696
WORLD	**38,689,767**	**45,404,638**	**55,809,158**	**66,327,133**	**64,803,463**	**54,742,138**	**57,276,054**	**59,477,415**

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
EUROPE	**2,889,904**	**3,156,871**	**2,308,825**	**2,625,426**	**2,981,609**	**2,537,257**	**2,866,401**	**2,442,633**
WESTERN EUROPE (1)	**2,310,844**	**2,376,384**	**1,712,171**	**1,962,508**	**2,371,360**	**1,920,964**	**2,105,148**	**1,768,794**
Germany	314,804	295,627	282,157	333,783	409,801	349,081	351,187	312,391
Belgium	66,125	71,413	60,157	70,458	91,992	78,503	80,688	65,261
Spain	335,684	430,611	132,104	182,982	242,993	179,570	174,587	145,439
France	477,204	480,122	457,215	427,866	541,448	449,912	483,279	397,519
Italy	268,057	251,328	202,573	150,342	215,681	183,003	211,825	189,059
The Netherlands	114,354	80,787	59,781	71,828	92,683	71,564	80,500	72,849
United Kingdom	301,523	388,410	262,730	427,903	425,419	333,596	401,824	329,509
EUR. CENTRAL AND EASTERN (2) AND TURKEY	**579,060**	**780,487**	**596,654**	**662,918**	**610,249**	**616,293**	**761,253**	**673,839**
Poland	-	48,100	50,722	77,464	100,660	81,806	107,972	98,299
Russia	-	286,400	194,341	158,183	211,098	197,207	258,521	178,681
Turkey	199,825	276,615	251,129	285,598	104,691	186,041	210,997	234,503
AMERICA	**-**	**11,719,925**	**8,588,367**	**13,023,706**	**15,774,661**	**13,953,878**	**14,991,703**	**14,337,522**
Canada	736,951	782,706	889,039	1,227,195	1,479,594	1,267,724	1,384,245	1,304,482
USA	8,965,048	9,784,346	6,136,787	10,328,798	12,768,444	11,479,518	12,058,515	11,371,749
Mexico	302,944	454,498	344,606	497,280	596,215	445,217	526,620	647,480
Argentina	81,995	112,042	175,813	163,069	118,974	102,183	140,748	146,732
Brazil	302,288	274,822	658,524	445,967	525,777	442,495	561,384	527,795
ASIA/OCEANIA/MIDDLE EAST (3)	**-**	**5,307,718**	**7,909,760**	**7,295,772**	**8,188,353**	**8,174,681**	**8,215,050**	**7,129,118**
Australia	-	199,173	208,167	231,254	263,604	240,164	296,575	303,741
China	-	1,787,088	4,304,142	3,451,263	4,324,840	5,133,338	4,795,939	3,300,458
South Korea	372,840	252,071	273,891	300,116	298,099	287,639	265,708	263,171
India	-	333,592	653,193	652,566	854,743	505,102	677,119	933,116
Indonesia	-	169,598	223,235	275,856	244,947	143,152	227,396	264,477
Japan	1,703,114	1,103,552	752,967	830,621	894,125	788,634	772,642	753,023
Malaysia	-	140,150	61,562	75,402	54,105	48,469	56,248	62,162
Thailand	-	514,215	453,713	443,569	538,914	448,652	436,380	506,039
AFRICA	**-**	**328,780**	**342,864**	**435,285**	**317,171**	**260,609**	**300,287**	**300,579**
South Africa	-	197,538	155,777	205,079	177,520	126,092	146,334	165,866
WORLD	**18,723,143**	**20,513,294**	**19,149,816**	**23,380,189**	**27,261,794**	**24,926,425**	**26,373,441**	**24,209,852**

(1) Including Iceland from 2015.
(2) Central and Eastern European countries, members and non-members of the EU.
(3) Not including Iran from 2019.
Sources: OICA from 2005, which uses data from its members and therefore local definitions in terms of vehicle type

REGISTRATIONS

► REGISTRATIONS OF NEW PASSENGER CARS BY GROUP IN THE EUROPEAN UNION + EFTA + UK

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

	2005	2010	2015	2018	2019	2020	2021	2022 (1)
Stellantis	-	-	-	-	-	-	2,379	2,027
	-	-	-	-	-	-	20.2%	18.2%
PSA group (Stellantis from 01/17/2021)	2,111	1,849	1,480	2,499	2,467	1,718	-	-
	13.6%	13.4%	10.4%	16.0%	15.6%	14.4%	-	-
Renault group	1,635	1,416	1,350	1,621	1,647	1,218	1088	1050
	10.5%	10.2%	9.5%	10.4%	10.4%	10.2%	9.3%	9.4%
FCA group (Stellantis from 01/17/2021)	1,085	1,080	871	1,017	939	696	-	-
	7.0%	7.8%	6.1%	6.5%	6.0%	5.8%	-	-
Ford group	1,269	1,128	1,031	1,009	993	683	553	539
	8.2%	8.2%	7.3%	6.5%	6.3%	5.7%	4.7%	4.9%
General Motors	1,590	1,196	943	4	3	0	1	1
	10.2%	8.6%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	3,041	2,984	3,516	3,726	3,855	3,036	2935	2742
	19.5%	21.6%	24.8%	23.9%	24.4%	25.4%	25.0%	24.7%
Daimler group	830	676	839	983	1,030	776	680	659
	5.3%	4.9%	5.9%	6.3%	6.5%	6.5%	5.8%	5.9%
BMW group	772	753	936	1,032	1,047	847	858	808
	5.0%	5.4%	6.6%	6.6%	6.6%	7.1%	7.3%	7.3%
Nissan	361	407	560	497	395	288	248	234
	2.3%	2.9%	3.9%	3.2%	2.5%	2.4%	2.1%	2.1%
Toyota-Lexus-Daihatsu	852	629	603	758	796	692	755	789
	5.5%	4.5%	4.3%	4.9%	5.0%	5.8%	6.4%	7.1%
Other Japanese brands	911	718	695	800	819	524	514	401
	5.8%	5.2%	4.9%	5.1%	5.2%	4.4%	4.4%	3.6%
Hyundai-Kia	569	614	854	1,033	1,061	841	1016	1036
	3.7%	4.4%	6.0%	6.6%	6.7%	7.0%	8.6%	9.3%
Chinese brands group	-	-	-	-	-	-	2	130
	-	-	-	-	-	-	0.0%	1.2%
Geely-Volvo	249	231	285	322	341	297	316	296
	1.6%	1.7%	2.0%	2.1%	2.2%	2.5%	2.7%	2.7%
Tata group	128	100	179	236	224	161	141	110
	0.8%	0.7%	1.3%	1.5%	1.4%	1.3%	1.2%	1.0%
Tesla	0	0	16	29	111	99	169	230
	0.0%	0.0%	0.1%	0.2%	0.7%	0.8%	1.4%	2.1%
Other brands	168	53	31	42	54	62	100	60.595
	1.1%	0.4%	0.3%	0.3%	0.3%	0.5%	0.9%	0.5%
TOTAL EU + EFTA + UK	15,572	13,832	14,189	15,607	15,783	11,940	11,753	11,113
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual change	-	-5.0%	9.3%	0.0%	1.1%	-24.3%	-1.6%	ND (3)

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES BY GROUP IN THE EUROPEAN UNION + EFTA + UK

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

	2005	2010	2015	2018	2019	2020	2021	2022 (2)
Stellantis	-	-	-	-	-	-	680	496
	-	-	-	-	-	-	33.8%	31.2%
PSA group (Stellantis from 01/17/2021)	389	344	354	533	557	460	-	-
	18.1%	21.9%	19.5%	24.7%	25.1%	25.3%	-	-
Renault group	331	266	299	349	362	275	315	231
	15.4%	17.0%	16.5%	16.2%	16.3%	15.1%	15.7%	14.5%
FCA group (Stellantis from 01/17/2021)	284	233	229	266	203	164	-	-
	13.2%	14.9%	12.7%	12.3%	9.1%	9.0%	-	-
Ford group	235	171	268	355	351	298	334	283
	10.9%	10.9%	14.8%	16.5%	15.8%	16.4%	16.6%	17.8%
General Motors	153	78	104	0	0.2	0.2	0.2	0.1
	7.1%	5.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	212	185	218	267	271	218	212	162
	9.9%	11.8%	12.0%	12.4%	12.2%	12.0%	10.5%	10.2%
Daimler group	166	140	172	201	222	199	194	163
	7.7%	8.9%	9.5%	9.3%	10.0%	10.9%	9.6%	10.3%
CNH / IVECO	-	-	-	-	64	52	70	62
	-	-	-	-	2.9%	2.9%	3.5%	3.9%
Nissan	103	43	50	62	57	37	45	23
	4.8%	2.7%	2.7%	2.9%	2.6%	2.1%	2.2%	1.4%
Toyota-Lexus-Daihatsu	65	39	41	56	55	56	84	75
	3.0%	2.5%	2.3%	2.6%	2.5%	3.1%	4.2%	4.7%
Other Japanese brands	81	38	37	40	43	29	41	38
	3.8%	2.4%	2.0%	1.9%	1.9%	1.6%	2.0%	2.4%
Hyundai-Kia	52	6	4	5	4	2	2	1
	2.4%	0.4%	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%
Other brands	78	27	35	24	28	28	35	55
	3.6%	1.7%	1.9%	1.1%	1.3%	1.5%	1.7%	3.5%
TOTAL EU + EFTA + UK	2,149	1,569	1,813	2,157	2,218	1,819	2,011	1,591
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual change	-	8.8%	11.4%	3.3%	2.8%	-18.0%	10.5%	ND (3)

(1) Excluding Denmark and Bulgaria, the annual variation is N/A because the scope is not comparable.
(2) Excluding Denmark, Bulgaria and the Czech Republic, the annual variation is N/A because the scope is not comparable.
Source: CCFA

Grouping of manufacturers used:
Stellantis = Peugeot + Citroën + DS + Opel/Vauxhall (from August 1, 2017) + Alfa Romeo + Fiat + Lancia + Maserati + Chrysler + Jeep + Dodge + Abarth + RAM.
Renault group = Renault (including Renault Trucks) + Alpine + Dacia + Lada (from January 1, 2017).
Ford group = Ford Europe + Ford United States + various Fords.
General Motors = Opel/Vauxhall (until July 31, 2017) + Cadillac+ Chevrolet + GMC.
Volkswagen group = Volkswagen + Audi + Cupra + Porsche + Seat + Skoda + Bentley + Lamborghini + MAN + Scania + Quattro.
Daimler = Mercedes-Benz + Smart + Fuso.
CNH/IVECO: before 2019, IVECO was in the FCA group.
BMW group = BMW + Alpina + Mini + Rolls-Royce.
Other Japanese brands: Mazda, Mitsubishi, Subaru, Suzuki, Honda, Isuzu.
Volvo/Geely group = Volvo + Geely + Polestar + Lotus + Lynk & Co.
Tata group = Jaguar + Land-Rover.
The scope of the groups corresponds to their situation on 01/01/2022.

REGISTRATIONS

▶ REGISTRATIONS OF NEW PASSENGER CARS IN THE EUROPEAN UNION + EFTA + UK IN 2022

(SEE NOTE PAGE 74) (IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	TOTAL	Stellantis Group	Of which Citroën and DS (1)	Of which Peugeot	Renault Group	Of which Renault	Volkswagen Group	Ford Group	BMW-Mini	Daimler	Japanese brands	Korean brands
Germany	2,651	331	41	45	143	81	982	133	252	264	178	181
	100.0%	12.5%	1.5%	1.7%	5.4%	3.1%	37.1%	5.0%	9.5%	9.9%	6.7%	6.8%
Austria	215	23	4	7	15	8	80	11	19	12	22	20
	100.0%	10.9%	2.0%	3.3%	7.2%	3.6%	37.2%	5.1%	8.6%	5.4%	10.1%	9.2%
Belgium	366	70	19	29	34	19	82	13	45	29	31	26
	100.0%	19.1%	5.3%	8.0%	9.4%	5.1%	22.3%	3.6%	12.3%	8.0%	8.5%	7.2%
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-
Spain	813	166	48	55	83	46	183	29	39	37	103	123
	100.0%	20.4%	5.9%	6.7%	10.2%	5.6%	22.5%	3.6%	4.8%	4.6%	12.6%	15.1%
Finland	82	7	2	2	3	2	18	4	5	5	18	9
	100.0%	9.1%	2.3%	2.5%	3.4%	1.9%	22.0%	4.3%	6.3%	6.7%	21.6%	11.0%
France	**1,529**	**478**	**151**	**246**	**369**	**239**	**195**	**47**	**71**	**49**	**133**	**93**
	100.0%	**31.3%**	**9.9%**	**16.1%**	**24.2%**	**15.6%**	**12.8%**	**3.1%**	**4.6%**	**3.2%**	**8.7%**	**6.1%**
Greece	105	27	5	9	7	4	15	4	7	5	21	14
	100.0%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
Ireland	105	10	2	5	7	4	26	5	5	4	19	21
	100.0%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%
Italy	1,317	464	62	69	127	60	219	74	65	51	138	84
	100.0%	35.2%	4.7%	5.3%	9.7%	4.5%	16.6%	5.6%	5.0%	3.9%	10.5%	6.4%
Luxembourg	42	9	2	3	2	2	13	1	5	4	2	2
	100.0%	20.5%	3.8%	7.9%	5.6%	3.7%	31.4%	2.6%	11.2%	9.9%	4.4%	5.5%
The Netherlands	312	52	9	21	22	17	65	13	23	13	40	47
	100.0%	16.6%	3.0%	6.8%	7.1%	5.3%	20.8%	4.3%	7.3%	4.1%	12.8%	15.1%
Portugal	156	41	10	17	23	13	23	6	12	12	13	14
	100.0%	26.2%	6.4%	10.8%	14.7%	8.2%	14.7%	3.7%	7.4%	7.9%	8.3%	8.8%
Sweden	288	18	4	8	9	6	68	11	19	16	33	36
	100.0%	6.2%	1.4%	2.7%	3.1%	2.1%	23.5%	3.7%	6.7%	5.5%	11.4%	12.4%
European Union. (13 countries) (2)	**7,983**	**1,696**	**359**	**516**	**846**	**498**	**1,970**	**350**	**566**	**501**	**749**	**670**
	100.0%	**21.3%**	**4.5%**	**6.5%**	**10.6%**	**6.2%**	**24.7%**	**4.4%**	**7.1%**	**6.3%**	**9.4%**	**8.4%**
Iceland	17	1	0	0	1	0	2	0	0	1	5	3
	100.0%	7.1%	0.8%	2.7%	5.7%	1.1%	9.2%	2.1%	2.3%	3.5%	27.5%	19.2%
Norway	174	8	2	3	1	1	43	5	15	11	21	15
	100.0%	4.4%	1.2%	1.9%	0.8%	0.7%	24.8%	3.1%	8.4%	6.0%	12.0%	8.4%
Switzerland	224	22	4	6	15	7	76	9	23	19	26	13
	100.0%	9.9%	1.8%	2.9%	6.6%	3.3%	33.7%	3.9%	10.4%	8.6%	11.7%	5.9%
United Kingdom	1,614	194	32	52	60	32	348	127	155	82	181	181
	100.0%	12.0%	2.0%	3.2%	3.7%	2.0%	21.5%	7.9%	9.6%	5.1%	11.2%	11.2%
Europe (17 countries) (2)	**10,012**	**1,922**	**397**	**579**	**923**	**539**	**2,438**	**492**	**759**	**613**	**982**	**882**
	100.0%	**19.2%**	**4.0%**	**5.8%**	**9.2%**	**5.4%**	**24.3%**	**4.9%**	**7.6%**	**6.1%**	**9.8%**	**8.8%**
Bulgaria	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-
Croatia	44	7	1	2	6	3	13	2	1	1	6	6
	100.0%	16.3%	2.2%	3.7%	13.2%	5.9%	29.4%	3.7%	2.9%	2.8%	14.3%	13.0%
Estonia	21	2	0	1	2	1	6	0	1	1	6	2
	100.0%	8.7%	2.2%	4.0%	7.6%	4.1%	29.2%	1.2%	3.0%	3.7%	29.3%	11.3%
Hungary	112	12	1	2	8	2	22	9	5	6	31	12
	100.0%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Latvia	17	1	0	0	1	0	5	0	1	0	4	2
	100.0%	8.6%	0.9%	2.9%	8.3%	2.6%	32.6%	3.0%	4.0%	1.7%	23.7%	10.1%
Lithuania	26	3	0	1	2	1	7	1	1	1	7	2
	100.0%	10.1%	1.8%	3.0%	7.5%	3.2%	25.7%	2.7%	5.4%	2.6%	27.3%	9.7%
Poland	420	36	7	10	35	14	103	16	27	21	97	61
	100.0%	8.6%	1.7%	2.3%	8.4%	3.4%	24.6%	3.9%	6.4%	5.1%	23.2%	14.5%
Czech Rep.	192	13	3	5	13	4	88	7	5	7	19	29
	100.0%	6.9%	1.6%	2.5%	6.8%	2.0%	45.8%	3.8%	2.5%	3.6%	9.9%	15.0%
Romania	129	10	2	4	48	8	21	9	3	4	17	12
	100.0%	8.1%	1.8%	2.7%	37.4%	6.5%	16.0%	6.7%	2.5%	3.0%	12.8%	9.5%
Slovakia	79	9	2	3	5	2	24	1	2	3	13	18
	100.0%	11.7%	3.1%	4.3%	6.9%	2.2%	30.3%	1.5%	3.0%	3.3%	15.9%	23.1%
Slovenia	44	9	2	2	5	4	14	1	1	1	5	6
	100.0%	20.5%	5.1%	5.7%	12.4%	8.4%	31.0%	3.0%	2.7%	2.6%	10.8%	13.3%
10 Eastern EU member countries (3)	**1,082**	**103**	**20**	**30**	**126**	**38**	**302**	**47**	**48**	**45**	**204**	**150**
	100.0%	**9.5%**	**1.9%**	**2.8%**	**11.6%**	**3.5%**	**27.9%**	**4.3%**	**4.4%**	**4.1%**	**18.8%**	**13.9%**
Europe (27 countries) (2) (3) (4)	**11,113**	**2,027**	**418**	**609**	**1,050**	**577**	**2,742**	**539**	**808**	**659**	**1,186**	**1,032**
	100.0%	**18.3%**	**3.8%**	**5.5%**	**9.5%**	**5.2%**	**24.7%**	**4.9%**	**7.3%**	**5.9%**	**10.7%**	**9.3%**

(1) 368,498 units for Citroën and 49,242 DS.
(2) Excluding Denmark.
(3) Excluding Bulgaria.
(4) Including Cyprus and Malta.

REGISTRATIONS

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

	2000	2010	2015	2019	2020	2021	2022
Germany	3,378,343	2,916,259	3,206,042	3,607,258	2,917,678	2,622,132	2,651,357
Austria	309,427	328,563	308,555	329,363	248,740	239,803	215,050
Belgium	515,204	547,340	501,066	550,003	431,491	383,123	366,303
Denmark	112,688	153,583	206,999	225,410	198,162	185,382	148,293
Spain	1,381,515	982,015	1,034,232	1,258,251	851,210	859,476	813,376
Finland	134,646	107,346	108,844	114,188	96,430	98,502	81,673
France	**2,133,884**	**2,251,669**	**1,917,226**	**2,214,279**	**1,650,118**	**1,659,004**	**1,529,035**
Greece	290,222	141,501	75,804	114,226	80,977	100,911	105,282
Ireland	230,989	88,445	124,804	117,109	88,324	104,932	105,398
Iceland	-	-	14,008	11,719	9,369	12,797	16,689
Italy	2,415,600	1,961,578	1,575,614	1,916,865	1,381,646	1,457,868	1,316,768
Luxembourg	41,896	49,726	46,473	54,923	45,104	44,366	42,094
Norway	97,376	127,754	150,686	142,381	141,405	176,276	174,329
The Netherlands	597,640	482,527	448,925	445,217	355,595	322,318	312,074
Portugal	257,834	223,464	178,503	223,799	145,136	146,637	156,304
United Kingdom	2,221,670	2,030,846	2,633,503	2,311,140	1,631,064	1,647,181	1,614,063
Sweden	290,529	289,684	345,108	356,036	292,024	301,008	288,088
Switzerland	316,519	292,453	321,669	311,256	236,703	238,355	224,272
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	**14,725,982**	**12,974,753**	**13,198,061**	**14,303,423**	**10,801,176**	**10,600,071**	**10,160,448**

► NEW DIESEL PASSENGER CAR REGISTRATIONS BY COUNTRY IN WESTERN EUROPE

(IN UNITS AND AS A % OF TOTAL REGISTRATIONS)

	2000	2010	2015	2019	2020	2021	2022
Germany	1,023,997	1,220,675	1,534,990	1,149,126	832,127	548,054	437,951
	30.3%	41.9%	47.9%	31.9%	28.5%	20.9%	16.5%
Austria	191,402	167,106	179,821	125,794	91,085	58,761	48,115
	61.9%	50.9%	58.3%	38.2%	36.6%	24.5%	22.4%
Belgium	290,301	415,728	299,357	168,378	133,078	90,954	59,972
	56.3%	76.0%	59.7%	30.6%	30.8%	23.7%	16.4%
Denmark	14,898	72,670	64,095	58,706	53,772	18,205	10,111
	13.2%	47.3%	31.0%	26.0%	27.1%	9.8%	6.8%
Spain	734,256	693,905	647,108	348,918	239,887	171,036	139,594
	53.1%	70.7%	62.6%	27.7%	28.2%	19.9%	17.2%
Finland	-	44,574	38,857	21,091	13,702	9,728	5,427
	-	41.5%	35.7%	18.5%	14.2%	9.9%	6.6%
France	**1,046,485**	**1,593,173**	**1,097,124**	**755,583**	**504,178**	**349,479**	**239,105**
	49.0%	**70.8%**	**57.2%**	**34.1%**	**30.6%**	**21.1%**	**15.6%**
Greece	2,006	5,661	47,792	30,390	22,340	17,527	17,113
	0.7%	4.0%	63.0%	26.6%	27.6%	17.4%	16.3%
Ireland	23,259	55,016	88,618	53,259	36,573	32,733	28,290
	10.1%	62.2%	71.0%	45.5%	41.4%	29.3%	26.8%
Islande	-	-	6,677	3,521	1,849	1,733	2,388
	-	-	47.7%	30.0%	19.7%	13.5%	14.3%
Italy	812,203	901,310	872,493	762,842	452,835	322,843	257,883
	33.6%	45.9%	55.4%	39.8%	32.8%	22.1%	19.6%
Luxembourg	21,110	37,403	32,694	22,961	16,592	11,156	9,236
	50.4%	75.2%	70.4%	41.8%	36.8%	25.1%	21.9%
Norway	8,761	95,733	61,482	22,744	11,681	6,422	5,441
	9.0%	74.9%	40.8%	16.0%	8.3%	3.6%	3.1%
The Netherlands	134,426	98,477	129,804	32,608	12,915	6,979	4,638
	22.5%	20.4%	28.9%	7.3%	3.6%	2.2%	1.5%
Portugal	62,417	149,046	121,650	89,411	47,738	32,309	27,968
	24.2%	66.7%	68.2%	40.0%	32.8%	22.0%	17.9%
United Kingdom	313,149	936,448	1,275,411	560,145	290,526	178,502	82,981
	14.1%	46.1%	48.4%	24.2%	17.8%	10.7%	5.1%
Sweden	18,325	147,802	198,956	114,803	55,078	30,272	17,709
	6.3%	51.0%	57.7%	32.2%	18.9%	10.1%	6.1%
Switzetrland	29,466	88,760	124,898	79,533	52,468	32,400	26,056
	9.3%	30.4%	38.8%	25.6%	22.2%	13.6%	11.6%
TOTAL WESTERN EUROPE (17 then 18 countries) (1)	**4,726,461**	**6,723,487**	**6,821,827**	**4,399,813**	**2,868,424**	**1,933,343**	**1,419,978**
Diesel share in Europe	**32.1%**	**51.8%**	**51.7%**	**30.8%**	**27.1%**	**18.2%**	**14.0%**
Year-on-year change	**+10.7%**	**+6.9%**	**+5.9%**	**-14.5%**	**-34.8%**	**-32.6%**	**-26.6%**

(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)

	ENERGY	2005	2010	2015	2019	2020	2021	2022
Germany	electric	0	160	12,319	60,527	188,620	339,847	463,358
		0.0%	0.0%	0.4%	1.7%	6.5%	13.0%	17.5%
	hybrid	3,559	10,174	32,714	240,697	503,735	683,544	818,391
		0.1%	0.3%	1.0%	6.7%	17.3%	26.1%	30.9%
Austria	electric	0	112	1,677	9,242	15,972	33,366	34,165
		0.0%	0.0%	0.5%	2.8%	6.4%	13.9%	15.9%
	hybrid	460	1,248	3,514	16,540	32,053	56,121	54,126
		0.1%	0.4%	1.1%	5.0%	12.9%	23.4%	25.2%
Belgium	electric	0	47	1,358	8,830	14,976	22,647	37,581
		0.0%	0.0%	0.3%	1.6%	3.5%	5.9%	10.3%
	hybrid	471	4,073	10,711	34,092	70,271	111,230	114,185
		0.1%	0.7%	2.1%	6.2%	16.3%	29.0%	31.2%
Denmark	electric	2	50	4,468	5,575	14,275	24,998	30,855
		0.0%	0.0%	2.2%	2.5%	7.2%	13.5%	20.8%
	hybrid	5	148	2,657	17,330	27,880	49,319	54,696
		0.0%	0.1%	1.3%	7.7%	14.1%	26.6%	36.9%
Spain	electric	0	69	1,461	10,048	17,925	23,685	30,524
		0.0%	0.0%	0.1%	0.8%	2.1%	2.8%	3.8%
	hybrid	908	6,253	20,547	114,531	148,193	273,130	287,460
		0.1%	0.6%	2.0%	9.1%	17.4%	31.8%	35.3%
France	**electric**	**6**	**184**	**17,268**	**42,764**	**110,917**	**162,106**	**202,929**
		0.0%	**0.0%**	**0.9%**	**1.9%**	**6.7%**	**9.8%**	**13.3%**
	hybrid	**2,857**	**9,655**	**61,619**	**125,372**	**243,464**	**427,477**	**459,216**
		0.1%	**0.4%**	**3.2%**	**5.7%**	**14.8%**	**25.8%**	**30.0%**
Italy	electric	28	112	1,452	10,671	32,492	67,267	49,165
		0.0%	0.0%	0.1%	0.6%	2.4%	4.6%	3.7%
	hybrid	1,132	4,841	26,262	116,333	253,171	492,675	515,518
		0.1%	0.2%	1.7%	6.1%	18.3%	33.8%	39.2%
Norway	electric	7	355	25,779	60,315	75,333	113,715	138,260
		0.0%	0.3%	17.1%	42.4%	53.3%	64.5%	79.3%
	hybrid	337	3,144	15,704	37,869	45,326	52,209	24,321
		0.3%	2.5%	10.4%	26.6%	32.1%	29.6%	14.0%
The Netherlands	electric	0	96	3,204	61,547	72,854	62,646	73,249
		0.0%	0.0%	0.7%	13.8%	20.5%	19.4%	23.5%
	hybrid	2,940	16,099	56,261	36,928	65,838	103,550	112,395
		0.6%	3.3%	12.5%	8.3%	18.5%	32.1%	36.0%
United Kingdom	electric	0	167	9,934	37,782	108,148	190,715	267,196
		0.0%	0.0%	0.4%	1.6%	6.6%	11.6%	16.6%
	hybrid	5,766	22,148	64,692	265,306	312,141	460,272	581,406
		0.2%	1.1%	2.5%	11.5%	19.1%	27.9%	36.0%
Sweden	electric	1	9	2,880	15,595	27,968	57,470	95,035
		0.0%	0.0%	0.8%	4.4%	9.6%	19.1%	33.0%
	hybrid	1,947	3,628	14,478	57,870	105,725	131,412	125,204
		0.7%	1.3%	4.2%	16.3%	36.2%	43.7%	43.5%
Switzerland	electric	13	199	3,777	13,143	19,485	31,806	39,842
		0.0%	0.1%	1.2%	4.2%	8.2%	13.3%	17.8%
	hybrid	1,413	4,210	8,400	26,990	44,875	74,960	73,956
		0.5%	1.4%	2.6%	8.7%	19.0%	31.4%	33.0%
TOTAL WESTERN EUROPE (17 then 18 countries) (1)	**electric**	**57**	**1,611**	**87,206**	**350,335**	**720,472**	**1,173,639**	**1,524,935**
		0.0%	**0.0%**	**0.7%**	**2.4%**	**6.7%**	**11.0%**	**15.0%**
	hybrid	**23,210**	**90,198**	**333,028**	**1,151,196**	**1,944,146**	**3,068,616**	**3,384,704**
		0.2%	**0.7%**	**2.5%**	**8.0%**	**18.0%**	**27.5%**	**33.3%**

(1) Including Iceland since 2015.
Sources: CCFA, ACEA

REGISTRATIONS

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

► NEW PASSENGER CAR REGISTRATIONS BY GROUP IN WESTERN EUROPE

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

	2000	2010	2015	2018	2019	2020	2021	2022 (2)
Stellantis	-	-	-	-	-	-	2,238	1,924
	-	-	-	-	-	-	21.1%	19.2%
PSA group	1,930	1,776	1,423	2,338	2,302	1,617	-	-
	13.1%	13.7%	10.8%	16.5%	16.1%	15.0%	-	-
Renault group	1,559	1,305	1,230	1,439	1,436	1,063	962	924
	10.6%	10.1%	9.3%	10.1%	10.0%	9.8%	9.1%	9.2%
FCA group (Stellantis from 01/17/2021)	1,575	1,035	841	966	877	638	-	-
	10.7%	8.0%	6.4%	6.8%	6.1%	5.9%	-	-
Ford group	1,248	1,063	966	931	917	635	504	493
	8.5%	8.2%	7.3%	6.6%	6.4%	5.9%	4.8%	4.9%
General Motors	1,720	1,119	878	4	3	0	1	1
	11.7%	8.6%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	2,776	2,757	3,202	3,305	3,437	2,701	2,615	2,441
	18.8%	21.3%	24.3%	23.3%	24.0%	25.0%	24.7%	24.3%
Daimler	811	662	815	938	984	735	636	614
	5.5%	5.1%	6.2%	6.6%	6.9%	6.8%	6.0%	6.1%
BMW group	499	735	906	993	1,001	807	810	760
	3.4%	5.7%	6.9%	7.0%	7.0%	7.5%	7.6%	7.6%
Nissan	392	384	524	458	364	266	228	219
	2.7%	3.0%	4.0%	3.2%	2.5%	2.5%	2.2%	2.2%
Toyota-Lexus-Daihatsu	576	582	539	647	673	574	618	643
	3.9%	4.5%	4.1%	4.6%	4.7%	5.3%	5.8%	6.4%
Other Japanese brands	701	651	624	691	697	453	437	343
	4.8%	5.0%	4.7%	4.9%	4.9%	4.2%	4.1%	3.4%
Hyundai-Kia	303	539	760	903	919	727	864	886
	2.1%	4.2%	5.8%	6.4%	6.4%	6.7%	8.2%	8.8%
Chinese brand groups	-	-	-	-	-	-	2	128.3
	-	-	-	-	-	-	0.0%	1.3%
Geely-Volvo	230	222	274	304	321	279	296	276
	1.6%	1.7%	2.1%	2.1%	2.2%	2.6%	2.8%	2.8%
Tata group	112	97	174	227	216	155	136	105
	0.8%	0.7%	1.3%	1.6%	1.5%	1.4%	1.3%	1.0%
Tesla	-	0	16	29	111	98	167	226
	-	0.0%	0.1%	0.2%	0.8%	0.9%	1.6%	2.3%
Other brands (including MG-Rover, Saab)	304	50	50	37	45	52	93	47
	2.1%	0.4%	0.3%	0.3%	0.3%	0.5%	0.9%	0.5%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	14,738	12,975	13,198	14,210	14,303	10,801	10,600	10,031
	100%	100%	100%	100%	100%	100%	100%	100%
Annual change	-2.1%	-5.0%	9.1%	-0.8%	0.7%	-24.5%	-1.9%	ND

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

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

	2000	2010	2015	2018	2019	2020	2021	2022 (2)
Stellantis	-	-	-	-	-	-	624	465
	-	-	-	-	-	-	34.0%	31.6%
PSA group (Stellantis from 01/17/2021)	349	326	329	496	521	430	-	-
	18.1%	22.1%	19.6%	25.0%	25.5%	25.7%	-	-
Renault group	272	251	274	313	328	249	277	207
	14.1%	17.0%	16.3%	15.8%	16.1%	14.9%	15.0%	14.1%
FCA group (Stellantis from 01/17/2021)	275	214	201	234	178	147	-	-
	14.2%	14.5%	12.0%	11.8%	8.7%	8.8%	-	-
Ford group	180	161	251	331	326	275	308	262
	9.3%	10.9%	15.0%	16.7%	16.0%	16.4%	16.7%	17.8%
General Motors	92	75	96	0	0	0	0	0
	4.8%	5.1%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	202	170	202	247	250	202	198	153
	10.5%	11.6%	12.1%	12.4%	12.2%	12.1%	10.7%	10.4%
Daimler group	178	133	164	189	209	186	182	155
	9.2%	9.0%	9.8%	9.5%	10.2%	11.1%	9.9%	10.6%
CNH / IVECO (3)	-	-	-	-	55	46	59	52
	-	-	-	-	2.7%	2.7%	3.2%	3.6%
Nissan	100	41	48	59	55	36	44	22
	5.2%	2.8%	2.9%	3.0%	2.7%	2.2%	2.4%	1.5%
Toyota-Lexus-Daihatsu	69	37	38	50	48	48	72	66
	3.6%	2.5%	2.3%	2.5%	2.4%	2.9%	3.9%	4.5%
Other Japanese brands	102	36	35	37	37	23	37	32
	5.3%	2.4%	2.1%	1.9%	1.8%	1.4%	2.0%	2.2%
Hyundai-Kia	44	5	4	5	3	2	2	1
	2.3%	0.4%	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%
Other brands	69	26	34	23	30	31	38	53
	3.6%	1.8%	2.0%	1.2%	1.5%	1.8%	2.0%	3.6%
TOTAL EUROPE (17 THEN 18 COUNTRIES) (1)	1,931	1,475	1,674	1,984	2,041	1,676	1,839	1,470
	100%	100%	100%	100%	100%	100%	100%	100%
Annual change	5.6%	11.1%	11.2%	2.6%	2.9%	-17.9%	9.7%	ND

(1) Including Iceland from 2015.
(2) Excluding Denmark, the annual variation is N/A because the scope is not comparable.
(3) Before 2019, IVECO was included in the FCA group.

The scope of the groups corresponds to their situation on 01/01/2022 (read page 74).
Source: CCFA

REGISTRATIONS

► REGISTRATIONS OF NEW PASSENGER CARS IN CENTRAL AND EASTERN EUROPEAN EU MEMBER COUNTRIES

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

	2005 (1)	2015	2018	2019	2020	2021	2022 (1)
Stellantis (since 01/17/2021)	-	-	-	-	-	140	103
	-	-	-	-	-	12.2%	9.5%
PSA group (Stellantis from 01/17/2021)	99	57	161	165	102	-	-
	9.5%	5.7%	11.6%	11.2%	8.9%	-	-
Renault group	193	120	182	211	155	126	126
	18.7%	12.1%	13.0%	14.2%	13.6%	10.9%	11.6%
FCA group (Stellantis from 01/17/2021)	50	30	51	65	59	-	-
	4.8%	3.0%	3.6%	4.4%	5.2%	-	-
Ford group	59	65	78	77	48	50	47
	5.7%	6.6%	5.6%	5.2%	4.3%	4.3%	4.3%
General Motors	132	64	0	0	0	0	0
	12.7%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	257	314	421	422	338	320	302
	24.8%	31.7%	30.1%	28.5%	29.7%	27.8%	27.9%
Daimler	11	24	45	46	41	44	45
	1.1%	2.5%	3.2%	3.1%	3.6%	3.8%	4.1%
BMW group	11	30	40	46	40	48	48
	1.0%	3.0%	2.8%	3.1%	3.5%	4.2%	4.4%
Nissan	19	36	39	30	22	20	14
	1.8%	3.6%	2.8%	2.0%	1.9%	1.7%	1.3%
Toyota	60	65	111	122	118	140	146
	5.8%	6.5%	8.0%	8.3%	10.3%	12.1%	13.5%
Other Japanese brands	91	71	109	122	71	77	58
	8.7%	7.2%	7.8%	8.2%	6.3%	6.7%	5.4%
Hyundai-Kia	39	95	130	141	114	152	150
	3.8%	9.5%	9.3%	9.6%	10.0%	13.2%	13.9%
Geely-Volvo	7	12	18	20	19	20	20
	0.6%	1.2%	1.3%	1.3%	1.6%	1.7%	1.8%
Tata group	2	4	8	8	5	5	5
	0.2%	0.5%	0.6%	0.5%	0.5%	0.5%	0.5%
Tesla	-	0	0	0	0	2	3
	-	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Other brands (including MG-Rover, Saab)	7	3	5	5	6	9	14
	0.7%	0.3%	0.3%	0.3%	0.5%	0.8%	1.3%
TOTAL CCEE EU MEMBERS	1,035	991	1,397	1,479	1,139	1,153	1,082
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual change		12.0%	8.2%	5.9%	-23.0%	1.2%	N/A

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES IN CENTRAL AND EASTERN EUROPEAN EU MEMBER COUNTRIES

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

	2005 (1)	2015	2018	2019	2020	2021	2022 (1) (2)
Stellantis (since 01/17/2021)	-	-	-	-	-	51	31
	-	-	-	-	-	29.9%	25.7%
PSA group (Stellantis from 01/17/2021)	20	26	37	36	30	-	-
	13.6%	18.4%	21.5%	20.5%	20.7%	-	-
Renault group	35	26	36	34	26	39	24
	24.4%	18.4%	20.9%	19.0%	18.2%	22.5%	19.7%
FCA group (Stellantis from 01/17/2021) (3)	21	28	32	24	18	-	-
	14.7%	20.4%	18.5%	13.8%	12.3%	-	-
Ford group	14	18	24	25	22	26	21
	9.8%	12.8%	13.7%	13.8%	15.7%	15.1%	17.4%
General Motors	8	8	0	0	0	0	0
	5.2%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen group	21	16	20	21	16	13	9
	14.7%	11.6%	11.3%	12.1%	11.1%	7.6%	7.5%
Daimler	10	9	11	14	13	12	11
	6.8%	6.4%	6.5%	7.7%	8.8%	7.0%	9.1%
CNH / IVECO (3)	-	-	-	9	7	11	10
	-	-	-	5.3%	4.8%	6.3%	8.3%
Nissan	2	2	3	2	1	1	0
	1.4%	1.2%	1.5%	1.3%	0.7%	0.8%	0.3%
Toyota	2	3	6	7	8	13	10
	1.6%	2.2%	3.6%	4.1%	5.7%	7.3%	8.0%
Other Japanese brands	3	2	3	3	2	4	3
	2.3%	1.7%	1.6%	1.7%	1.4%	2.0%	2.5%
Hyundai-Kia	5	1	1	0	0	0.04	0.01
	3.2%	0.4%	0.3%	0.2%	0.0%	0.0%	0.0%
Other brands (including MG-Rover, Saab)	4	1	1	1	1	3	2
	2.5%	0.8%	0.6%	0.6%	0.5%	1.5%	1.6%
TOTAL CCEE EU MEMBERS	145	139	173	177	143	172	121
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual change	-	17.5%	10.9%	2.0%	-19.2%	20.1%	ND

(1) Excluding Bulgaria (annual variation is N/A because scope is not comparable).
(2) Excluding the Czech Republic (annual variation is N/A because scope is not comparable).
(3) Before 2019, IVECO was included in the FCA group.
The scope of the groups corresponds to their situation on 01/01/2022 (read page 74).
Source: CCFA

REGISTRATIONS

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

	2000	2005	2010	2015	2019	2020	2021	2022
Germany	212,290	202,372	202,446	243,305	309,963	272,590	270,466	234,403
Austria	27,243	28,878	28,130	33,013	43,578	36,634	58,956	26,959
Belgium	54,090	62,672	56,006	65,179	86,672	77,111	79,008	62,437
Denmark	33,092	58,076	16,848	33,177	34,529	31,116	31,558	27 170 (1)
Spain	299,246	387,203	116,770	155,400	215,784	158,863	152,335	120,155
Finland	15,056	16,211	11,550	11,986	15,611	13,729	13,774	11,930
France	414,966	420,065	417,612	379,428	479,784	402,383	432,631	348,072
Greece	23,008	23,374	10,935	5,756	8,144	7,003	10,570	9,842
Ireland	41,474	37,073	10,486	23,837	25,330	21,716	28,762	22,665
Iceland	-	-	-	1362	1,451	1,050	1,207	1 599 (1)
Italy	225,517	207,067	177,887	134,265	189,245	160,639	185,300	161,084
Luxembourg	3,083	3,064	3,291	4,016	5,308	4,804	5,060	4,475
Norway	31,627	37,021	30,422	34,394	39,313	33,609	35,479	30,561
The Netherlands	96,570	66,232	49,863	57,921	76,458	60,638	68,690	59,361
Portugal	152,836	66,774	45,756	30,996	38,546	27,637	28,847	23,561
United Kingdom	245,163	330,436	231,539	380,996	376,386	300,199	362,358	286,609
Sweden	31,854	35,098	38,543	45,124	54,127	31,239	36,404	34,703
Switzerland	24,121	22,428	26,507	34,297	40,659	35,064	37,571	31,724
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	1,931,236	2,004,044	1,474,591	1,674,452	2,040,888	1,676,024	1,838,976	1,497,310

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

	2000	2005	2010	2015	2019	2020	2021 (2)	2022 (2)
Germany	96,830	88,364	75,014	85,002	93,714	70,435	78,981	76,218
Austria	8,508	8,235	5,138	7,151	7,946	5,605	6,680	6,363
Belgium	11,061	11,657	7,133	8,188	11,518	7,535	8,181	8,566
Denmark	4,597	5,902	2,682	4,687	4,951	5,036	4,384	4,886
Spain	33,700	39,753	13,215	22,043	24,019	18,604	20,805	23,454
Finland	3,072	3,492	2,368	2,400	3,237	2,620	3,536	3,341
France	57,918	55,281	34,221	41,714	55,215	41,729	45,030	44,567
Greece	1,633	1,589	1,081	439	402	545	568	676
Ireland	4,666	4,621	1,011	1,867	2,223	1,953	2,271	2,207
Iceland	-	-	-	183	273	178	275	287
Italy	38,388	35,313	17,532	15,020	23,413	20,083	24,762	25,341
Luxembourg	1,451	1,394	803	1,089	1,290	1,024	1,054	1,088
Norway	3,564	4,952	3,126	4,366	6,117	4,686	6,035	5,605
The Netherlands	16,835	13,405	9,390	13,546	15,192	10,288	11,742	13,289
Portugal	7,403	4,588	3,116	3,956	4,920	3,543	4,264	4,095
United Kingdom	51,864	53,344	27,988	44,364	48,535	32,918	42,825	45,356
Sweden	5,549	5,688	4,605	5,289	7,165	5,364	5,910	6,024
Switzerland	4,733	3,817	3,388	4,079	4,405	3,821	3,565	3,449
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	351,772	341,395	211,811	265,383	314,535	235,967	270,868	274,812

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

	2000	2005	2010	2015	2019	2020	2021 (2)	2022 (2)
Germany	5,684	4,891	4,697	5,476	6,124	6,044	6,474	4,883
Austria	706	565	733	878	1,146	854	887	934
Belgium	974	754	909	778	1,250	726	945	590
Denmark	419	315	450	269	184	60	636	667
Spain	2,738	3,655	2,119	2,537	3,147	2,069	1,877	2,344
Finland	0	252	300	330	518	249	382	417
France	4,320	4,776	5,382	6,724	6,417	5,791	6,857	5,883
Greece	374	575	325	44	202	185	454	261
Ireland	121	271	47	313	442	129	444	287
Iceland	-	-	-	34	48	14	30	25
Italy	4,152	4,514	3,931	2,163	3,988	2,948	3,469	3,255
Luxembourg	108	147	173	247	263	197	167	301
Norway	427	708	1,052	660	2,013	1,177	1,083	591
The Netherlands	949	1,134	524	332	910	639	338	237
Portugal	806	620	418	199	567	395	586	1,405
United Kingdom	4,496	4,630	3,203	3,931	3,100	2,100	4,136	4,232
Sweden	1,071	1,021	1,302	1,172	1,150	1,588	728	1,241
Switzerland	491	457	476	689	568	586	646	391
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	27,836	29,285	26,041	26,776	32,037	25,751	30,139	27,944

(1) The scope is limited to at least 3.5 t.
(2) The scope is extended to those over 3.5 t.
Sources: CCFA, ACEA

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS IN CENTRAL AND EASTERN EUROPEAN EU COUNTRIES (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Bulgaria	-	-	15,646	24,256	39,419	27,214	24,631	28,684
Croatia	62,009	70,541	38,587	35,715	62,938	36,084	45,289	44,088
Estonia	10,600	19,640	10,295	21,033	27,585	19,278	22,608	20,562
Hungary	133,233	198,982	43,476	77,171	157,906	128,031	121,920	111,540
Latvia	7,300	16,602	6,365	13,766	18,233	13,516	14,366	16,768
Lithuania	6,158	10,467	7,970	17,071	46,388	40,338	31,454	25,544
Poland	478,752	235,522	333,490	352,378	553,942	428,527	446,443	419,641
Czech Republic	148,592	151,699	169,580	230,857	249,915	202,971	206,876	192,087
Romania	64,432	215,554	106,333	81,162	161,562	126,351	121,208	129,326
Slovakia	55,090	57,125	64,033	77,979	101,568	76,305	75,696	78,841
Slovenia	67,665	59,324	61,142	59,664	59,862	40,200	42,071	43,616
TOTAL CCEE EU MEMBERS (1)	907,400	749,361	818,330	991,052	1,479,318	1,138,815	1,152,562	1,110,697

► REGISTRATIONS OF LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) IN CENTRAL AND EASTERN EUROPEAN EU COUNTRIES (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Bulgaria (2)	-	-	3,211	4,875	5,985	5,060	6,659	4 889 (3)
Croatia	3,360	7,671	2,845	6,909	9,143	7,025	8,131	6,964
Estonia	1,500	2,944	1,406	3,962	4,487	3,332	4,225	3,783
Hungary	26,686	20,479	9,337	17,719	26,410	22,305	23,170	17,825
Latvia	900	1,753	649	2,473	2,783	2,178	2,625	2,465
Lithuania	1,270	3,371	1,044	2,533	4,606	3,103	3,471	3,350
Poland	33,653	35,985	42,852	55,207	68,010	57,286	70,899	57,426
Czech Republic	14,786	16,024	11,318	17,595	20,612	17,331	19,672	16 908 (3)
Romania	14,789	35,842	10,404	13,471	19,122	14,754	17,178	14,991
Slovakia	5,812	14,428	6,953	7,321	8,534	6,392	8,275	7,679
Slovenia	6,274	6,897	4,744	6,686	8,653	6,275	7,490	6,671
TOTAL CCEE EU MEMBERS (1)	90,900	101,881	91,918	138,751	178,345	145,041	171,795	121,154

► REGISTRATIONS OF NEW LIGHT VEHICLES (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN CENTRAL AND EASTERN EUROPEAN EU COUNTRIES (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Bulgaria	-	-	18,857	29,131	45,404	32,274	31,290	28,684
Croatia	65,369	78,212	41,432	42,624	72,081	43,109	53,420	51,052
Estonia	12,100	22,584	11,701	24,995	32,072	22,610	26,833	24,345
Hungary	159,919	219,461	52,813	94,890	184,316	150,336	145,090	129,365
Latvia	8,200	18,355	7,014	16,239	21,016	15,694	16,991	19,233
Lithuania	7,428	13,838	9,014	19,604	50,994	43,441	34,925	28,894
Poland	512,405	271,507	376,342	407,585	621,952	485,813	517,342	477,067
Czech Republic	163,378	167,723	180,898	248,452	270,527	220,302	226,548	192,087
Romania	79,221	251,396	116,737	94,633	180,684	141,105	138,386	144,317
Slovakia	60,902	71,553	70,986	85,300	110,102	82,697	83,971	86,520
Slovenia	73,939	66,221	65,886	66,350	68,515	46,475	49,561	50,287
TOTAL CCEE EU MEMBERS (1)	998,300	851,242	910,248	1,129,803	1,657,663	1,283,856	1,324,357	1,231,851

► REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5 TONNES (INCLUDING COACHES AND BUSES) IN CENTRAL AND EASTERN EUROPEAN EU COUNTRIES (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Bulgaria (2)	-	-	1,000	1,500	3,621	2,235	3,276	3,917
Croatia	612	1,463	599	1,044	1,741	1,000	1,403	1,732
Estonia	400	927	502	934	1,207	697	1,041	1,282
Hungary	2,900	4,400	2,408	6,045	5,776	3,639	5,486	6,396
Latvia	1,000	1,284	520	1,372	1,169	764	1,573	1,950
Lithuania	1,000	2,297	1,355	3,633	7,688	4,379	8,121	10,049
Poland	7,464	11,079	11,611	23,226	28,758	20,759	34,046	36,061
Czech Republic	6,400	8,200	5,750	12,416	10,889	8,552	9,685	10,203
Romania	3,113	5,019	2,686	6,485	7,740	4,838	7,104	7,730
Slovakia	1,796	3,754	2,870	4,637	3,691	2,181	3,397	3,554
Slovenia	1,876	1,635	985	2,025	2,456	1,380	2,023	2,446
TOTAL CCEE EU MEMBERS (1)	22,800	33,500	29,700	63,317	73,315	50,424	77,155	85,320

(1) New member states: 8 countries in 2000, 10 countries from 2006 to 2012, 11 countries from 2013.
(2) OICA data from 2019.
(3) Perimeter is limited to less than 3.5 t.
(4) ACEA data, scope >3.5 t.
Sources: CCFA, ACEA

THE WORLDWIDE PRODUCTION OF THE RENAULT GROUP, STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS AND PRODUCTION IN FRANCE

► WORLDWIDE PRODUCTION OF LIGHT VEHICLES BY STELLANTIS (EXCLUDING FCA) AND THE RENAULT GROUP (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Citroen	1,168,470	1,379,082	1,452,847	1,153,855	980,758	699,087	745,029	743,439
DS	-	-	-	103,342	62,601	40,735	46,759	61,427
Peugeot	1,708,968	1,996,284	2,152,331	1,702,393	1,455,444	1,112,263	1,145,276	1,104,977
Vauxhall	-	-	-	-	920,314	611,467	606,960	616,010
Others	-	-	-	22,191	17,092	13,852	61,487	101,046
Stellantis excluding FCA (PSA before 2021) (1)	2,877,438	3,375,366	3,605,178	2,981,781	3,436,209	2,477,404	2,605,511	2,626,899
Renault	2,356,616	2,326,359	2,099,027	2,255,701	2,610,246	1,817,712	1,616,750	1,632,655
Alpine	-	-	-	-	4,244	1,279	3,005	3,782
Dacia	55,183	172,021	341,090	570,533	696,018	508,249	529,045	626,392
Renault Samsung Motors	14,517	118,438	276,169	206,418	143,143	107,814	112,964	52,110
Lada	-	-	-	-	407,963	364,062	360,668	71,149
Others (Mobilize, Nissan, Mercedes, Mitsubishi)	-	-	-	-	-	-	35,788	39,630
Renault group	2,426,316	2,616,818	2,716,286	3,032,652	3,861,614	2,799,116	2,658,220	2,425,718
TOTAL (2)	5,303,754	5,992,184	6,321,464	6,014,433	7,271,006	5,256,602	5,243,147	5,052,617

► PRODUCTION OF LIGHT VEHICLES IN FRANCE (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Total passenger cars	2,879,810	3,112,961	1,924,131	1,563,184	1,661,448	927,344	918,823	1,010,463
Including Stellantis excluding FCA (PSA before 2021) and Renault group	2,765,803	2,803,891	1,665,797	1,241,794	1,375,463	719,418	690,105	737,544
Including smart	101,365	77,015	97,373	93,357	62,961	19,926	26,718	16,983
Including Toyota	0	180,643	158,512	228,033	223,024	188,000	202,000	255,936
Total Light Commercial Vehicles	409,966	382,201	262,479	414,676	509,563	388,655	433,407	372,707
Including Stellantis excluding FCA (PSA before 2021) and Renault group	370,538	361,521	243,029	414,676	509,563	388,655	433,407	372,707
Including Fiat	39,428	20,680	19,450	-	-	-	-	-
Total light vehicles	3,289,776	3,495,162	2,186,610	1,977,860	2,171,011	1,315,999	1,352,230	1,383,170
Including Stellantis excluding FCA (PSA before 2021) and Renault group	3,136,341	3,165,412	1,908,826	1,656,470	1,885,026	1,108,073	1,123,512	1,110,251

► PRODUCTION OF HEAVY-DUTY VEHICLES IN FRANCE (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Renault Trucks (3)	87,719	54,501	31,874	31,598	35,950	26,246	33,422	39,133
Scania	10,710	9,391	9,594	n/a	n/a	n/a	n/a	n/a
Coaches and buses	535	3,687	3,475	n/a	n/a	n/a	n/a	n/a
Including Heuliez	-	291	451	n/a	n/a	n/a	n/a	n/a
Including Iveco Bus (4)	-	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	2019	2020	2021	2022
TOTAL	-	-	-	46,973	54,098	41,117	51,460	58,967
16t and more	-	-	-	26,111	30,002	21,328	27,475	32,781
7 to < 16t	-	-	-	5,487	5,948	4,918	5,947	6,352
< 7t	-	-	-	15,375	18,148	14,871	18,038	19,834

► RENAULT TRUCKS RANGE

Weight	Models	Electric models
16t and more	T, T High, K, C, D, D Wide	E-Tech D Wide, E-Tech T, E-Tech C
7 to < 16t	D	E-Tech D
< 7t	Master Red Edition, Trafic Red Edition	Master E-Tech Red Edition

(1) The FCA group and the PSA group merged on 01/17/2021 to create the Stellantis group. The FCA group, member of Stellantis produced 3.5 million vehicles in 2021.
(2) Excluding double counting. See page 84.
(3) In 2001, the truck activities of Renault were merged with those of AB Volvo. From 2012, the scope of industrial vehicles covers invoices of 7 tonnes and more.
(4) Irisbus until 2013
Source: CCFA

WORLD PRODUCTION OF THE RENAULT GROUP AND STELLANTIS (EXCLUDING FCA)

► PASSENGER CAR PRODUCTION BY BRAND (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Citroën	976,232	1,173,706	1,272,385	967,886	788,127	538,568	561,448	580,114
DS	-	-	-	103,342	62,601	40,735	46,759	61,427
Peugeot	1,522,051	1,808,984	1,942,079	1,494,318	1,213,885	916,387	925,656	921,678
Opel	-	-	-	-	804,805	529,216	498,910	520,566
Others (Fiat, Toyota)	-	-	-	-	-	-	26,355	29,580
Stellantis excluding FCA (PSA before 2021) (1)	**2,498,283**	**2,982,690**	**3,214,464**	**2,565,546**	**2,869,418**	**2,024,906**	**2,059,128**	**2,113,365**
Renault	2,043,815	1,924,574	1,796,321	1,868,031	2,152,285	1,486,511	1,202,439	1,255,366
Alpine	-		-	-	4,244	1,279	3,005	3,782
Dacia	42,603	152,150	323,386	542,325	668,584	481,118	511,817	626,392
Renault Korea Motors	14,517	118,438	276,169	206,418	143,143	107,814	112,964	52,110
Lada	-	-	-	-	407,963	364,062	360,668	71,149
Others (Mobilize, Nissan, Mercedes)	-	-	-	-	-	-	35,788	39,630
Renault group	**2,100,935**	**2,195,162**	**2,395,876**	**2,616,774**	**3,376,219**	**2,440,784**	**2,226,681**	**2,048,429**
TOTAL	**4,599,218**	**5,177,852**	**5,610,340**	**5,182,320**	**6,245,637**	**4,465,690**	**4,285,809**	**4,161,794**
of which production in France	**2,765,803**	**2,803,891**	**1,665,797**	**1,241,794**	**1,375,463**	**719,418**	**690,105**	**737,544**
Citroën	504,323	605,988	468,398	204,040	119,364	87,054	63,071	76,268
DS	-	-	-	80,980	62,282	40,388	41,419	38,202
Peugeot	1,094,756	1,155,292	722,214	607,150	804,101	347,979	297,190	337,141
Opel	-		-	-	85,841	33,684	120,057	124,015
Autres	-	-	-	-	-	-	13,014	13,640
Stellantis excluding FCA (PSA before 2021)	**1,599,079**	**1,761,280**	**1,190,612**	**892,170**	**1,071,588**	**509,105**	**534,751**	**589,266**
Renault	1,166,724	1,042,611	475,185	349,624	299,631	209,034	116,561	106,404
Alpine	-		-	-	4,244	1,279	3,005	3,782
Others	-	-	-	-	-	-	35,788	38,092
Renault group	**1,166,724**	**1,042,611**	**475,185**	**349,624**	**303,875**	**210,313**	**155,354**	**148,278**

(1) Read the notes on page 82.

► PRODUCTION OF PASSENGER CARS BY MODEL IN 2022

Brands/Models	World production	Production in France	Production outside France
STELLANTIS (excluding FCA)	**2,113,365**	**589,266**	**1,524,099**
Citroën	**580,114**	**76,268**	**503,846**
C1	97	0	97
C3, C3 Picasso	191,608	0	191,608
C3 Aircross	80,075	0	80,075
C3-XR, C-ELYSEE	11,596	0	11,596
C4, C4 Cactus, C4 Spacetourer, C4 X	120,879	0	120,879
C5 X, C5 AIRCROSS	118,367	68,180	50,187
C6	2,549	0	2,549
BERLINGO	46,444	0	46,444
SPACETOURER	8,088	8,088	0
Others	411	0	411
DS	**61,427**	**38,202**	**23,225**
DS3 Crossback	14,627	14,627	0
DS4	21,411	0	21,411
DS7 Crossback	23,880	23,575	305
DS9	1,509	0	1,509
Peugeot	**920,001**	**336,181**	**583,820**
108	232	0	232
208	299,939	0	299,939
2008	190,952	0	190,952
301	7,330	0	7,330
308	107,405	107,391	14
3008	159,166	151,475	7,691
4008	5,388	0	5,388
408	26,876	4,028	22,848
5008	55,493	50,232	5,261
508	22,560	15,929	6,631
RIFTER / PARTNER	36,593	0	36,593
TRAVELLER	7,817	7,126	691
Others	250	0	250
OPEL	**520,566**	**124,015**	**396,551**
CORSA	201,867	0	201,867
CROSSLAND	83,290	0	83,290
ASTRA	32,829	0	32,829
ZAFIRA LIFE	11,615	11,419	196
GRANDLAND	44,973	124	44,849
INSIGNIA	11,747	0	11,747
COMBO	21,773	0	21,773
MOKKA	112,472	112,472	0
Others (Fiat)	**1,677**	**960**	**717**
Others (Toyota)	**29,580**	**13,640**	**15,940**

Brands/Models	World production	Production in France	Production outside France
Renault group	**2,048,429**	**148,278**	**1,900,151**
Renault	**1,255,366**	**106,404**	**1,148,962**
AUSTRAL	21,550	0	21,550
TWINGO	48,377	0	48,377
CLIO	226,306	0	226,306
KWID	123,829	0	123,829
KADJAR	26,088	0	26,088
KIGER	14,843	0	14,843
CAPTUR	178,428	0	178,428
ZOE	35,176	32,600	2,576
LOGAN / SANDERO	108,607	0	108,607
DOKKER	14,711	0	14,711
DUSTER	94,635	0	94,635
MEGANE	141,084	53,020	88,064
EXPRESS	4,511	0	4,511
KOLEOS	17,743	0	17,743
TALISMAN	1,487	1,487	0
ESPACE	894	894	0
ARKANA	129,833	0	129,833
KANGOO	16,549	16,549	0
Others	50,715	1,854	48,861
Alpine	**3,782**	**3,782**	**0**
Mobilize (Limo)	**3,782**	**3,782**	**0**
Dacia	**150**	**0**	**150**
LOGAN / SANDERO	626,392	0	626,392
KWID/SPRING	331,989	0	331,989
DUSTER	60,829	0	60,829
JOGGER	203,029	0	203,029
LODGY	21,148	0	21,148
Renault Samsung Motors	**9,397**	**0**	**9,397**
KOLEOS	52,110	0	52,110
TALISMAN / SM6	26,940	0	26,940
ARKANA / XM3	4,874	0	4,874
Lada	**20,296**	**0**	**20,296**
GRANTA, GRANTA HATCHBACK	71,149	0	71,149
VESTA	23,819	0	23,819
LADA, LADA 4X4	11,048	0	11,048
Various	26,958	0	26,958
Others (Various Nissan, Nissan Micra)	**9,324**	**0**	**9,324**
TOTAL	**39,480**	**38,092**	**1,388**

NB: Renault also produced 577 Twizys in its factories in Valladolid (Spain) and Busan (South Korea) in 2022.
Stellantis produced 15,953 Citroën Ami Ones and Opel Rocks-Es in Morocco in 2022.
Source: CCFA

WORLD PRODUCTION OF THE RENAULT GROUP AND STELLANTIS (EXCLUDING FCA)

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

	2000	2005	2010	2015	2019	2020	2021	2022
Citroën	192,238	205,376	180,462	185,969	192,631	160,519	183,581	163,325
Peugeot	186,917	187,300	210,252	208,075	241,559	195,876	219,620	183,299
Opel	-	-	-	-	115,509	82,251	108,050	95,444
Others (Fiat, Toyota)	-	-	-	22,191	17,092	13,852	35,132	71,466
Stellantis excluding FCA (PSA before 2021) (1)	**379,155**	**392,676**	**390,714**	**416,235**	**566,791**	**452,498**	**546,383**	**513,534**
Renault (including partners)	312,801	401,785	302,706	387,670	457,961	331,201	414,311	377,289
Dacia	12,580	19,871	17,704	28,208	27,434	27,131	17,228	0
Renault group	**325,381**	**421,656**	**320,410**	**415,878**	**485,395**	**358,332**	**431,539**	**377,289**
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Various	42	24	-	-	-	-	-	-
TOTAL (2)	**712,899**	**823,816**	**711,124**	**832,113**	**1,025,369**	**790,912**	**957,338**	**890,823**
Of which production in France (3)	**370,538**	**361,521**	**243,029**	**414,676**	**509,563**	**388,655**	**433,407**	**372,707**
Citroën	53,561	58,223	42,882	41,471	31,826	16,111	20,224	12,785
Peugeot	67,629	68,166	38,514	39,058	60,488	37,275	37,271	19,469
Opel	-	-	-	-	44,809	36,959	49,063	18,583
Others	-	-	-	22,191	17,092	13,852	19,904	37,967
Stellantis excluding FCA (PSA before 2021) (1)	**121,190**	**126,389**	**81,396**	**102,720**	**154,215**	**104,197**	**126,462**	**88,804**
Renault	240,985	225,648	161,633	311,956	382,165	304,376	327,529	283,903
Renault group	**240,985**	**225,648**	**161,633**	**311,956**	**382,165**	**304,376**	**327,529**	**283,903**
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Various	42	24	-	-	-	-	-	-

(1) Read the notes on page 82.
(2) Excluding duplicate production of Opel vehicles from 2017.
Source: CCFA

► PRODUCTION OF LIGHT COMMERCIAL VEHICLES BY MODEL IN 2022 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
STELLANTIS (excluding FCA)	**513,534**	**88,804**	**424,730**
Citroën	**163,325**	**12,785**	**150,540**
C3	9,431	0	9,431
BERLINGO	50,088	0	50,088
JUMPY	36,649	12,785	23,864
JUMPER	67,157	0	67,157
Peugeot	**183,299**	**19,469**	**163,830**
208	6,896	0	6,896
308	0	0	0
PARTNER	65,671	0	65,671
EXPERT	51,911	19,469	32,442
BOXER	52,981	0	52,981
Others	5,840	0	5,840
Opel	**95,444**	**18,583**	**76,861**
VIVARO	43,478	18,583	24,895
COMBO	26,461	0	26,461
MOVANO	25,505	0	25,505
Others	**71,466**	**37,967**	**33,499**
Fiat (Scudo, Doblo)	30,279	19,129	11,150
Toyota (Proace, Proace city)	41,187	18,838	22,349
Renault group	**377,289**	**283,903**	**93,386**
Renault (including partners Nissan, Mercedes, Mitsubishi)	**377,289**	**283,903**	**93,386**
DOKKER / LUDOSPACE	57,613	0	57,613
KANGOO	63,088	63,088	0
TRAFIC	99,037	99,037	0
MASTER	132,916	121,778	11,138
EXPRESS	16,982	0	16,982
Various (Alaskan, Logan)	7,653	0	7,653
TOTAL	**890,823**	**372,707**	**518,116**

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	2019	2020	2021	2022
Less than 3,5t	Total	577,926	670,654	531,452	588,686	708,800	521,245	656,929	612,264
	E	55,883	39,019	61,998	46,973	nd	31,115	47,288	61,651
	D	521,229	631,499	469,178	537,345	nd	476,462	581,709	482,587
	EL	814	136	276	4,368	13,057	13,668	27,932	68,026
From 3,5t to 5,1t	Total	134,973	153,162	179,672	243,427	316,569	269,667	300,409	278,559
	E	1,724	719	0	0	0	0	0	0
	D	133,249	152,443	179,672	243,427	316,215	269,348	299,610	277,261
	EL	-	-	-	-	354	319	799	1,298
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	Total	2,938	-	-	-	-	-	-	-
	D	2,606	-	-	-	-	-	-	-
	G	332	-	-	-	-	-	-	-
	EL	-	-	-	-	-	-	-	-
Total petrol		57,607	39,738	61,998	46,973	nd	31,115	47,288	61,651
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	13,411	13,987	28,731	69,324
Total NGV or LPG		332	-	-	-	-	-	-	-
TOTAL		768,996	878,320	742,998	n/a	n/a	n/a	n/a	n/a

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	2019	2020	2021	2022
Cars derivatives								
Citroën	29,449	26,227	14,972	11,715	11,237	7,097	12,544	9,431
Peugeot	41,451	38,133	33,403	19,122	16,486	11,040	13,300	6,896
Opel	-	-	-	-	-	507	218	0
Stellantis excluding FCA (PSA before 2021)	70,900	64,360	48,375	30,837	27,723	18,644	26,062	16,327
Renault-Dacia	60,320	55,009	48,167	40,158	0 (2)	352	0 (2)	743
Total	131,220	119,369	96,542	70,995	27,723	18,996	26,062	17,070
Small vans								
Citroën	100,832	97,954	98,042	90,957	73,702	62,236	63,542	50,088
Peugeot	70,443	70,480	97,608	95,144	95,144	74,453	81,325	65,671
Opel	-	-	-	-	36,481	28,662	35,719	26,461
Others	-	-	-	-	-	-	-	33,499
Stellantis excluding FCA (PSA before 2021)	171,275	168,434	195,650	186,101	205,327	165,351	180,586	175,719
Renault-Dacia	147,670	118,404	97,142	117,863	157,896	108,852	149,031	137,683
Total	318,945	286,838	292,792	303,964	363,223	274,203	329,617	313,402
Vans								
Citroën	61,957	81,195	67,448	83,297	107,692	91,186	107,495	103,806
Peugeot	75,023	78,687	79,241	93,809	129,929	108,658	120,359	104,892
Opel	-	-	-	-	79,028	53,082	72,113	68,983
Others	-	-	-	22,191	17,092	13,852	35,132	37,967
Stellantis excluding FCA (PSA before 2021)	136,980	159,882	146,689	199,297	333,741	266,778	335,099	315,648
Renault	104,811	228,372	148,404	224,799	278,581	236,593	257,901	231,953
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Sovam-Etalmobil	42	24	-	-	-	-	-	-
Total (1)	250,154	397,738	295,093	424,096	585,505	483,453	572,416	547,601
Others (Pick-ups, 4WD, various)								
Peugeot	-	-	-	-	-	1,725	4,636	5,840
Renault-Dacia-Samsung	12,580	19,871	26,697	33,058	48,918	12,535	24,609	6,910
Total	12,580	19,871	26,697	33,058	48,918	14,260	29,245	12,750
TOTAL	712,899	823,816	711,124	832,113	1,025,369	790,912	957,340	890,823

(1) Excluding duplicate production of Opel vehicles from 2017.
(2) Cars derivatives have been accounted for in cars.
Source: CCFA

DELIVERIES OUTSIDE FRANCE OF THE RENAULT GROUP OF STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS

The scope of the groups is that of January 1 of the year of the data.
The integrations (Lada, Opel) and withdrawals (Lada) of brands in the groups have a strong impact on delivery volumes, as do geopolitical events (Iran, Russia).
Deliveries from French manufacturers include assembled vehicles and collections of spare parts. From 2005, deliveries from Dacia outside France are included in the scope, then from Renault Samsung Motors in 2007. In addition, certain deliveries are allocated to zones, but not to countries.
From 2018, the scope of deliveries will evolve to get closer to sales. In general, deliveries corresponding to productions for partners are no longer counted. In addition, reclassifications of vehicles into the "passenger cars" and "light commercial vehicles" categories are made locally.

► NEW PASSENGER CARS BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Europe (1)	2,636,150	2,835,899	2,331,256	2,384,342	3,473,547	2,755,716	2,594,409	2,149,893
European Union (2)	2,261,904	2,424,350	1,893,455	1,871,647	2,758,235	1,692,657	1,631,282	1,614,341
Germany	337,743	365,860	299,072	266,587	543,083	413,290	359,242	332,199
Austria	41,510	48,779	50,767	41,349	58,254	42,665	35,207	30,485
Belgium-Luxembourg	172,806	171,552	182,241	146,015	172,727	132,836	94,834	101,918
Denmark	30,239	34,477	27,801	49,204	55,776	48,783	35,773	26,258
Spain	556,934	577,439	302,663	310,876	381,672	254,321	224,942	224,014
Greece	54,270	32,681	10,744	12,132	28,498	22,719	24,060	34,193
Italy	353,616	377,100	317,851	304,829	490,766	340,846	316,678	310,089
The Netherlands	120,438	99,707	108,951	106,236	108,857	72,013	59,663	62,017
Portugal	68,375	66,524	58,750	54,165	81,773	51,694	50,836	55,391
Sweden	31,473	43,062	16,691	32,650	29,867	23,958	26,871	23,489
12 then 13 new Member States	-	276,433	176,330	170,849	354,270	264,933	215,706	219,042
Hungary	23,887	26,926	6,156	11,031	34,141	25,464	17,308	16,498
Poland	59,093	47,521	53,521	50,485	108,887	74,214	63,778	60,412
Romania	7,520	122,930	41,804	45,361	79,278	62,636	51,213	56,240
CEE/CIS (3)	164,814	214,335	206,868	258,054	590,644	539,228	538,362	71,250
Russia	6,042	42,637	158,018	272,461	498,581	462,253	471,416	50,839
Switzerland	45,654	41,231	50,740	43,545	43,505	30,578	27,083	26,465
United Kingdom	432,507	413,743	280,244	294,142	362,364	248,730	210,632	225,898
Turkey	148,264	142,160	168,456	211,096	124,668	232,242	173,837	200,861
Africa	69,865	103,130	171,484	241,078	235,921	138,263	162,779	152,722
South Africa	13,913	32,941	14,711	23,223	30,933	18,293	23,884	32,936
Maghreb	37,236	42,881	139,790	184,708	158,644	77,422	73,941	64,974
Nigeria	8,860	6,159	210	301	297	-	-	-
Egypt	-	-	-	-	-	37,795	32,392	14,414
America	230,270	314,505	559,780	426,937	489,142	290,756	327,117	368,235
Argentina	97,605	70,099	149,746	122,408	64,058	59,933	53,538	64,210
Brazil	80,205	144,030	320,930	210,638	253,871	139,055	155,690	171,130
Colombia	16,659	36,499	6,329	50,819	54,538	38,124	46,004	48,763
Mexico	1,408	39,871	24,822	10,685	27,136	23,819	27,122	32,055
Asia (1)	166,261	512,772	1,201,459	1,070,526	458,887	291,504	306,913	305,529
Japan	15,976	16,323	12,346	25,072	23,061	24,044	20,184	20,618
China	54,334	143,756	392,569	756,268	136,498	48,606	84,514	83,158
Iran	45,722	304,326	516,121	38,176	-	-	-	-
India	-	-	4,488	50,877	88,869	80,732	96,142	93,147
South Korea	-	-	157,824	90,056	156,599	96,738	61,648	53,969
Oceania	9,984	16,698	14,079	17,929	11,780	19,414	19,298	33,562
Australia	2,765	11,872	9,761	13,435	6,571	4,894	5,520	8,003
TOTAL	3,174,447	3,841,448	4,306,065	4,159,198	4,674,081	3,495,653	3,410,516	3,009,941

► NEW LIGHT COMMERCIAL VEHICLES BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Europe (1)	379,289	401,860	357,998	456,712	772,391	549,076	757,238	606,509
European Union (2)	312,421	326,077	312,293	418,876	728,474	407,525	545,372	446,875
Germany	50,081	40,760	46,406	90,020	118,576	71,921	101,675	85,433
Austria	4,697	6,206	6,797	7,585	16,711	9,761	19,056	7,009
Belgium-Luxembourg	22,857	24,827	29,330	29,267	52,473	37,416	37,956	30,433
Spain	57,516	71,185	28,263	38,386	121,639	54,542	77,575	62,951
Italy	35,910	29,706	39,690	34,656	70,963	40,935	55,272	48,780
The Netherlands	23,087	11,630	13,848	15,904	27,027	17,824	23,529	19,885
Portugal	34,551	25,410	18,557	15,539	25,421	15,599	16,333	13,725
12 then 13 new Member States	-	51,099	33,784	55,213	95,137	57,531	82,857	69,830
Poland	5,624	9,039	14,258	13,563	32,594	20,842	29,286	24,414
CEE/CIS (3)	25,100	46,685	16,121	29,981	28,168	25,930	39,218	8,900
Switzerland	4,293	5,934	8,500	7,855	12,684	7,436	11,367	9,762
United Kingdom	55,647	64,554	60,997	101,797	134,302	88,688	118,020	99,457
Africa	16,074	22,597	27,769	27,611	21,291	12,750	25,619	24,601
Maghreb	13,509	18,345	24,690	26,466	17,152	10,060	7,195	6,801
America	36,682	33,328	85,810	61,943	92,699	59,255	93,551	98,801
Asia (1)	8,260	11,781	5,632	9,512	168,674	35,466	36,343	24,546
Oceania	1,797	1,967	2,208	6,064	6,080	5,463	6,871	6,645
TOTAL	444,516	474,532	480,430	563,013	1,061,135	662,010	919,622	761,102

(1) From 2004, deliveries to Cyprus are included in Europe and no longer in Asia.
(2) European Union: 9 countries in 1980, 10 countries in 1985, 12 countries from 1990 to 1994, 15 countries from 1995 to 2003, 25 countries from 2004 to 2005, 27 countries from 2006 to 2012, 28 countries from 2013 , 27 countries as of 2021.
(3) CEEC/CIS excluding the 10 new countries joining the European Union in 2004 and 2005, excluding the 12 new countries joining from 2006 to 2012, excluding the 13 new countries joining from 2013.

Source: CCFA

FRENCH EXPORTS OF AUTOMOTIVE PRODUCTS

► THE 25 MAIN DESTINATION COUNTRIES FOR AUTOMOTIVE EXPORTS FROM FRANCE IN 2022

(IN EURO MILLIONS AND BY WEIGHT)

New passenger cars		
Total	**17,892**	**100%**
Germany	4,523	25%
Belgium	3,156	18%
United Kingdom	1,476	8%
Italy	1,399	8%
Spain	1,267	7%
The Netherlands	715	4%
Poland	612	3%
Algeria	439	2%
Portugal	359	2%
Czech Republic	352	2%
Switzerland	304	2%
Turkey	301	2%
Sweden	257	1%
Denmark	178	1%
Austria	160	1%
Ireland	155	1%
Slovenia	145	1%
Israel	129	1%
Norway	124	1%
Chile	111	1%
Greece	96	1%
Romania	91	1%
Hungary	89	0%
USA	84	0%
Japan	71	0%

New light commercial vehicles		
Total	**3,931**	**100%**
Germany	863	22%
Belgium	615	16%
United Kingdom	608	15%
Poland	292	7%
Spain	203	5%
Italy	184	5%
The Netherlands	138	3%
Switzerland	97	2%
Sweden	89	2%
Australia	87	2%
Ireland	74	2%
Czech Republic	72	2%
Slovenia	61	2%
Denmark	57	1%
Hungary	56	1%
Romania	55	1%
Turkey	46	1%
Austria	45	1%
Portugal	35	1%
Norway	32	1%
Morocco	37	1%
Slovakia	33	1%
Bulgaria	30	1%
Algeria	18	0%
Saudi Arabia	16	0%

New heavy commercial vehicles and coaches and buses		
Total	**5,987**	**100%**
Germany	1,246	21%
United Kingdom	614	10%
Spain	583	10%
Italy	481	8%
Belgium	337	6%
Poland	319	5%
Turkey	289	5%
The Netherlands	247	4%
Austria	144	2%
Switzerland	111	2%
South Korea	103	2%
Sweden	98	2%
Czech Republic	90	1%
Portugal	88	1%
Hungary	80	1%
Australia	77	1%
Ireland	75	1%
Romania	72	1%
Morocco	63	1%
Denmark	61	1%
Norway	26	0%
Israel	26	0%
Lithuania	24	0%
Bulgaria	23	0%
Chile	22	0%

Total Parts and Accessories, Chassis-Bodies, Engines, Trailers		
Total	**22,265**	**100%**
Germany	4,615	21%
Spain	2,962	13%
United Kingdom	1,898	9%
Italy	1,424	6%
Belgium	1,234	6%
Poland	884	4%
Turkey	688	3%
Slovakia	681	3%
Romania	557	2%
Sweden	533	2%
USA	526	2%
Czech Republic	525	2%
The Netherlands	478	2%
Morocco	452	2%
Portugal	451	2%
China	398	2%
South Korea	368	2%
Hungary	351	2%
Switzerland	267	1%
Brazil	249	1%
Argentina	221	1%
Slovenia	185	1%
Austria	170	1%
Algeria	161	1%
Russia	131	1%

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 'enterprise' defined by decree 2008-1354 in application of the 'modernisation of the economy' law (LME) which is based on the notion of groups of companies (rather than legal units), so as to better take into account the new economic realities that have arisen through globalisation. Data since 2012 (below) come from this new source. Trends between the old and new scopes are minor for the moment.

	Units	2000	2010	2015	2019	2020	2021	2022 (1)
PHYSICAL DATA								
Employees on 12/31 (excluding temporary staff)	units	190,830	137,527	118,952	120,704	116,108	110,386	104,000
Production in France (only light vehicles from 2012)	thousands	3,348	2,229	1,978	2,175	1,316	1,352	1,383
Production per employee	units	17.5	16.2	16.6	18.0	11.3	12.3	13.3
FINANCIAL DATAS								
Net sales	€ million	73,684	78,969	83,969	109,088	89,884	97,675	110,000
Export sales	€ million	42,290	45,526	54,290	65,199	52,468	55,952	66,000
Exports as a % of total sales	%	57.4%	57.6%	64.7%	59.8%	58.4%	59.0%	60.0%
Value added value before tax	€ million	13,282	10,112	11,332	12,356	9,258	10,726	12,000
Value added / sales	%	18.0%	12.8%	13.5%	11.3%	10.3%	11.0%	10.9%
Value added per employee	€ thousand	70	73.5	95	102.4	80	97	115
Social costs	€ million	2,153	2,302	2,072	2,317	2,135.3	1,905.9	-
Social costs per employee	€ thousand	11.3	16.7	17.4	19.2	18.4	17.3	-
Wages and salaries	€ million	5,093	5,696	5,186	5,692	5,187	5,562	-
Wages and salaries per employee	€ thousand	26.7	41.4	43.6	47.2	44.7	50.4	-
Personnel costs	€ million	7,246	7,999	7,258	8,008	7,323	7,468	-
Personnel costs per employee	€ thousand	38.0	58.2	61.0	66.3	63.1	67.7	-
Personnel costs / value added	%	54.6%	79.1%	64.0%	64.8%	79.1%	69.6%	-
Gross operating surplus	€ million	5,201	1,340	3,293	3,452	1,136	2,577	-
Gross operating surplus / value added	%	39.2%	13.3%	29.1%	27.9%	12.3%	24.0%	-
Interest expense	€ million	1,178	2,862	2,337	1,648	1,878	2,250	-
Interest expense / value added	%	8.9%	28.3%	20.6%	13.3%	20.3%	21.0%	-
Interest income	€ million	2,508	2,191	2,523	2,901	1,886	3,767	-
Interest income / value added	%	18.9%	21.7%	22.3%	23.5%	20.4%	35.1%	-
Net interest income	€ million	1,330	-671	186	1,253	8	1,518	-
Net interest income / value added	%	10.0%	-6.6%	1.6%	10.1%	0.1%	14.2%	-
Cash flow	€ million	5,499	1,078	3,291	4,294	683	4,463	-
Cash flow / value added	%	41.4%	10.7%	29.0%	34.8%	7.4%	41.6%	-
Taxes, payments, assimilated payments	€ million	-	-	822	944	816	723	-
Net income	€ million	2,851	293	1,244	2,117	Nd	2,614	-
Net income / sales	%	3.9%	0.4%	1.5%	1.9%	Nd	2.7%	-
Capital expenditure	€ million	3,807	-	-	-	-	-	-
Gross fixed investments exclusive of contributions	€ million	-	2,078	1,959	2,642	2,087	1,590	-
Capital expenditure / sales	%	5.2%	2.6%	2.3%	2.4%	2.3%	1.6%	-
Capital expenditure / value added	%	28.7%	20.6%	17.3%	21.4%	22.5%	14.8%	-

(1) CCFA estimates based on industrial data, INSEE and OPCO2i / Observatory of Metallurgy data.

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.

	Unités	2000	2010	2015	2019	2020	2021	2022 (1)
PHYSICAL DATA								
No. of companies (>20 employees up to 2007)	units	243	639	611	531	538	533	-
Employees on 12/31 (excluding temporary staff)	units	94,171	61,759	81,309	96,701	94,025	89,182	88,000
FINANCIAL DATA								
Sales before tax	€ million	17,766	16,056	22,157	30,615	24,565	26,440	28,500
Export sales	€ million	7,512	7,865	11,159	15,124	13,278	13,546	14,500
Exports as a % of total sales	%	42.3%	49.0%	50.4%	49.4%	54.1%	51.2%	50.9%
Value added before tax	%	4,643	3,885	5,664	7,832	6,432	6,687	7,100
Value added / sales before tax	€ thou-sand	26.1%	24.2%	25.6%	25.6%	26.2%	25.3%	24.9%
Value added per employee before tax	€ million	49	63	70	81	68	75	81
Social costs	€ thou-sand	902	937	1,357	1,841	1,664	1,706	-
Social costs per employee	€ million	9.6	15.2	16.7	19.0	17.7	19.1	-
Wages and salaries	€ thou-sand	2,213	2,302	3,186	4,335	3,937	4,048	-
Wages and salaries per employee	€ million	23.5	37.3	39.2	44.8	41.9	45.4	-
Personnel costs	€ thou-sand	3,115	3,239	4,543	6,176	5,601	5,755	-
Personnel costs per employee	%	33.1	52.4	55.9	63.9	59.6	64.5	-
Personnel costs / value added	€ million	67.1%	83.4%	80.2%	78.9%	87.1%	86.1%	-
Gross operating surplus	%	1,206	412	818	1,253	446	659	-
Gross operating surplus / value added	€ million	26.0%	10.6%	14.4%	16.0%	6.9%	9.8%	-
Interest expense	%	440	177	301	1,998	3,037	2,036	-
Interest expense / value added	€ million	9.5%	4.6%	5.3%	25.5%	47.2%	30.5%	-
Interest income	%	337	217	661	2,249	3,575	2,749	-
Interest income / value added	€ million	7.3%	5.6%	11.7%	28.7%	55.6%	41.1%	-
Net interest income	%	-103	40	360	251	538	713	-
Net interest income / value added	€ million	-2.2%	1.0%	6.4%	3.2%	8.4%	10.7%	-
Cash flow	%	889	341	1,188	2,059	2,398	1,400	-
Cash flow / value added	€ million	19.2%	8.8%	21.0%	26.3%	37.3%	20.9%	-
Taxes, payments, assimilated payments	€ million	-	-	316	412	399	315	-
Net income	%	-92	-17	702	644	252	403	-
Net income / sales	€ million	-0.5%	-0.1%	3.2%	2.1%	1.0%	1.5%	-
Capital expenditure	€ million	1,024	-	-	-	-	-	-
Gross fixed investments exclusive of contribu-tions	%	-	413	856	1,106	837	825	-
Capital expenditure / sales	%	5.8%	2.6%	3.9%	3.6%	3.4%	3.1%	-
Capital expenditure / value added	%	22.0%	10.6%	15.1%	14.1%	13.0%	12.3%	-

(1) CCFA estimates based on FIEV, INSEE, Observatory of Metallurgy data.

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	2019	2020	2021	2022
Alpine	-	-	-	-	3,172	744	1,618	2,138
Dacia	-	9,760	104,641	97,441	138,977	97,170	125,204	130,855
Renault	602,415	546,227	497,820	382,504	407,134	314,630	268,951	236,405
Mobilize	-	-	-	-	-	-	-	34
Renault group	**602,415**	**555,987**	**602,461**	**479,945**	**549,283**	**412,544**	**395,773**	**369,432**
Citroën	261,508	275,053	301,607	201,065	235,110	162,688	161,883	129,883
DS	-	-	26,539	30,257	26,845	22,182	22,782	20,959
Opel (1)	-	-	-	-	66,901	43,801	37,393	36,052
Peugeot	397,547	385,739	400,663	327,393	379,582	301,935	285,929	245,608
PSA group (Stellantis from 01/17/2021)	**659,055**	**660,792**	**728,809**	**558,715**	**708,438**	**530,606**	**-**	**-**
Alfa Romeo	12,774	13,847	13,033	6,353	3,938	2,372	1,541	3,090
Fiat	95,983	46,157	72,717	54,443	71,666	42,360	39,914	36,508
Jeep	3,001	3,525	1,177	8,585	11,541	6,381	10,822	5,727
Lancia	5,864	4,414	3,368	1,469	1	0	0	0
Maserati	-	174	162	508	420	135	135	136
FCA group (Stellantis from 17/01/2021)	**122,449**	**73,183**	**91,337**	**71,358**	**87,566**	**51,248**	**-**	**-**
Stellantis	**-**	**-**	**-**	**-**	**-**	**-**	**560,399**	**477,963**
Bolloré	-	-	0	1,191	1	0	0	0
Various France	63	148	56	50	121	73	87	142
RENAULT GROUP & STELLANTIS (INCLUDING FCA FROM 2021) & FRENCH BRANDS	**1,261,533**	**1,216,927**	**1,331,326**	**1,039,901**	**1,257,843**	**943,223**	**956,259**	**847,537**
Audi	34,937	44,311	50,936	58,734	57,532	45,360	50,083	43,687
BMW	31,576	40,508	46,074	53,558	58,751	45,478	45,969	45,439
Cupra	-	-	-	-	-	236	4,006	7,555
Ford	117,061	103,597	114,810	80,729	78,838	55,219	43,777	47,095
Honda	8,716	8,883	11,251	7,325	8,196	5,802	5,374	5,438
Hyundai	11,019	27,396	18,785	23,968	39,970	34,585	45,241	47,106
Jaguar	1,939	2,118	1,126	1,530	3,561	1,309	1,718	1,093
Kia	2,631	18,073	24,055	29,146	45,056	39,052	44,215	46,224
Land Rover	7,570	6,946	2,735	8,846	7,878	5,456	6,078	4,372
Lexus	-	-	1,921	4,457	7,159	5,913	4,704	3,256
Lynk Co	-	-	-	-	-	-	300	3,098
Mazda	6,366	11,440	10,232	8,418	12,596	8,890	9,482	7,040
Mercedes-Benz	43,389	54,779	45,612	55,376	70,214	52,570	50,789	47,977
M.G.	-	-	-	-	-	656	4,619	12,666
Mini	-	12,627	18,007	22,512	27,158	21,881	25,337	25,649
Mitsubishi	5,575	6,758	3,514	3,936	7,207	5,012	1,967	2,439
Nissan	31,330	40,858	54,084	74,102	42,313	32,963	26,414	27,169
Opel (1)	133,576	106,462	94,877	64,170	-	-	-	-
Porsche	825	2,404	2,073	4,943	5,572	4,878	4,487	3,857
Seat	40,562	32,744	30,645	22,009	37,148	26,676	26,687	13,684
Skoda	11,570	15,044	18,533	21,759	36,498	29,875	30,399	28,904
Smart	6,645	12,649	6,408	8,107	10,494	1,692	1,602	1,341
Ssangyong	19	3,972	451	636	157	177	120	18
Subaru	2,312	1,464	1,146	841	510	125	67	28
Suzuki	11,355	21,125	22,070	18,506	30,758	19,651	22,907	14,750
Tesla	-	-	11	708	7,442	7,372	26,446	29,199
Toyota	43,698	87,500	65,390	71,755	101,730	89,727	96,170	100,268
Volkswagen	152,868	136,011	146,538	144,103	149,105	97,784	105,298	97,292
Volvo	6,777	11,096	11,841	13,876	21,696	16,412	17,285	13,515
TOTAL OTHERS (2)	**872,351**	**900,634**	**920,342**	**877,325**	**956,436**	**706,895**	**702,745**	**681,498**
TOTAL	**2,133,884**	**2,117,561**	**2,251,668**	**1,917,226**	**2,214,279**	**1,650,118**	**1,659,004**	**1,529,035**
Of which Temporary Transit	-	49,772	39,011	31,665	30,326	11,826	14,361	14,362
RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS AS A %	**59.1%**	**57.5%**	**59.1%**	**54.2%**	**56.8%**	**57.2%**	**57.6%**	**55.4%**
TOTAL OTHERS AS A %	**40.9%**	**42.5%**	**40.9%**	**45.8%**	**43.2%**	**42.8%**	**42.4%**	**44.6%**

(1) Opel has belonged to the PSA group since 1 August 2017. Thus, the registrations of this brand are presented at PSA over the period from 08/01/2017 to 12/31/2017.
(2) Including miscellaneous and FCA (before 2021).

► USED PASSENGER CAR REGISTRATIONS (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
TOTAL ALL CATEGORIES	5,082,122	5,383,361	5,386,007	5,562,082	5,790,612	5,569,298	6,016,321	5,204,976
Used/new ratio	2.4	2.5	2.4	2.9	2.6	3.4	3.6	3.4

► USED LIGHT COMMERCIAL VEHICLE REGISTRATIONS (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
TOTAL ALL CATEGORIES	651,033	718,948	806,398	789,073	817,285	799,287	896,509	814,504
Used/new ratio	1.6	1.7	1.9	2.1	1.7	2.0	2.1	2.3

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	2019	2020	2021	2022
Dacia	-	-	53,737	54,326	53,487	33,255	21,831	13,940
Renault	257,909	373,738	352,530	233,998	157,234	117,563	50,674	29,286
Renault group	257,909	373,738	406,267	288,324	210,721	150,818	72,505	43,226
Citroën	138,628	185,733	228,977	113,446	80,631	58,229	54,618	35,344
DS	-	-	14,864	15,281	10,774	7,786	7,006	5,089
Peugeot	206,153	275,898	307,518	190,548	149,244	114,763	100,965	73,545
Opel (1)	-	-	-	-	11,252	12,196	10,017	7,020
PSA group (Stellantis from 01/17/2021)	344,781	461,631	551,359	319,275	251,901	192,974	-	-
Alfa Romeo	7,444	10,857	8,432	2,995	2,904	1,833	1,305	1,194
Chrysler-Dodge-Jeep	4,161	6,561	2,863	7,183	4,746	2,199	2,980	462
Fiat-Lancia	38,337	27,223	28,240	16,935	8,297	3,163	2,446	1,458
FCA group (Stellantis from 01/17/2021)	49,942	44,641	39,535	27,113	15,947	7,195	-	-
Stellantis	-	-	-	-	-	-	179,337	124,112
TOTAL RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS	602,690	835,369	957,626	607,599	462,622	343,792	251,842	167,338
Audi	25,901	39,420	45,201	44,445	21,291	12,322	8,142	8,205
BMW-Mini	21,065	36,859	50,906	57,145	39,102	24,458	13,637	9,220
Ford	58,896	76,494	89,334	41,986	16,098	11,432	5,839	1,957
Honda	413	4,473	5,029	4,364	482	153	58	0
Hyundai	5,510	22,137	13,174	15,069	13,568	3,827	1,061	298
Jaguar-Land Rover	5,656	8,172	3,551	9,403	5,169	1,874	295	14
Kia	1,200	10,610	15,428	15,870	10,751	5,469	336	4
Mazda	3,204	6,061	6,768	4,802	2,893	1,547	776	601
Mercedes-Benz	30,007	44,165	41,460	47,646	48,424	29,399	23,192	17,433
Mitsubishi	3,227	4,798	3,102	2,053	75	0	0	0
Nissan-Infiniti	15,533	23,499	35,092	46,879	18,245	8,809	2,464	300
Opel (1)	63,726	75,957	63,751	29,335	-	-	-	-
Seat	27,861	26,421	25,462	10,683	10,841	5,777	4,060	2,782
Skoda	7,741	12,391	14,781	12,930	15,392	12,709	9,996	8,416
Suzuki	3,165	11,979	9,263	4,359	63	0	0	0
Toyota-Lexus	12,282	54,639	35,744	17,879	1,474	1,495	1,266	964
Volkswagen	89,487	107,005	118,702	80,893	60,158	28,323	25,705	20,421
Volvo	4,786	10,270	11,614	12,747	12,735	5,418	402	1
TOTAL OTHERS (2)	443,795	631,303	635,547	489,525	292,961	160,386	97,637	71,767
TOTAL	1,046,485	1,466,672	1,593,173	1,097,124	755,583	504,178	349,479	239,105
Of which Temporary Transit	-	37,259	34,432	27,141	17,563	6,971	7,767	6,614
Share of diesel registrations	49.0%	69.2%	70.8%	57.2%	34.1%	30.6%	21.1%	15.6%
RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS AS A %	57.6%	57.0%	60.1%	55.4%	61.2%	68.2%	72.1%	70.0%
TOTAL OTHERS AS A %	42.4%	43.0%	39.9%	44.6%	38.8%	31.8%	27.9%	30.0%

► REGISTRATIONS OF NEW ELECTRIC AND PLUG-IN HYBRID PASSENGER CARS BY BRAND (1) (IN UNITS)

	2010	2015	2017	2018	2019	2020	2021	2022
Dacia	0	0	0	0	0	1,722	11,386	18,326
Renault	13	10,408	15,245	17,038	18,817	45,953	44,334	44,550
Renault group	13	10,408	15,245	17,038	18,817	47,675	55,720	62,876
Citroën	27	397	881	1,140	727	5,155	10,107	12,935
DS	0	0	0	0	314	7,245	8,414	9,107
Peugeot	30	725	1,039	1,344	781	28,947	45,462	46,430
Opel (1)	0	5	7	8	1	3,116	4,246	5,917
PSA group (Stellantis from 01/17/2021)	57	1,127	1,927	2,492	1,823	44,463	-	-
Chrysler-Dodge-Jeep	0	0	0	0	0	1,475	5,639	3,846
Fiat-Lancia	0	0	0	0	0	1,761	9,556	15,269
FCA group (Stellantis from 01/17/2021)	0	0	0	0	0	3,236	-	-
Stellantis	-	-	-	-	-	-	83,424	93,504
Bolloré	0	1,191	56	104	1	0	0	0
TOTAL RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS	70	12,726	17,228	19,634	20,641	92,138	139,144	156,380
Audi	0	1,129	815	538	765	5,492	11,026	9,828
BMW-Mini	50	1,125	4,534	5,726	6,882	13,039	20,760	24,551
Cupra	0	0	0	0	0	25	2,125	2,163
Ford	0	1	0	0	0	2,112	4,588	2,217
Hyundai	0	10	665	1,457	2,789	6,637	12,072	14,729
Jaguar -Land Rover	0	0	0	731	2,340	2,366	4,043	3,038
Kia	0	485	1,097	1,370	3,298	7,502	12,421	15,140
Lynk Co	0	0	0	0	0	0	300	3,098
M.G.	0	0	0	0	0	656	4,619	9,535
Mercedes-Benz	0	245	2,762	1,489	1,034	11,665	19,529	19,623
Mitsubishi	7	961	572	1,304	3,118	2,642	809	1,522
Nissan-Infiniti	0	2,298	2,530	4,758	3,893	3,512	3,582	2,693
Porsche	0	505	710	1,187	1,442	2,938	3,443	3,048
Seat	0	0	0	0	0	1,236	2,092	24
Skoda	0	0	0	0	0	1,292	3,544	2,956
Smart	34	336	1,145	1,599	2,219	1,687	1,602	1,341
Tesla	11	708	1,368	1,252	7,442	7,372	26,446	29,199
Toyota-Lexus	82	68	405	281	288	234	1,635	2,433
Volkswagen	0	2,141	1,941	1,902	1,391	11,031	16,490	14,781
Volvo	0	125	1,044	2,374	3,806	7,301	11,112	9,150
TOTAL OTHERS (2)	196	10,141	19,596	25,963	40,715	93,370	164,024	146,790
TOTAL	266	22,867	36,824	45,597	61,356	185,508	303,168	303,170
Share of electric and plug-in hybrid registrations	0.0%	1.2%	1.7%	2.1%	2.8%	11.2%	18.3%	19.8%
RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS AS A %	26.3%	55.7%	46.8%	43.1%	33.6%	49.7%	45.9%	51.6%

(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) Including miscellaneous and FCA (before 2021).

REGISTRATIONS

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

	2000	2005	2010	2015	2019	2020	2021	2022
Dacia	0	0	5,434	2,594	1,572	1,206	1,200	1,284
Renault	139,752	140,059	135,591	124,634	147,826	121,837	124,737	99,572
Renault group	139,752	140,059	141,025	127,228	149,398	123,043	125,937	100,856
Citroën	77,048	73,166	70,579	59,295	74,026	60,937	66,596	55,114
DS	0	0	259	489	179	200	144	111
Peugeot	74,950	73,778	72,228	59,649	85,360	70,643	76,833	59,457
Opel (1)	-	-	-	-	7,442	7,448	9,169	7,286
PSA group (Stellantis from 01/17/2021)	151,998	146,944	143,066	119,433	167,007	139,228	-	-
Fiat	25,253	12,497	34,659	32,071	37,572	33,333	35,610	20,295
Jeep	-	146	287	1,268	1,794	630	275	354
FCA group (Stellantis from 17/01/2021)	25,253	12,643	34,946	33,339	39,366	33,963	-	-
Stellantis	-	-	-	-	-	-	188,627	142,617
Various France	40	10,076	528	905	869	640	678	1,019
TOTAL RENAULT GROUP & STELLANTIS (EXCLUDING FCA BEFORE 2021) & FRENCH BRANDS	291,790	297,079	284,619	247,566	317,274	262,911	314,564	243,473
Audi	-	357	3,223	790	810	623	472	362
BMW	-	-	1,600	446	383	280	291	207
Ford	18,110	19,695	20,437	22,534	32,798	28,170	29,397	27,130
Fuso	-	-	-	242	655	807	1,221	1,232
Hyundai	588	1,380	237	195	347	247	341	403
Isuzu	108	1,370	1,961	2,024	2,495	932	1,840	2,253
Iveco	16,534	15,721	11,610	11,414	17,030	14,309	17,492	15,469
Kia	-	219	142	177	175	145	248	225
Land Rover	1,857	1,256	1,550	2,591	625	431	595	479
MAN	-	-	-	-	1,763	1,795	2,465	2,311
Mercedes-Benz	23,139	18,973	19,051	18,643	23,385	23,301	22,890	19,073
Mitsubishi	3,392	1,350	2,639	1,836	1,757	1,516	1,424	642
Nissan	5,197	9,746	7,307	7,260	8,167	6,117	7,859	5,832
Opel (1)	7,561	12,617	7,195	6,782	-	-	-	-
Seat	-	286	435	410	567	436	757	277
Skoda	-	122	715	340	497	719	702	570
Suzuki	-	586	457	99	734	1,056	2,439	1,961
Toyota	1,771	2,587	4,013	5,210	8,542	6,712	9,815	9,543
Volkswagen	13,819	10,043	13,249	16,375	21,182	16,941	16,387	14,556
TOTAL OTHERS (2)	123,176	122,986	132,993	131,860	162,475	139,471	118,067	104,603
TOTAL	414,966	420,065	417,612	379,426	479,749	402,382	432,631	348,076
Renault group & Stellantis (excluding FCA before 2021) & other French brands as a %	70.3%	70.7%	68.2%	65.2%	66.1%	65.3%	72.7%	69.9%
TOTAL OTHERS as a %	29.7%	29.3%	31.8%	34.8%	33.9%	34.7%	27.3%	30.1%

(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) Including miscellaneous and FCA (before 2021).

► REGISTRATIONS OF NEW INDUSTRIAL VEHICLES BY BRAND (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Renault Trucks	20,818	18,339	10,908	11,568	15,308	11,770	13,064	12,873
TOTAL RENAULT TRUCKS AND MISCELLANEOUS FRANCE	20,992	18,465	10,964	11,584	15,323	11,783	13,066	12,876
DAF	4,365	6,321	4,464	4,723	7,295	5,599	5,519	6,263
Iveco	6,998	5,901	4,003	4,783	4,248	4,044	4,063	3,741
MAN	3,498	4,545	2,729	4,581	6,095	4,128	4,516	3,973
Mercedes-Benz	9,976	9,325	5,229	6,128	7,513	5,674	5,721	5,873
Scania	4,963	4,417	2,553	4,359	7,038	4,770	5,026	4,242
Volvo	6,739	5,870	3,938	5,219	7,018	5,131	5,611	6,143
TOTAL OTHERS	36,924	36,819	23,257	30,132	39,892	29,946	31,072	31,135
TOTAL	57,916	55,284	34,221	41,716	55,215	41,729	44,138	44,011
TOTAL RENAULT TRUCKS AND MISCELLANEOUS FRANCE AS A %	36.2%	33.4%	32.0%	27.8%	27.8%	28.2%	29.6%	29.3%
TOTAL OTHERS AS A %	63.8%	66.6%	68.0%	72.2%	72.2%	71.8%	70.4%	70.7%

► REGISTRATIONS OF USED INDUSTRIAL VEHICLES (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
TOTAL	59,056	55,975	56,142	48,381	53,571	49,825	53,504	54,465
Used/new ratio	1.0	1.5	1.6	1.1	1.0	1.2	1.2	1.2

► REGISTRATIONS OF NEW COACHES AND BUSES PER GROUP (MORE THAN 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022
Renault	1,633	39	0	0	0	1	1	1
Divers France	367	-	-	-	-	-	-	-
Kässbohrer-Setra	261	-	-	-	-	-	-	-
Mercedes-Benz	602	-	-	-	-	-	-	-
TOTAL	4,320	-	-	-	-	-	-	-
Iveco Bus (1)	-	2,459	2,412	3,197	2,862	2,731	3,313	2,981
Evobus (2)	-	888	1,433	2,050	1,444	1,599	1,048	791
Groupe VGF (3)	-	404	559	589	942	674	1,131	765
Bova	-	198	116	0	0	0	0	1
Temsa	-	301	309	146	150	191	241	178
Van Hool	230	238	169	98	157	96	21	49
Yutong	-	-	-	96	20	8	7	60
Irizar	-	0	0	38	202	27	119	68
Isuzu	-	0	0	8	122	61	173	149
Otokar	-	0	105	187	193	201	147	190
Others	-	237	279	315	325	203	303	200
TOTAL	-	4,773	5,382	6,724	6,417	5,791	6,503	5,432

(1) Iveco Bus: Iveco and Iveco Bus, Irisbus, Heuliez. (2) Evobus: Setra and Mercedes. (3) VGF: MAN and Neoplan, then Scania from 2015.

VEHICLE OWNERSHIP

► MOTORISATION RATE IN EUROPE

NUMBER OF CARS PER 1,000 INHABITANTS

	2015	2017	2018	2019	2020	2021
Germany	555	563	569	575	580	584
Belgium	497	505	507	508	506	506
Spain	481	508	526	533	531	535
France	564	570	571	573	572	573
Greece	470	480	481	489	496	506
Hungary	324	354	372	390	401	413
Italy	614	636	645	661	666	672
The Netherlands	493	503	511	517	520	523
Poland	545	593	617	642	662	684
Portugal	437	466	487	506	515	525
Czech Republic	490	529	547	562	573	588
Romania	259	305	330	355	376	396
Sweden	479	485	481	478	479	480
EUROPEAN UNION	553	535	545	555	560	567
Norway	502	512	514	520	521	520
Switzerland	547	549	550	535	549	551
EFTA	529	537	539	532	540	541
Russia	284	294	301	308	312	-
Turkey	136	151	153	152	158	-
United Kingdom	517	527	526	528	544	546
EUROPE	-	446	453	460	466	-

Source: ACEA, Vehicles in use Europe January 2023

► TOTAL VEHICLES IN USE (ON 1 JANUARY 2023)

(IN THOUSANDS)

	All energies	Diesel	Others
Passenger cars			
5 CV and less	18,897	8,446	10,451
From 6 CV to 10 CV	17,831	11,150	6,681
11 CV and more	2,128	1,002	1,127
TOTAL PASSENGER CARS	38,856	20,598	18,259
Light commercial vehicles (LCV)			
Less than 2.5t	2,822	2,508	314
From 2.5t to 3.5t	3,559	3,513	46
From 3.6t to 5t	159	138	20
TOTAL LCV UP TO 5T (1)	6,540	6,159	381
TOTAL PASSENGER CARS AND LCVS	45,397	26,757	18,639
Heavy trucks over 5t			
Rigids			
From 5.1t to less than 12t	82	81	1
From 12t to less than 20t	154	152	3
20t and more	160	157	3
Total rigids	397	390	7
Tractors	224	220	4
TOTAL HEAVY TRUCKS	621	609	11
COACHES AND BUSES	94	82	12
TOTAL COMMERCIAL VEHICLES OVER 3.5T	715	692	23
TOTAL COMMERCIAL VEHICLES ALL WEIGHTS	7,255	6,851	404
TOTAL ALL VEHICLES	46,111	27,449	18,663

(1) Including unknown weights. Sources: MTE/SDES, CCFA estimates

► VEHICLE OWNERSHIP

	units	2000	2010	2015	2019	2020	2021	2022
Households without a vehicle	%	19.7%	16.5%	17.1%	15.0%	14.8%	15.0%	15.0%
Households with a vehicle	%	80.3%	83.5%	82.9%	85.0%	85.2%	85.0%	85.0%
Households with one vehicle	%	50.7%	47.6%	48.4%	48.3%	48.2%	48.0%	48.7%
Households with two vehicles	%	25.4%	30.7%	29.4%	31.5%	31.7%	31.8%	31.3%
Households with three or more vehicles	%	4.2%	5.2%	5.1%	5.2%	5.3%	5.2%	5.0%
Average age of the vehicle	year	7.25	8.0	8.9	8.9	9.0	9.4	9.8
Average ownership period	year	4.43	5.0	5.5	5.5	5.6	5.8	6.2
Used passenger cars	%	56.1	58.9	58.5	58.0	59.0	60.3	59.6
Total average kilometres	km	13,670	12,240	11,710	11,900	9,730	10,650	10,830
Petrol average kilometres	km	11,690	8,440	8,030	8,850	7,190	8,410	8,610
Diesel average kilometres	km	18,240	14,720	13,990	14,410	11,950	12,890	13,160
Domestic passenger road transport								
By passenger car	billions of passenger-km	752.3	765.5	817	845	679	736	820
By coach-bus	billions of passenger-km	44.7	53.1	58.8	61.0	37.9	41.7	47.9
Total traffic	billions of passenger-km	894.1	933.5	995.0	1,034.9	788.6	874.0	999.7
Road transport as a % of total traffic	%	89.1	87.7	88.0	87.6	90.9	89.0	86.9
Annual change								
By passenger car	% var/n-1	-0.1	0.8	1.2	0.7	-19.7	8.4	11.5
By coach-bus	% var/n-1	2.7	2.2	1.6	2.7	-37.8	10.1	14.8

Sources: KANTAR TNS PARC AUTO and MTE/SDES

► CARS IN USE ON 1 JANUARY DEPENDING ON ENGINE (IN THOUSANDS)

	2015	2020	2022	2023
Electric and hydrogen	26	142	404	596
Petrol	12,841	14,956	15,544	15,712
Diesel	23,428	22,610	21,416	20,598
Gas	178	146	195	235
Plug-in hybrids	31	85	300	424
Non rechargeable hybrids	123	480	954	1,289
Others	4	3	3	3
All	36,631	38,421	38,815	38,856

► CARS IN USE ON 1 JANUARY DEPENDING ON CRIT'AIR STICKER (IN THOUSANDS)

	2015	2020	2022	2023
Crit'Air E	25	141	404	596
Crit'Air 1	2,843	8,487	10,828	11,847
Crit'Air 2	9,248	13,548	14,199	14,117
Crit'Air 3	12,178	9,935	8,671	8,103
Crit'Air 4	5,332	3,670	2,866	2,559
Crit'Air 5	1,880	960	653	561
Unknown and unclassified	5,125	1,680	1,194	1,073
All	36,631	38,421	38,815	38,856

Source: MTE/SDES

POLLUTING EMISSIONS AND CO_2

► EVOLUTION OF EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 AND 2022

	1990	2000	2010	2019	2020	2021	2022 (1)	Change 2022/1990	Change 2022/2019
POLLUTING EMISSIONS FROM THE ROAD (IN THOUSANDS OF TONNES)									
SO_2	143.2	23.0	0.8	0.8	0.7	0.8	0.8	-99%	-1.9%
CO	6,020	2,504	705	296	230	267	268	-96%	-9.2%
NOx	1,255	948	598	407	318	333	311	-75%	-23.5%
NMVOC	929	438	114	50	41	44	45	-95%	-11.4%
Lead (in tonnes)	3,885	29	27	28	25	25	26	-99%	-7.8%
PM10: particles	72	67	42	25	20	21	21	-71%	-16.1%
OTHER ROAD EMISSIONS (IN MILLIONS OF TONNES)									
CO_2 net of CO_2 emissions of renewable energies	114	131	126	123	104	117	120	5%	-2.5%
CO_2 from combustion of biomass	0	1	7	9	7	8	9	-	0.8%

(1) Estimates.
Source: CITEPA/Secten data, 2023 edition

► CO_2 EMISSIONS IN METROPOLITAN FRANCE BY BUSINESS SECTOR (IN MILLIONS OF TONNES OF CO_2 AND AS % OF TOTAL EXCLUDING LULUCF)

	1990	2000	2010	2019	2020	2021	2022 (1)	as a % of the Total excluding LULUCF (2)
Energy processing	70.4	66.8	64.5	44.6	39.8	41.1	43.2	14
	18%	16%	17%	14%	14%	13%	14%	-
Manufacturing industry	107.1	107.3	88.2	74.6	67.4	73.9	69.2	23
	27%	26%	23%	23%	23%	23%	23%	-
Waste treatment	1.9	1.4	1.3	1.5	1.5	1.5	1.5	0
	0%	0%	0%	0%	1%	0%	0%	-
Residential/Tertiary	85.6	86.5	87.8	63.9	60.3	64.6	54.8	18
	21%	21%	23%	20%	21%	20%	18%	-
Agriculture/Forestry	11.6	12.7	12.1	10.9	11.9	11.3	11.4	4
	3%	3%	3%	3%	4%	4%	4%	-
Transport	121.7	140.2	133.0	130.3	110.0	124.0	127.2	41
	31%	34%	34%	40%	38%	39%	41%	-
of which road	114.1	130.7	125.6	122.7	104.3	117.5	119.6	39
	29%	32%	32%	38%	36%	37%	39%	-
of which other transport	7.7	9.6	7.3	7.6	5.7	6.6	7.6	2
	2%	2%	2%	2%	2%	2%	2%	-
TOTAL EXCLUDING LULUCF (2)	398.4	414.8	386.9	325.9	291.0	316.4	307.3	100
LULUCF (2)	-28.1	-24.6	-42.7	-20.5	-23.8	-19.3	-19.1	-
TOTAL WITH LULUCF (2)	370.3	390.2	344.2	305.4	267.2	297.2	288.1	-

(1) Estimates.
(2) LULUCF: Land Use, Land Use Change and Forestry.
Source: CITEPA/CORALIE/Secten format 2023 edition

► AVERAGE CO_2 EMISSIONS OF NEW PASSENGER CARS IN FRANCE AND EUROPE (IN GRAMS OF CO2 PER KM)

	2000	2005	2010	2015	2019	2020	2021 (1) (2)	2022 (2)	Change 2022/2021
FRANCE									
Petrol	168	159	130	116	116	109	-	-	-
Diesel	155	149	130	111	113	107	-	-	-
TOTAL FRANCE	162	152	130	111	112	97	109	103	-6
EUROPEAN UNION									
Italy	161	149	134	115	-	-	125	119	-6
Spain	162	150	140	115	-	-	127	122	-5
United Kingdom	180	169	145	121	-	-	-	-	-
Germany	179	170	152	128	-	-	114	106	-8
EU 15 COUNTRIES AVERAGE	171	161	141	119	-	-	-	110	-

(1) The new procedure (WLTP) leads to CO_2 emission rates that can reach up to 25% more than with the old procedure (NEDC cycle).
(2) Source: ACEA.
Source: ADEME (September 2022)

AUTOMOTIVE TAXES AND DUTIES

► ROAD FUEL CONSUMPTION, PRICES AND TAXES

	UNITS	2000	2005	2010	2015	2019	2020	2021	2022
Fuel consumption									
Petrol	millions of litres	14,329	14,097	10,880	9,510	11,296	9,760	11,805	13,058
Unleaded petrol 98	millions of litres	7,138	4,280	2,202	1,998	2,449	2,260	2,703	2,570
Unleaded petrol 95	millions of litres	7,191	9,816	7,299	4,314	3,466	2,412	2,576	2,320
Unleaded petrol 95-E10	millions of litres	-	-	1 379	3 198	5 381	4 734	6 058	7 314
	as a % of total petrol	-	-	12.7%	33.6%	47.6%	48.5%	51.3%	56.0%
Ethanol-gasoline blend E85	millions de litres	-	-	-	-	-	353	467	854
Diesel	millions of litres	32,373	36,744	39,749	41,187	39,019	32,803	36,356	36,233
TOTAL ROAD FUEL	millions of litres	46,703	50,840	50,629	50,697	50,316	42,562	48,161	49,292

Source: CPDP

	UNITS	2000	2005	2010	2015	2019	2020	2021	2022
Retail prices of fuel (annual average)									
Unleaded petrol 98	euros/litre	1.11	1.20	1.38	1.42	1.57	1.42	1.61	1.86
Tax as a %	%	69	65	60	61	61	65	60	54
Unleaded petrol 95-E10	euros/litre	-	-	-	1.35	1.48	1.34	1.53	1.77
Tax as a %	%	-	-	-	64	62	67	61	55
Superethanol E85	euros/litre	-	-	-	-	-	66	68	80
Tax as a %	%	-	-	-	-	-	23	23	25
Petrol	euros/litre	1.11	1.18	1.35	1.36	1.51	1.31	1.49	1.62
Tax as a %	%	70	67	61	63	62	66	60	54
Diesel	euros/litre	0.85	1.02	1.15	1.15	1.44	1.26	1.43	1.85
Tax as a %	%	62	57	54	59	59	65	65	50

Source: DGEC

► AUTOMOTIVE TAXES AND DUTIES (IN € MILLION)

	2000	2005	2010	2015	2019	2020	2021	2022
Tax on road-use oil products (including VAT)	30,630	32,205	32,324	36,294	43,070	35,159	40,991	41,678
Tax on vehicle registration certificates	1,373	1,623	1,917	2,086	2,296	2,091	2,163	1,891
Annual tax on parking spaces	-	-	-	59	70	76	79	88
Automotive insurance tax	3,429	4,057	4,126	4,662	5,269	5,406	5,540	5,701
Road taxes	539	145	0	0	0	0	0	0
Taxes on company cars	644	867	992	753	768	801	756	693
Tax based on number of axles	223	205	168	169	104	101	101	158
Fixed rate police and traffic fines	720	1,266	1,255	1,562	1,578	1,316	1,655	1,803
Driver's licence tax	14	4	1	11	10	10	10	10
Regional development tax	442	499	539	555	523	459	561	685
Road and Transport Investment Fund (DOM)	-	-	1	1	0	0	1	1
Government royalty	132	154	186	326	355	365	362	367
General tax on polluting activities (TGAP) (1)	-	20	500	600	426	345	708	952
VAT on spending to acquire vehicles (passenger cars)	6,603	7,693	8,171	8,709	10,886	8,519	9,095	8,978
VAT on repairs, maintenance, MoTs and driving licences	4,324	5,898	7,133	8,081	9,875	9,102	10,426	11 000 (3)
Automotive taxes and duties (including VAT)	49,073	54,636	57,313	63,869	75,230	63,751	72,449	74,005
of which specific automotive taxation	-	37,200	37,300	40,800	47,494	42,100	46,600	47,813
of which tax on fuels: TICPE and VAT on TICPE	-	28,900	28,200	31,500	37,594	32,400	36,300	36,659
ADDITIONAL INFORMATION (In € million)								
Freeway tolls (excl. VAT)	4,457	6,410	8,110	9,390	10,860	9,000	10,664	11,610
Freeway tolls (incl. VAT)	5,330	7,666	9,700	11,268	13,032	10,800	12,797	13,932
Total expense by the APUs (2) for the road	-	15,800	16,500	14,600	14,300	14,100	14,900	15,700

(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) CCFA estimates.
Sources: Tax Directorate, CCFA, URF, MTE/SDES, Commission des Comptes des Transports de la Nation

USEFUL ADDRESSES

► FRENCH AUTOMOTIVE MANUFACTURERS

Stellantis
2, boulevard de l'Europe
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www.stellantis.com/fr

Groupe Renault
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92100 Boulogne Billancourt cedex
Tel.: 01 76 84 50 50
www.renault.com

Renault Trucks
99, route de Lyon
69800 St Priest
Tel.: 04 69 09 60 00
www.renault-trucks.fr

Alpine-Renault
40, avenue de Bréauté
76885 Dieppe cedex
Tel.: 01 76 86 31 50
www.alpinecars.com

►AUTOMOTIVE PROFESSIONAL ORGANISATIONS IN FRANCE

Fédération Française de Carrosserie Industries et Services (FFC)
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8, rue Bernard Buffet
75017 PARIS
Tel.: 01 44 29 71 00
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

MOBILIANS
43 bis, route de Vaugirard
CS 80016
92197 Meudon
Tel.: 01 40 99 55 00
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

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

Elanova
60, rue Auber
94408 Vitry-sur-Seine cedex
Tel.: 01 49 60 57 57
www.elanova.fr

FIM Auto / Fédération des Industries Mécaniques-Mecallians
39/41, rue Louis Blanc
92400 Courbevoie
Tel.: 01 47 17 60 88
fim.net

Groupement Plasturgie Automobile (GPA)
125, rue Aristide Briand
92300 Levallois
Tel.: 01 44 01 16 38
www.autoplasticgate.com

PFA, Filière automobile et mobilités
2, rue de Presbourg
75008 Paris
Tel.: 01 41 44 94 30
www.pfa-auto.fr

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.sesamlld.com

Syndicat des Véhicules de Loisirs (UNI VDL)
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Tel.: 01 43 37 86 61
www.univdl.org

Industries et Métiers de la Métallurgie (UIMM)
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75017 Paris
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www.uimm.fr

Union Routière de France (URF)
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75008 Paris
Tel.: 01 44 13 37 17
www.unionroutiere.fr

Union Technique de l'Automobile, du Motocycle et du Cycle (UTAC)
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91310 Linas
Tel.: 01 69 80 17 00
www.utacceram.com

► INTERNATIONAL AUTOMOTIVE ASSOCIATIONS

Association des Constructeurs Européens d'Automobiles (ACEA)
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www.acea.auto

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ACA - Automobile Club Association
Head office: 38, avenue du Rhin
67027 Strasbourg Cedex
Tel.: 09 70 40 11 11
Bureau parisien : 9 rue d'Artois
75008 Paris
Tel.: 01 40 55 43 00
www.automobileclub.org

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

Association Prévention Routière
33, rue de Mogador
75009 Paris
Tel.: 01 44 15 27 00
www.preventionroutiere.asso.fr

Société des Ingénieurs de l'Automobile (SIA)
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92158 Suresnes cedex
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www.sia.fr

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Association nationale pour le développement de la mobilité électrique France (AVERE France)
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75009 Paris
Tel.: 01 53 25 00 60
www.avere-france.org

Groupe d'Etudes et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile (GERPISA)
4, avenue des Sciences,
91190 Gif-sur-Yvette
Tel.: 01 47 40 59 50
www.gerpisa.org

ID4CAR
Technocampus Composites
Chemin du Chaffault - ZI du Chaffault
44340 Bouguenais
Tel.: 02 28 44 36 50
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

Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
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CARA
1, boulevard Edmond Michelet
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www.nextmove.fr

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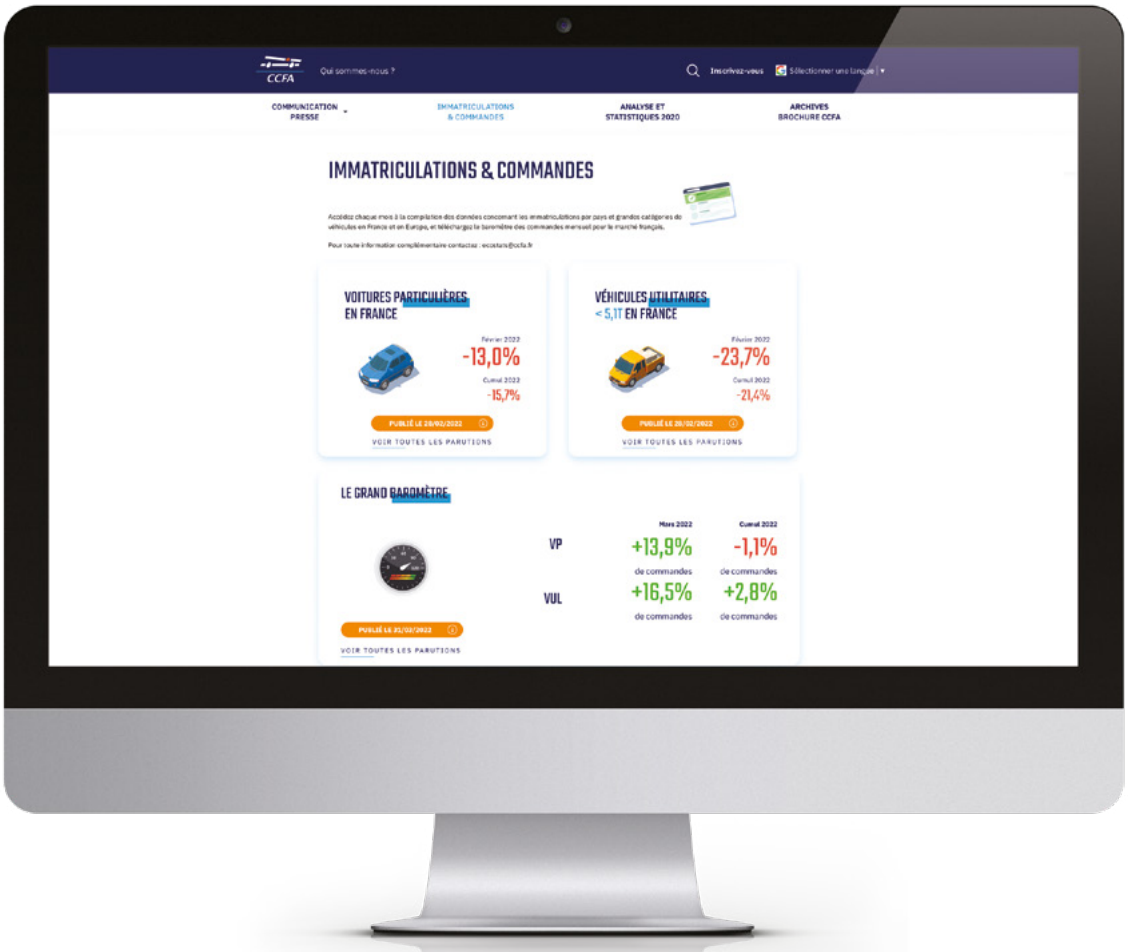


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